QUIRK'S

For marketing research and insights professionals

CHECK YOUR TECH

A researcher's guide to data privacy
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PLUS

Using a behavioral approach
to thwart the fraudsters

Rethinking CX metrics in the age of AI

Real thoughts on synthetic data

OUTLOOK 2026

2026 RESEARCH TRENDS AND TOPICS

The world is less human.

The scarcest resource in the enterprise isn't data. Or capital. Or talent.

It's empathy — the ability to see, hear, and truly know the customer.

Somewhere along the way, that was lost. The customer got buried in costly reports, hidden in bloated decks, locked away in forgotten research.

Business may have been good these last few decades. But it became less human. Now we stand at the dawn of a new era — one where automation promises to flatten everything.

What will remain? How can a brand stand out when every business is an AI business?

The answer is humanity.

What people feel. What they want. What they believe.

The companies that know people will be the ones that win. This is why GetWhy exists, to get the customer out of once-a-quarter reports and into your every decision. To make them a living, breathing part of your innovation engine.

Because the future doesn't belong to the companies with the most data.

It belongs to those with the most understanding.

Be More Human.

GetWhy

The leading AI-moderated qual platform.

✓ **Faster research cycles**
From research brief to decision-ready insight in days

✓ **Deeper insights**
AI interviews that capture and interpret every human signal

✓ **Built for scale**
Global recruiting, 56 languages, built for enterprise workflows

Let's talk insights

DETECTED INSIGHTS

Emotional Fit Indulgent, Bold   Emotional Stickiness High impact, short-term excitement

Associations Treat, Celebration, Escape   Brand Personality Confident, Playful

CONVEO'S CONCLUSION

This variant created a strong emotional connection rooted in familiarity and warmth.

BEST PERFORMING CONCEPT

113 people responded that this concept is the most convincing

Fair point. But this latte feels a little... basic. It's not blow...

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●●● Write for Quirk's

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

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COLUMNS

DEPARTMENTS

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An interactive downloadable PDF of this magazine is available at www.quirks.com/magazine-issues.

Clients truly appreciate the value in pure in-context research to understand the 'why'. Researchers definitely love the closer rapport and ability to observe or pick up on nuances they don't get over a video call. The insights delivered are 'more alive' and build even more compelling findings to our clients.
Jon Ward, VP of Sales at EMEA

While online tools are impactful in achieving many Qualitative research objectives, there is just nothing like having the face-to face interaction with our consumers and clients – something that online just cannot replicate. The interaction between Moderator and Respondent becomes more immersive and natural – body language is key when tapping into the System 1 which is integral in a lot of the work we do. Finally, the back room and client engagement is just as important – bringing key stakeholders together to workshop live during research is unmatched and super effective.
Paul Markovic, Director of Behaviorally

I have enjoyed helping clients return to in-person research. You can see the excitement as they leave, re-energized with a very enthusiastic "We'll be back!" I think this is something we are all experiencing in our lives as we also return to more social gatherings, making more interpersonal connections face to face. I have been very grateful for technology through the pandemic, but what once seemed like a suitable substitute now pales in comparison to the real thing.
Megan Pollard, President of Fieldwork Network

The rich and robust nature of in person research is the best avenue for much of the qualitative work to be conducted. We are fortunate to see this back to its full potential with questions answered, ideas generated and collaboration amongst so many. As the conversations flow, we are gaining the much needed information to move ideas, products and plans forward.
Debby Schlesinger

#facetofacemrx

Research mirrors society: something gets lost when our only form of communication is on a computer screen or telephone. Of course there are the three senses...taste, touch and smell...that cannot be replicated online. But there's also the fact that humans are social creatures, and make decisions based upon social influences. People behave differently when you meet them in-person versus how they respond on a FaceBook neighborhood group post, do they not? Research is no different.

Smart companies know new products and ideas cannot be tested solely online: they need to be exposed "in the real world", with people interacting together. Much can be learned from what people do and react, versus solely about what they say...just like the real world, researchers are remembering the value of in-person research, and the incredible learning.
Brett Watkins, CEO of L&E Research

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e-commerce journeys

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aisle reinvention

impulse shopping

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brand success drivers

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DISCOVER THE POWER OF **VIDEOMETRICS**

••• consumer psychology

We're sold on no-haggle buying

Would you pay more for a car just to skip the negotiation process? According to research by David Hunsaker, clinical associate professor of management at the IU Kelley School of Business Indianapolis, many Americans would – and do. "Across five studies, we found that 95% of individuals chose not to negotiate up to 51% of the time," Hunsaker says.

The project spanned large-scale experiments exploring why people avoid negotiating and what it costs them, examining: how often individuals forgo negotiation opportunities; the minimum savings people need to justify negotiating; how much extra people will pay to skip negotiating; and whether interventions, such as utility comparisons or social norm prompts, can reduce avoidance.

"We framed this research around a simple question: When you have the chance to negotiate, will you?" Hunsaker says. "Even in traditional contexts like buying a car, companies now advertise 'no-haggle pricing' as a selling point. Businesses can raise prices by 5% to 11% and more than half of consumers will pay it."

The research also revealed that people judge negotiation value by percentage saved, not the absolute dollar amount. "On average, participants needed savings of 21% to 36% of an item's price before considering negotiation worthwhile," Hunsaker says. "This shows that decisions are driven by perceived proportional value, not absolute dollars."

The research, published in Negotiation and Conflict Management Research, was conducted by Hunsaker in collaboration with Hong Zhang of Leuphana University and Alice J. Lee of Cornell University.

••• the business of research

See my point?

Next time you're presenting research findings, make sure your hand gestures match the material you're talking about.

For their Journal of Marketing Research article, "Express: Talking with your hands – how hand gestures influence communication," Giovanni Luca Cascio Rizzo, assistant professor of marketing, University of Southern California, and his co-authors analyzed thousands of TED Talks. They found that movements that visually represent the idea a speaker is talking about (which they call "illustrators") can shape and improve an audience's understanding, giving listeners a visual shortcut to a presenter's meaning and helping abstract ideas feel more concrete. This makes messages easier to process (in what psychologists call "processing fluency") and when people to see a speaker as more competent and persuasive, their ideas feel easier to grasp.

Rizzo advises to focus on clarity over choreography. Think about where your hands naturally illustrate what you're saying – emphasizing size, direction or emotion – and let them move with purpose. Make sure the movements match the message – avoid random waving, fidgeting or pointing to things in space.
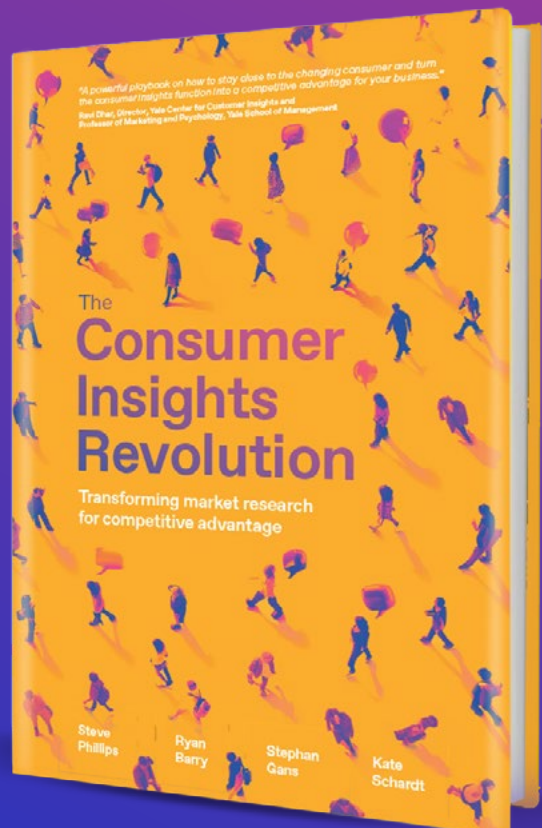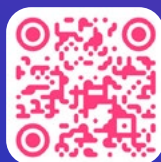
Synthetic data: Intriguing, but is anyone actually sold?

Joe Rydholm can be reached at joe@quirks.com

In December I moderated an informal video chat among a dozen or so members of the Professional Insights Collaborative (PIC), a corporate researcher-only group that Quirk's is helping operate, on the topic of synthetic data and digital twins. In our outreach for the gathering among PIC members, I had framed (hopefully without biasing!) the conversation as one that would likely be tinged with a kind of good-humored skepticism, based on my general sense of researchers' views on the topic drawn from discussions at industry conferences.

I've seen iterations of that skepticism many times over the decades, as research vendors and agencies routinely take some new wrinkle on information-gathering (or in the case of synthetic data, information-generating) and exult about it, in true marketing fashion, like it's the cure for all ills. From online research to big data, DIY to text mining, behavioral economics to AI, it feels like every few years a new elixir comes along. And I can only imagine what it's been like for the end-client researchers to sit through all the breathless presentations from their existing or prospective supplier partners on why this new thing is THE thing, knowing full well that their budgets are already tight and, in any case, their internal clients are in no hurry to move on from their trackers and their focus groups just yet.

Based on my PIC conversation, it seems that while researchers are curious about synthetic data, no one is particularly eager to embrace it – and there's a growing sense that research agencies are pushing it harder than corporate researchers are demanding it.

The potential benefits are clear enough. When asked what would make synthetic data valuable, participants consistently mentioned being able to get data (granted, of the synthetic ilk) from hard-to-reach audiences and to overcome low response rates, particularly among niche B2B populations or specific customer segments.

But the concerns are substantial. Validity topped the list. As PIC member R noted, vendors keep touting 80% matches with real data, "But what about that 20%? That might be the really important 20%," he said.

PIC member L emphasized the critical importance of understanding the input, since the data coming out will only be as good as what went in. She worried about models trained on older data that might not reflect current realities – particularly problematic in fast-moving tech sectors where "older" means pre-AI, just a couple of years ago.

The naming itself creates problems. PIC member J bluntly stated that "synthetic" means "fake," making it difficult to sell internally. "The name itself is a turn-off," she said. PIC member S highlighted another barrier: securing funding to test something that "might or might not work" when budgets for actual research are already tight.

When we discussed presenting synthetic findings to internal audiences, the consensus favored transparency and advance notice – never surprising leadership with methods they haven't approved. "I would tell my stakeholders ahead of time before we even launched the project that, 'this is what we're doing,' so they'd already have pre-bought into it so it wasn't a surprise when we we deliver the results," said PIC menber M.

Several participants worried about losing the human element with synthetic data. One member emphasized that natural research settings capture valuable spontaneity – the silences, the non-responses, the unexpected phrasings that reveal actual consumer thinking. "We're gonna lose the behavioral insights that come from observing how people naturally express themselves," she said. PIC member S couldn't imagine replacing authentic customer quotes with responses "attributed to AI" in marketing materials or stakeholder presentations.

The emerging consensus suggested synthetic data might work for quick validation – choosing between message A or B – but not for understanding unmet needs or discovering unexpected insights.

The group's overall assessment? Synthetic data is another tool in the toolbox – not the salvation it's sometimes portrayed to be. PIC member A compared it to big data and social listening: "They turned out to be really important things but not necessarily the game changers that they were touted as when we first heard about them."

It's the agencies that seem most enthusiastic, perhaps seeing a new revenue stream. But among the client-side researchers on our call? The verdict was clear: We're watching and we're learning but we're far from convinced. ⓠ

PIC membership is free to any current corporate or client-side researcher. Head over to https://www.piconline.org/ for more info!

QUIRK'S

OUTLOOK 2026

COMMENTARIES BY INDUSTRY LEADERS ON THE YEAR AHEAD

Welcome to Quirk's Outlook 2026! We asked research companies to offer their viewpoints on a range of topics – from AI to data quality and fraud prevention – and delve into some factors that will make an impact in the year ahead.

Toluna explores the new rules of innovation research. Dynata argues for the need to move beyond demographics. Glaut focuses on the power of technology to free-up researchers. Bolt explains how AI is redefining insight. Conveo covers why insights professionals need to go from executing research to shaping understanding. Discuss offers three strategies for insights leaders in 2026. Rep Data tackles how to combat tech-enabled survey fraud. Neurons addresses the capabilities of neuroscience-trained AI. SIS International outlines the value of full-service research partners.

We hope this section will offer you a glimpse into 2026 and a sample of viewpoints, tips and tricks to help make this year a success.

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AGILE RESEARCH

toluna

AI and the new rules of innovation research

In a year when most insight teams are being asked to do more with less, innovation is one of the few lines in the budget that can't simply be switched off. History shows that organizations that continue to invest in innovation through downturns tend to outperform their peers in the recovery.

What has changed is the way we generate the evidence behind those innovation bets. Traditional innovation research, built around a handful of large, late-stage tests, is colliding with shrinking budgets, shorter timelines and rising expectations. At the same time, AI is opening up entirely new ways to learn, from rapid synthetic screening to AI-assisted qual and automated insight extraction.

This article looks at how we got here, what's breaking in the old model and how AI is reshaping innovation research in practice.

The old model: strong governance, slow learning

For many CPG and consumer brands, the default innovation framework is still some flavor of Stage-Gate or phase-gate: a linear process where ideas move through discovery, development, testing and launch, punctuated by formal decision "gates."

That structure brought discipline to innovation: clear go/no-go decisions; standardized KPIs; risk management and financial control.

But from a research perspective, it also hardwired certain behaviors:

- Heavy reliance on late-stage validation. Many organizations built toolkits dominated by large, normative concept and product tests just before (or even after) major investment decisions. Learning earlier in the process was often treated as a nice-to-have.
- Limited room for iteration. When each full validation test consumes a big slice of budget and weeks of fieldwork, teams become reluctant to run multiple rounds. Concepts are treated as single shots, not evolving hypotheses.

In benign economic conditions, those inefficiencies were tolerable. Today, they're becoming existential.

Why the traditional playbook is under strain

Three pressures are now converging on the classic innovation research model:

1. **Time and budget compression.** Insight teams report ongoing pressure to shorten timelines and cut costs, even as pipelines and launch targets stay the same or increase. That makes it harder to justify large, single-shot studies that don't materially reduce risk earlier in the process.

2. **Data quality and reach.** Declining survey participation, professional respondents and fraudulent entries are raising questions about the reliability of traditional samples, especially for niche or low-incidence audiences. Synthetic respondents, AI-generated data and AI-driven fraud detection have emerged partly as a response to these issues.

3. **Richer questions, not just sharper numbers.** Marketers increasingly want to know not only which concept wins but why, for whom and how it should be refined. That demands more iterative learning between gates, plus tighter integration of qual and quant, than many

existing toolkits were designed to deliver.

The net result is a growing mismatch: a world that demands more, faster learning and a research model currently optimized for a small number of large, late decisions.

What AI changes: from big bets to continuous learning

AI doesn't replace good research practice or robust methodology. But it does change the economics of learning. Three shifts, in particular, are reshaping innovation research.

1. From occasional tests to continuous, AI-accelerated learning

Generative and analytical AI are already speeding up many of the slowest parts of the research workflow:

- drafting and adapting questionnaires
- summarizing open-ends
- clustering ideas or claims
- extracting themes and sentiment from qual at scale

Platforms like Toluna Start, for example, embed AI into surveys so respondents can answer in more natural language, with AI summarizing comments into themes and analyzing sentiment in near real-time.

For innovation teams, the impact is less about automation for its own sake and more about creating space for multiple, smaller learning loops between formal gates:

- screening a wide set of ideas cost-effectively
- quickly iterating language, benefits, attributes or RTBs
- running targeted learning sprints between early and late validation

In effect, AI makes it economically feasible to use the right tool for the "learning" job and a different one for the "validation" job, rather than forcing everything through a single, expensive template.
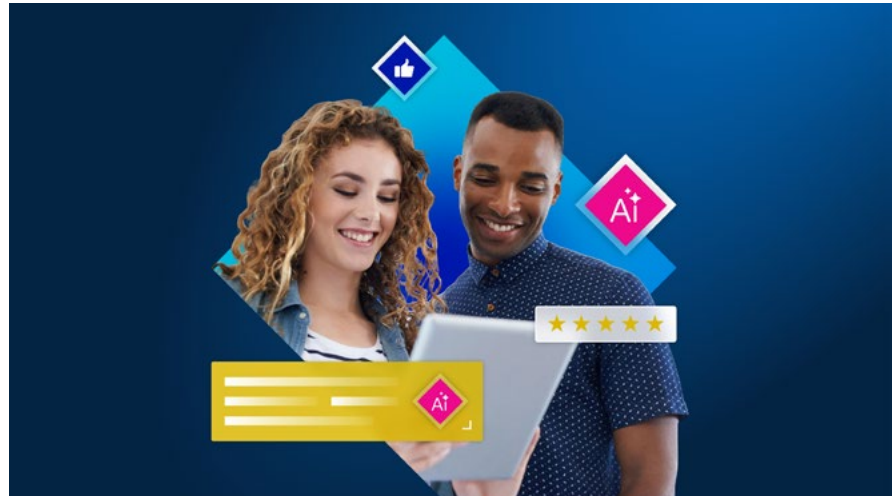
2. From sample scarcity to synthetic abundance

The most visible change, and arguably the most contentious, is the rise of synthetic respondents. Synthetic respondents (or synthetic personas) are virtual survey takers generated by AI models trained on large volumes of real-world data. They are designed to mimic the attitudes and behaviors of real people, often with rich backstories and attributes, and can be queried at speed and scale.

Across the industry, synthetic research promises to:

- dramatically reduce fieldwork time, by minimizing recruitment
- unlock hard-to-reach audiences, by simulating segments that are rare, sensitive or geographically dispersed
- enable larger testing spaces, by allowing dozens of ideas, claims or flavors to be screened in parallel, often within hours

Providers are taking different approaches. Toluna, for instance, has developed synthetic personas built from its first-party global panel, enriched with predicted traits and behaviors so each persona behaves like a unique survey respondent rather than an "average type." Internal parallel tests have reported high correlations with human samples on key metrics, and early commercial use cases in rapid screening of claims and messages suggest potential cost reductions of around 25-40% versus running only traditional validation tests.

However, there is broad agreement on one crucial point: Synthetic data is not a free pass to skip robust validation.

3. From dashboards to decisions

The third shift is more subtle but equally important. AI is changing how innovation data is interpreted and used inside organizations.

Where traditional dashboards largely reported "what happened" (e.g., top-two box scores, preference shares, purchase intent), newer AI-assisted systems are evolving towards decision intelligence:

- automatically surfacing patterns (e.g., which attributes drive choice for specific personas or missions)
- learning from both synthetic and human tests to optimize the next iteration

Done well, this brings research closer to the way innovation leaders actually think: juggling trade-offs, exploring what-if scenarios and continually reallocating budget towards the ideas with the strongest evidence.

Toluna as a case in point

Toluna is re-architecting its innovation offer around these AI-enabled capabilities, rather than treating AI as an add-on. This end-to-end agentic AI system includes:

- Quality measures that enhance inputs, throughputs and outputs to deliver high-quality insights.
- Rapid screening of ideas, claims and flavors in hours, using synthetic personas built from long-standing first-party panel data and tuned to behave like individual respondents.
- Agile concept testing using custom templates at scale to provide clients with the flexibility to use their own KPIs.
- AI question probes, theme extractors and sentiment analysis to extract richer qualitative learning from each test.
- Flexible servicing models from DIY to full consultative support, so teams can integrate these tools into their existing ways of working.

Crucially, this approach is meeting today's challenges of increasing scale and decreasing timelines without sacrificing quality. Combining AI tools and solutions with deep human expertise delivers what Toluna calls augmented intelligence.

Other global agencies and platforms are also leveraging AI to compress timelines and turn existing knowledge assets into living decision tools.

Taken together, these moves signal an industry-wide shift – from viewing AI as a bolt-on feature to treating it as core infrastructure for innovation learning.

What this means for insight leaders

The AI wave is no longer something that is appearing on the horizon. The wave has reached the shore and the imperative is to understand how to adopt it in a way that strengthens, rather than weakens, the evidence behind your company's innovation bets.

Three themes are emerging from early adopters:

1. **Rebalancing the portfolio**. Many teams are deliberately shifting a portion of spend away from late-stage validation into earlier-stage, AI-enabled learning. The goal is not to cut validation but to ensure that what reaches those expensive gates has already been iterated through multiple rounds of cheaper, faster testing.
2. **Creating transparency for synthetic research**. In such a new field, there remain many unknowns, diverse opinions and new norms being created. Insisting on transparency regarding external providers' methodologies, validation and synthetic data training sets will help build knowledge and trust.
3. **Building new skills and partnerships**. AI literacy is becoming a core skill inside insight teams, as researchers learn to blend traditional expertise with a soon-to-be ubiquitous technological shift. At the same time, relationships with external providers are shifting from transactional "project delivery" towards more collaborative design

of insight systems that blend AI, human expertise and organizational context.

Three questions to stress-test your own approach

To close, this isn't about buying a particular tool or replicating another company's stack. It's about rethinking how you learn your way to stronger innovations in a world where AI has changed the speed and cost of insight.

Three questions can help you assess where you stand:

1. Where in our innovation process are we still relying on one or two big, late-stage validation tests – and what learning are we not getting earlier as a result?
2. How could synthetic personas, AI-assisted qual and automated analytics help us explore more ideas, claims or territories between gates?
3. Do we have the right skills and partners in place to treat AI as a core capability in innovation research, not a black box and not a bolt-on?

The answers will be different for every organization. But the direction is clear: the old model of innovation research – slow, expensive and overly reliant on late-stage validation – is giving way to a new, AI-enabled system of continuous learning. The opportunity for insight leaders is to shape that system deliberately, before it shapes them.

To learn more about how Toluna is specifically delivering AI-centric solutions on a global scale alongside our highly experienced insights professionals, visit our AI hub a www.tolunacorporate.com/ai
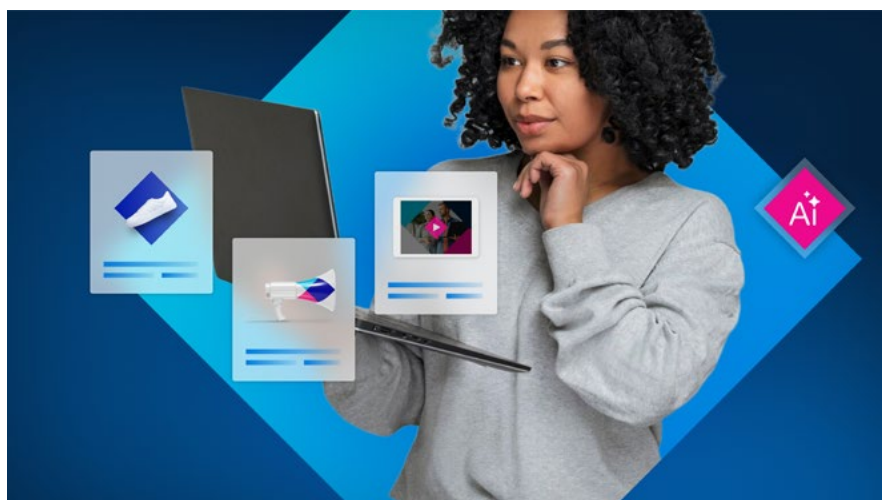
FUTURE OF INSIGHTS

Look-alikes are obsolete

The future of insights runs on graphs and attitudes

BY ALAIN BRIANÇON
Vice President of Research and
Data Science, Dynata

For years, the insights industry has relied on demographic proxies as if they were predictive truth. Look-alike audiences were efficient, inexpensive and comfortable. They powered media plans, digital targeting and even parts of measurement. But they now restrain more than they enable.

The market has outgrown them. Consumers move across screens, platforms and contexts at a pace that no static profile can track. Their motivations evolve quickly. Their behaviors adapt instantly. And the data signals we depend on are too dynamic – and too complex – to be compressed into demographic buckets built for another era.

The conclusion is unavoidable: Look-alikes are no longer aligned with the world we measure. It is time to move on.

The problem with look-alikes

Demographics are not predictive models. They are shortcuts. And today those shortcuts create unnecessary inaccuracies at the exact moment the industry is under pressure to deliver sharper guidance, tighter confidence intervals and more accountable insights.

Look-alikes flatten nuance. Millions of individuals reduced to broad bins inevitably lead to overgeneralization and underperformance.

Look-alikes age poorly. They operate at the speed of census updates while the real world shifts by the hour.

Look-alikes erase context. People are treated as isolated entries instead of connected participants in a larger structure of influence, exposure and attitude.

In information-theory terms, look-alikes introduce avoidable uncertainty. We knowingly discard structure and then attempt to rebuild it later through modeling, weighting or heroic assumptions. It is an inefficient, backward workflow.

Moving to behave-alike: progress with limits

Behavioral modeling was the industry's first attempt to break out of demographic gravity. It gave us trajectories, patterns and richer signals. But behavior alone cannot answer the most important question: Why?

Two consumers may take the same action with entirely different intentions behind it. Without attitudinal context, behavioral similarity still leaves prediction incomplete. Behave-alike is necessary but it is not the finish line.

The attitude-alike advantage

Attitudes – beliefs, motivations, values, expectations – are the most stable, most interpretable and most predictive components of decision-making. They give meaning to behavior and allow us to anticipate future actions with higher confidence.

The challenge is scale. Attitudes cannot be passively scraped or continuously observed. They must be measured, validated and responsibly extended. A conventional dataset cannot do this. A graph can.

A graph is the only path forward. A graph allows us to understand individuals the way they actually exist: as connected entities, not isolated rows.

A graph captures structure. Sequence, similarity, influence and context are preserved as first-class features.

A graph enables responsible inference. Attitudinal signals can be propagated to structurally similar nodes without violating privacy or precision.

A graph reduces uncertainty. Instead of throwing away information early, we retain it – and use it intentionally.

A graph aligns with the ecosystem we actually operate in. Identity is fragmented. Exposure paths are multichannel. Behavior is continuous. A graph architecture is built for this complexity.

This is not an incremental improvement. This is a structural shift in how insight systems function.

A practical roadmap for the industry

Moving toward attitude-alike systems follows a clear progression:

Identity becomes relational, not stitched. We stop forcing deterministic matches and start understanding structural similarity.

Exposure becomes sequence-aware. CTV, social, in-feed video, display and retail media become connected pathways, not siloed impressions.

Behavior becomes encoded. Embeddings capture behavioral patterns cleanly and efficiently.

Attitudes become anchors. They provide stability and meaning and the graph carries them where direct measurement is impossible.

Synthetic augmentation adopts structural guardrails. Quality is measured through divergence, fidelity and attitudinal consistency – not just point estimates.

Measurement becomes more realistic. Brand lift, reach and incrementality reflect how influence actually moves across attitudinal communities.

This is the blueprint for the next decade of insights leadership.

The industry wake-up call

Organizations that cling to look-alikes will continue to misread audiences, misinterpret campaign outcomes and misallocate budgets. Their models will produce inconsistent signals. Their predictions will drift. Their measurement will lack the structural fidelity needed for modern media.

The industry is outgrowing its old tools. Precision requires structure. Prediction requires attitude. And both require a graph.

The final word

The future of insights will belong to companies willing to model people the way they actually live: connected, contextual and dynamic. Look-alikes were a starting point. Behave-alike moved us closer. Attitude-alike is where real prediction begins.

And if you're ready for that future, you can belong to my graph on LinkedIn.

www.dynata.com
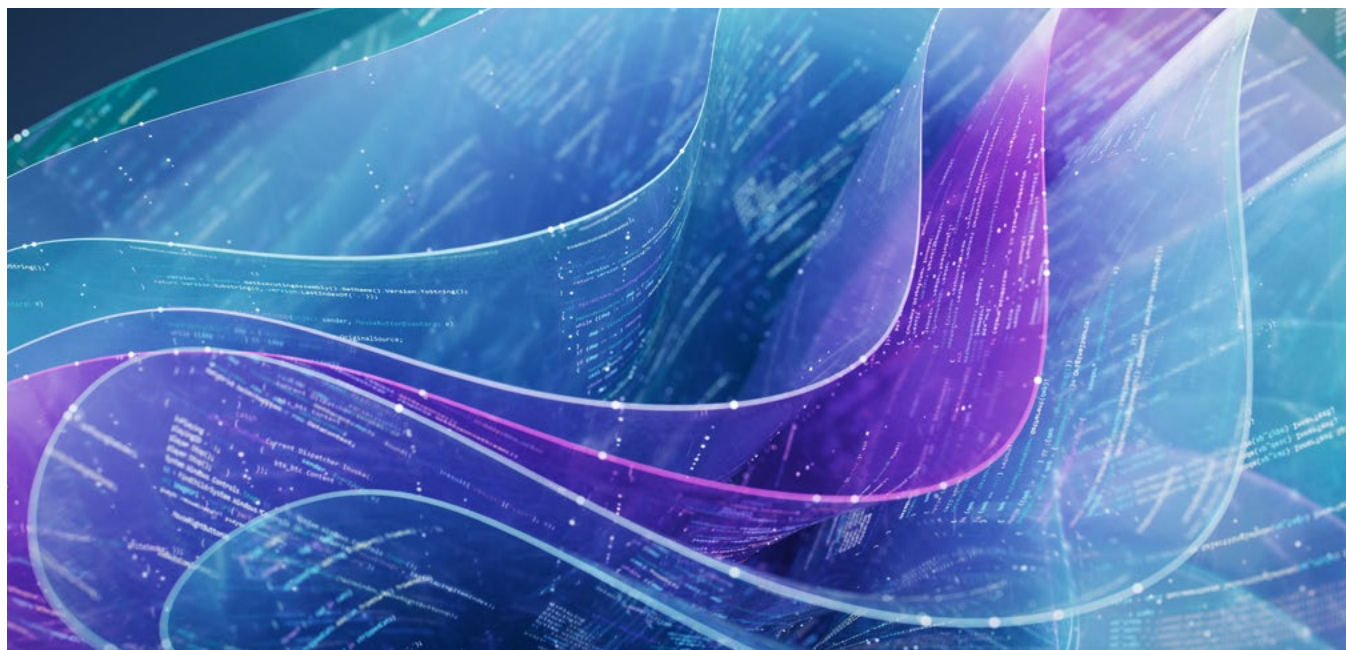
DIY RESEARCH

glaut*

Reclaiming the time to think

How technology can liberate researchers

BY MATTEO CERA
CEO and Co-Founder, Glaut

Recently, I spent hundreds of hours talking to researchers. The conversations often start with curiosity about AI but they quickly turn into something else: anxiety.

The questions come up again and again: Will clients stop valuing methodological rigor and just buy the speed of AI-native agencies? Will I lose my job?

At the same time, there is a quieter frustration: Many researchers no longer feel like researchers; they feel like project managers.

A typical assignment means juggling a small army of external providers: scripters, panels, fieldwork, EDPs, designers. Days disappear into coordination calls, file checking and deadline firefighting.

But anxiety can be overcome. How? Learning how leverage agentic software to regain time to do what researchers do best: think.

The future of DIY research is powered by agentic software, a layer of intelligence that absorbs much of the operational weight researchers have been carrying for years.

At the project level, modern software assists with study design, respondents' engagement, interview moderation, qualitative data analysis and drafting insight-ready outputs. Instead of producing everything manually, researchers review, steer and refine.

Across projects, something even more powerful happens. Learning accumulates. Patterns recur. Knowledge compounds.

For most researchers, this will feel like a liberation. When they stop managing vendors, they get their time back. Time to challenge briefs, connect dots across studies and act as true advisors again.

This shift matters because competition is changing fast. A wave of AI-native research agencies is popping up, selling speed and software-first execution as the product. Experienced

researchers can win by reclaiming what other players lack: context, judgment and trust with their client.

At Glaut, we've built the platform we wished senior research practitioners had: one place to design and run research, analyze data and generate insights, without stripping away methodological depth and maintaining full control over each single parameter.

Every technological shift in research has promised efficiency. What feels different this time is not the automation itself but where it applies. When machines take over coordination, processing and production, researchers are left with something rare: time to think. And in research, that has always been the scarcest resource.

www.glaut.com
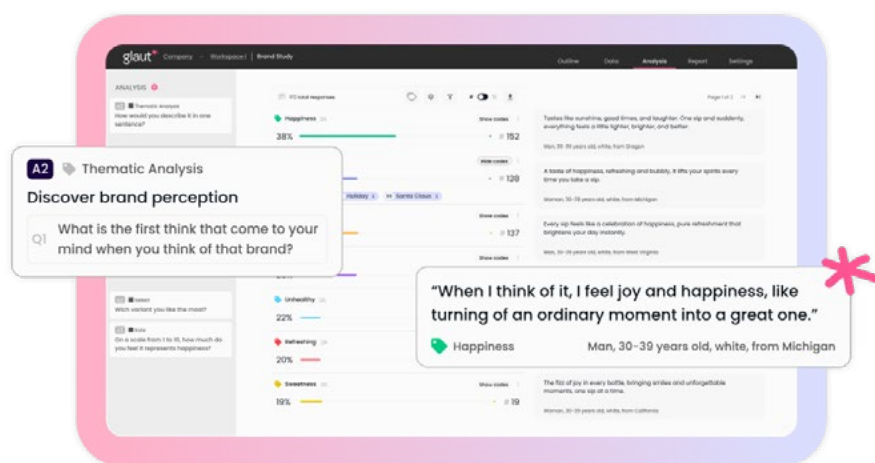
bolt

How AI is redefining insight

BY HAKAN YURDAKUL
CEO and Co-Founder, Bolt Insight

As AI becomes embedded in market research, it is changing how understanding is built and acted on. This shift is not about replacing researchers with technology, it is about enabling deeper, more responsive insight while increasing our responsibility to use it well.

From fixed segments to living understanding

For decades, segmentation has offered a frozen view of audiences, captured at a single point in time and revisited only when resources allow. AI introduces a more fluid alternative: dynamic personas.

These dynamic personas evolve over time. Each new response adds context, revealing changes in behavior, motivation and emotional state. Rather than relying on fictional profiles, researchers can work with living representations grounded in real data.

These personas connect signals across interactions, highlight subtle shifts and show how individuals move closer to or further from particular mind-sets. Teams can now track how sentiment develops, understand how preferences respond to changing conditions and spot micro-level behaviors that would typically be lost.

Dynamic personas become tools for exploration, helping researchers ask better questions and develop richer interpretations without losing human nuance.

Seeing the bigger picture without losing detail

Qualitative research has always excelled at depth but scale has been its constraint. AI-supported meta-analysis offers a way forward.

By compiling insights across multiple conversations, datasets and markets, researchers can identify themes that are difficult to see in isolation. Patterns emerge across cultures and categories. Signals become visible over time.

This is particularly valuable in exploratory research, where the goal is to uncover new problem spaces rather than confirm existing assumptions.

Crucially, interpretation remains human. Technology surfaces connections but meaning is shaped by expertise and context.

Why human oversight still matters

The most important principle in modern research is having a human in the loop. AI can support moderation, organization and analysis but understanding people requires judgement, empathy and accountability.

When researchers stay in control, trust is reinforced. Participants know how AI is used. Clients understand how conclusions are formed. Insight remains transparent, ethical and human-led.

The future of research lies in collaboration. AI expands what is possible. Human judgement ensures it remains meaningful.

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QUALITATIVE RESEARCH

Conveo

AI exposes insights teams that matter

From reskilling to real-world consumer understanding

BY NIELS SCHILLEWAERT
Head of Research and Methodologies, Conveo

It has become a cliché to say that AI is transforming the insights industry. What is easier to underestimate is the amplitude of that change. The impact of AI is operational, organizational and deeply personal for insight leaders and their teams right now.

Two shifts will define the next phase of insights: fundamental reskilling and augmentation; and going beyond what people say to capture real-world consumer experience.

These shifts determine which insights executives and teams will become more influential inside organizations.

Fundamental reskilling and augmentation

AI anxiety is understandable. History shows that every major technological wave automates tasks before it creates new value. What is different this time is the speed and breadth of change.

Recent announcements from major consultancies have made this tangible. Deloitte, McKinsey and Accenture[1] have all acknowledged that AI is reshaping professional services work, particularly non-client-facing and production-heavy roles. These widely reported AI-driven restructuring plans make one thing clear: reskilling is no longer optional. If this is happening at the world's largest advisory firms, insight organizations (client-side as well as agency-side) should not assume immunity.

The new skills premium. The core value of insights professionals no longer lies in executional mastery – writing discussion guides, managing fieldwork, building charts or summarizing transcripts. AI does much of that faster, cheaper and increasingly well.

The premium will decisively shift to:

AI literacy – knowing how to work with AI tools, not around them.

Critical thinking – asking better questions, spotting weak logic, understanding mechanics of how things work.

Creativity – reframing problems, designing smarter research, imagining new angles.

Narrative consulting – turning evidence into stories that drive boardroom decisions.

As Sam Altman[2] so succinctly put it, the most future-proof skill is the ability to learn, adapt and understand what people truly want and need. That has always been the stated mission of insights professionals, so let's use AI to practice human understanding at a higher level.

From doing the work to shaping the work. At Conveo we are therefore building an AI platform that helps democratize execution, end-to-end – from design to recruitment and field to instant analysis and co-creation.

The teams at our clients are already doing more studies, faster, across more markets and cultures with the same headcount. Many of our insight leaders report that this increased throughput is not reducing trust – on the contrary, it is increasing it. When insights teams deliver at the speed of business, more often and with sharper clarity, their visibility and influence rise.

But this only happens when AI is treated as a companion or a team member that is integrated into your workflow, not as window dressing or a threat. AI should allow insights executives to reinvest the saved time into what is strategically important: synthesis, sense-making, stakeholder engagement and business impact.

Go beyond what people say – combine conversation and observation

To apply these premium skills and generate premium insights, one needs rich and holistic input and AI can deliver exactly that. This shift that AI brings is therefore not about how we work but what we can now learn.

Conveo's AI-moderated video interviews are pushing qualitative research beyond traditional limits by combining conversation and observation. Our
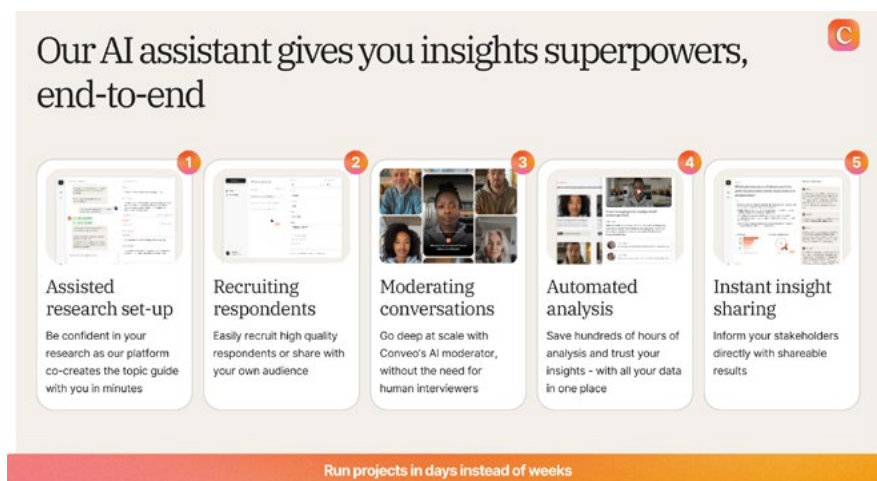
Figure 1: Conveo's AI integrated into your insights workflow.

AI conducts human-like conversations while observing actual behavior in local language and culture as well as real-life context. The AI moderator has memory to probe and reference to earlier statements and deploy projective techniques during the interview – all while capturing non-verbal signals.

Multimodal video insights in practice. This means the AI analysis of what people say (interview transcripts) is complemented with how they say and show things (multimodal video analysis).

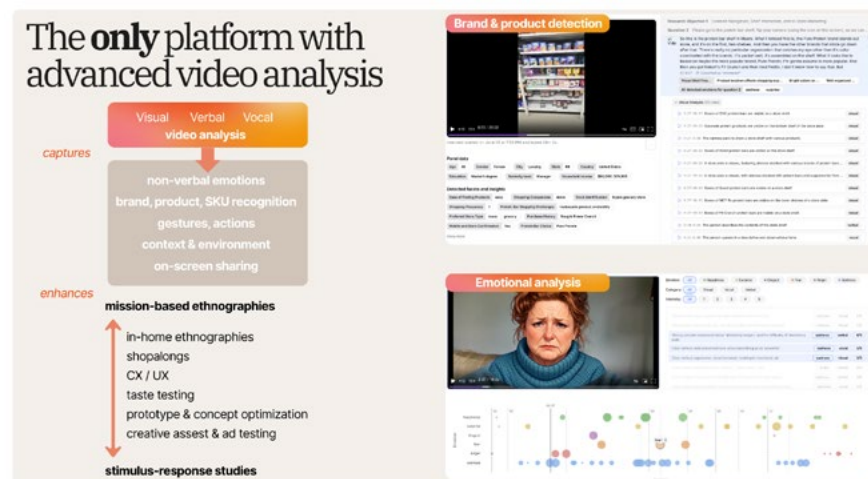Through combined verbal, vocal and visual analysis, AI captures what people:

• express non-verbally (tone, pace, hesitation, vocabulary);
• feel (emotional signals and intensity);
• do and share (actions, sequences, routines, on-screen behaviors); and
• are surrounded by (products / SKUs, brands, context and environments).

Figure 2: Video analysis enhances insights use cases.

This bridges one of the longest-standing gaps in insights: the distance between stated attitudes and actual behavior. It also enables teams to capture consumer reality with a richness and scale that was previously impractical.

What this enables:

• Mission-based research and ethnographies at scale. AI-moderated mobile studies allow participants to complete missions in real-life contexts: shopping journeys, in-home routines, product usage or digital and UX experiences. Video analysis can recognize actions, products and sequences, revealing patterns that would otherwise require costly, small-sample ethnography.
• Stimulus and experience response. Consumers respond to concepts, packaging, advertising and touchpoint experiences emotionally in non-verbal ways – often before they articulate an opinion.

AI-driven video analysis captures these non-verbal reactions and their intensity, revealing what words miss.

Case study: Capturing unspoken frictions in online dog food shopping

Edgard & Cooper conducted an AI-moderated, mission-based study in Germany, France and the U.K. to understand how consumers shop for dog food online in real time. Participants completed an actual e-commerce shopping task while sharing their screen and thinking aloud. While one participant gave a detailed verbal account without mentioning brands or emotions, AI video analysis revealed repeated consideration of the brand Pooch & Mutt and a strong non-verbal expression of dismissal and disgust toward a low-cost alternative. These emotional reactions were not articulated verbally but were clearly visible in facial and vocal cues.

Why it matters: Combining conversation with observation allowed the team to identify true brand consideration and emotional frictions in the decision journey – insights that would have remained invisible in traditional interview-based research.

Will not replace

AI will not replace the insights professional. It will expose the difference between those who execute research and those who shape understanding.

With AI, insights teams will be able to scale their impact without scaling headcount – conducting research in contexts that were previously impractical, with richer data and more time for interpretation and advisory.

The question is no longer whether AI belongs in insights. The question is whether insights teams are willing and able to move upstream in decision-making, closer to strategy.

conveo.ai

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ARTIFICIAL INTELLIGENCE

The insights stack is breaking

2026 is when everyone will notice

BY DANIEL GRAFF-RADFORD
CEO, Discuss

A few weeks ago, I found myself in a familiar situation: sitting across from a senior insights leader, notebook open, trying to ask the right questions – and then get out of the way.

Our executive team had been traveling across North America and Europe, meeting with nearly 30 customers one-on-one after the merger of Discuss and Voxco. These weren't roadshows or demos. They were listening sessions. The kind where you stop talking about what you're building and start paying attention to what people are actually trying to do.

What I heard, repeatedly, was not subtle.

When your career is built around valuing research or rigor but you're struggling because the system you're operating inside – tools, workflows, org design, expectations – was built for a slower world, it's beyond painful.

A world where an eight-week cycle was acceptable because the market didn't shift underneath you while you were still writing the report? That world is gone.

And 2026 is going to be the year this becomes obvious to everyone, including the people who approve budgets.

The real problem isn't qual vs. quant. It's latency.

The industry loves to debate methods. Qual versus quant. Depth versus scale. Story versus stats. If you've spent enough time in research, you've heard every version of these arguments.

But in the conversations we've been having, method isn't the friction point. Latency is.

Latency is the time between "I'm curious" and "I'm confident." It's the lag between a real business question and an answer the business will actually act on. It's the dead space where context fades, urgency dissipates and momentum dies.

The uncomfortable truth is that many insights teams have become very good at producing outputs that arrive too late to matter.

When that happens, something predictable follows: stakeholders decide anyway. They rely on partial information, instinct, internal politics or last quarter's dashboard. Research becomes a retrospective justification instead of an input to the decision.

Rather than it being a problem with talent, it's a structural one.

Our industry built a research workflow that assumes handoffs are free. They're not.

Most organizations still run qualitative and quantitative work in separate lanes. Different tools. Different teams. Different vendors. Different timelines. Often different incentives.

In theory, these lanes "connect." In practice, they collide at the end, like two trains pulling into the same station without a shared map.

Here's the cost that rarely makes it onto a slide: every handoff introduces friction.

The qual team uncovers something that should reshape the quant instrument but the quant study is already programmed. The quant team spots an unexpected signal but the qual budget is spent. Someone tries to stitch the story together in a deck full of screenshots, pasted tables and hope.

Everyone is working hard. The system is still leaking value.

That's why, across our listening tour, I kept hearing a version of the same request: Help us stop treating qual and quant like separate planets.

Not because leaders want philosophical alignment. Because they want decisions that hold up in the real world.

AI isn't the story but it changes the standard

AI isn't interesting because it can shave a few days off a task. That's table stakes. The real shift happens when speed becomes available and expectations reset.

Once stakeholders believe fast feedback is possible, they stop tolerating slow cycles. Not out of impatience, out of necessity. The market isn't waiting for a beautifully formatted deck.

In these conversations, insights leaders described a new kind of pressure. They're being asked to provide strategic guidance at the pace of product, the pace of marketing, the pace of the internet while operating with tools and workflows designed for a quarterly cadence.

This is where AI becomes both a force multiplier and a spotlight.

It amplifies what strong researchers can do. It also exposes where the workflow is still manual, fragmented and held together by heroics.

Heroics are admirable. They are not a strategy.

The missed opportunity: reuse

One of the chronic tragedies in research is how much knowledge disappears after each study.

Teams have years of interviews, open-ends, recordings, transcripts, trackers, segmentation work, then six months later someone asks a question that's essentially already been answered and the process starts over.

Why? Because the data lives in different systems. The context is buried.

The effort required to find and trust what you already know is higher than the effort to rerun the work.

The knowledge exists. The operating model just makes it hard to use.

The strongest insights organizations in 2026 will start behaving like knowledge organizations.

They'll build bodies of evidence that compound over time. Reuse what they've learned instead of re-creating it. And connect "why" and "what" without rebuilding the universe every time a new question appears.

Vendor sprawl is becoming a tax on progress

Another theme came through clearly: teams are tired. Not tired of the work. Tired of the overhead. Too many vendors. Too many logins. Too many contracts. Too many tools that are excellent at one narrow task and silent everywhere else. Too many hours spent coordinating instead of thinking.

In a world where every function is being asked to do more with less, vendor sprawl stops looking like sophistication and starts looking like operational debt.

And 2026 is different for one reason: leadership teams are finally connecting the dots. They're realizing the cost isn't just subscription fees. It's latency. Lost reuse. Handoff friction. And the very real risk of making decisions with stale inputs.

So what happens in 2026?

The gap between what businesses expect from insights and what most insight operating models can deliver will widen. Some teams will close it. Others will get squeezed.

You'll see organizations reorganize around decision velocity, not method silos. Platforms will be evaluated on whether they reduce latency end to end, not whether they offer a flashy feature. Researchers will be pushed toward higher-leverage work as mechanical steps are automated or eliminated.

And a new standard will emerge: insight that is both fast and trustworthy.

What are three things insights leaders can do in 2026 (without burning everything down)?

1. **Measure latency like it matters.** Not "time to field." Not "time to report." Measure the full distance from question to confident action. If you can't see it, you can't fix it.
2. **Stop letting handoffs be invisible.** Map where qual informs quant and where it doesn't. Map where quant raises questions qual could answer and where it can't. The friction you ignore today is the friction that will break you tomorrow.
3. **Treat research as an asset, not an output.** Design for reuse. Make it easier to find what you already know than to rerun the work. If your organization isn't learning faster over time, you're just repeating yourself at scale.

Start with human conversations

When launching a product in a new market, you start with human conversations, pressure-test what you hear with a broader study and pull it together into a decision you can defend.

The details change. The pattern doesn't: curiosity, evidence, confidence.

That's what insights are meant to enable.

If your systems add friction between curiosity and confidence, you'll feel it in 2026 because the world isn't slowing down to accommodate your workflow.

Instead of relitigating qual versus quant, the teams that win will be the ones who remove the nonsense, connect the evidence and help their organizations make better decisions while the decision still matters.

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DATA QUALITY/FRAUD PREVENTION

REPDATA

When bad data looks good

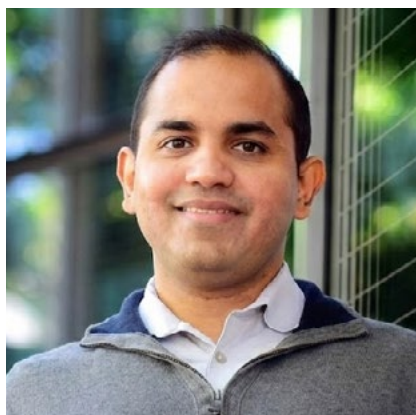## Tech-enabled fraud is already here and better-looking than you might think

BY STEVEN SNELL
Head of Research, Rep Data

BY VIGNESH KRISHNAN
Chief Technology Officer, Rep Data

Do you ever think your data is too good to be true? Have you seen respondents that make you question the quality of every other response in your data set? Market research has long been plagued by fraudsters – respondents who deliberately misrepresent who they are or where they are in order to access your study and steal your incentives. Fraudsters traditionally reveal themselves as poor-quality because they finish too quickly, say "good" as a response to every open-ended question or give conflicting answers.

Fraud has evolved considerably and the new class of fraudsters is more sophisticated and tech-savvy than ever. They are adept at giving thoughtful-looking answers and evading traditional techniques for identifying bad responses. In short, fraudsters are getting good at looking good.

The evolution of survey fraud

Industry veterans may describe fraudsters as hustlers with dozens of email addresses attached to dozens of survey profiles or as offshore click farms staffed by low-skill workers who are paid per survey attempt. In reality, the barrier to entry for fraud is lower than ever because emerging technologies, especially AI, make it easy for fraudsters to commit fraud at scale. The current industry landscape further enables significant amounts of duplication across panels.

Bad actors use advanced developer tools to manipulate device signals, run concurrent virtualized instances and accurately emulate other hardware environments. Our proprietary Research Defender fraud detection platform routinely detects survey respondents who manipulate their real-time communication (RTC) configuration, use emulators, subnets, web proxies and developer tools. The system is being targeted by coordinated bad actors, not genuine respondents.

Advances in AI add fuel to the fire. A recent academic study warned of a "potential existential threat," showing that LLMs or agentic respondents can pass attention checks and give coherent, passable survey responses.[1] Others have shown that browser-based agents can enter surveys in a leading research platform.[2] Taken together, the evidence suggests AI will make fraud faster, easier to perpetrate and less easily detected.

Tech-enabled survey fraud is already pervasive

Our research demonstrates that tech-enabled fraud is already pervasive across the online survey ecosystem. In a comparative study of six online consumer sample providers (Figure 1), including panels and aggregators, we measured the prevalence of tech-enabled fraud by leveraging Research Defender's digital fingerprinting. This identifies tech-enabled fraud through respondents' use of suspicious technology and by comparing survey entrants against lists of known bad actors.

Holding constant the survey design and sampling criteria, we observed high rates of tech-enabled fraud across the six separate sample sources – ranging from 14-20% of respondents in each sample. More generally, Research Defender recommended blocking as fraud a total of 25-42% of respondents in each sample. Other flags contributing to these total fraud rates include markers for duplicate entrants, hyperactive respondents and low-quality open-ended responses, which may also point to tech-enabled fraud.

Fraudsters routinely evade data quality checks

Conventional wisdom proposes that survey fraudsters can be sniffed out through quality checks or close readings of open-ended responses. On the other hand, we routinely hear from researchers that their data still feels unreliable after several rounds of data cleaning, suggesting that traditional

data quality checks are inadequate to root out fraudsters.

To test this proposition, we conducted additional research, using Research Defender to flag fraud but allow the fraudsters into our survey. While Research Defender terminates respondents flagged as fraud by default, in this instance we disabled this feature in order to determine whether fraudsters could be detected through standard techniques measuring attention and cleaning data.

In a separate study of more than 2,000 consumer respondents, 33% of respondents were flagged by Research Defender as suspicious and 67% were otherwise considered qualified entrants. Regardless of their fraud status, all of these respondents were allowed to participate in our survey. Their responses were then subjected to a rigorous machine learning-powered, human-supervised data cleaning process, in which 27% of all respondents were determined to be inattentive or of poor quality.

The mosaic plot in Figure 2 represents the intersection of Research Defender's fraud detection and traditional data cleaning. Although the biggest group, it is important to note that just 50% of respondents were found to be qualified and attentive, passing fraud detection and data cleaning checks. Perhaps more alarming still, if we focus on the right column, we see that the 33% of respondents flagged as fraudsters are split between 10% who are also discovered in data cleaning and 23% that have no markers of inattention or low response quality. Stated another way, nearly 70% of the fraud discovered by Research Defender successfully blended in as quality data. If the fraud makes it
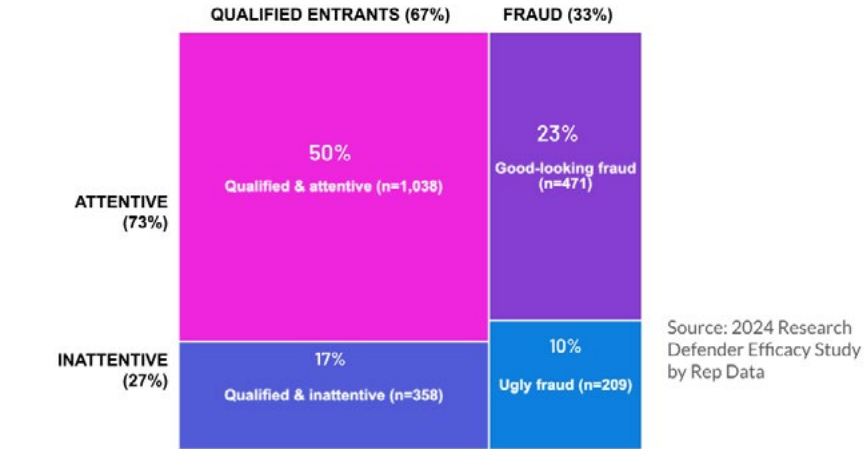

Figure 2

in the front door it is likely to never be discovered.

Blocking good-looking fraud in the age of AI

Bad data is bad, even if it looks good, and undetected fraud can add bias to research, even when the fraud gets through data cleaning. We've observed that fraudsters attenuate differences in brand ratings and bias estimates across health and policy outcomes, political polling and demographics.[3] The challenge of collecting high-quality data hinges on our ability to detect and block good-looking fraud.

When it comes to detecting tech-enabled fraud, it's less a question of what respondents say and more how they say it. That is, survey responses themselves are of limited value because fraudsters give passable answers. Instead, we turn to the paradata – data about how the survey responses are generated.

Especially when it comes to agentic respondents, we recommend tech-forward

defenses to explicitly target LLM trackers, automated scripts like Selenium, Playwright and specific device signals – such as those from OpenAI – while simultaneously utilizing digital fingerprinting and virtual machine verification to expose identity spoofing.

Beyond technical detection, researchers should leverage tools to analyze behavioral elements like unnatural cursor movement, programmatic typing and copy/paste use. We also recommend measuring respondents' activity across the ecosystem to understand how many surveys each respondent attempts per day. We have seen the number of hyperactive survey respondents increase dramatically over the past year.

Staying a step ahead of fraud

Research Defender is constantly evolving to stay ahead of tech-enabled fraudsters. Given our wide visibility into the survey ecosystem, having scanned and scored more than 5 billion survey attempts in the past 12 months, we can observe and build protections against new forms of fraud – AI or otherwise – before other organizations even perceive them as threats. To learn more about our innovations in blocking tech-enabled fraud, visit repdata.com.

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3 Learn more about our research on research at https://repdata.com/research-on-research/.

Figure 1

ADVERTISING RESEARCH

neurons

The Creative AI Loop

How neuroscience-trained intelligence is reshaping insights and research

BY THOMAS ZOËGA RAMSØY
Founder and CEO, Neurons

Modern research teams face a persistent paradox. We have more sophisticated tools, more data and more methodological rigor than ever before, yet insights still take too long to turn into action. Weeks, sometimes months, separate insight generation from execution. High-value research projects regularly exceed $40,000, only to arrive on a decision maker's desk after a campaign is already live or too late for anything more than minor adjustments. The result is familiar and frustrating: insights trapped in decks and postmortems, instead of embedded directly into the work they were meant to improve.

This is not a question of belief in insights. Brands and advertisers all agree that understanding people matters. The market research industry was worth $140 billion in revenue in 2024 according to ESOMAR, showing the scale and importance of insights work. Friction appears when speed, scale and creative reality collide. Research teams are asked to answer fundamental questions: What will people notice? What will they feel? What will they remember?

Part of the challenge is methodological. These questions have traditionally required neuromarketing methods such as eye-tracking, brain monitoring and implicit measures, which are scientifically robust but slow, costly and complex to translate into action. Traditional methods like surveys, focus groups and interviews struggle with these questions altogether, as much of human attention, emotion and memory formation happens outside conscious awareness.

Another reason is conceptual. Insights are still treated as lagging indicators, explanations of what worked or failed after launch. But what teams actually need are leading indicators that guide decisions before money is spent. This is where AI enters the conversation – but not in the way the industry initially imagined.

A new foundation: neuroscience-trained AI

In 2024 around 47% of researchers worldwide had already used AI regularly in their work and about 83% planned to invest more in AI for research, according to a Qualtrics Report. The real question is not whether to invest in AI but where to invest. The biggest gains come from AI systems that learn from the right foundations.

When AI is trained on large-scale neuroscience and behavioral data, it stops acting like a generic pattern-recognition tool and begins to function as a validated proxy for human response. Instead of guessing, it can forecast attention, emotion, cognition and memory with consistency.

This enables a new class of systems: agentic AI that is predictive, suggestive and generative. Together, these capabilities form what we call the Creative AI Loop.

Predictive AI: simulated consumer responses

Not every human response can be predicted. Some metrics are poorly validated or insufficiently reliable. The first task, therefore, is identifying which responses can be predicted with high validity and reliability and which can meaningfully predict audience responses. Only through this quality assurance can we collect high-quality data for AI models to learn from and predict.

Figure 1: Ad with AI heatmap. Predictive AI shows attention patterns, while suggestive AI explains how to improve impact.
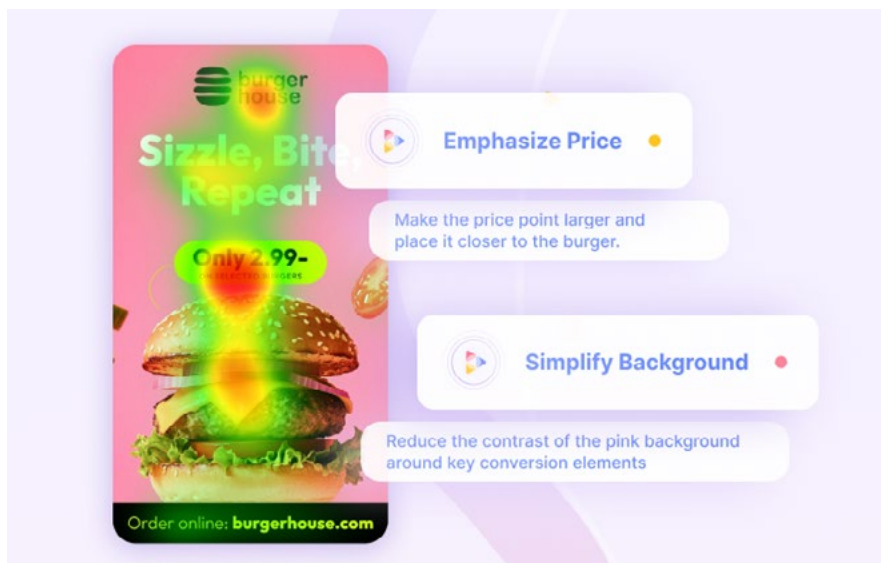
Figure 2: Original vs. AI-improved ad. Generative AI visualizes improved ad creative based on predictive and suggestive AI insights.

Predictive AI gives insight teams an early read on how people are likely to respond to an asset, concept or experience. It delivers simulated responses in seconds, such as heatmaps and behavioral metrics, data that would traditionally require weeks of fieldwork.

This allows teams to identify issues early: attention drop-off, emotional flatness, cognitive overload, weak branding cues or poor memorability. Instead of validating ideas after the fact, researchers can filter and prioritize before expensive testing or production begins. This reduces downstream waste and late-stage surprises.

But prediction alone doesn't paint the full picture.

Suggestive AI: From data to insights

The hardest part of insights work has never been data collection. It is interpretation. Suggestive AI bridges this gap by translating predictive outputs into clear, actionable insight.

This is not a generic large language model summarizing data. A true suggestive AI must be curated and domain-trained. It needs to understand how predictive scores relate to benchmarks; how attention, emotion and memory work across formats and industries; and what actions are most appropriate in context. Recommendations must be grounded in marketing and neuromarketing knowledge, explaining not just what to do but why.

This is where AI begins to behave like a strategic partner, offering evidence-based decision pathways. Still, even strong insights can stall if teams cannot align on next steps. This is where the third type of AI model completes the Creative AI Loop.

Generative AI: What would better look like?

In 2025, 95% of generative AI pilots failed, an MIT report found. Our view is that this is largely because generative AI

delivers value only when guided by predictive and suggestive intelligence. Without that foundation, it tends to produce random variations rather than meaningful progress.

When properly guided, generative AI can produce hypotheses grounded in behavioral science, such as versions that strengthen emotional relevance, reduce cognitive load or improve memorability. For the first time, researchers can show what better looks like. Alignment happens faster because insight and execution converge visually.

The Creative AI Loop in practice

Together, these three stages form the Creative AI Loop:

- Predictive AI shows how people will respond.
- Suggestive AI reveals why they respond that way and what decisions matter.
- Generative AI illustrates how impactful improvements could look.

This closed loop is the new operating system for insight teams. Neurons AI puts this into practice through predictive, suggestive and generative AI. Together, they help teams keep scientific rigor while moving faster, reducing creative risk, improving alignment across teams and influencing decisions earlier.

Most importantly, Neurons AI is built to support insight professionals, not replace them. It helps researchers have more impact by making validated insights faster to access, easier to understand and easier to share visually.

The future of insights

As the industry enters a period defined by speed and uncertainty, research teams need tools that augment their capabilities without sacrificing quality. Neuroscience-trained AI like Neurons offers that combination.

The future of insights will not be defined by how much AI can produce but by how well AI understands humans and helps researchers turn that understanding into better decisions. With the Creative AI Loop, that future is no longer theoretical. It is operational.

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SIS INTERNATIONAL RESEARCH™

Continued growth in a changing landscape

Technology will fuel the research industry in 2026

BY RUTH STANAT
CEO, SIS International Research Inc.

The global market research industry, valued at over $140 billion in 2024 and expected to exceed $160 billion in 2025, is forecasted to grow through 2026. Companies leverage data insights to accelerate growth, stay competitive and reduce risks in product development.

Research technology fuels growth, with research software growing over 11% annually, outpacing traditional services at 4-5%. This shift increases demand for experienced partners to transform testing into confident decisions. Full-service providers generate over a third of revenue, as clients rely on consultative teams for analytics, automation and product testing to deliver comprehensive strategies with measurable ROI.

Evolving methods: combining consumer product testing and insights

While quantitative research dominates globally, insights are evolving. Digital methods like mobile surveys and behavioral tracking provide speed and scale but are increasingly complemented by in-person research for deeper insights. Leading organizations use hybrid models combining digital tools with focus groups and live testing.

In-person qualitative research is crucial for assessing physical products, usability, sensory experiences and emotional reactions, which online methods can't fully capture. It includes concept screening, message validation, usability testing, pricing and post-launch optimization. In-facility sessions reveal the "why" behind consumer behavior. This blended approach minimizes risk and improves decision-making before launch.

Technology powering smarter product decisions

By now, most researchers will have used AI tools for survey programming, analysis, pattern detection and reporting, with the focus shifting to AI-powered platforms for consumer testing and predictive modeling.

These tools boost human research: AI speeds insights and forecasts; in-person testing adds context to validate findings. As analytics advance, research shifts from describing to proactive guidance, helping organizations simulate market reactions and improve products pre-launch.

Rising expectations from B2C and B2B clients

Client expectations for 2026 are rising. Consumer brands want quick feedback for shorter product cycles and B2B firms seek customized insights into complex buyer journeys. Across sectors, stakeholders demand faster results, measurable impact and research that guides product strategy, underscoring the value of full-service partners that combine advanced tech with expert in-person research.

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A digest of survey findings and new insights for researchers

••• entertainment research

Not isolating at all

Global gamers find connections, new experiences

The Entertainment Software Association, in partnership with video game trade associations in Australia, Canada, Europe and South Korea, released the 2025 Global Power of Play report revealing the universal social and emotional benefits of video games.

Globally, players agree on the positive social, emotional and mental benefits of game play. Having fun is the top reason people around the world say they play video games (66%), with stress relief (58%) and keeping minds sharp (45%) making up the top three reasons for playing. In the U.S., the top three reasons are to have fun (63%), for stress relief (56%) and to keep their mind sharp (47%).

Seventy-seven percent of players globally say video games help them feel less stressed, 70% report reduced anxiety and 64% credit video games with easing loneliness by connecting them to others. Similarly, Americans report that games help them feel less stressed (75%), less anxious (67%) and less lonely (58%). Players worldwide agree that video games provide mental stimulation (81%), provide stress relief (80%) and create accessible experiences for people with different abilities (78%). American players align with global sentiment, ranking mental stimulation (80%), stress relief (80%) and creating experience for people with different abilities (77%) highest.

Players around the world turn to games for broader skill development. Players agree that video games help improve creativity (77%), problem-solving (76%) and teamwork and collaboration skills (74%). Adaptability (72%), critical thinking (71%) and communication skills (67%) also rank high.

In the U.S., the top three skills players believe are improved by playing video games are adaptability (77%), cultural sensitivity (74%) and communication (73%). Half of all players worldwide say playing video games has directly bolstered their professional education through technical or behavioral skills and 43% report that games have influenced their career or educational path. In the U.S., 45% say video games have positively impacted their careers. Over half (54%) of global players feel that sports video games have sharpened their real-world abilities in that same sport; 44% of Americans agree.

Video games are not only a popular vehicle for lasting connections with children, family members and friends but also are an avenue to forge new relationships. Nearly two-thirds (62%) of players worldwide agree that video games create spaces for positive connections with others; 55% of Americans agree.

Across the world, younger players (ages 16-35) use games to make and build relationships, with 67% saying they have met a good friend, spouse or significant other through video games. Nearly three in four (73%) of that same age group say video games help them feel less isolated and lonely by connecting them to other people.

More than half of players globally (55%) say that video games positively impact their relationships with their children, and 68% play with their children in-person at least monthly. Forty-seven percent of American players say games positively impact their relationship with their children.

On average, the global video game player is 41 years old and is just as likely to be male (51%) as female (48%). China is the country with the lowest average player age at 32; Italy has the highest at age 50. There are several countries where significantly more women than men play video games, including Brazil (57% to 43%) and South Africa (58% to 41%). Globally, the majority (55%) of players play on mobile devices. Action and puzzle games are the top two favored genres in 20 of the 21 countries surveyed.

The global survey was conducted by AudienceNet, gathering 24,216 responses across 21 countries on six continents. Participants were aged 16-65+, and all qualified as active gamers. Quotas and screening criteria ensured a minimum of 1,000 active gamers per country.

••• hispanic research

Feeling the pressure

Hispanic consumers battle a host of ills

Hispanic households account for 15% of consumer spending but according to data and tech company Numerator, growth has stalled. Hispanic household spending was highest among non-white ethnic groups, but after peaking at 3.2% growth in 2024, Hispanic spending per household dramatically slowed to 0.8% growth in 2025.

Nearly one in four (23%) Hispanic consumers report prioritizing their mental health over their physical health in 2025, the highest among any ethnic group (compared to 17% of Black consumers, 14% of white consumers and 9% of Asian consumers). The leading issues identified by Hispanic consumers were rising prices (40%), immigration policy and issues (30%), financial security/personal debt (24%), public safety and crime (23%) and health (22%). While rising prices topped concerns for all consumers, Hispanic consumers ranked immigration and public safety notably higher than the general U.S. population.

Hispanic perceptions of financial security have significantly worsened. A large majority (80%) of Hispanic consumers say that rising prices are making non-essential goods and services unaffordable. Additionally, 71% believe the U.S. is already in a recession and 59% expect their household's financial situation to worsen over the next year. As a result, big-ticket categories are under pressure. Nearly half of Hispanic consumers say they feel less comfortable spending on vehicles (46%), homes (46%) and luxury goods (45%) in the coming months, with travel (41%) and home improvement (40%) also at risk.

Hispanic consumers are 80% more likely than the general population to say they have canceled subscription services like Walmart+ or Amazon Prime. Nineteen percent of Hispanic consum-

ers reported canceling a shopping subscription in the past year, compared to 11% for total U.S. consumers. They are also more likely than any demographic to oppose brands whose political stances conflict with their own. Sixty percent say they would stop purchasing from a company that takes a political or social stance they disagree with, compared to 47% of U.S. consumers overall. More than half (57% vs. 44% total U.S. consumers) of Hispanic consumers say it is important that the brands they buy reflect their personal values, 51% (vs. 36% of total U.S. consumers) have participated in at least one consumer boycott and 44% (vs. 31% total U.S. consumers) regularly research corporate policies, values or initiatives of brands and retailers.

Numerator's Hispanic Consumer Spending survey was fielded in June 2025 to 1,663 consumers.

••• financial services research

Economic realities derailing U.S. consumers' financial plans

Long-term view takes a backseat

Although many Americans continue to make responsible financial choices – budgeting (68%), reducing leisure spending (64%) and creating financial plans (57%) – U.S. Bank finds that most Americans feel a lack of control over many important life decisions.

Eighty-one percent say it is harder to retire now than it was for their parents (87% of Millennials; 84% of Gen Z and Gen X; 68% of Baby Boomers), 77% believe the current economic environment influences their retirement timeline (86% of Gen Z and of Millennials; 79% of Gen X; 55% of Baby Boomers) and 77% say the economy influences

where to live, including more affordable parts of the country or tax-friendly states (90% of Gen Z; 84% of Millennials; 76% of Gen X; 61% of Baby Boomers). Seventy-five percent indicate that the economy influences whether they buy or rent a home and 63% are worried they will have to come out of retirement due to economic factors.

While traditional financial goals like owning a home and saving for retirement are still as important across generations and genders as ever; personal goals like having meaningful relationships with family, having children and maintaining emotional well-being are also extremely important – particularly to younger generations. Ninety-three percent of Americans say meaningful family and community relationships are important and younger generations are more likely to strongly agree, including 55% of Gen Z and 49% of Millennials, compared to 40% of Gen X and 39% of Baby Boomers.

Eighty-eight percent say owning a home is a key measure of financial success, with 60% of Gen Z saying it has become more important in the last five years. Ninety-three percent say having enough retirement savings to live comfortably is a key indicator of success but 16% have given up on retiring due to financial reasons.

Americans are confident in their ability to manage daily expenses but long-term financial planning is more uncertain. Just 48% are making monthly contributions to their retirement funds and only 37% of non-retired Americans are actively planning and saving for retirement. Sixty-eight percent of Gen Z and 69% of Millennials worry that they will outlive their retirement savings and women (54%) are less likely than men (67%) to have started thinking about, planning or saving for retirement.

This survey was conducted by U.S. Bank in partnership with Edelman DXI. The study was fielded online between June 9-26, 2025, among a nationally representative sample of 5,000 U.S. adults aged 18+.

● ● ● beverage research

Gen Z taking their drinks on-the-go

Cocktails over coffee

Nearly half of Gen Z Brits say they prefer to end a meal with an espresso martini cocktail instead of an espresso, according to a survey by Bacardi Limited. While 48% of 18-29-year-olds prefer an espresso martini cocktail, that number falls to 20% for those 45 years or older.

Gen Z is driving cocktail culture more than ever, with half of 18-29-year-old respondents saying they prefer to celebrate a special moment with a cocktail instead of Champagne, 32% saying they drink more cocktails than wine and 30% choosing cocktails over beer. The survey also revealed the extent to which Gen Z is familiar with cocktail culture. Almost one-third (31%) think of an Americano first as a cocktail, before a coffee – compared to only 9% of those aged 45 and over.

The aperitivo occasion is becoming increasingly significant in the U.K., too. Thirty-seven percent of Gen Z consumers and 42% of Millennials are routinely enjoying earlier evenings out, while 47% of respondents are going to nightclubs less often. Globally, consumers are drinking, eating and socializing earlier in the evenings, as noted by 40% of Spain and India, 32% in Italy and Australia and 30% of those in France. This is led by younger consumers, with over half of those in France (51%) and 34% of Americans.

Another trend being driven by Gen Z is the rise of convenient, ready-to-drink (RTD) cocktails with 40% of 18-29-year-old respondents saying that they plan to drink more RTDs. Cocktails that combine convenience and quality and can be easily enjoyed out and about will take the lead. This will be happening even more in 2026 with 45% of Gen Z saying that they will be going to more casual outdoor gatherings. Gen Z is prioritizing music and cultural festivals over traditional clubs with 49% of those in Spain, and around 40% of Brits and Australians, planning to attend more music festivals in 2026 than they did in 2025.

Mini martinis and smaller portions are also a more frequent request among consumers. This has allowed venues to fix a consumer pain point: drinks not being cold enough, highlighted by 54% of consumers in Mexico, 50% in Spain, 49% in France, 44% in Germany, 40% in the Netherlands, 38% in Canada and 26% in Australia.

The Bacardi report was created in collaboration with The Future Laboratory. Globally, Bacardi surveyed 11,000 consumers in 11 markets including 1,000 in the U.K.

● ● ● pet research

The state of the modern pet parent

Ninety-seven percent of pet owners say their pet is a member of the family, 77% say their pet is their best friend and 90% say their pets have helped improve their mental or physical health – data points that illustrate the emotional bonds we form with our animals. But those bonds come with a price, according to a study by the Human Animal Bond Research Institute, in partnership with Chewy Health.

Seventy-four percent of pet owners found at least one aspect of pet care "very" or "extremely" challenging, with challenges most common among Gen Z (82%), multi-pet households (77%) and those with older or sick pets (81%).

Eighty-two percent of pet owners say they experience some challenges in understanding their pet's health. Satisfaction with veterinary care is highest when multiple communication options are available, especially in-person visits (82%) and phone calls (75%).

The emotional toll of leaving a pet behind is the No. 1 challenge across all demographics, signaling a need for solutions that help pet owners feel more connected and reassured when they're away – like trusted pet sitters, cameras or check-in tools. Affording quality veterinary care is the No. 2 challenge overall, disproportionately affecting younger, lower-income and multi-pet households. Thirty-five percent of <$60K households and 34% of multi-pet owners cite veterinary costs as a top concern.

Willingness to adopt tech solutions jumps from 24% among "strong bond" pet owners to over 50% among those with the "strongest bonds." Pet owners are most willing to adopt technology solutions that are focused on affording (45%), finding (44%) and managing (43%) their pets' veterinary care. Pet owners who are younger, especially Gen Z, report the highest levels of care-related stress and are turning to technology for support. They use an average of 3.6 pet health tools and express interest in solutions like symptom checkers, smart feeders, robotic litter boxes, wearables and telehealth.

Willingness to spend on pet care is strong, with 31% of pet owners agreeing that "money is no object" when it comes to spending on their pets. More than half (52%) of pet owners with the strongest bonds hold this view on pet spending.

The Pet Health Challenges Study was fielded February 6-13, 2025, among 2,005 U.S. pet owners aged 18+ who own a dog or cat and are the primary decision-makers for their pet's care.

••• cannabis research

Budtender advice grows loyalty

Consumers ditch inconsistent dispensaries

AI-powered digital conveniences paired with expert budtender recommendations lead to more loyal customer experiences, according to research by cannabis POS system provider Sweed. Further, 86% of cannabis customers will be loyal to a specific dispensary if it offers personalized recommendations.

When it comes to cannabis users, 75% are Gen Z, 69% are Millennials, 48% are Gen X and 36% are Baby Boomers. Across the cannabis industry, personalized recommendations are more tailored and specific. Digital conveniences are important to consumers, with 71% saying they like to shop using kiosks and in-store screens. Other digital tools also play a major role. Seventy-five percent favor simple one-click reordering capabilities, 72% want the ability to pre-order online and 67% say delivery options are essential.

Cannabis retailers must offer both best-in-class digital conveniences as well as budtender expertise. Eighty-eight percent of cannabis users purchase their products through dispensaries, and the budtender experience plays a pivotal role in shaping both purchase choices and brand loyalty. Three-in-four (76%) dispensary shoppers say a budtender's expertise and advice directly influence what they buy. This is especially true among Gen Z and Millennials (78%), who are more likely than older generations to rely on this guidance, compared to 73% of Gen X and Boomers. However, 60% of shoppers prefer to browse on their own before engaging with a budtender. Eighty-five percent of dispensary shoppers would return to the same dispensary because of knowledgeable budtenders.

Building customer loyalty and increasing customer value has historically been a challenge for cannabis retailers. Eighty-nine percent of cannabis shoppers say they would be inclined to be a repeat customer if the dispensary offered competitive prices and 86% say loyalty or rewards programs would motivate repeat visits as well.

When it comes to what drives purchases, promotions and deals are key motivators. Seventy-seven percent report that promotions influence which dispensary they choose, 78% say they encourage trying new brands or products, 75% reveal that they increase their order size during sales and 79% report that discounts often result in adjusting when they shop, such as shopping earlier or making event or holiday-timed purchases.

Fifty-seven percent of consumers say inconsistent experiences result in them not going to a dispensary and 48% would return more often if offers and communications felt more personalized. One-in-three shoppers have churned from a dispensary they liked because of irrelevant outreach or confusing promotions.

The Sweed Cannabis Retail Survey was conducted by Wired Research in partnership with Oak PR and surveyed 955 nationally representative Americans aged 21+ between October 6-10, 2025.

●●● special advertising section

10 TOP MEDICAL INTERVIEWING/ RESEARCH COMPANIES

Medical marketing research operates in a uniquely complex environment, where methodological rigor, ethical safeguards and regulatory awareness are essential. Interviewing patients and health care professionals requires specialized expertise to ensure data is collected responsibly, accurately and in compliance with privacy and consent requirements. As pharmaceutical and health care organizations face increasing pressure to demonstrate value, support innovation and respond to changing care models, high-quality medical research plays a critical role in informing sound decisions.

For corporate and end-client researchers, selecting partners with experience in medical interviewing and broader health-focused research services helps reduce risk and improve the reliability of insights. Firms that understand clinical contexts, stakeholder sensitivities and appropriate research methods are better equipped to deliver findings that stand up to internal and external scrutiny. This directory highlights organizations active in this space, offering a range of capabilities to support medical and health care research needs.

Applied Marketing Science (AMS)

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

Applied Marketing Science (AMS) is an award-winning, full-service market research consulting firm. With roots in the MIT Sloan School of Management, and as pioneers of voice of the customer research, we bring more than 35 years of customer insights expertise to health care and life sciences organizations. Leading medical innovators rely on us for in-depth qualitative interviewing and advanced research methods that uncover the needs, motivations and experiences of patients, providers and caregivers alike. Our insights help people across the care journey work together to design meaningful pathways that improve patient outcomes and elevate the provider experience.

Phone 1-781-250-6300
ams-insights.com/who-we-help/medical-products-and-pharmaceuticals

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Culture Wise Insights

Founded 2021 | 5 employees
Fernando Castro, M.Ed, Founder
Amanda Bagatelli, M.Ed, Senior Project Manager
Vivian Chaves, Associate Project Manager

At Culture Wise Insights, we specialize in recruiting and interviewing patients for health care research, with a focus on engaging multicultural and linguistically diverse populations. Using trained cultural brokers and experienced qualitative moderators, we bridge cultural and trust-based gaps that often limit participation in medical studies, including those involving rare or complex conditions. A cornerstone of our approach is in-language qualitative interviewing, which enhances data validity, reduces misinterpretation and allows patients to communicate symptoms and health care experiences with greater accuracy and nuance. By creating inclusive, respectful spaces for dialogue, we ensure access to hard-to-reach patient populations and generate high-quality insights that support equitable, informed health care decision-making.

Phone 1-617-903-8116
www.culturewiseinsights.com

Decision Analyst

Founded 1978 | 120 employees
Monisha Hatfield, Senior Vice President
Bonnie Janzen, President

The Medical Research Group at Decision Analyst combines deep scientific and technical expertise to address complex challenges in the pharmaceutical, medical, health and wellness industries. Their work – often strategic, multiphase and spanning multiple countries – focuses on patients and health care professionals (HCPs). The team employs a broad range of methodologies, including qualitative research, strategic survey design, advanced analytics and consulting services. Decision Analyst excels in areas such as strategy research, market segmentation, new product concept testing and forecasting, messaging optimization, innovation services and advertising research. With extensive experience solving intricate marketing problems, the team tailors and blends research approaches – quantitative, qualitative, including AI – to meet your specific business needs. Decision Analyst has ISO certification 27001:2022 and designs and executes health care, medical and pharma consulting assignments in North America, Europe, Latin America, Asia, the Middle East and Australia.

Phone 1-817-640-6166
www.decisionanalyst.com/industry/medical

Dynata

Founded in 1977
Josh Monroe, SVP Sales, MRA EAST

Dynata is the world's largest first-party data company for insights, activation and measurement. With a reach that encompasses 70 million consumers and business professionals globally, and an extensive library of individual profile attributes collected through surveys, Dynata is the cornerstone for precise, trustworthy quality data. The company has built innovative data services and solutions around its robust first-party data offering to bring the voice of the customer to the entire marketing continuum – from uncovering insights to activating campaigns and measuring cross-channel marketing return on investment. Dynata serves more than 6,000 market research, media and advertising agencies, publishers, consulting and investment firms and corporate customers in North America, South America, Europe and Asia Pacific.

Phone 1-860-209-0097
dynata.com

Fieldwork

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

Our specialties include medical, global research, consumer, CX/UX, B2B and mock jury. For over 40 years Fieldwork has recruited the highest-quality medical, consumer and business 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 multi-country 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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www.fieldwork.com/market-research-services

Karchner Marketing Research, LLC, WBE

Founded 2003
Helen and Mike Karchner, Co-Founding Moderators

Fast-paced markets demand initiative, agility, insight and innovation. KMR designs, executes and moderates PMR studies like branding, value proposition, concept/message testing, product positioning, market landscape, detailing material effectiveness, etc. KMR empowers health care organizations and businesses! How do we effervesce a reluctant HCP's or patient's internal inclinations? Our unique "proprietary secret sauce," uncovering respondents' ahas and propensity/drive to engage in product/service selection. KMR's client base represents global and national pharmaceutical/health care brands, with 33% direct end-client strategic partnerships and 67% through subcontracting relationships. The end-client's product portfolio is strengthened by KMR uncovering missed opportunities or potential risks before resources are wasted. By anticipating tomorrow's needs today, clients remain strategically advanced and continue outpacing competitor innovation. Elevate your business with KMR's expertise – because smarter decisions lead to lasting success. KMR – your strategic partner from quick, gut-check projects to multi-phased global studies. Value established KMR's prominence!

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www.KMRResearchStudio.com

Murray Hill National

Founded 2013 | 40 employees
Susan Owens, COO
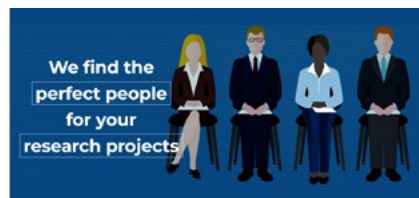
Clients trust Murray Hill National with thousands of studies per year as their research partner. In return, we deliver valuable solutions, high-quality recruitment and data collection for all your research needs, specializing in health care and B2B! All methodologies and all audiences! MHN can host and deliver your results across the U.S. What makes us different from most is that we put data quality at the top of the list. For the last 30 years, the executives at Murray Hill National have worked diligently and advanced to one of the leading data collection and recruitment companies in the U.S. Our teams are committed to meeting your research needs. We provide high-quality recruitment, with access to 5 million consumers, 650,000+ B2B executives/professionals and 750,000 physicians, nurses and administrators. MHN maintains 150+ patient panels. MHN's qualitative services extend far beyond the traditional focus group. MHN services include online, digital, remote, home-use test and any other methodology needing to find an audience with feedback or expert knowledge. MHN's motto: "Any audience, any methodology. Specializing in B2B and health care." Call us today for your next project, your "national" recruiting experts!

Phone 1-972-707-7645
www.murrayhillnational.com

Olson Research Group Inc.

Founded 1995 | 55 employees
Charles Olson, CEO

Olson Research provides a full spectrum of innovative qualitative and quantitative market research services to the pharmaceutical and life sciences industries. Our deep access to accurate U.S. provider data combined with our team of senior-level consultants – who each possess 20+ years of health care marketing research expertise – and our dedicated qualitative and quantitative project managers – with an average of 10+ years of experience – are hallmarks of our success. We are known for our collaborative approach to research that supports custom solutions and flexible offerings, while staying laser focused on supporting our clients' most critical strategic decisions.

Phone 1-267-487-5500
www.olsonresearchgroup.com

ReadingMinds.ai

Founded 2025 | 12 employees
Stu Sjouwerman, CEO

ReadingMinds.ai is a new, AI-powered marketing research platform that turns real customer conversations into fast, actionable insights. You get a second-generation platform that features an emotionally intelligent AI-interviewer called Emma. She conducts crisp voice interviews 24/7, no appointments needed! Marketers use ReadingMinds to uncover emotions that truly drive buyer behavior, then translate those findings into sharper targeting, stronger messaging, better-quality leads and higher close rates. Teams get actionable, shareable reports in hours, not weeks, with granular sentiment analysis and key themes that align marketing and sales around what makes buyers tick. Collaborate effortlessly with teammates and partners while keeping workflows centralized and efficient. Find out how affordable this now is!

Email support@readingminds.ai
www.readingminds.ai

WebMD/Medscape Market Research

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

WebMD Medscape offers you what no other health care market research company can: engaged health care professionals who are regularly accessing Medscape for clinical content and patients/caregivers who engage with WebMD for health care information. Our market research team leverages WebMD and Medscape members to provide you with solutions that deliver high-quality results. Our Medscape members include such titles as MDs, pharmacists, medical students and NPPAs. We use our advanced targeting capabilities to deliver the HCP respondents and results that you are looking for. In addition to our U.S. coverage, we also have MD coverage in the U.K., Italy, Spain and Germany. The WebMD patient and caregiver panel is profiled on over 500 conditions and diseases.

Phone 1-646-856-3860
www.medscapemarketresearch.com

Automation, optimization and real-world impact: What enterprise AI looks like behind the curtain

| By Ekaagar Singh Hara

abstract

As organizations grapple with efficiently operationalizing AI, it's helpful to explore what insights professionals need to know about model drift, retraining cycles and the practical realities of maintaining AI systems.

In marketing research circles, AI conversations often revolve around generative models, shiny dashboards or large language models destined to "change everything." But inside large organizations, the AI systems with the greatest immediate impact aren't the flashy ones, they're the automated pipelines and optimization frameworks running quietly in the background.

These systems power targeting, segmentation, budget allocation and campaign forecasting. And unlike the AI demos that go viral on social media, enterprise AI runs in a world full of constraints: limited budgets, multistep campaign processes, data inconsistencies and dozens of stakeholders who must approve every change.

This article aims to pull back the curtain on what automation and optimization really look like – not in theory, but in the day-to-day work of supporting research and marketing teams.

Why automation matters more than ever

In marketing research, speed-to-insight is gold. However, predictive models – the engines behind audience selection, campaign optimization and outcome forecasting – tend to degrade over time. People change, markets shift and behavior evolves.

Automation helps maintain the accuracy and usability of models without overwhelming data science teams or delaying market research cycles.

Automated retraining keeps insights fresh

Traditionally, retraining required:

- A request from a marketing stakeholder.
- Weeks of data preparation.
- Manual algorithm selection.
- Validation.
- Deployment

Multiply that by 30–50 models in an organization and you can see why retraining often gets postponed. Automated retraining systems solve this by:

- Ingesting new data continuously.
- Triggering retraining when performance dips.
- Comparing algorithms automatically.
- Deploying the best model version.

This ensures marketing insights get reflected in reality – not a version of insights from 18 months ago.

Monitoring pipelines catches issues before they become problems

Enterprise systems adapted to automation monitor:

- Data drift.
- Feature-importance shifts.
- Response rate changes.
- Segmentation density changes.
- Model lift deterioration.

Think of it as a Fitbit for your predictive models – you can spot trouble early, long before failure impacts campaigns.

Deployment becomes predictable and safe

- Automation removes chaos from rollout.
- Versioning is consistent.
- Documentation almost writes itself.
- Rollback is instant.

The result: Marketing teams trust the model lifecycle instead of fearing "who touched the pipeline last?"

Optimization: The part of AI no one talks about

In research and insights, "optimization" often gets mistaken for "use a better algorithm." But in production environments, optimization is more holistic.

Optimization must respect business constraints

Researchers know that reality rarely fits neat statistical models. Campaigns have budgets. Email volumes have limits. Some segments carry a higher risk or lower tolerance.

Optimization engines must balance:

- Business rules.
- Risk thresholds.
- Capacity constraints.
- ROI goals.
- Audience fatigue.

This is why a model that performs extremely well in a lab setting may be unusable in the real world.

Optimization reduces the insight-to-action gap

The best predictive model still needs translation into decisions. Optimization frameworks:

- Prioritize segments.
- Adjust thresholds.
- Estimate expected lift.
- Translate predictions into recommended volumes.

This is where marketing researchers often reenter the picture. The strongest results happen when insights teams guide which business levers to optimize.

Optimization isn't one-and-done. Markets shift. Creative changes. Offer mix fluctuates. The economy sneezes and suddenly response rates change. Optimization frameworks constantly recalculate – allowing insights teams to stay nimble instead of reactive.

Real-world impact: What changes for researchers?

AI does not replace research – it accelerates it. Here's what automated, optimized modeling systems can actually change for research teams.

Faster turnarounds and more confident recommendations

Instead of relying on outdated segments or gut feel, researchers can:

- Access current model performance.
- Test multiple scenarios.
- Model predicted outcomes.
- Simulate alternative targeting strategies.

When everything recalculates automatically, you get speed without sacrificing rigor.

More reliable targeting and less risk

Automation reduces the chance of:

- Outdated audiences.
- Stale behavioral predictors.
- Data inconsistencies.
- Human error during manual refreshes.

Research teams no longer need to ask, "Is this model still good?"

Efficiencies across multistage campaign ecosystems

When dozens of campaigns run across multiple channels, automation ensures consistency. No rogue spreadsheets. No version mismatches. No "we thought this model was already updated." This is particularly important in organizations where research teams coordinate with multiple internal stakeholders.

A few lessons learned

Every enterprise AI system has its quirks (pun intended). Here are a few lighthearted lessons from real life – offered anonymously, but with absolute accuracy.

The "model gremlin" episode. During an early automation test, a model suddenly declared an obscure microsegment as the "most engaged humans on Earth." No one could reproduce the phenomenon. Turns out the gremlin was a corrupted input file – caught by monitoring minutes later.

Lesson: Automation doesn't replace humans – it protects them.

The surprise weekend retrain. An automated retraining cycle triggered at 2:13 a.m. on a Sunday due to performance decay. The pipeline rebuilt the model, validated it and deployed it. Monday morning, the team arrived to a Slack message that simply read: "Your model is fresh. – Automation."

Lesson: AI does some of its best work when everyone else is asleep.

What should research leaders do next?

AI's future – especially in marketing research – lies in automation plus human judgment. To get started:

Invest in monitoring before modeling. It doesn't matter how great your model is if it quietly degrades.

Build refresh strategies based on decay, not on calendars. Annual refreshes are convenient but not always optimal.

Automate documentation and versioning. You'll thank yourself later.

Partner closely with data science. Optimization and model-making thrive when business rules are clear and shared.

Use AI to scale insights, not replace them. AI is the engine – insights are the driver.

More time to focus

Enterprise AI doesn't need to be mysterious or intimidating. When done right, automation and optimization free researchers from chores that don't require human interpretation – and give them more time to focus on strategy.

By understanding what's happening behind the curtain, insights professionals can work more closely with analytics teams, improve forecasting accuracy, reduce risk and accelerate the decision-making cycle.

Behind every "smart campaign" is a smart system – and a smarter research team that knows how to use it. ⓠ

Ekaagar Singh Hara is a data scientist at AARP. He can be reached at ekaagar@gmail.com.

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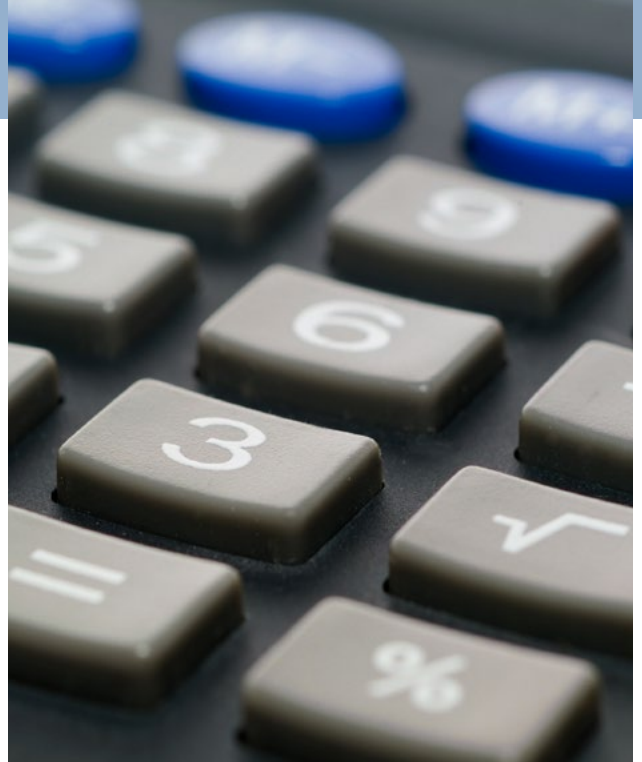
Using rating scales in segmentation studies: At least twice as bad as you think

| By Keith Chrzan

abstract

Better research design choices – such as MaxDiff, Q-sort or semantic differential scales – can reduce scale-use bias before it contaminates analysis.

Rating scale data almost always contains scale-use biases: Different respondents use rating scales in different ways. Take for example rating scale data from a study I collected a few years back. Some respondents, like Socrates in Figure 1, use the full width of the rating scale (mean response of about a 3 on a five-point scale).

Other respondents, like Jones in Figure 2, pile up their responses only on the top end of the scale, in this case with a mean rating of 4 on the five-point scale.

Figure 1

Please use the scale below to indicate how important each of the following are in terms of your experience at a casual dining restaurant.

	Extremely important	Very Important	Somewhat important	Slightly important	Not important
Prompt greeting	○	○	○	○	●
Overall cleanliness	○	●	○	○	○
Comfortable environment	○	○	○	●	○
Server attentiveness	○	○	●	○	○
Server friendliness	○	○	●	○	○
Pace of meal	○	○	○	●	○
Taste of food	●	○	○	○	○
Temperature of food	○	●	○	○	○
Receive check in a timely manner	○	○	○	●	○
Reasonable prices	○	●	○	○	○

Figure 2

Finally, some respondents, like Bubba in Figure 3, fail to use the scale to discriminate at all, nearly or completely straightlining their responses (Bubba has a mean score of 4.9).

If you've looked at rating scale data you've probably seen all three of these patterns. Not only do patterns differ across individual respondents, they can also differ systematically between respondents from different cultures or from different countries.

If you try use these 10 rating scale variables as the basis variables for a needs-based segmentation, you'll almost always find segments of respondents grouped by their use of the rating scale and not by the content of the rating scale. For example, from my surveys of 1,024 respondents, the three-segment solution shown in Figure 4 emerges when I use latent class clustering (I get similar segments when I use k-means clustering).

We have a segment of high raters (Segment 2), a segment of low raters (Segment 1) and a segment of folks in between. We might try to hide this fact by running out to five or six segments but still we usually end up with a segment or two of high raters, a segment or two of low raters and a

Figure 3

segment or two in between. I should add that this isn't just a problem with importance ratings; it affects the even more commonly used agree-disagree ratings as well.

Most analysts realize that this means bias in rating scales will pollute their segmentation, so to avoid it, they center their data, subtracting from each respondent's rating that respondent's average score – this functionality is even built into commercial cluster analysis programs. What most analysts don't realize, however, is that mean-centering may not solve their problem at all, because now they may just get a segmentation that groups respondents by the variance with which they respond to the survey questions. And this is exactly what happened in my casual-dining segmentation (Figure 5).

Now we have segments of near-straightliners like Bubba (Segment 1), highly discriminating respondents like Socrates (Segment 3) and respondents in between like Jones (Segment 2). We might try to disguise this by running out to more segments or by column-standardizing the data

Attribute	Segment 1	Segment 2	Segment 3
Prompt Greeting	2.18	3.53	3.22
Overall Cleanliness	3.64	5.00	4.08
Comfortable Environment	2.95	4.11	3.89
Server Attentiveness	2.86	4.13	4.01
Server Friendliness	2.81	4.17	3.87
Pace of Meal	2.35	3.54	3.31
Taste of Food	3.83	5.00	4.38
Temperature of Food	3.24	4.47	3.96
Receive Check in Timely Manner	2.34	3.43	3.29
Reasonable Prices	3.31	4.21	3.70

Figure 4

but the problem and its detrimental effects will still be present, if slightly less evident.

While I've shown the above examples from an R&D case study, rest assured that it happens in commercial studies too and with all manner of what are somewhat inaccurately called "Likert-type scales." In Likert-type scales we present all the items with a single set of scale anchors, like the importance anchors in the earlier examples or degrees of agreement and disagreement.

Hopefully you're aware or you've become aware of how pervasive this problem is for attitudinal and needs-based segmentation studies. What are some solutions?

My preference would be to solve the problem at the research design stage, by choosing better scaling methods.

For needs-based segmentation I advise my clients to use scales that constrain respondents from saying that all attributes are equally important: MaxDiff scaling and Q-sort are two excellent ways to accomplish this, at least up to about 25 items in the first case and up to about 20 items in the second.

For attitudinal ratings, I recommend semantic differential scales. These use bipolar adjective pairs unique to each item, so perhaps a five- or seven-point scale with "Expensive" on the left pole and "Inexpensive" on the right, "Easy to use" on the left and "Difficult to use" on the right and so on. These can often reduce the scale-use biases described above (but not always – sometimes they still oc-

cur, even with semantic differential scales).

Another alternative for attitudinal ratings comes from a recent (and excellent) book ("Market Segmentation Analysis: Understanding It, Doing It, and Making It Useful") by Grün, Leisch and Dolnicar in 2018. They suggest using "doubly level-free binary scales as inputs for segmentation," though like semantic differential scales, I have seen cases where these scales contain scale use bias as well.

In the event these attitudinal scaling alternatives fail to ameliorate the scale use bias, we may need to try to solve the problem at the analysis stage, by respondent-standardizing the data prior to segmentation.

Of course, any suggestions you have would be most welcome – this is an area where I am certain of the problem, where I have confidence in a solution for needs-based segmentation and where I'm still searching for a "works every time" solution for attitudinal segmentation. ⓠ

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Figure 5

Attribute	Segment 1	Segment 2	Segment 3
Prompt Greeting	-0.19	-0.42	-1.19
Overall Cleanliness	-0.01	0.68	1.07
Comfortable Environment	-0.04	0.28	-0.18
Server Attentiveness	-0.18	0.24	-0.06
Server Friendliness	-0.09	0.20	-0.18
Pace of Meal	-0.04	-0.70	-0.83
Taste of Food	0.32	0.65	1.25
Temperature of Food	0.06	0.20	0.47
Receive Check in Timely Manner	-0.01	-0.80	-0.89
Reasonable Prices	0.17	-0.35	0.55

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CHECK YOUR TECH

A researcher's guide to data privacy and security before you buy

| By Lisa Horwich and Z Johnson

Lisa Horwich and Z Johnson distill complex AI-era data privacy guidance into several categories, helping researchers confidently evaluate ResTech vendors, avoid legal and security pitfalls and protect respondent and client data.

As the research technology (ResTech) landscape remains a key part of a researcher's workflow, making smart decisions on which technology to adopt becomes more critical. The wrong decision can leave you vulnerable to costly data privacy violations or find your confidential information used in unauthorized ways.

In September 2025, QRCA offered a comprehensive class on data privacy in the age of AI that featured experts in all aspects of data privacy, including the legal ramifications of the recent laws governing AI. The course had so much rich information that some were left wondering exactly how to implement the advice.

We put together a checklist to help distill the information. We sat down after putting the checklist together to chat through it and thought we'd share the conversation with you.

Disclaimer: We are not attorneys; we are just technologically savvy researchers who stay on top of the security and privacy issues facing the market research industry. The information provided in this article does not, and is not intended to, constitute legal advice. Please consult with your own legal counsel on your situation.

PLATFORM PRIVACY

Lisa Horwich: OK, Z, let's start out with platform privacy. This covers legal compliance and how both our – as well as research participants' and respondents' – personal data is protected. So, this is really where we get into legal things like how the platform handles current laws and how it will take into account any kind of future changes to the laws. What should we be looking for?

Z Johnson: This is one where really it comes down to which laws are the most restrictive – not necessarily for where

you're operating but for where your respondents live. It's not so much, "I operate in the U.S., therefore, I should just use the most restrictive laws in the United States." Instead, if you are doing research that would include people in Europe or if your client does business in Europe, you should use Europe's privacy laws (GDPR). Generally, using Europe's privacy laws is a good foundation. Not only do they have strict measures in place but they also have comprehensive coverage and established guidelines to follow.

Lisa: Let's now talk a little bit about personal data. There are a couple of things to mention here, specifically what data does the vendor collect and then who has access to it. We also should discuss what happens with that data when the project is completed. Also, how much control do we have as the technology platform user or deployer on how that data is used?

Z: This information is extremely important to look for, not just by asking the vendor but also by checking the privacy policy! I've started to note that a lot of well-written privacy policies will specifically spell out what data they collect about you and what they do with your personal data. Much of this is important for data in general but personal data is even more important.

There will be cases where your personal data is shared with a third party, for example for marketing purposes. Or it's shared with a third party for tracking purposes (e.g., Google Ads), for advertising purposes or for legal purposes, in order to be able to execute the terms of a contract. I've seen these specified in some privacy policies. You're definitely looking for, "Who owns my data in your platform? Do I have control over how long it's stored? Who should I contact if I want to exercise my privacy rights, such

as right-to-know or right-to-deletion? Can I ask you, the platform provider, who is storing my personal data to delete my personal data from your tools?" This last question is one of the more important things and, honestly, one of the items I find missing most often.

Lisa: Don't forget to check the terms of service, too. Privacy policies are often limited to what the technology provider is doing with the data it collects about you, the user. What the technology provider is doing with the data you input into the tool (including any personal information included in the data you input) is often governed by the terms of service and related addendums known as data processing agreements or DPAs.

One of the best practices is to limit the amount of personal data you share or that you disclose when using any technology tool. If you don't have to share it, don't do it! And, if the tool allows you to choose, pick the shortest amount of time they store the personal data. I know I want to see granular controls which allow you to select which type of data is stored and how long it will be stored.

Z: It's also important here to define what "personal data" actually means. Any of those single sign-on (SSO) options can include the personal data stored in Google or Facebook, like your birthdate, address, social media channels, websites or even company information that is then stored on the platform – all so that you can continue to sign into their system via SSO. This is another reason to look for those granular controls for what data you can keep and what data you can remove. What information can I take away so the platform doesn't get to keep this information forever? I should get to decide what stays and what goes and how long.

TERMS OF SERVICE

Lisa: Let's talk a little bit more about data itself. One thing I always get into is the data usage. How is this platform using my data?

Z: It should be in a vendor's terms of service. Interestingly, in the past few months, I have learned that anything that you, as a user, input into a tool – this is especially relevant for tools that use prompts like AI tools – can be stored by the provider and tied to you and your tool usage. The output from that is also considered data that can be tied to you and your tool usage. What can all of that data be used for? Sometimes it is actually specified and sometimes it is not. Often it will be vague like, "We can use your information to help us improve the services we provide you." Other times it will be more specific. This specificity is what you want to see from vendors so you can make an informed decision about whether to use the tool. Statements such as:

We will use your information to help us train our models.

We will anonymize the information that you provide to help us train our models.

We will not use the prompts that you enter into this tool to train our models.

We will remove your personal information from the prompts and the outputs when training our models.

We will use this information to help our third-party providers improve their models to then improve our services to our users.

It can get really muddy very quickly!

Lisa: And it's not enough to just look at the terms of service once, right? I know I came across one the other day that said you are granting somebody rights to your data and that same platform said we will change our terms of service from time to time. We're not going to tell you when. You just have to keep checking back.

Z: I did see one that said that and then followed with, "The fact we have stated that we change our terms and service every once in a while, and have instructed you to come and read our terms of service whenever you use our tool, is enough to say that we have informed you that we change our terms of service – we don't need to inform you further."

Lisa: That's wild! But it illustrates the need to read the terms of service thoroughly before choosing a tool or platform and to be sure to re-review it from time to time – especially if they notify you that there has been a change.

DATA STORAGE

Lisa: We talked a little bit previously about understanding where data is coming from to ensure we follow the applicable privacy laws but now we should talk more about data storage, because we really want to know exactly where the data is being stored and processed as there are certain countries where policy states the data has to reside in that country.

Z: Yes, where data is stored has a direct impact on which regulations apply. I actually saw a terms of service the other day that very specifically stated, "While we say that we will be as good as we can with your data, we also need to let you know that your data is stored in Singapore and therefore is only guarded insofar as Singapore rules and regulations allow." Essentially, they are saying, "Be aware we don't have to be as strict with your data as we would if we were storing your data in Europe or somewhere else."

Lisa: Yes, very important! And then checking what their policies are around data retention and deletion. One of the best practices I've always said is just pick the shortest amount of time possible – for personal and general data. You want to look for and make sure they've got clear guidelines.

Z: And if you don't find a clear guideline on how long your data is stored or a clear guideline on when your data is deleted, seek clarification or look for a different tool.

Lisa: If you don't see it in their terms of service, ask the vendor and write it into your contract with them if you're writing your own contract.

COMPLIANCE

Lisa: Let's turn to compliance. We've touched a little bit on it here and there but now let's talk about it, especially in relation to AI.

Some of the questions we want to ask in this case are, "Who is handling the AI when it comes to training data compliance?" And, "Who is liable for the output's intellectual property compliance?" I think these fit together because it's all about who owns the rights to that data.

Z: This was something that I did not even know was a thing to be concerned about until Jessica Santos (global compliance and quality director, DPO at Oracle Life Sciences) talked about this during the data privacy webinar. What it boils down to is simply: The AI training data should not be using copyrighted material. It really doesn't matter who is doing the training.

Lisa: There are numerous lawsuits out there right now claiming some of the major LLMs used copyrighted information without permission to train their models. The public domain and copyrighted works are mutually exclusive concepts. A work is either in the public domain and free to use or it is protected by copyright and requires permission to use. The AI provider, deployer or user is responsible for checking that the information obtained from public domain and/or output of the AI are copyright protected.

Z: When it comes to the output, this is another time to ensure the data does not have copyrighted material. So, not only does the material going into the tool need to be checked for copyright, the information coming out also needs to be checked for copyright violations. You want to be sure the platform provider has tools in place that check for copyrighted material both directions.

Lisa: Then who owns that data when it comes out? If I put something in a gen AI tool, who then owns that output?

Z: Again, with many legal battles going on, this could be either the developer, deployer or user of the AI. You might think that because you entered a prompt, you now own the output. But before we talk about output ownership, there's a group of people who are growing their prompt libraries and they want to copyright them. Basically, they're arguing, "I spent time and energy building this prompt and honing it so that it would work for this tool and I don't want someone to be taking this prompt and building their own tool based off of my prompt." This is going to change over time with copyright laws.

It's a heated space to watch and, as marketing researchers, we should keep an eye on it! As for output, some tool providers now say in their terms of service that they, not you, own the output from prompts. We need to be very aware who actually does own and retain the ownership of the output. Because when you

are using ResTech that generates reports, who owns those reports at the end of the day? You want to be very clear on that.

Lisa: Right. Let's talk a little bit about models and what we need to know from our platform providers about how they are protecting us and our data going into third-party systems including LLMs.

Z: A first step is making sure it's one of the larger, well-known LLMs and not an LLM that no one has heard of. Also, ensure it has good security and privacy practices around it. Know that sometimes you have to go into the tool and actually change your settings to ensure the controls are set up for maximum privacy and security for you and your clients. Be aware that these tools can change their terms of use anytime.

Lisa: What about an acceptable use policy? What do we want to learn from the vendor at that point?

Z: You're just trying to understand how the system can be used. You're looking for guardrails that the tool provider expects you to honor. For instance, acceptable use policies may prohibit uploading certain types of data like protected health information. Thus, if you use a ResTech tool for a project you're working on with a health care client and you upload interview notes that include protected health information, you might be violating the ResTech provider's terms and exposing both yourself and your client to risk. You can never get rid of all risk – this was something that both Jessica Santos and Jessica Clark (privacy and IP counsel at Kelly & Simmons LLP) pointed out – but you can mitigate risk by taking the time to thoroughly vet and understand the tools you choose to use.

Lisa: Absolutely. This prevents you from using it in a way that it wasn't designed for, which would result in more issues. Setting up a contract with a data usage provision is also recommended. The best method is data minimization – only load the minimum necessary data into the system or transfer to the vendor and delete them as soon as the processing activity is completed.

SECURITY

Z: Exactly! As we're talking about how you can use these tools, we also need to be looking at tool security. Lisa, you've talked a lot about security frameworks. Could you talk a little more about what frameworks mean and what we should look for?

Lisa: A framework is the way a technology vendor should be building security into their platform or tool. I know I always want a tool that is built with security in mind from the start. Very often, people build a tool and then they try to secure it.

When talking about frameworks, there are two that are pretty standard, one is from NIST – the National Institute of Standards and Technology. The other is COBIT – Control Objectives for Information and Related Technologies, a different IT governance framework. These frameworks outline exactly how to mitigate risk and what steps a vendor should take to secure their platform or tool. You want to ask your vendor which framework they are using because then you know that security is not an afterthought for them.

Z: Got it! You've also talked about checklists, which makes me think of training, and training makes me think of certifications. Are there certifications that we can look for that give us that trigger that yes, this company has been thinking about security when developing this tool?

Lisa: There are two kinds of certifications to look for. The first is ISO 27001, developed by the International Organization for Standardization (it was co-developed by IEC, the International Electrotechnical Commission). This covers information security standards (and what we're talking about when we're talking about data security is information security).

Another key one is SOC 2, which outlines internal controls and checklists that an organization has in place for information security. To get the SOC 2 certification, an organization is audited, looking specifically at a vendor's procedures, controls, who has access to the data, etc. You want to ensure the audit is conducted by a very reputable audit firm. There are companies out there that will give you an SOC 2 certification that are kind of fly-by-night. Also, it's not just enough to have the SOC 2 certification. You also want to look at the audit findings to understand areas that a company could be deficient in within their security controls.

Z: So don't just say, "Oh, great, they have SOC 2 on their website – done!" Dig

a little deeper. Let's now talk a little bit about encryption. What should we look for when it comes to data encryption?

Lisa: Data encryption is super important because when your data is transmitted – uploaded or downloaded – somebody could get in and grab it. You want to know that it's encrypted versus having somebody's name, Social Security number or other private information easily read. You also want to know that it's encrypted where it's being stored. Wherever that data lives, it needs to be encrypted.

Z: There is another area of security I want to ask you about that is specific to gen AI applications called prompt injection. What does it mean and why should anyone care about prompt injection?

Lisa: Prompt injection is such a weird term. What it means is somebody is using prompts essentially to either inject malicious code into the application or put in instructions to the platform to give up information that it shouldn't, like passwords. If a vendor is not protecting their application against prompt injection, it means somebody could get in there and get your data.

Z: Are there safeguards to prevent unauthorized access or to prevent prompt injection?

Lisa: You definitely want to look for extra authentication protocols like multi-factor authentication, where you are sent a code to enter, or you can do biometric authentication, where you have to show your face or log in with a passkey. It's an extra layer because anybody can get your username and password, but you want something that's going to ensure it's you or another authorized user using the tool. Ask your vendor what extra authentication protocols they use for sign-in. You don't want it to just be username and password. And this isn't just for AI. This is for any kind

> **Explainability essentially is, how can I explain what is coming out of this platform or tool? It's super important for us as researchers. What if you deliver your insights and findings to your client or stakeholder and they then ask you, "Where'd you get it? How did you get it?"**

of technology tool. There are many cases out there of databases that have been hacked because the vendor didn't take that extra step.

Z: We talked earlier about tools that are connecting to third parties for everything from marketing and tracking to even connecting to other LLMs. When we are looking at data protection, there's only so much we can do ourselves. What should we look for from the tool provider when it comes to data protection when our data is shared?

Lisa: In the world of technology, a supply chain is all of the different programs or the third parties and their programs, and if it's a gen AI tool, it includes the LLMs. Also, APIs – application program interfaces – are super important because they act like the bridge between two programs. And you want to make sure that all of those things are protected along the way because any security issue within the supply chain means the entire system isn't secure.

UNIQUE GEN AI ISSUES

Z: Shifting gears a little bit, there's the output that we talked about earlier. You type in a prompt, you get something out. It's usually kind of a black box, right? But I've seen this term starting to surface more and more about explainability: AI explainability. What is that?

Lisa: Explainability essentially is, how can I explain what is coming out of this platform or tool? It's super important, especially for us as researchers. What if you deliver your insights and findings to your client or stakeholder

and they then ask you, "Where'd you get it? How did you get it?" And if you can't explain it (beyond, "I got it from AI"), it can a be big problem.

For researchers, it is essential for us to "explain" or demonstrate accuracy and replicability (if we do the same analysis again, we should generate the same result).

Z: I'd imagine that would be very true, especially for using AI to do data-quality checks, right? "Explain why you flagged these particular respondents for low data quality."

Lisa: Right. That's a really great one!

Z: We talked about explainability. We've talked about data protection and prompt injection. We have a lot of agentic AI now where AI can do all of these things on your behalf and you don't have to do anything more than type in a prompt. And so that's been bringing out this term "human in the loop." At what stages should we have a human in the loop? And where should we look for that when it comes to the tools that we are using?

Lisa: It's best to keep the human in the loop wherever possible. One of the main reasons to have the human in the loop is because of hallucinations. Let's talk a little bit about hallucination and what happens. How do we mitigate hallucinations and platforms?

Z: You know, I've seen a lot about the idea of how you mitigate for hallucinations, everything from just write a better prompt to making sure that you have this guardrailed project where you are prompting to begin with. You have a limited data set that you are allowing the LLM to pull from. And I think they both have their merits and both have their abilities.

Lisa: I read the other day about why these programs hallucinate, which I found fascinating: It's the reward system. These systems are rewarded to make things up instead of saying, "I don't know."[1] That's why we have to keep checking, because that reward system is set up for the LLM to just make something up.

Z: It's funny you say that because I was also reading something similar about one of the ways that you can avoid hallucination. So, ChatGPT has projects, Claude has projects and each can have unique, project-specific instructions now. And there was a thing that said

as part of the instructions, give it the out of saying "I don't know" and that will reduce the hallucination. That way it doesn't default to, I must give it an answer no matter what the cost. Instead, you now have told it, "If you don't have the information, tell me you don't have the information." It was another way to avoid the AI hallucination that I found really interesting. Always checking the citations provided by AI is another way to mitigate hallucination.

Lisa: That's a great piece of advice for researchers!

Z: I think there's another type of hallucination we don't necessarily talk enough about and that is bias. We haven't even figured out how to mitigate bias in ourselves but how do we work with bias in the models that we work with?

Lisa: That's so important! If you think about what all of these AI solutions and models have been built on, the training data is inherently biased, because it just is. Find out from the vendor what data it's been trained on and how the vendor checks for bias, if at all. If you have a good understanding that the data was trained on information from a subset of the population, you cannot extrapolate it to the entire population. It's just like thinking about your sample – treat bias like your own sample.

Z: This has been a great conversation about what researchers should look for in their ResTech platforms and tools – especially data privacy and security. Hopefully, we have helped some researchers feel more confident about data privacy and security questions to consider when selecting a technology solution. ⬤

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Invisible interfaces, visible consequences

Rethinking CX measurement in the age of AI outcomes

| By Arnie Guha

abstract

In a world where AI has rendered invisible the decision processes behind things like credit card applications or airfare searches, legacy customer satisfaction metrics such as NPS – which were designed for a world of visible interactions – are ill suited to measuring and giving voice to consumer frustrations.

In 1769, a Hungarian nobleman unveiled The Turk, an automaton that appeared to play flawless chess. Crowds marveled at the mechanical genius, convinced that the machine's moves emerged from pure mechanism. In truth, a human chess master sat hidden inside, guiding every move. Those who lost to the machine had no way of knowing whether they had been beaten fairly, only whether the moves seemed sensible and the loss legitimate.

Today, AI has replaced The Turk's hidden master with code but the customer's position is much the same. The process is invisible. The decision arrives, unadorned, and the only points of contact are trust, clarity and the emotional residue left behind.

The disappearing interface

The history of user experience is largely the history of the interface. Vannevar Bush's 1945 essay "As We May Think" envisioned the "memex," a conceptual forerunner to hypertext that would allow users to navigate complex data intuitively. This launched a multi-decade quest in human-machine interaction (HMI) to perfect the bridge between human intent and machine computation.

Early command-line interfaces demanded users learn a machine's language. The revolutionary work at Xerox PARC in the 1970s inverted this, creating the graphical user interface (GUI) where the machine learned to speak ours. The interface became the locus of design, the tangible plane where function was made accessible.

As digital services moved from workplace to home, brands came to live and die on these interfaces. Consider America Online in the 1990s: the friendly layout, distinct folders and iconic "You've got mail!" were inseparable from the AOL brand itself. Designers iterated endlessly on flows, buttons and page load times. We measured satisfaction with the journey.

But in AI-driven service environments, this painstakingly constructed interface often dissolves. The customer no longer navigates a process; they receive a verdict.

In banking, a user applying for a credit card provides information through a simple form and, within seconds, receives a decision. The complex, AI-driven underwriting process – weighing hundreds of variables in a model – is entirely invisible. The user doesn't experience a journey; they are handed a decision: approved, with a specific credit limit and interest rate, or denied.

In health care, Google's DeepMind AI can analyze retinal scans to detect diabetic retinopathy with accuracy matching or exceeding human ophthalmologists. The system's internal process of analyzing millions of pixels is a black box. The clinician and patient receive a verdict: a probability score or classification that informs the medical decision.

In retail, a customer visiting Amazon sees a specific price generated by a dynamic pricing algorithm that has instantly weighed purchase history, current demand, competitors' prices and time of day. The "products recommended for you" list is a verdict from a sophisticated engine that has already decided what you are most likely to buy. The customer does not see the calculation; they only see the final, authoritative result.

These contexts expose a blind spot in the traditional customer experience (CX) toolkit. Net Promoter Score (NPS), Customer Effort Score (CES) and customer satisfaction (CSAT) were all designed to evaluate an observable interaction with an interface. They cannot explain why two customers receiving identical outcomes might diverge sharply in trust, loyalty and advocacy when the journey itself has become invisible.

Why traditional CX metrics fail

Procedural justice research has long shown that people's perception of the fairness of a process is often more critical to their acceptance of a decision than the outcome itself. In a courtroom, a defendant who believes they had a fair trial is more likely to accept a guilty verdict than one who feels the system was rigged. The perceived legitimacy of the process validates the result.

In invisible-interface environments, however, the customer is denied a view of the "trial." The AI's process is inaccessible, so fairness can only be inferred from the final decision and whatever explanation accompanies it. This creates a critical vulnerability for brands.

Finance – the opaque verdict: The Consumer Financial Protection Bureau's 2022 guidance mandates specific, comprehensible reasons for adverse AI-driven credit decisions. An applicant for a small business loan is rejected with a notice stating, "Your profile did not meet the profitability threshold of our proprietary model." This opaque verdict is functionally useless. The applicant can't learn from it, correct a potential error or understand the bank's logic. This absence of an understandable process invites suspicion that the "black box" is arbitrary or biased, destroying trust.

Retail – the betrayal of the algorithm: Wu et al. (2022) found that algorithmic price discrimination directly harmed loyalty by increasing customers' feelings of betrayal. Two loyal customers browse the same airline's website for the same flight. One, whose browsing history suggests price sensitivity, sees a fare of $350. The other, whose history includes expensive hotel bookings, sees $425. If they discover this, the damage isn't the $75 difference; it's the violation of trust. The invisible process treated them unequally, turning their loyalty into a variable to be exploited.

Gig platforms – judgment without appeal: Kellogg et al. (2020) documented how opaque algorithmic deactivation on gig platforms destroyed worker trust. A food delivery driver with a 4.9-star rating over thousands of deliveries wakes up to find they can't log in. They receive an automated email: "Your account has been deactivated for fraudulent activity." No specifics are given. The driver is locked out of their livelihood by a secret judgment. The absence of a visible process for review or meaningful appeal is devastating, removing any sense of recourse and making the entire platform feel illegitimate.

The psychological dynamics of outcome-only experiences

The behavioral mechanics of how we react to decisions are well understood. In AI-driven contexts, these dynamics are dangerously amplified due to the inherent opacity of the systems.

Fairness heuristics: People use mental shortcuts to judge fairness and will accept negative outcomes if they believe the process was fair. A driver is more likely to accept a speeding ticket if the officer was polite and clearly explained the radar reading. When an AI simply triples a ride-sharing fare due to "surge pricing," the user gets bad news without any visible process, making the outcome feel arbitrary and exploitative.

Transparency and legitimacy: When a platform like YouTube removes a video with a vague notice like, "This violates our community standards," it feels like illegitimate censorship. A transparent reason – "This video was removed because it contains copyrighted audio from 'Song X'" – makes the platform's authority feel legitimate and gives the user a clear path to correction.

Recourse confidence: The mere belief that one could challenge a decision significantly reduces dissatisfaction, even if never used. When an AI system denies a business loan, the presence of a clear "Appeal This Decision" button that leads to human review provides psychological safety, signaling that the system is not an unchallengeable dictatorship.

Emotional immediacy: First emotional reactions are powerful predictors of future behavior. When a credit card is unexpectedly declined at a busy checkout counter, the immediate feeling is embarrassment and anger. This gut reaction is a stronger predictor of switching banks than any subsequent rational analysis. Because AI verdicts are delivered instantly in high-stakes moments, they are potent triggers for churn-driving emotions.

In AI-driven contexts, these dynamics are compounded by severe information asymmetry. The decision logic is inaccessible, the criteria are opaque and human dialogue is often entirely absent. This creates a perfect storm where an invisible process feels inherently unfair, unexplained decisions feel illegitimate and the lack of recourse leaves the customer with nothing but their immediate, negative emotional reaction.

The case for new metrics – and the TAR framework

If AI is restructuring the customer experience from a journey into a verdict, then our methods for measuring that experience must evolve. Continuing to rely solely on traditional CX metrics like NPS, CSAT and CES in these new contexts is a critical error. It's like judging a chef's cooking based on the cleanliness of the menu.

These legacy metrics were designed for a world of visible processes. NPS asks if a customer would recommend your brand, but that willingness now hinges on the perceived justice of an AI's verdict. CSAT measures satisfaction but satisfaction with what? The seamless app that delivered a life-altering loan denial? CES measures effort but in an AI-driven world, effort can be near-zero while emotional impact is sky-high.

These metrics fail because they cannot see or measure the judgment moment – that instant the verdict is delivered and trust is either forged or shattered. Without outcome-level metrics, companies are flying blind.

At Phase 5, we developed the TAR framework – trust, alignment, recourse – as a governance and design model built for outcome-driven experiences, where the decision is the interface. TAR was designed for contexts where AI acts with institutional authority but without the natural feedback loops of human interaction.

Trust means users believe the outcome was reached fairly and transparently and can follow the reasoning behind it.

Alignment means the AI's decision-making remains faithful to the institution's stated role, policies and values, even as the system adapts over time.

Recourse means users retain agency: the ability to question, appeal or override an AI-driven decision. A system that cannot be challenged is not just unaccountable, it is unsafe.

TAR differs from existing AI governance frameworks because it is rooted in the user's lived experience of an AI verdict. Where compliance models focus on documentation and audits, TAR operationalizes fairness, purpose and agency into the real-time moment of delivery.

Metrics for the AI outcome era

To be able to measure and govern CX meaningfully, organizations must adopt a new suite of metrics designed specifically to measure the customer's perception of an AI-driven outcome:

Perceived fairness (trust)
Definition: The customer's belief that the outcome, regardless of whether it was favorable, was just, unbiased and equitable.
Measurement: Five-point agreement scale on "The decision I received was fair," paired with mandatory open-text follow-up: "Why do you feel this way?"

Decision clarity (trust + alignment)
Definition: How well the customer understands why the outcome occurred.
Measurement: "Do you understand the reason(s) for the decision you received?" (Yes/No/I'm not sure)

Brand alignment (alignment)
Definition: The degree to which the AI-delivered outcome feels consistent with the brand's established values and tone.
Measurement: Five-point agreement scale on "This interaction reflected what I expect from [your brand name]."

Recourse confidence (recourse)
Definition: The customer's belief that they could effectively challenge or get a human review of the decision.
Measurement: Five-point agreement scale on "I am confident I would know how to get this decision reviewed by a person if I disagreed with it."

Outcome emotional response (trust + recourse)
Definition: The immediate, unfiltered emotional reaction to the decision.
Measurement: Emotion-tagging question with context-specific options (Angry/Disappointed/Confused/Calm/Relieved/Hopeful/Delighted).

Implementation roadmap

Adopting these metrics requires deliberate integration into organizational operations:

Post-outcome micro-surveys: Deploy lightweight, often single-question surveys within minutes of a decision, in the same channel as the decision – a pop-up in the app, a link in the email, an SMS message. Capture the emotional reaction before it cools.

Passive sentiment tracking: Use natural language processing (NLP) to analyze unstructured feedback. Systematically scan support chat logs, call transcripts and social media for keywords

Metric	Question/Wording	Scale/Options	When/How Deployed
Perceived Fairness	"The decision I received was fair."	5-point scale + mandatory open-text ("Why do you feel this way?")	Post-outcome micro-survey (immediate, same channel as decision: app, email, SMS)
Decision Clarity	"Do you understand the reason(s) for the decision?"	Yes/No/Not sure	Post-outcome micro-survey (linked to explanation notice or denial/approval message)
Brand Alignment	"This interaction reflected what I expect from [Brand]."	5-point scale	Post-outcome micro-survey (embedded in branded communication of decision)
Recourse Confidence	"I am confident I would know how to get this decision reviewed by a person."	5-point scale	Post-outcome micro-survey (often coupled with an "Appeal/Review" option)
Outcome Emotion	"Right now I feel…"	Angry/Disappointed/Confused/Calm/Relieved/Hopeful/Delighted	Post-outcome micro-survey (triggered within minutes of the verdict to capture raw affect)
Passive Signals	Unsolicited mentions of fairness, algorithms, confusion, etc., in chats, calls or social media posts.	Continuous sentiment analysis (NLP)	Continuous monitoring (always-on scanning of customer service channels + social feeds)

Figure 1: TAR metrics at a glance

related to AI decisions (e.g., "algorithm," "automated," "unfair," "confusing").

Data linkage to business outcomes: Connect these metrics to hard business data. Does a one-point drop in perceived fairness correlate to increased churn over 90 days? Does low decision clarity predict higher call volumes? This linkage proves the tangible ROI of fairness and transparency.

Governance integration as early-warning system: A sudden dip in perceived fairness among a specific demographic can be the first signal of unintentional algorithmic bias, triggering a model review before the issue escalates into a regulatory fine or public relations crisis.

Cross-sector benchmarking: Compare your metrics against direct competitors or best-in-class examples from other industries. This provides crucial context, sets meaningful improvement targets and helps identify emerging best practices.

Governance and brand resilience

These metrics are not just diagnostic tools, they are governance instruments. TAR-based metrics are intended to form an early-warning system, giving leadership a live dashboard of trust. They can show in real time whether outcomes are experienced as fair, clear and challengeable.

While direct quantitative impact is an emerging area of study, the business logic is clear: Since brand trust is a known driver of retention, it stands to reason that a decline in perceived fairness – a direct measure of that trust – would serve as a powerful leading indicator for future customer churn. Following the same logic, low decision clarity scores are a likely proxy for customer confusion, which often translates directly into higher call volumes. Gaps in recourse confidence signal a growing sense of user powerlessness that serves as an early warning for reputational and regulatory risk.

The underlying principle is thus: Outcome-level perception metrics are leading indicators, offering executives a chance to detect and address the erosion of trust before it materializes in lost customers or public backlash. By integrating these signals into board-level dashboards alongside financial KPIs, organizations can transform "soft" perception data into a quantifiable control system for risk management.

Beyond internal monitoring, cross-sector benchmarking gives TAR metrics additional weight, creating reputational benchmarks. Just as firms once competed on NPS, the next decade will likely see competition on legitimacy, with metrics like TAR forming a potential new scorecard.

These instruments do more than quantify user sentiment or reduce support costs. They are the levers by which institutions preserve legitimacy in an era when decisions arrive without process

and outcomes speak louder than any interface. Governance through metrics like TAR is the operating system that can keep authority explainable, accountable and aligned with purpose. With measurement in place, organizations can manage risk and protect reputation – but without it, every verdict risks becoming indistinguishable from arbitrariness.

Hides the process inside the code

In the 18th century, The Turk fooled audiences by hiding the human inside. Today, AI hides the process inside the code. In both cases, the visible element – the outcome – determines belief, trust and loyalty.

The decision has become the customer experience. In a world where interfaces vanish, the only way to protect trust is to measure – with unflinching precision – the moment the verdict arrives. But measurement alone is not the shield; it is the alarm.

Without trust, decisions are never legitimate. Without alignment, systems drift from institutional purpose into quiet betrayal. Without recourse, mistakes calcify into injustice. Our belief is

that TAR is not an accessory to CX – it is the operating system for legitimacy in the age of invisible interfaces.

The organizations that embed TAR will define what it means to be worth trusting: every verdict explainable, every decision anchored in purpose, every user empowered to challenge the machine. Those that do not will learn, often too late, that in an outcome-only world, trust lost at the moment of decision is almost impossible to regain. ⓠ

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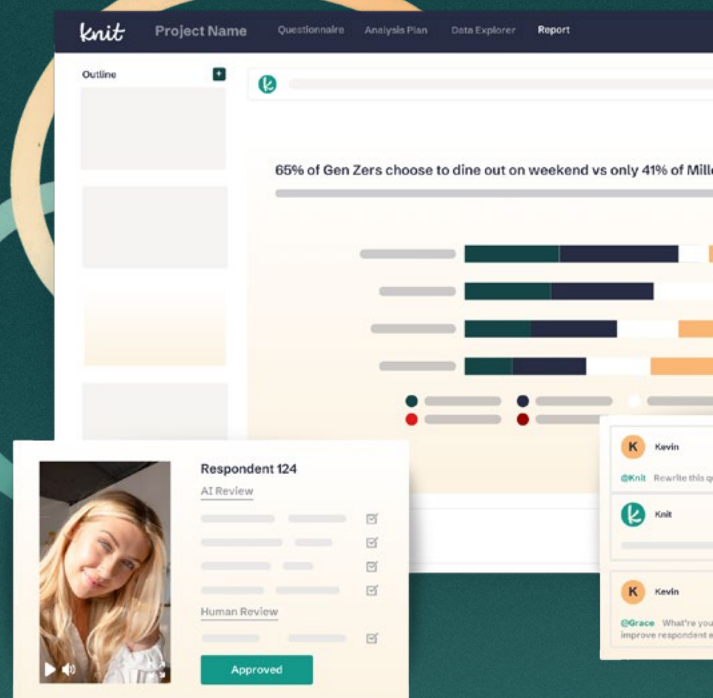
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The rise of the bionic fraudster

Why technical defenses alone no longer protect data integrity

| By Alexandrine de Montera

abstract

Fraud in market research has moved beyond bots and bad IPs, forcing a shift from technical filters to behavioral intelligence designed to distinguish real human engagement from sophisticated deception.

It's 2026, yet most fraud prevention systems in market research are fighting yesterday's war.

While the industry still applauds IP filtering, proxy checks and bot detection as "comprehensive security," the fraud landscape has already evolved. The new adversary isn't just using better bots. They're blending human intelligence with machine precision. Bots are no longer mechanical. They're bionic.

When fraud thinks like a human

Today's fraudsters aren't brute-forcing their way into surveys. They're strategizing. They navigate reCAPTCHA tests, adapt to trap questions and use AI to craft grammatically perfect open-ends that sound authentic.

In many cases, automation scripts control response timing and mouse movement while a real person steps in to handle the tasks that require nuance. This creates an alternating rhythm of machine consistency and human improvisation.

Today's hybrid model blurs the boundary between human and machine. It fuses AI's precision (flawless grammar, structured logic and optimized timing) with human adaptability (intuitive navigation, dynamic response handling and real-time corrections).

The result? A fraudster that can pass every technical check in your system while quietly sabotaging your data quality.

The flaw in technical-only defenses

Technical defenses were designed for a simpler time, when bots were binary and humans were human. Each layer of traditional protection (think: IP validation, device fingerprinting, geographic checks) relies on static, easily imitated signals. Fraudsters now use residential IPs, legitimate devices and sophisticated proxies that make them technically indistinguishable from real respondents.

The result is an arms race that technical systems are destined to lose. Fraud evolves faster than filters can be updated.

What these systems fail to see is behavior.

Behavioral intelligence: the new frontier of fraud detection

Fraudsters can fake their IP. They can fake their device. But they cannot fake genuine human cognition. Every authentic respondent leaves behind a behavioral fingerprint: subtle, measurable and neurologically impossible to counterfeit at scale.

- Mouse movement and keystroke dynamics reveal cognitive processing, not automation.
- Response timing distinguishes thoughtful engagement from robotic repetition.
- Attention patterns separate multitaskers from focused respondents.
- Question engagement exposes AI-assisted responses that are linguistically perfect but emotionally flat.

Behavioral intelligence doesn't ask what a respondent is. It asks how they behave. And that "how" is the only data fraudsters can't fake at scale.

Let's be clear: A technical-only defense doesn't prevent fraud. It filters out amateurs while professionals stroll through the front door.

The fallout for research buyers is both subtle and catastrophic:

- Contaminated datasets driving multimillion-dollar business decisions
- Inflated sample sizes needed to offset data noise
- False trends that distort brand tracking and segment insights
- "Customer" data built on non-existent customer segments

If your fraud prevention can't tell cyborgs from humans, your insights stop reflecting reality.

When clean looks dirty

In today's research environment, fraud doesn't look like fraud anymore. Bad actors, and even inattentive respondents, know how to blend in, bypassing traditional quality checks and slipping into datasets that once felt secure.

The difference between clean data and contaminated data now comes down to one thing: how well your system understands behavior.

THE SOPHISTICATED FARM OPERATION

Yesterday's IP farms were obvious clusters of machines hitting the same survey link from identical locations, leaving digital fingerprints a mile wide. Today's fraud farms are something else entirely. They operate more like distributed micro-enterprises, with human "workers" across multiple countries managing hundreds of identities simultaneously. Each identity is supported by residential IPs, clean browser profiles and legitimate mobile devices. To any technical defense system, this network looks indistinguishable from genuine, globally sourced respondents.

These operations often leverage subscription-based "clean device" services that automatically rotate IP addresses and simulate authentic internet traffic patterns. Some even run small-scale legitimate activity (searching, shopping, social posting) to build credible browsing histories before being used in a survey. From a technical standpoint, these respondents are spotless. Every flag that once identified fraud (such as repeated IPs, duplicate fingerprints and shared devices) has been eliminated.

But behavioral data reveals a completely different picture. Response timing across long surveys is eerily consistent, showing none of the natural pauses or distractions real humans exhibit. Mouse movements are linear and mechanical, lacking the subtle hesitation or correction patterns that come with genuine reading and comprehension. Open-ended responses reuse structures or phrases, suggesting copy-paste

behavior disguised under different wording. Across hundreds of "unique" participants, these micro-patterns stack up into something unmistakable: orchestrated fraud.

Behavioral analytics exposes this co-ordination because humans, no matter how diverse their backgrounds, don't act identically when thinking independently. The farms can randomize IPs and devices, but not cognition.

Outcome: Technical systems = fooled. Behavioral systems = instant detection.

AI-ASSISTED SURVEY GAMING

Fraudsters have discovered that the easiest way to appear authentic is to actually be human, just assisted by AI. These aren't fully automated bots but semi-automated respondents who use generative tools to write, rephrase and even reason through complex survey questions. A person sits behind the screen, but every cognitive effort, sentence and "thoughtful" open-end is generated, corrected or polished by AI.

This new hybrid behavior creates a paradox. Technically, the participant checks every quality box: a verified device, valid location, unique finger-print and proper completion time. To a technical system, this looks like exemplary engagement. But under the hood, the respondent's behavioral rhythm gives them away. There are frequent tab switches between browser windows, short bursts of keystrokes inconsistent with the complexity of their written responses and attention patterns that spike and flatline at unnatural intervals.

The resulting data is seductive but hollow. It's linguistically sophisticated and contextually plausible, but emotionally vacant. These answers mimic comprehension without demonstrating it. For research buyers, this means that AI-assisted responses can pass every filter while subtly distorting attitudinal metrics and open-end insights.

Behavioral intelligence identifies these respondents not by what they say but by how they arrive at saying it: the pacing of their typing, their reading time and their pattern of engagement across question types.

Outcome: Technical systems see compliance. Behavioral systems see manipulation.

THE ATTENTION ECONOMY SCAMMER

Not every data threat is deliberate. Many come from real, verified humans who simply don't care. They're part of the "attention economy," where the goal isn't contribution but compensation. These respondents rush through surveys, barely reading questions, answering reflexively and clicking through just fast enough to get paid.

Technical defenses can't distinguish them from your best participants. They have legitimate devices, clean IPs and pass CAPTCHA checks. They might even have participated in legitimate research before. To the system, they are the definition of "valid."

Yet their behavioral footprint tells a truer story. Straightline patterns in grid questions, sub-second completion times on complex items and erratic scrolling reveal a total absence of attention. They don't think, pause or engage like humans gathering information. They're optimizing for speed, not comprehension.

The problem is that inattentive respondents don't just lower quality, they systematically distort it. They inflate brand awareness, flatten emotional responses and create phantom correlations between questions that no real participant would produce. Their presence doesn't just add noise. It changes the signal entirely.

Behavioral analysis identifies this satisficing behavior by detecting patterns that break the cognitive logic of human interaction. It spots when someone isn't truly reading, when their reactions are too fast or too uniform and when the rhythm of participation diverges from genuine thought.

Outcome: Technical systems approve low-quality data. Behavioral systems protect insight integrity.

Hides in plain sight

Each of the scenarios above exposes a simple truth: fraud no longer announces itself through broken code or duplicate IPs. It hides in plain sight. It's inside legitimate traffic, human hands and even seemingly thoughtful answers. Technical defenses, no matter how advanced, can only confirm that a person was there. Behavioral intelligence confirms that the person was real, engaged and thinking. For research buyers, that distinction is

everything. It's the difference between data that passes validation and data that truly represents human reality.

We know fraud evolves faster than any static system. Every time a platform patches one vulnerability, fraudsters pivot. They adapt tools, scripts and tactics overnight. But while technology can change instantly, human cognition cannot. That's why behavioral defense wins.

Genuine human engagement follows predictable neurological patterns. Consider how people read, pause, think and respond. These behavioral signatures are universal, measurable and impossible to fake consistently across thousands of cases.

The limits of technical defense

Technical defenses stop fraud vectors (the infrastructure behind attacks). Behavioral defenses stop fraud actors (the people and patterns driving them). Together, they create a detection matrix that forces fraudsters into an impossible position. To slip through, they'd have to: maintain a perfect technical disguise; replicate flawless human behavior; sustain authentic attention and engagement; and evade multiple layers of behavioral and cognitive analysis.

That's not additive protection. It's exponential protection for a hybrid, human-machine world.

The stakes for research buyers

In marketing research, data quality isn't just about accuracy. It's about consequence. Contaminated data drives poor business decisions, erodes trust in insights and wastes millions in misdirected spend. Behavioral defense has become the final and most critical line between insight and illusion.
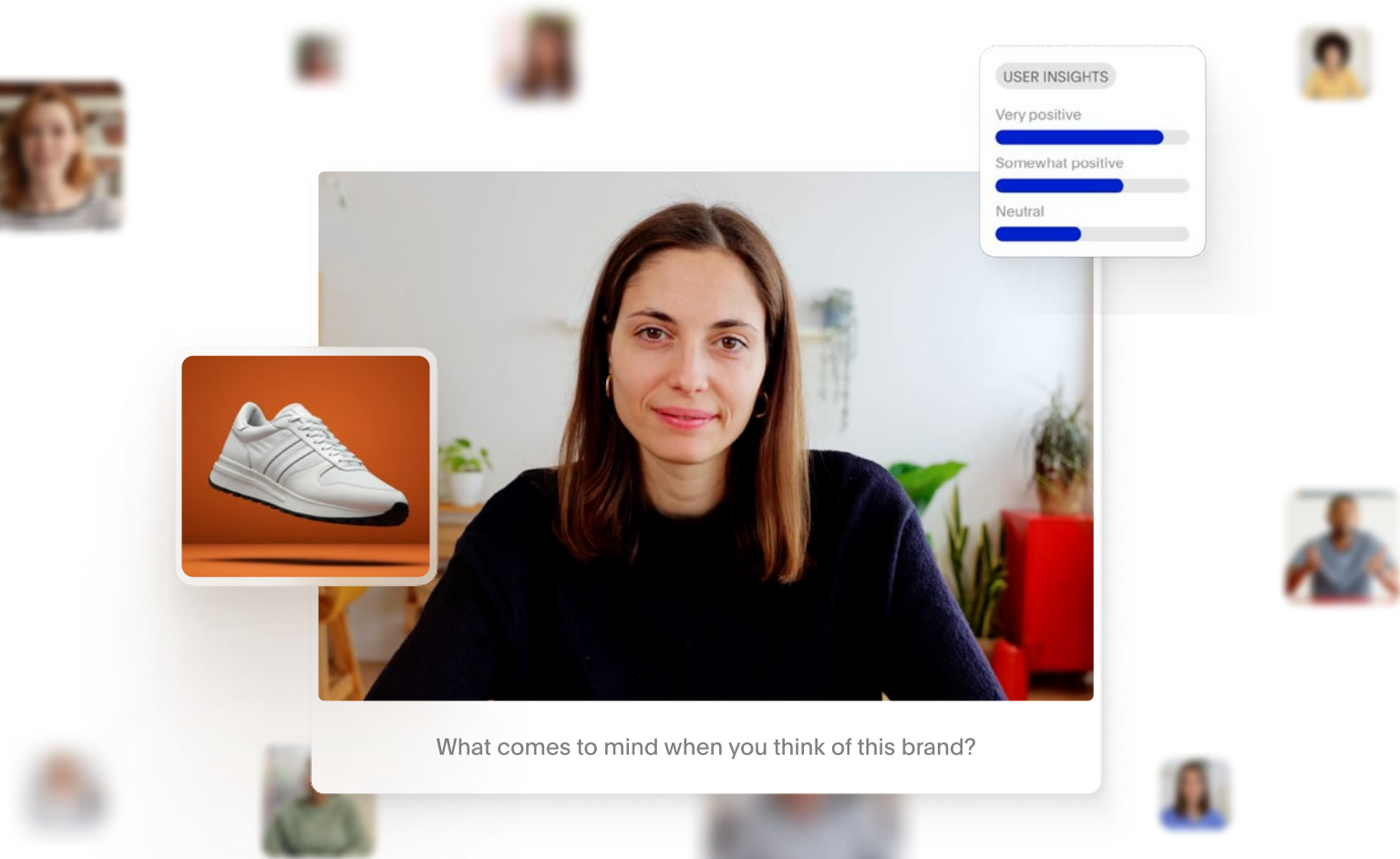
The question is no longer whether you can afford behavioral fraud detection. It's whether you can afford to keep operating without it. ⦿

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Question, clarify and focus

Tips for better, more effective research

| By Adam Warner

abstract

Drawing from his experience on both sides of the industry, Adam Warner offers advice and practical steps to ensure research projects start – and finish – on solid ground.

Over the years I've been a marketing research client, vendor and consultant. While I'm still a consultant, I am also now a college professor teaching marketing research. Along the way I've picked up some tips and observations that I hope will help my fellow researchers, no matter where they are in the journey.

I'll start from my initial introduction to market research in the pharmaceutical industry. I had moved from the sales force to the home office and was in my first research role. I had a wonderful manager who encouraged us to question everything – not just for the sake of it but to clarify what our internal clients really needed when they came to us asking for help. Don't be just an order taker, our manager said. Probe to ensure you understand the real issue at hand.

Tip #1: Ask questions to better understand

Here's an example request/project for the new market researcher: Create a report of prescription sales for Product X by state, by strength, by month and by prescriber for the last year. Sounds easy, right? Probably not. Nothing is as straightforward as it sounds.

This data might be available. It might not be. However, rather than just jumping down a rabbit hole and trying to figure it out, ask some thoughtful questions right away to ensure you fully understand the issue. What is your internal client really trying to figure out? What are they going to use the information for?

It may turn out that they are trying to finalize an incentive compensation plan for the sales force. You wouldn't have known this solely based on their request. Perhaps you have a better way to tackle their request with some different data. By asking questions beforehand, you're better positioned to understand exactly what is needed. You're being a valuable team player and consultant rather than just a functionary.

What incentives should be offered to encourage participation in your research?

Then, importantly, how will you reach them? What methodology will you use? Is this a qualitative or quantitative approach or a combo? Interviews in-person, focus groups, via phone or Zoom? How will you do the recruiting? From a list, via e-mail, texts, phone calls or social media outreach, using a professional recruiting firm or all of these? Web-based surveys? How many respondents? What size audience will be a valid sample? Or really do you just need enough sample to pass the "red face test"?

Tip #4: Set realistic timing expectations

There's nothing worse for a client than to have their market research provider – whether internal or external – overpromise and then underdeliver.

Overpromising often relates to a delayed timeline. When creating a timeline, ensure it is realistic. Frequently, the biggest challenge is recruiting the right audience and getting the interviews scheduled. Make sure you have a clear vision of who the target audience is and a plan to reach them. Equally important: How long will it take? Do you have good lists with names, accurate e-mails and cell numbers? If not, you'll need to factor in extra time. Do you have attractive incentives that will motivate the target respondents to participate?

All clients want results ASAP. However, allow enough time to conduct the research and, as importantly, time to analyze the results. Data matters, of course, but what does the data mean? What are the insights, ahas and recommendations from the research? Also, you'll want to coordinate with your primary client(s) to ensure they understand the insights as they are coming in. You don't want to have surprises at the final presentation.

So, strive to underpromise and overdeliver on expectations!

Tip #2: Align on a key business issue

One of my favorite expressions is, "Don't try to boil the ocean." To me this means focus. Don't aim to accomplish too many things at once. Home in on the most important item and come up with a key overriding business issue you want to tackle. Put it into a big, umbrella question to guide your overall project.

The up-front phase of a project – where you are developing and aligning on that key business issue – is the most important part. Get this phase right and you are in good shape. Get it wrong and you're in trouble.

Another quote I love is attributed to Albert Einstein: "If I had an hour to solve a problem, I would spend 55 minutes determining the proper question and five minutes solving it." Heed his advice. Invest extra time at the beginning of your project to make sure you are asking the right question. This business issue/question should guide your overall project, so make sure you nail it. Don't forge ahead into the details, get the big picture first.

Once you've landed on that key business question, write it down and circulate it to all the primary stakeholders of the project to ensure they are all on board. Get their approval before moving forward. This may seem like you're slowing the process down. You're not. Better to get aligned now before the project starts rather than at the final presentation. When presenting results, you don't want anyone to say, "Oh, I thought you were doing X, not Y."

Tip #3: Clarify the who and the how

Who is the right target audience for your project. Can you reach them? Do you have a list? If not, how can you get to them? How easy or difficult will be this target audience be to reach? How long will it take?

Tip #5: Focus on insights

As discussed, data and results are critical, but even more important is what it all means. Focus on the insights. Avoid a data dump in which you overload a 30-slide PowerPoint with charts, graphs, data and statistics but neglect to provide next steps and implications.

Consider including a key takeaway on every slide to highlight your insights. Attention spans are getting shorter. A summary bullet point helps that easily distracted client quickly understand the main point.

Tip #6: Tell a story

Everyone advises researchers to tell a story with the data. It makes sense, as stories are generally far more compelling than your typical PowerPoint slide. One way to tell a story is to consider using personas. Can you create a typical respondent who will help share your insights? Give them a name. Use a stock photo. Describe them (age, job, family situation, education). What are their tendencies (likes, dislikes, frequency of usage, current situation)? Make "Mike" or "Maria" part of your presentation and let them add a human element to the findings. Help your client connect the dots. What is the best way to reach these consumers? What is a typical day like for them? What might they be doing or thinking when using your product?

Tip #7: Create actionable recommendations

I've always heard that "show and tell" is significantly more effective than just "tell." It's true. When it comes time to make recommendations, go beyond bland generalizations. For example, instead of merely recommending that, based on the research, the company get more active on social media, be specific. What platform? If you think Instagram is right one, say that and then show an example. Create an Instagram post based on your findings that you believe would be compelling for potential customers or whomever the target audience is.

From aligning on a key business issue to setting realistic expectations and creating actionable recommendations, I hope my battle-tested bits of advice will help on your next project, no matter which part of the marketing research industry you work in. Ⓠ

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Beyond attribution

A practitioner's guide to rapid incrementality testing

| By Maksim Zhirnov
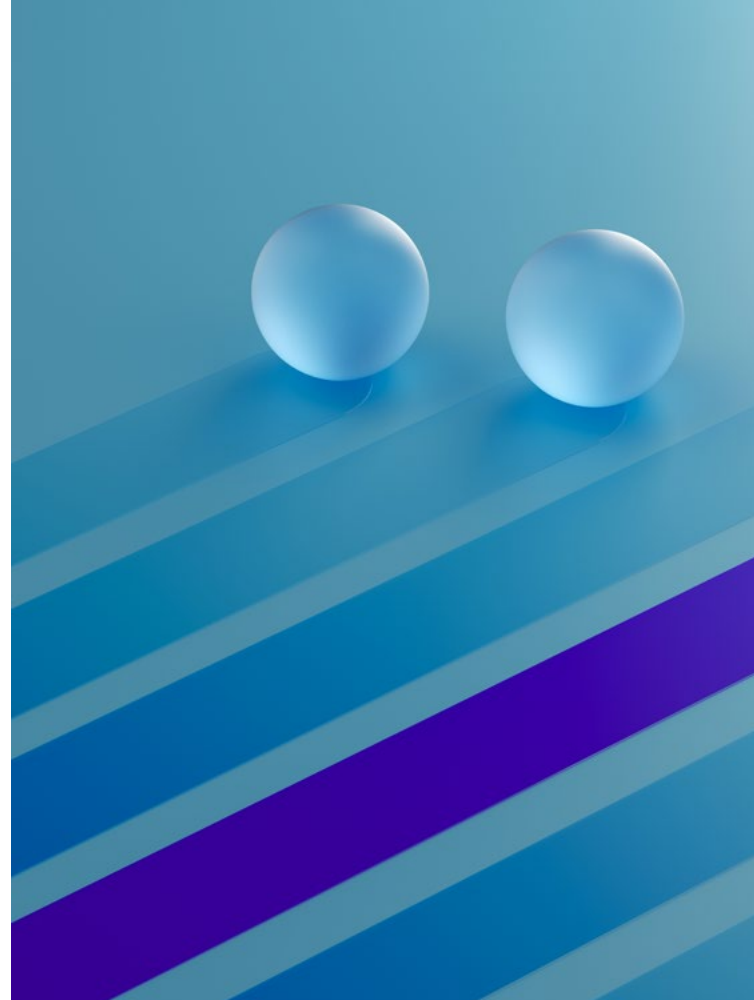
abstract

How performance marketers can move from correlation to causation with controlled experiments that reveal true campaign impact.

In today's privacy-first marketing landscape, attribution models are losing their grip on reality. While last-touch, multi-touch attribution (MTA) and data-driven attribution (DDA) tell us which touchpoint "gets credit" for a conversion, they can't answer the fundamental question that keeps CMOs awake at night: Are our campaigns actually driving new business or are they just getting credit for sales that would have happened anyway?

The answer lies in incrementality testing – controlled experiments that measure the true causal impact of marketing activities. This methodology is rapidly becoming the gold standard among brands from Uber to HelloFresh, who use it to optimize their multibillion-dollar media investments.

The attribution blind spot

Traditional attribution models suffer from a fundamental flaw: they assume correlation equals causation. When a customer clicks an ad and then purchases, attribution gives that touchpoint full or partial credit. But what if that customer was already planning to buy? What if they would have found your product through organic search instead?

The privacy changes accelerating this crisis include:

- iOS 14.5+ reducing mobile tracking accuracy by 15-30%.
- Third-party cookie deprecation affecting cross-device measurement.
- Platform algorithms becoming increasingly sophisticated at targeting high-intent users (inflating attributed performance).

As one performance marketing director at a major e-commerce brand put it: "Our attribution was telling us that every channel was
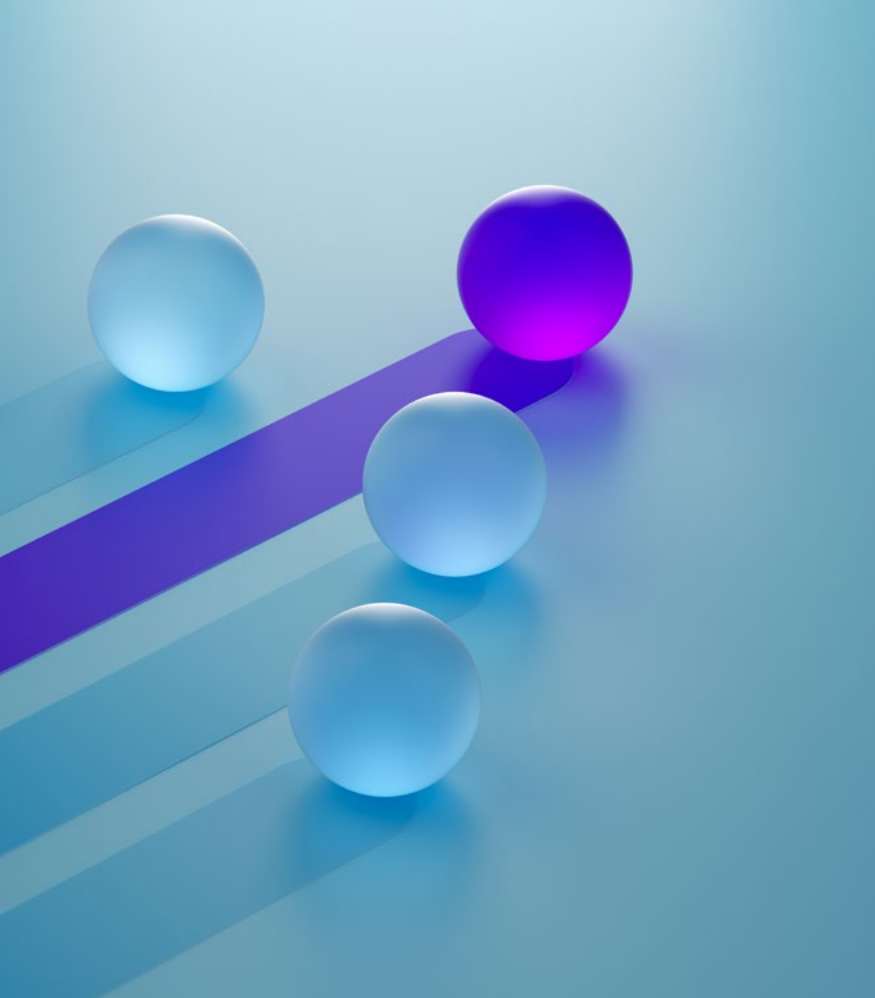
optimize for true incremental return on ad spend (ROAS) not reported ROAS; future-proof measurement strategy (requires no third-party tracking).

The five-step rapid testing framework

STEP 1: DEFINE YOUR HYPOTHESIS AND SUCCESS METRICS.

Start with a specific business question:

• Does our retargeting campaign drive new sales or mostly capture customers who would convert organically?
• What percentage of our branded search revenue is truly incremental?
• Will scaling our TikTok prospecting budget bring in profitable new customers?
• Select meaningful KPIs: incremental conversion rate; incremental revenue per user; incremental return on ad spend (IROAS); incremental customer acquisition cost (ICAC).

STEP 2: DESIGN YOUR TEST AND CONTROL GROUPS.

Your approach depends on the channel and campaign type:

Geographic experiments: Pause or modify spend in selected markets (DMAs, cities or regions) while maintaining normal activity elsewhere. Ideal for brand campaigns, local businesses or omnichannel measurement.

profitable but our overall growth had flatlined. We were optimizing for vanity metrics, not actual business impact."

What is incrementality testing? Incrementality testing applies the scientific method to marketing measurement. Instead of asking "Who gets credit?" it asks "What would have happened if we hadn't run this campaign?"

The methodology splits your audience into two statistically similar groups: test group (exposed to your marketing campaign) and control group (withheld from exposure or shown a placebo).

By measuring the difference in conversion rates, revenue or other KPIs between these groups, you can isolate the true causal impact of your marketing spend.

Key benefits: eliminate wasted spend on cannibalistic tactics; defend budget allocations with causal proof, not vendor dashboards;

Define Objectives — Select Test & Control — Launch Campaign — Analyze Data — Take Action

Audience split tests: Divide customer segments for email campaigns, retargeting or lookalike audiences. Critical requirement: maintain complete exclusivity between groups.

Platform-native tools: Leverage Meta conversion lift, Google campaign experiments or TikTok's measurement solutions for automated control group creation.

Pre-flight validation: Ensure test and control groups show similar historical performance trends (correlation coefficient $R^2 \geq 0.9$ is the benchmark for valid randomization).

STEP 3: EXECUTE THE INTERVENTION

Run your test for a minimum of one week, though 4-8 weeks provides more robust results for slower-converting businesses. During the test period:

- Maintain consistent external marketing activity.
- Avoid major creative changes or competing campaigns.
- Monitor for "media leakage" (control group exposure through other channels).
- Document any external factors that might influence results.

STEP 4: ANALYZE RESULTS AND CALCULATE LIFT

Incremental Lift Percentage:

$$\text{Incremental Lift (\%)} = \frac{\text{Test Group KPI} - \text{Control Group KPI}}{\text{Control Group KPI}} \times 100$$

Incremental Revenue:

$$\text{Incremental Revenue} = \text{Lift Percentage} \times \text{Control Group Revenue}$$

Incremental Return on Ad Spend (IROAS):

$$\text{IROAS} = \frac{\text{Incremental Revenue}}{\text{Campaign Spend}}$$

Statistical validation: Run significance tests (t-tests for large samples, Bayesian methods for smaller ones) to ensure results aren't due to random chance. A p-value <0.05 or 95% confidence interval not containing 0 indicates statistical significance.

STEP 5: APPLY INSIGHTS AND ITERATE

For positive lift: Scale successful tactics, reallocate budget from under-performing channels or extract winning creative elements for broader application.

For neutral or negative lift: Pause ineffective spending immediately, investigate root causes or test modified approaches.

For ongoing optimization: Feed incrementality results into marketing mix models (MMM) for long-term planning and establish always-on testing protocols for continuous learning.

Case studies

Nutrition brand (DTC): Incrementality testing revealed that TikTok's upper-funnel impact was severely undervalued by last-click attribution. The test showed 6x higher marginal ROI than reported, leading to a $11.8 million budget reallocation that increased total incremental reach.

Beauty brand: Meta's conversion lift study found that switching from attribution-based to incrementality-optimized bidding reduced cost per acquisition by 71% while delivering 3.3x incremental ROAS.

Omnichannel retailer: Split-testing branded search and retargeting campaigns revealed that only 5% of attributed search revenue was truly incremental. The brand reallocated 40% of search budget to prospecting channels, resulting in 25% total revenue growth.

The modern measurement stack

Leading consumer brands now employ measurement triangulation, combining: attribution models for real-time optimization; marketing-mix modeling for cross-channel budget allocation; incrementality testing for ground-truth validation.

This approach provides the speed of attribution, the breadth of MMM and the accuracy of controlled experiments – creating a measurement system that satisfies both marketing teams and finance departments.

Implementation recommendations

Technology solutions: Consider platforms like Measured, Lifesight or Rockerbox for automated incrementality testing, or Meta's GeoLift and Google's Campaign Experiments for channel-specific tests.

Organizational readiness: Ensure buy-in from leadership and establish clear processes for acting on test results. The most sophisticated measurement is worthless without organizational commitment to optimization.

Testing roadmap: Start with your largest-spending channels or those with the most questionable incrementality (often retargeting and branded search), then expand to test creative variants, audience segments and channel combinations. 🔴

Maksim Zhirnov is a performance marketing manager at Yandex. He can be reached at mzhirnov@yandex-team.com.

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13 TOP DATA QUALITY COMPANIES

High-quality data is the foundation of credible marketing research, yet it is increasingly difficult to achieve amid survey fatigue, automated responses, fragmented audiences and rising privacy expectations. As organizations make faster, higher-stakes decisions, the consequences of poor data quality – misguided strategy, wasted investment and diminished confidence in insights – have become more pronounced.

For corporate and end-client researchers, prioritizing data quality is a strategic advantage, not a theoretical exercise. Partners that invest in strong quality controls and methodological discipline deliver insights that are defensible, actionable and trusted by stakeholders. The companies listed here place a deliberate emphasis on data quality as part of their research approach. For researchers evaluating potential partners, this focus can provide a useful starting point for identifying organizations aligned with rigorous, transparent research standards.

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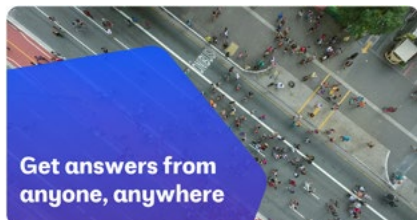
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Full Circle Research

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

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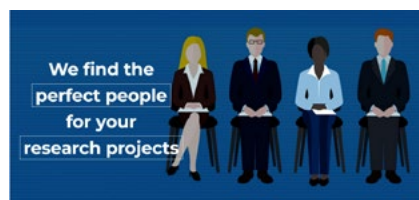
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Founded 2025 | 12 employees
Stu Sjouwerman, CEO

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Patrick Stokes, CEO

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SIS International Research

Founded 1984 | 50 employees
Ruth Stanat, CEO

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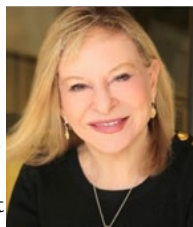
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Online survey research, circa 2001

In a January 2001 article titled "Best practices for online survey research," researchers questioned whether online survey research was meaningful or simply a more convenient approach. At the time, according to Nielsen/NetRatings, there were over 149.6 million internet users. The number was correctly expected to greatly increase, making researchers debate not if online research should be conducted but how to approach it.

When it came to email surveys, embedded surveys were best when compared to attached surveys. "The embedded email survey, despite its formatting limitations, can be answered and returned by the most unsophisticated of email users and, therefore, can appeal to a broader audience," found authors Scott Dimetrosky, Sami Khawaja and Phil Degens. At the time, research had not identified a difference in dropout rates among scrolling versus screen-based surveys. Papers had found that scrollable or static web designs allowed respondents to make more informed decisions about participation using the survey content.

Today, most brands and companies have set standards for logo placement in finalized documents. In 2001, logo placement and general text and graphic layout was still in an experimental phase. Many researchers found that question alignment and logo placement had no effect on overall survey results. However, white space, the simplicity of the content and the ease of navigating a website were found to be crucial factors when starting online survey research.

Similarly, the appearance and frequency of survey invitations and reminders were questioned. Research had found that the more active an invitation was, the better the response, and frequent reminders resulted in higher response rates. Additionally, researchers found no difference between those getting an email reminder compared to those getting a phone reminder.

2001

There were conflicting results when it came to open-ended question response rates. Some research indicated that open-ended responses were less informative than other survey modes. Other research papers argued that online surveys were far more effective in terms of the level of detail and word count.

While so much experience has either disproven or reinforced theories from 2001, it is always interesting to look back to truly understand how research has progressed to 2026.

Viewers gave Sydney Olympic sponsors the gold

A 2001 Survey Monitor covering the Sydney 2000 Olympic Games questioned whether minimal commercialism resulted in weaker sponsorship results. According to Performance Research, only 20% found the Sydney Olympics to be overcommercialized, a drop from the 1996 Atlanta Games (40%), which had been critiqued by viewers.

Research from returning worldwide sponsors including McDonald's, Kodak, Nike, IBM, UPS and Visa recorded higher awareness numbers in Sydney than Atlanta. There was a 35% spontaneous recall in Sydney for McDonald's, compared to 9% in Atlanta; 21% for IBM compared to 9% in Atlanta; and 16% in Sydney for Visa compared to 8% in Atlanta. A majority of Sydney Olympic attendees approved of companies spending money to be official Olympic sponsors and 34% indicated that sponsorship made a valuable contribution to the games and made them feel better about the sponsors.

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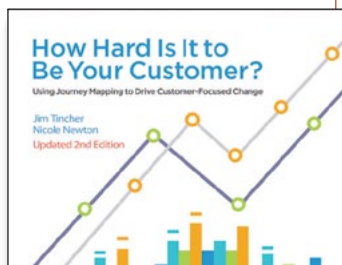
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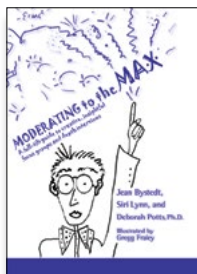
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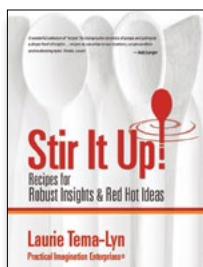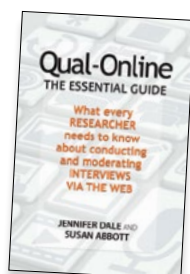
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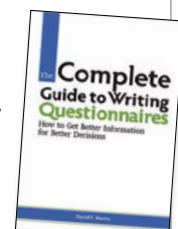
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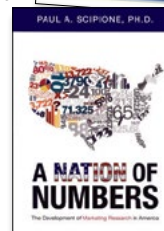
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CALENDAR OF EVENTS

••• can't-miss activities

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

Global Insight Conferences will host the Shopper Insight Conference on **February 12** in **London**. Visit https://shopperinsightconference.com.

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

Corinium Global Intelligence will host CDAO Financial Services on **February 18-19**. Visit https://cdaofs.coriniumintelligence.com.

IQPC will host CX USA Exchange on **February 24-25**. Visit www.cxnetwork.com/events-customer-experience-exchange-usa.

WBR will host eTail Palm Springs on **February 23-26**. Visit https://etailwest.wbresearch.com.

Corinium Global Intelligence will host CDAO UK on **February 25-26**. Visit https://cdao-uk.coriniumintelligence.com.

WBR will host eTail Connect Spring on **March 3-4**. Visit https://etailconnecteu.wbresearch.com.

Corinium Global Intelligence will host CDAO Sydney on **March 3-4**. Visit https://cdao-syd.coriniumintelligence.com.

IQPC will host Customer Contact Week UK Executive Exchange on **March 3-5** in **London**. Visit https://europe.customercontactweekdigital.com/events-ccwexchange-uk.

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

CMO Alliance will host the CMO Summit New York on **March 11**. Visit https://events.cmoalliance.com/location/newyork.

Gartner will host the Data & Analytics Summit on **March 9-11** in **Orlando**. Visit www.gartner.com/en/conferences/na/data-analytics-us/venue-travel.

Merlien Institute will host Qual360 NA on **March 11-12**. Visit https://na.qual360.com.

IQPC will host Customer Contact Week Philippines on **March 10-13**. Visit www.customercontactweekdigital.com/events-customercontactweekphilippines.

AMA will host the AMA International Collegiate Conference on **March 12-14**. Visit www.ama.org/events/collegiate/2026-ama-international-collegiate-conference/.

We.CONECT Global Leaders GmbH will host Big Data Mind on **March 16-17** in **Munich**. Visit https://www.big-data-minds.eu.

IQPC will host CX BFSI Exchange UK on **March 16-17** in **London**. Visit www.cxnetwork.com/events-cx-bfsi-exchange.

SampleCon will host SampleCon 2026 on **March 16-18**. Visit https://samplecon.com.

WBR will host eTail Germany on **March 17-18** in **Berlin**. Visit https://etailgermany.wbresearch.com.

Succeet will host succeet 2026 on **March 18-19**. Visit www.succeet.de.

Qualtrics will host **Qualtrics: X4 2026 on March 17-19** in **Seattle**. Visit www.qualtrics.com/x4summit/.

ARF will host AUDIENCExSCIENCE on **March 18-19**. Visit https://thearf.org/arf-events/audiencexscience-2026/#overview

IQPC will host Customer Contact Week Sydney on **March 18-19**. Visit www.customercontactweekdigital.com/events-customercontactweek-au.

Intellus Worldwide will host Intellus Worldwide on **March 18-20** in **Chicago**. Visit www.intellus.org.

Connect Media will host CX Leaders Forum on **March 24** in **Sydney**. Visit https://connectmedia.com.

ESOMAR will appoint ESOMAR LATAM on **March 22-24**. Visit https://esomar.org/events/esomar-latam-2026.

WBR will host eTail Asia on **March 24-25** in **Singapore**. Visit https://etailasia.wbresearch.com.

Quirk's Media will host Quirk's Virtual – The Changing Consumer on **March 25**. Visit www.quirks.com/events?q=QuirksVirtual.

Corinium Global Intelligence will host CDAO Canada on **March 25-26** in **Toronto**. Visit https://cdao-canada.coriniumintelligence.com.

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

Insights Association will host Ignite: Data Quality on **April 21**. Visit www.insightsassociation.org/Events/Full-IA-Calendar.

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

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

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...

Isabel Parashos
Lead Insights Consultant, Xero

What excites you about coming to work each day?

A lot! First, I love solving hard problems with talented people. I learn something new every day from the teams I work with.

The next is that our purpose is one that I am deeply passionate about: Making life better for small businesses, their advisors and communities around the world.

Put purpose and problem-solving together, and you've got an engaging and motivating job.

Could you share tips for researchers who are struggling to engage with key stakeholders?

My secret trick – that isn't that secret – is sharing working versions and sharing early. Everyone loves a good news story, and they'll not get tired of hearing it, but a big reveal of a bad story is never the best way to deliver news. I make sure the agencies I work with truly understand and feel comfortable with the iterative sharing process.

We don't expect or want a typo-free pack before the deadline, but we do want time to think about how to socialize and action results, regardless of whether they are positive, negative or in-between.

How do you prioritize research projects when time or budget is limited?

We have strong researchers within Xero who are as talented on the tools as they are at socializing insights, so that is one option we assess.

Otherwise, everyone is really pragmatic and understands that sometimes there needs to be a trade-off between taking four weeks to curate the most comprehensive brief, design intricate stimulus or reach every person in the world that fits our study criteria and getting actionable insights quickly or cost-effectively.

We have a network of great collaborators who we trust to help inform the trade-offs that need to be made to get results we can use.

"I love solving hard problems with talented people. I learn something new every day from the teams I work with."

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