QUIRK'S

For marketing research and insights professionals

THE HIDDEN HALF

Understanding consumers who aren't buying

PLUS

Medtronic sales reps embrace field-driven research

Is it time for a diff take on MaxDiff?

How upcycled segmentation can fuel innovation

ADVERTISING SECTIONS

14 Top Home Use Testing/Research Companies

6 Top Retail/Shopper Research Companies

Quirk's Marketing Research Review
MAY/JUNE 2026
VOLUME XL NUMBER 3
WWW.QUIRKS.COM

As we continue to gather in-person at industry events, I think about the idea generation that happens just in our casual moments together. A lot of value comes from in-person research, including the collaboration behind the mirror. Watching consumers almost always leads to great ideas.
Merrill Dubrow, CEO of M/A/R/C Research

Clients and respondents are relishing being back in person. We have been thrilled to help researchers get close to the customer in a rich environment that facilitates high engagement, instinctive responses, product interaction, visual cues, and ease of conversation flow.
Steve Schlesinger, Executive Chairman of SAGO

I'm thrilled when I receive positive feedback from our clients regarding successful in-person research. If there was ever a time to directly explore how your brand is received by your audience, it is now.
Sarah Kotva, Executive Vice President of Fieldwork

The variety and nature of in person research covers all industry sectors with healthcare, medical UX and automotive along with consumer product testing being particularly strong. The viewing back room is pleasingly vibrant with corporate clients hugely enthused with immersion in person research allows.
Bob Qureshi, Managing Partner of iView London

In-person research, by far, is an effective, relevant, diverse and inclusive way of getting that deeper level of understanding of how we, as humans, are evolving.
Roben Allong, President of QRCA

#facetofacemrx

Online research methods will never replace the experience of immersing yourself in a culture or city. The benefits of in-person research start well before any interviews begin; realized by the delivery of rich insights by humans through the nuances of language and movement that are infinitely more challenging to capture digitally. As brands continue to navigate global unknowns, in-person methods remain fundamental to our success as storytellers and data translators and will continue to deliver key insights for better business outcomes.
Kristin Luck, President of ESOMAR

As research teams emerge … they need to know how and why consumer opinions, habits and preferences have changed. In-person research has always played a critical role in developing deep understanding of people and change.
Melanie Courtright, CEO of Insights Association

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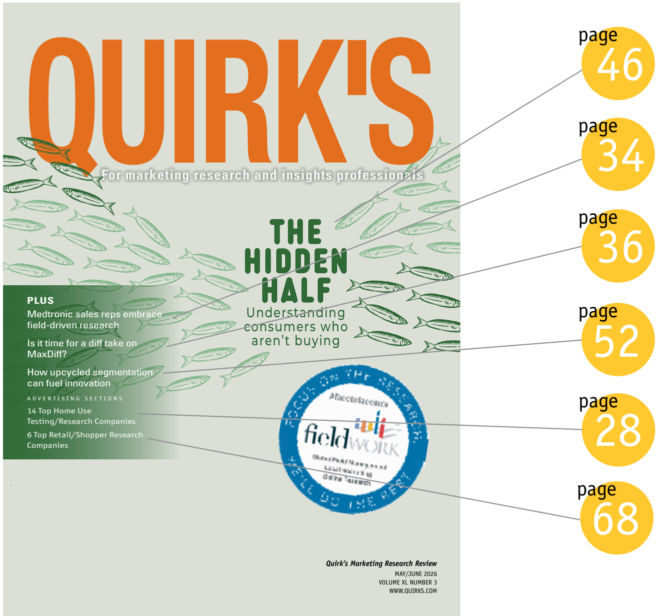

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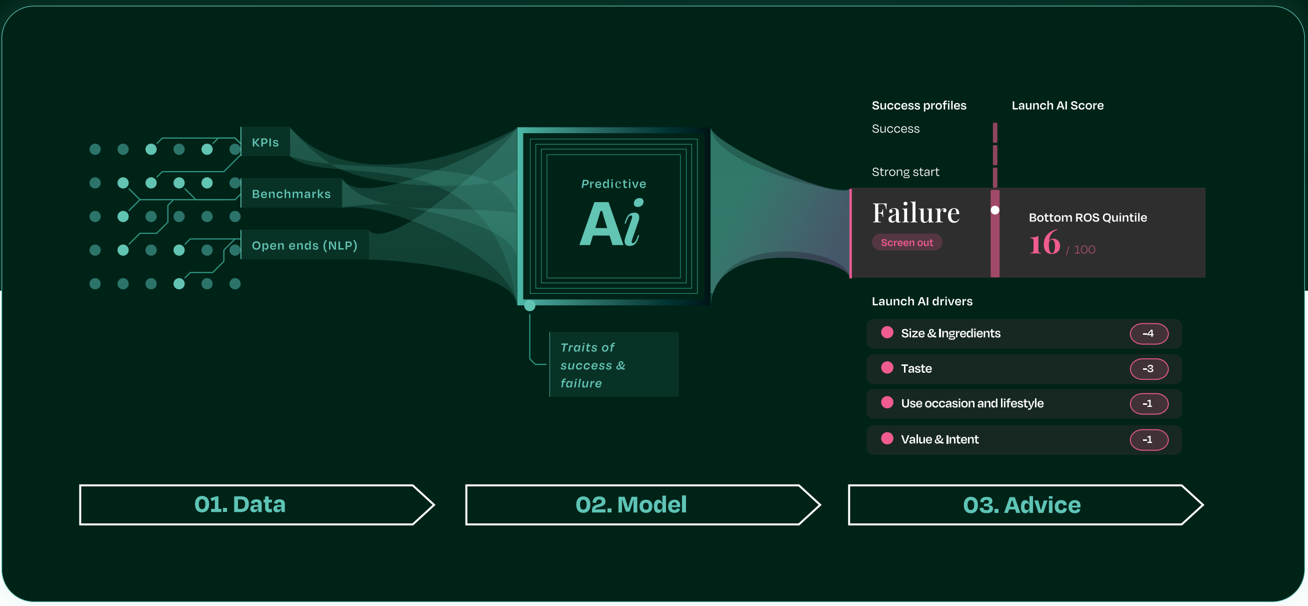

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Don't miss the June Quirk's Virtual series on data quality, security and ethics

Join fellow researchers on June 11 for sessions exploring strategies to enhance data quality and security. Learn how others are combating issues like fraud and poor-quality data to make decisions with greater confidence. Register for free and receive access to the live and recorded sessions at https://bit.ly/42meQGQ.

Quirk's Awards nominations closing June 16

We're excited to have already received so many great nominations for the 2026 Quirk's Awards! All 17 categories shine a light on the best of the industry. Take your shot before it's too late. The nomination portal closes on June 16 at 12 p.m. ET. Remember, you can't win if you don't enter! Nominate a researcher or research company today at QuirksAwards.com.

// E-newsworthy

Consumer research needs to move beyond choice and take habit seriously

How to validate AI concepts when customers can't articulate the benefit

Narrow career entryways create a quiet crisis for Gen Z in insights

Work and Play: Dungeons & Dragons and inclusive facilitation

The role of expert networks in accelerating innovation

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// Noted Posts

Quirk's Blog

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Data quality in B2B marketing research
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Celebrating diversity and open-mindedness
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Research Industry Voices

Human intelligence needed for AI to thrive
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AI adoption isn't approval: The metric researchers are missing
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Social media restrictions could be the reset brands need
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Research Careers Blog

Looking back after retiring
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How AI is rewriting the researcher's job description
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How to improve employee retention
https://bit.ly/3OcSfsM

••• shopper insights

Consumers not so charitable toward in-store donation asks

As shoppers, we've all been asked some variation of "Would you like to round up for charity today?" at checkout. Beyond being awkward, new research from Adelaide University suggests this practice may have unintended consequences for retailers.

The research analyzed the experiences of U.S. consumers and explored how these requests influence both donation behavior and perceptions of retailers. The study, "Doing good but feeling bad: How checkout donation requests might backfire for retailers by eliciting negative emotional and cognitive consumer response," published in Journal of Retailing and Consumer Services, found that asking customers to donate money while they are paying for their own purchases can trigger negative consumer reactions.

"Many participants reported feelings of anxiety and perceived the requests as intrusive, largely due to time pressure and social pressure at the checkout. Consumers frequently felt rushed and worried about being judged by others," says Ying Zou of the School of Marketing at Adelaide University.

"As we expected, these negative reactions may backfire on retailers. While checkout charity is intended to enhance brand image, uncomfortable experiences can lead consumers to be less willing to donate and to form more critical evaluations of the retailer."

Providing information about donation requests earlier in the shopping journey, such as through posters or in-store messaging, may reduce surprise and time pressure at checkout. "Most importantly, retailers should communicate clearly and transparently about how donations are collected, where the money goes and the impact those donations make," Zou says.

••• respondent cooperation

Do incentive bumps increase survey response rates?

A recent study from scholars in the University of Nebraska-Lincoln's Bureau of Sociological Research shows that a sequential incentive can help survey response rates – but less might be more.

As explained in their article, "Will one more dollar help? The effect of sequential incentives on survey participation and costs in a concurrent mixed-mode survey," the researchers performed an experiment using a general-population survey mailed to Nebraska households in which the initial mailing included a $1 incentive. Nonrespondents then received an additional $0, $1, $2 or $5 in a subsequent mailing.

Sequential incentives increased response rates overall and offering another $2 or $5 increased response rates but were statistically the same. The data suggests that more than doubling the incentive – to more than $2 – likely won't help response rates and is a higher expense for researchers.

The most cost-effective sequential incentive, the authors write, is likely around $2, and $1 may be sufficient. Additionally, offering another incentive did not speed up data collection or change the composition of the survey sample.

The researchers note that the sequential incentives in the experiment were small, capped at $5, and that the initial offering was $1. Future research could explore whether higher incentives would boost response rates.

By Joseph Rydholm, Quirk's Editor

400 issues later, the focus remains the same

My, how time flies. If our calculations are correct, this is the 400th issue of Quirk's. Debuting with our October/November 1986 edition, we've been a bimonthly, a monthly/bimonthly hybrid and are now back to publishing six times per year – kind of a textbook example of the famine/feast/famine lifecycle of an independent, long-running B2B print magazine that has survived into the digital age!

Since we entered the event space in 2015, the magazine has gone from our flagship product – the thing that made the company what it is today – to an almost vestigial entity. No Quirk's Event goes by without a few attendees telling us they weren't even aware that we published a magazine – a sentiment, by the way, that I don't blame them one bit for in this twilight of print publishing! (And to an extent it says even more about the quality of our events if people feel they just somehow sprung from the ground, fully formed.)

In August, I will have been editor of the magazine for 38 years. I can see the end of the road for it and I'm thankful our small but mighty team has been able to keep it going this long. I appreciate the research companies that still purchase print ads and fill our various sponsored content sections in each issue.

Our founder Tom Quirk was himself a corporate researcher and also a research company owner and he recognized the need for a magazine that would educate readers on the applications and benefits of various research methods while also making a case for the value of marketing research as a business discipline.

When he brought me aboard in 1988, a newly minted journalism school graduate with a specialization in magazine editing, he basically gave me the keys to the car, his few bits of direction being that the editorial content had to be high-quality, as objective as possible (no research company "puff pieces," as he always called them) and focused on the needs of end-client researchers.

Decades later we applied those same guideposts to the planning of our first Quirk's Events and I think that's helped us grow them into the successes that they are.

From the first issue of the magazine in late 1986 we have served the corporate researcher, offering a host of free resources without ever charging a membership fee. Suspecting that the same people who don't know that we publish a magazine may also be unaware of the many other resources we offer, here is a quick overview:

Free online learning resources

- Access to all 400 past magazine issues
- Access to archive of 12,000+ articles
- Audio versions of all 12,000+ articles
- Digital magazine subscription
- Quirk's GPT – your research questions answered on demand
- Access to Quirk's video archive with 300+ recordings

Free research tools

- Online statistical calculator
- Glossary of 1,300+ research terms
- End-client research survey findings
- Global directory of research suppliers (including ability to send RFPs)
- Directory of focus group facilities
- Directory of global research associations

Free employment resources

- Research job board (free to post and view)
- Access to over 200 research career articles
- Industry salary data
- Directory of research-related degree programs (including online programs)

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Joe Rydholm can be reached at joe@quirks.com

Never wavered

Our focus on corporate insights workers has never wavered, even as other industry bodies – seemingly out of nowhere – discovered a whole other half of the industry beyond vendors and agencies and began pursuing end-clients' attention and employee development budgets.

I've even heard hints over the years that we as a for-profit company are viewed as somehow less noble or altruistic than non-profit insights organizations and that therefore our motives are transitory and disingenuous.

To those who feel that way, I would simply point to the page you're reading for free right now (either printed or digital), the fact that we've been publishing this magazine for nearly 40 years, that our founder was a corporate researcher and that our track record of promoting the use, value and understanding of marketing research is unmatched.

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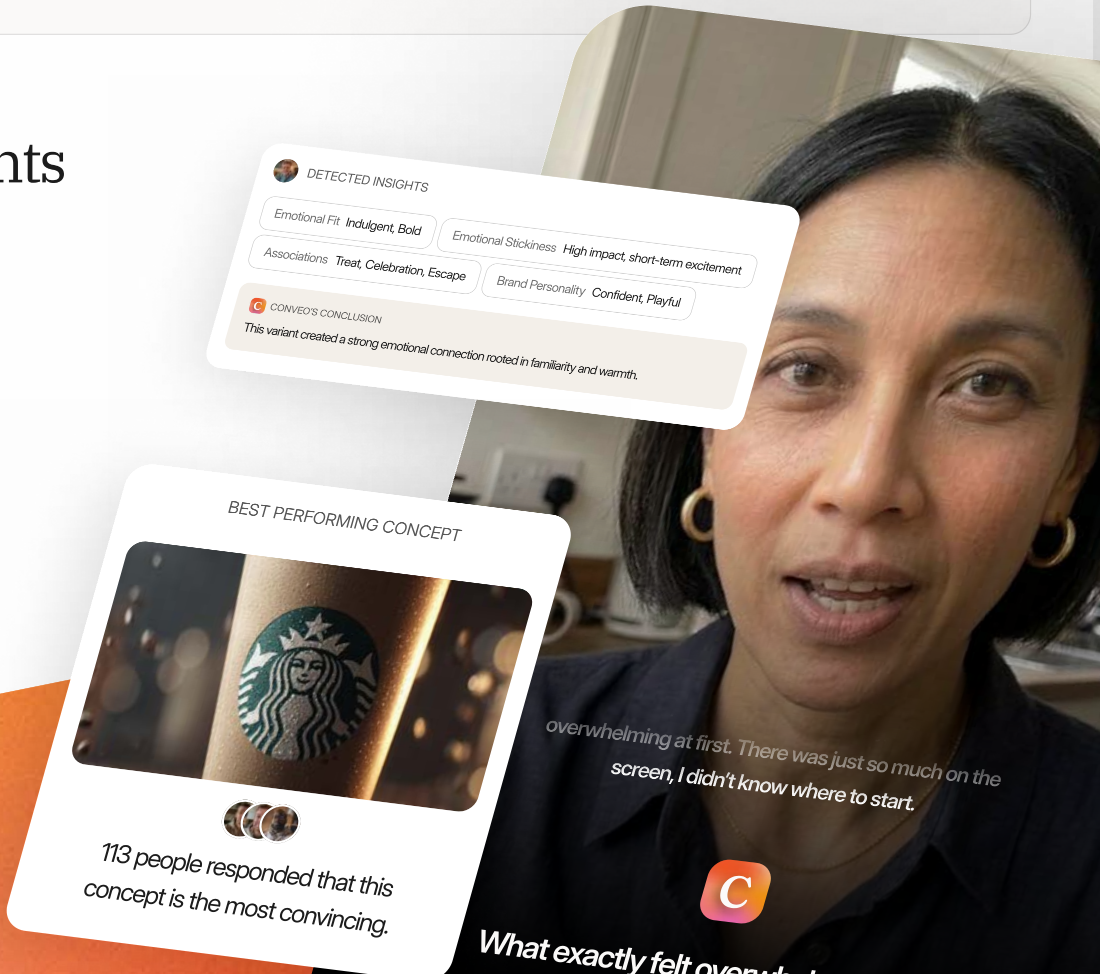
Let’s talk insights



4 Top INSIGHT PLATFORMS for 2026

Insights Automation Platform

Panoplai: The Human Data Engine

PANOPLAI

Digital twins and synthetic data are coming! If they're carefully constructed and fueled by quality data, they promise efficiency gains and predictive insights.

Done badly, they promise a universe of indistinguishable AI slop.

Panoplai understands the difference, with more than two years of enterprise experience using digital twins and synthetic data to deliver measurable ROI for clients like Amazon, Hubspot and Mars.

Our Human Data Engine ingests raw quantitative and qualitative data – from surveys to transactions. Our integrated survey platform collects new data to fill gaps.

The result: living audience models to query, compare and pressure-test in real time.

Capabilities

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- **Synthetic enrichment:** Generate accurate synthetic datasets anchored in real human data – to test concepts and content.
- **Always-on decision support:** Move from episodic research to insights integrated into everyday workflows – across marketing, product and strategy.
- **Continuous learning:** Each client's ring-fenced environment gets smarter over time.

This isn't incremental improvement. It's a new operating model for insights: continuous, testable and decision-first.

www.panoplai.com

Scaling human insights with AI-ethnographies. Dishwashing tales.

CONVEO

Ask someone how their dishwasher performs, and they'll likely say "fine." Ask them to film a real load before and after a cycle and an entirely different story emerges – one of wet plastics, towel-dried containers and quiet compromises that never surface in a survey or a recall-based qualitative study.

That gap between claimed satisfaction and lived reality is what traditional research struggles to capture. And it is precisely where AI-led ethnography is proving its worth.

The study: real loads, real kitchens, real behavior

We recently completed a mobile ethnographic video study with 91 U.S. households on Conveo's end-to-end AI-led insights platform. The design was deliberately simple: participants were filmed loading a real dishwasher load, narrating their choices, concerns and product use. After the cycle completed, they returned on camera to evaluate the results – cleaning, drying and what happened next.

No in-home interview. No lab. Just an ordinary day or evening, captured on a smartphone and guided by an AI interviewer that could smartly probe, follow up and remember context across both sessions. The sample skewed female (76%), with ages ranging from 21 to 79 years old.

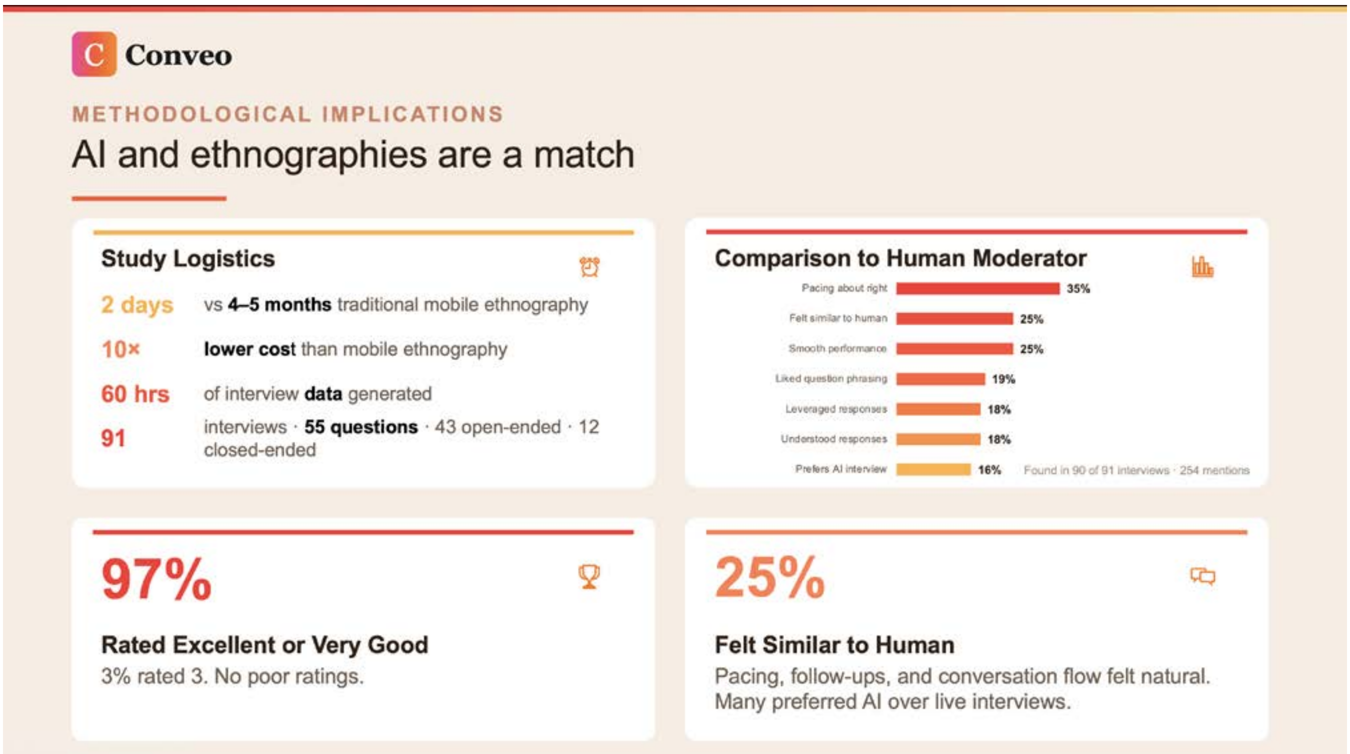
The ethnographic lens here is important: a dishwasher load is not just a mechanical task. It is a social and material performance. The approach also represents a meaningful evolution in how ethnographic research can be conducted.

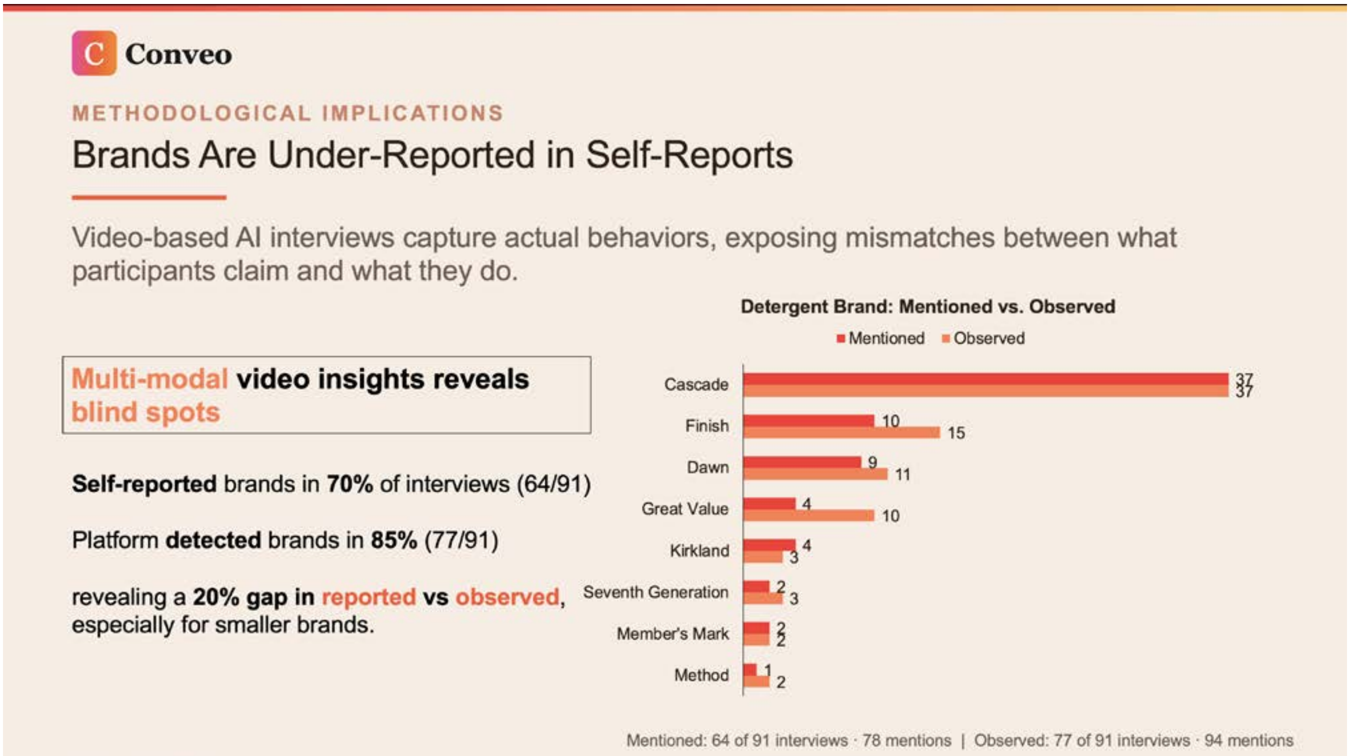
Where traditional in-home studies require weeks of fieldwork coordination, observer training and travel budgets, this AI-led model completed 91 two-part video diaries in a fraction of the time – without sacrificing the contextual richness that makes ethnography valuable.

What a "successful run" really needs to deliver

Applying a jobs-to-be-done framework to the dishwashing cycle revealed that cleaning is necessary but not sufficient. While cleaning topped the jobs list at 95%, right behind it, "dry enough to put away" appeared at 78%, followed by "clear kitchen and free up space" at 70%, "convenience and save time" at 67% and "fit schedule" at 66%.

This reframes the entire value proposition. The dishwasher is not just a cleaning machine. It is a household coordination device and the jobs it fails to complete ripple through daily routines in ways that only in-context observation can reveal.





What the method uncovered: the drying problem nobody reports

The machine cleaned. It rarely finished the job. Conveo's "talk to your data" module revealed four underlying themes: front-end labor (the persistent question of "Do I have to rinse or scrape?"), fit and geometry constraints (awkward items and rack layout limitations turning workarounds into standard operating procedure), end-state reliability gaps (drying failures driving post-wash fixing behaviors) and household coordination ("the right way" rules creating interpersonal conflict and reloading behaviors, adding a social layer to a mechanical task).

These findings were striking – and commercially relevant for anyone in the dishwashing ecosystem, from appliance manufacturers to home care brands to retailers. Due to space restrictions, we focus on the drying issue here. The dishwashing machine does not earn its keep when it comes to drying – and our data exposed a striking paradox. Six out of 10 households needed post-wash remediation, yet eight in 10 still rated results "as expected." Consumers have learned to expect imperfection and built repair routines to compensate. As one participant put it: "Fine means I only had to hand-dry a few things."

Yet only one in five households used a rinse aid, the one additive proven to meaningfully improve drying. The fix exists but consumers are not reaching for it. This finding points to an opportunity for bundling detergents with rinse aids – just to name one example.

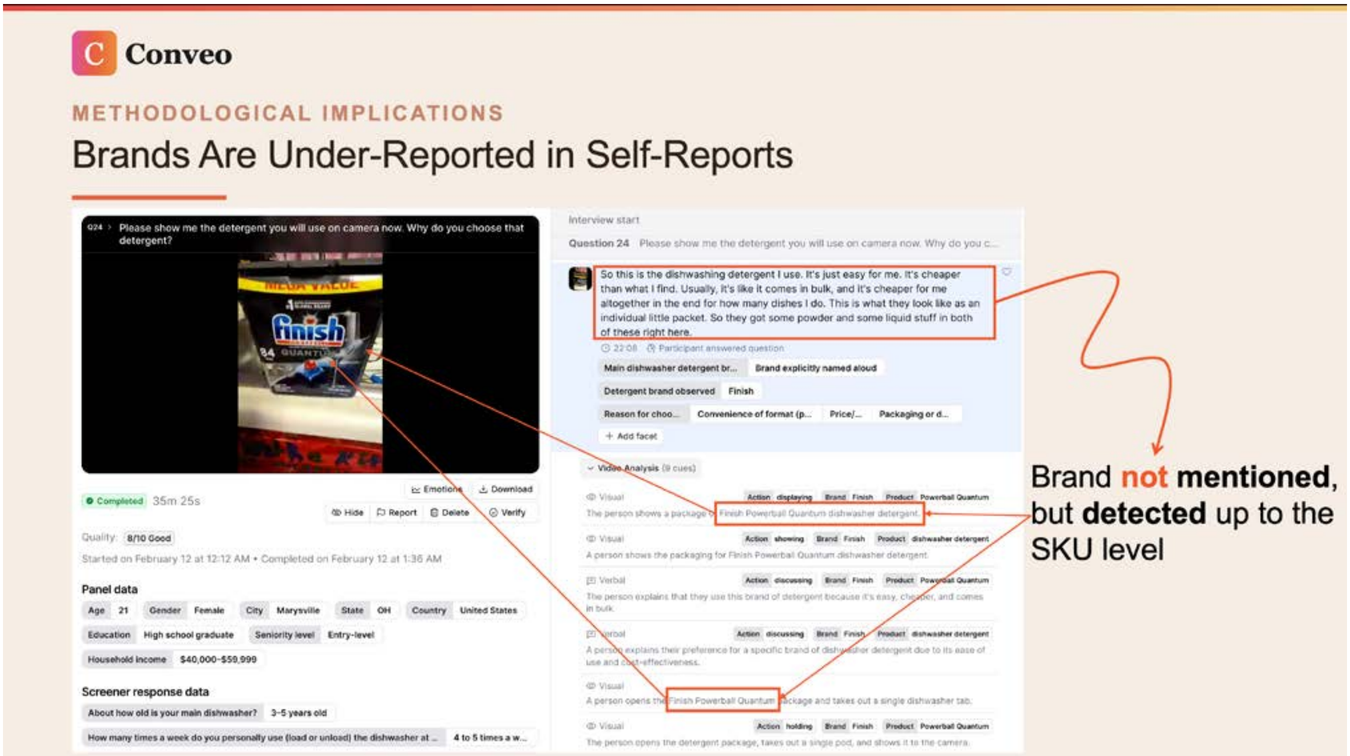
Why this matters methodologically: the challenges AI addresses

For researchers and insights leaders evaluating AI's role in qualitative work, this study offers a practical proof point – one grounded in the real limitations of traditional ethnographic research.

Traditional ethnographies in the field face several challenges: access and recruitment (getting into the actual kitchen is a hurdle from the start), the observer or Hawthorne effect (participants clean up before visits, hiding natural kitchen behavior), time, cost and occasion constraints (behavioral dynamics often occur outside the observation window), data overload (video, audio, notes and photos make it hard to distill clear themes), interpretation bias (ethnographic interpretation depends heavily on the individual researcher), limited generalizability (10 to 20 households yield deep insight but not prevalence), difficulty capturing tacit behavior (automatic habits are hard to articulate or observe) and translating insights (rich narratives need to become decisions, not just observations).

Our AI-moderated ethnography approach addresses each of these systematically. The study completed in two days what traditional mobile ethnography takes four to five months to deliver, at one-tenth the cost. It generated 60 hours of interview data across 91 interviews, with 55 questions per interview – 43 open-ended and 12 closed-ended – producing both the contextual richness of qualitative research and the quantifiable patterns of survey data. This is what we call a "quantified why" – a scalable and replicable method that remains authentic and in-context.

Participant feedback validated the approach. Ninety-seven percent rated the AI interviewer as excellent or very good. The AI-interview even



holds against human moderation with a quarter of participants saying the experience felt similar to talking with a human moderator, citing natural pacing, thoughtful follow-ups and smooth conversation flow. Many actually preferred the AI interview format over live interviews.

Video insights reveal what self-reports miss

Perhaps the most methodologically significant finding was about SKU and brand measurement. Self-reported brands appeared in 70% of interviews (64 of 91), generating 78 mentions. But Conveo's unique multimodal AI video analysis – which scans what appears on screen, not just what participants say – detected brands in 85% of interviews (77 of 91), generating 94 observations. That is a 20+% gap between reported and observed brand presence, with the underreporting concentrated among smaller brands.

Cascade showed near-perfect alignment between what participants claimed and what cameras observed (37 mentioned, 37 observed) – a marker of dominant brand salience. Great Value, by contrast, showed four mentions versus 10 observations, a 150% uplift from verbal to visual, suggesting private-label use is significantly underreported in traditional research. Finish revealed 10 mentions but 15 observations, with the platform detecting not just the brand but the specific product down to the SKU level – Finish Powerball Quantum – even when participants did not name it. None of these dynamics would have surfaced from transcripts alone.

This capability matters for brand strategists because it reveals which brands have genuine salience (consumers name them unprompted) versus habitual presence (used regularly but not top of mind). Finish, for example, showed strong observed usage but weaker unaided recall, leaving it potentially vulnerable to switching.

The broader shift

The promise of generative AI in consumer insights has been evolving rapidly. Early applications focused on automating moderation or scaling qualitative sample sizes – useful but incremental improvements. What this dishwashing study illustrates is something more fundamental: AI as a method that makes previously impractical research designs practical.

A 91-household, two-part video ethnography with adaptive AI interviewing, multimodal video analysis and integrated quantitative-qualitative measurement would have been prohibitively expensive and logistically complex even three years ago. Today, it runs in days, not months, and produces insight layers – behavioral, emotional, contextual – that compound with each other.

For the ethnographic research tradition specifically, this is not a replacement narrative. It is an expansion of what ethnography can achieve when freed from the constraints of human observer bandwidth. The human insight advantage does not diminish with AI – it scales.

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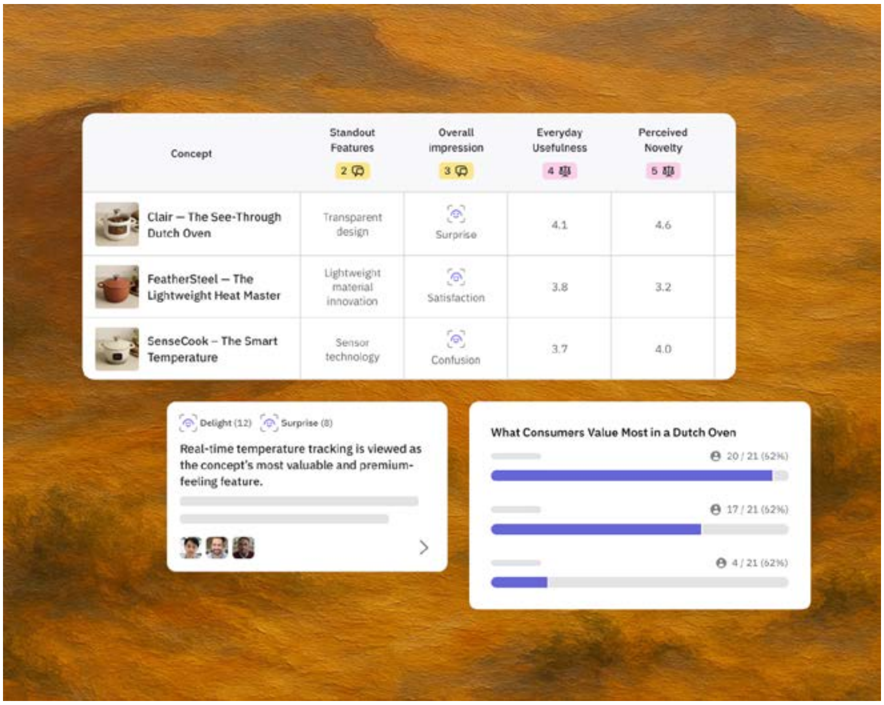
Conveo

AI-Moderated Research Platform

Scale insights without sacrificing rigor

OUTSET



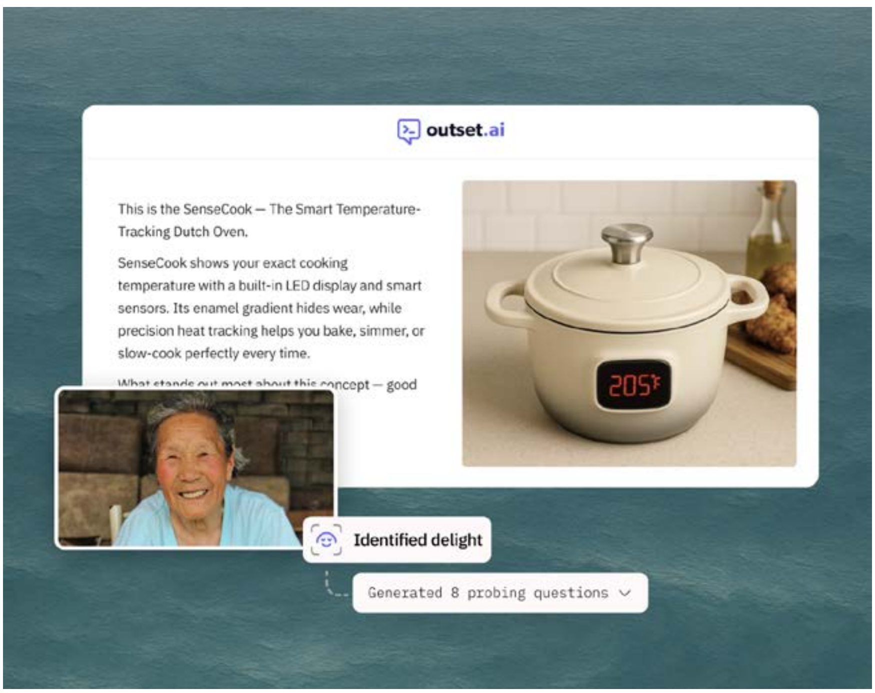
Outset was built for market researchers and consumer insights teams seeking the depth of qualitative insight at the speed and scale of quantitative methods.

Overview

The first AI-moderated research platform to conduct rich, real-time conversational interviews at scale, it reaches hundreds of participants simultaneously, across 40+ languages, anywhere in the world. The AI moderator engages participants in natural dialogue, asks intelligent follow-up questions and probes dynamically. This gives teams the ability to run studies that simply weren't possible before, without stretching existing resources.

How to use it

Setting up a study is remarkably fast. Researchers can build from scratch or share their objectives and Outset's AI generates a complete discussion guide, including probing and skipping logic. When the responses come in, AI-powered synthesis surfaces themes, standout quotes and customizable highlight reels, eliminating hours of manual analysis. AI's assistance not only speeds up reporting but makes it easy to granularly tailor reports to be maximally relevant to individual stakeholders.



Research use cases

From discovery to evaluative testing, Outset supports the full research arc from market strategy to creative testing. Customers including Nestlé, HubSpot, Uber, Away and Glassdoor are already using the platform for brand research, creative testing, diary studies, in-home testing, shop-alongs and more.

Closing the say-do gap

Outset's new Visual Intelligence suite extends AI-moderated research beyond conversation, giving the moderator the ability to "see" digital click paths, physical real-life surroundings and emotional cues present in real research. This functionality, unique to Outset, enables powerful dynamic probing and instant synthesis based on both verbal and non-verbal cues, most effectively closing the gap between what people say and do.

For research teams under pressure to do more with less, Outset is the most consequential tool in the 2026 toolkit.

Learn more at outset.ai

outset.ai

Two frictions holding insight communities back and how to remove them

RESEARCHBODS

Client-side insight teams are under more pressure than ever: do more with less, move faster and prove ROI. That's where communities earn their keep, helping teams stay close to customers and respond at pace. And yet, as our annual survey of community buyers shows, two common frictions often show up.

Pressure to DIY

Around half of organizations running an insight community say they increasingly need to deliver projects in-house. But few client-side teams have capacity for spikes in workload, intensive qual phases or in-store fieldwork, especially when teams are small, nimble and often quant-leaning. Many community contracts lock buyers into a fixed choice – either fully serviced or entirely DIY – which removes the pressure valve to tap into extra (or expert) help.

At Researchbods we offer a fully flexible model: clients can tap into extra support on a project-by-project basis, without switching contracts or platforms.

Right here, right now

Recruiting a representative mix of customers and keeping them engaged remain top-three challenges in our survey. In an ongoing research relationship, taking part must feel rewarding and relevant. Trusted brand cues and personalized content are what make customers join up and stick around.

The challenge? Communities rarely house a single, neat audience; a media owner community might house sports fans alongside fashion fanatics. Yet many platforms force one-size-fits-all branding, leaving teams with a poor choice: dilute brand assets to create a generic look and feel or finance multiple separate communities.

Our ex-plor platform allows for bespoke branded environments to be presented based on the member's profile – that means the fashionista will see branding that's true to the look and feel of the magazine they love and will only see tasks and content relevant to them.

The TL;DR? To reduce friction, opt for a community partner that offers a flexible support model and provides platform personalization.

From insight communities to agile ad hoc research, Researchbods combines human insight with smart automation to devise strategies that drive clear, sustainable growth. ex-plor is its powerful, proprietary insight community platform.

researchbods.strat7.com

STRAT 7 researchbods

QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

••• beverage research

No more bellying up to the bar?

Consumers want to find and buy their alcohol online

Findings from a January 2026 national consumer survey from U.S. alcohol market platform DRINKS reveal a disconnect between where consumers find alcohol brands and where they actually buy them. An estimated $40 billion discovery-to-purchase gap exists in the industry.

Seventy percent of 21- to 34-year-olds have discovered alcohol brands online they couldn't easily purchase. On top of this, 24% of all consumers say purchasing alcohol through the internet is harder than it should be. One in five Americans don't know that buying alcohol online is possible.

This generation of consumers is shifting from primarily planned purchasing (34% of purchases) to content-triggered purchases (16%). It's no longer considered fringe behavior but rather the default path.

Another shift in consumer attitude is the expectation to be able to purchase alcohol within non-alcohol retail environments. Half of all consumers find shopping for alcohol separately inconvenient. Only 14% are completely opposed to the concept of buying alcohol from their favorite online retailers, with 65% of consumers on board with the idea.

With the development of AI, more alcohol consumers are receptive to AI-driven alcohol recommendations. Almost 70% of 21- to 34-year-olds and 73% of 35- to 44-year-olds said they likely would buy alcohol based on an AI recommendation. In a March 2025 survey, only 56% of Millennials and Gen Z had expressed this interest.

The alcohol industry has a growing competitor: Fifty-two percent of 21- to 34-year-olds have purchased cannabis or THC products as an alternative to alcohol. Twenty-two percent of this population buys these products on a regular basis. Cannabis use is a risk many alcohol brands have tried to ignore but no longer can.

There is a large generational gap as well. The majority (85%) of consumers 55 and older do their alcohol shopping in-store, a stark comparison to 59% of 21- to 34-year-olds. Older consumers are far more hesitant to transition to online purchases; only 9% plan to increase their internet alcohol purchases while 29% of younger adults see an increase in online purchases.

The market will continue to move toward digital infrastructure as the primary digital consumers move into peak earning years. Alcohol commerce will follow this trend to capture the next generation of growth. The real question is, who will be the first to embrace this change?

Findings are based on two national consumer surveys commissioned by DRINKS: March 2025 (n=1,000) and January 2026 (n=550). Year-over-year comparisons are included where applicable.

••• travel and leisure research

Airline delays deter new fliers

Frustrations rise and push Americans to avoid flying

A new Ipsos poll finds that two-thirds of Americans believe the travel experience has gotten worse in the past year. Those who have flown in the last two months share this sentiment and half of recent fliers report that they have experienced travel delays due to airlines.

Ipsos put out the results of a nationally representative probability sample of 1,021 general-population adults aged 18 or older. In this sample, there were 163 respondents who have flown in or out of a U.S. airport in the last two months, with 865 adults who have flown in or out of a U.S. airport in their life.

American travelers are increasingly familiar with delays at airports, Transportation Security Administration (TSA) shortages and the deployment of Immigration and Customs Enforcement (ICE) agents to airports. A third of Americans say they are postponing or cancelling trips they have already booked flights for with over half saying they are likely to avoid booking flights altogether in the next six months.

Compared to just a year ago, only 2% of Americans claim the travel experience in U.S. airports is better with two-thirds claiming it is worse. Twenty-eight percent say the experience is about the same.

Those who have flown recently (in the past two months) share this sentiment with 65% believing the experience has worsened in a year. Half of Americans who have flown in the past two months report delays due to airlines, while 20% report delays due to security. Almost one in 10 have postponed (8%) or canceled (10%) their flight.

Recent political events in U.S. airports influence the way Americans approach travel. About two-thirds of Americans are at least somewhat familiar with travel delays at airports (68%), TSA staffing shortages (66%) and ICE agent deployment to assist TSA officers (66%).

More Americans oppose (58%) than support (39%) the deployment of ICE agents to U.S. airports, with Republicans being significantly more likely to show support at 78%. Only 4% of Democrats and 38% of independents support this deployment.

With this knowledge, over half (54%) of Americans are likely to avoid booking flights in the next six months. Fifty-three percent are more likely to choose an alternative mode of transportation to travel, while 33% say they will likely cancel or postpone their trip instead. Unsurprisingly, lower-income Americans are more likely to avoid booking flights than their higher-income counterparts.

This Ipsos poll was conducted March 27-29, 2026. It is based on a nationally representative probability sample of 1,021 general population adults aged 18 or older. The sample includes 163 Americans who have flown in or out of a U.S. airport in the past two months, and 865 adults who have flown in or out of a U.S. airport in their life.

••• health care research

Health care is on the ballot

Midterm voters seek changes in medical system

Despite a general feeling of bipolarism in American politics, a survey shows that the overwhelming majority of Americans agree that health care should be more equitable. Seventy-one percent consider access

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to health care a right rather than a privilege.

On top of this, 70% believe the nation should work toward eliminating health inequities for everyone and 61% believe that together we can. Collective action may be the solution to bridge the gap on this issue.

In terms of political influence, 63% say improving the health of everyone will be very or extremely important in their midterm vote. Almost the same amount (59%) would prioritize voting for a candidate committed to eliminating health inequities. Tapping into this discomfort may be advantageous for potential candidates considering 57% of Americans surveyed hold personal values aligned with eliminating health inequities.

Over 8 in 10 Americans (83%) believe that preventive care is crucial to keeping us all healthy. On top of this, 76% believe that health care should be delivered in the languages we understand and feel most comfortable communicating in. Seventy-five percent said care should focus on the whole person and 60% agreed that care should be available in the communities where we live and work. Just over half of respondents (51%) said that our health care should reflect our preferences and address our physical, mental and social needs.

In terms of insurance and cost, many respondents agreed that coverage should not be denied due to preexisting conditions (81%) and that services should cost and be billed the same, regardless of insurance (67%).

Although many agree that fewer barriers should exist in the health care system, there is less agreement on how to approach the issue. Fewer than half (41%) of respondents strongly support prioritizing the elimination of health inequities for racial or ethnic groups. Voters polled indicated that improving the health of and eliminating health inequities for racial and ethnic minorities was not particularly important to them in the 2026 midterm elections (42% and 41%, respectively).

This survey was conducted by the Institute for Policy Solutions at the Johns Hopkins School of Nursing. The 2025 Health Inequities Survey used a national probability sample of 1,578 U.S. adults recruited from the National Opinion Research Center's AmeriSpeak panel, which covers approximately 97% of U.S. households, with an intentional oversample of individuals identifying as American Indian or Alaska Native.

••• financial services research

Advising in a turbulent market

Financial planners adjust to cope with low yields

Financial advisors are becoming increasingly cautious with their clients in recent months. A U.S. News-AdvisorFinder survey conducted in the fourth quarter of 2025 found that only 41% of respondents said their clients were better positioned to reach their retirement goals and about 30% said their clients would be in "somewhat worse" shape for retirement readiness.

There are a few factors influencing this change: people are retiring earlier and living longer, which means they need to make their savings last longer. At the same time, markets are elevated and yields are historically low. Concerns grow over the long-term viability of Social Security, bond market volatility and Americans' shorter retirement timelines.

Forty-seven percent of advisors surveyed said their clients would face a lighter tax burden this year, which is slightly lower than the close to 50% who said the same thing in the third quarter. On top of this, 41% said inflation would rise to 3% or more in 2026, with 24% expressing a bearish outlook on U.S. equities this year.

The fear of potential cuts to Social Security is prevalent to advisors and clients alike. Cuts could reduce payments by 24% in late 2032 unless there are interventions. This could mean that early retirees will face higher health care premiums by the end of 2025.

Despite this, 35% of advisors say their clients will be "somewhat better" positioned to reach their financial retirement goals within the next year. Six percent even claim their clients are looking "much better" positioned.

Advisors expect a heavier tax burden in 2026, with 18% saying evolving tax policies to present a "somewhat heavier" burden, compared to the 7% who said the same thing in the previous quarter. Interestingly, 35% responded with "no meaningful change" for their clients.

Although inflation has come down since the summer of 2022, it remains above the Federal Reserve's preferred rate of 2%. Many financial advisors expect this to continue through 2026, with 47% expecting it to stand between 2% and 2.99% and 41% expecting it to rise over 3%.

A little over 41% are optimistic about U.S. equities and stocks, with 24% feeling more bearish. Many investors fear stocks are overvalued and that mega-cap tech firms with outsized artificial intelligence ambitions portend a stock market bubble.

Data for the U.S. News-AdvisorFinder Advisor Outlook Index was collected between Nov. 5, 2025, and Jan. 13, 2026 by PureSpectrum. It included responses from 17 financial advisors in U.S. News' and AdvisorFinder's network.

••• food research

Quality over quantity

Amidst a national protein craze, knowledge gaps emerge

For the past few years, protein has dominated the fitness space, so much so that it has shifted how Americans think about healthy eating overall. The International Food Information Council's (IFIC) latest consumer research reveals that while Americans are actively seeking protein, their understanding of protein quality often omits scientific truths. This creates a gap of knowledge that provides

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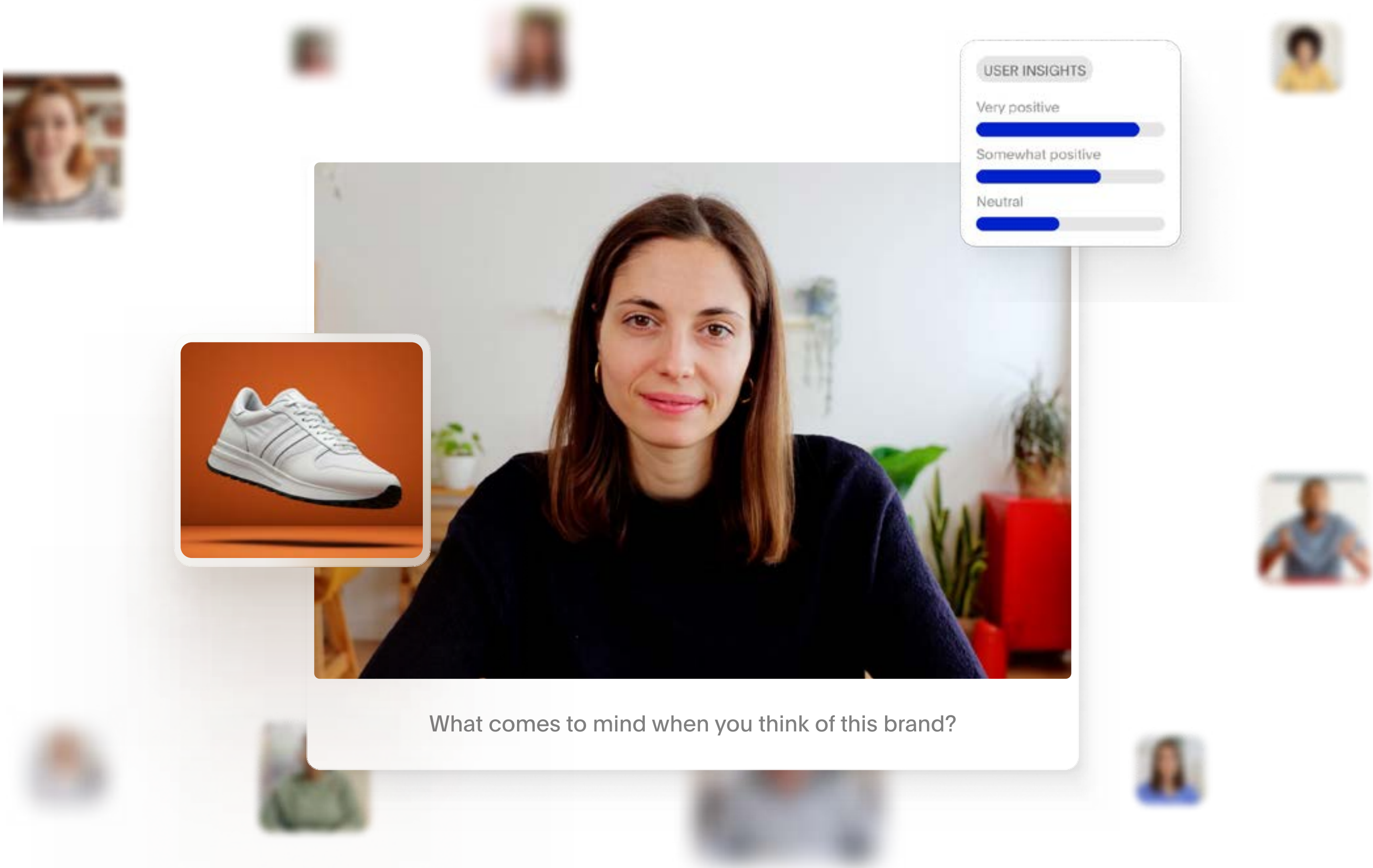

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The most common way Americans define healthy food is "a good source of protein," while national dietary guidance is reinforcing the quality of the protein. However, instead of focusing on the essential amino acids that could quantify the quality of a protein, 40% say a high-quality protein is one that tastes good. Another third of respondents associate quality with the amount of protein per serving.

Many also link quality to broader food attributes such as additive-free (29%), natural (28%) or minimally processed (26%). This means that amino acid composition or scientific validation are less associated with what makes a protein high-quality.

If Americans are so protein obsessed, why aren't they so concerned with scientifically supported quality? When looking at food labels, simple messages resonate deeper with the average consumer. Consumers are most drawn to clear, accessible cues like total protein content (45%), "good source of protein" claims (45%) and contribution to daily protein needs (41%). If labeling becomes too technical, fewer shoppers are likely to be influenced.

Almost two-thirds of Americans (64%) look for front-of-package information, with 79% checking for details on the back or side of packaging. Despite this, a meaningful portion of consumers do not engage with labels at all, proving the need for multiple communication touchpoints beyond the packaging.

This protein trend offers an opportunity for the conversation around quality to influence the way consumers interpret food. Most Americans believe the body uses protein differently depending on the source; 71% say protein from different foods is used differently in the body to some degree. Only 13% of respondents admit they are unsure if protein source matters. Beliefs around how protein influences the body are varied and this is the time when dietitians and nutritionists can fill the informational gap.

••• technology research

'Get a load of the new guy'

Age influences attitudes around workplace AI use

A new survey has discovered a generational divide in the trust that business leaders and their employees have in AI. While 31 percent of 18-24-year-old workers say they trust AI recommendations over their own judgement, a mere 4% of workers aged 55-64 say the same.

In terms of daily use, 39% of 18-24-year-olds use AI tools in their job, compared to 20% of 55-64-year-olds. This gap demonstrates the distrust older professionals, who are more likely to be in leadership roles, have in the future of AI.

Although younger professionals may use AI tools more regularly at work, only 13% of 18-24-year-olds and 9% of 25-34-year-olds claim that AI is central to their organization. Almost half (48%) of respondents say their organization is improving at AI use but still has a way to go and about a quarter (24%) say their organization rarely uses AI at all.

There is a lack of direction with AI at an organizational level and this is reflected among young professionals. More workers aged 18-24 primarily improve their AI skills outside of work hours (40%), in contrast to those who do so during work hours (32%). Only 5% of all respondents say they upskill in AI through mentorship or peer learning. While younger professionals are actively using AI tools in their work, senior leadership may not be providing sufficient strategic direction. Without clear, leadership-driven AI frameworks, organizations risk a disconnect between the potential of these tools and the results they actually deliver – whether through formal initiatives or informal use.

In the age of AI, a surprising 15% of respondents report not using AI at work at all. In contrast, 27% use AI every day, 33% a few times a week and 24% use AI tools occasionally. The most common cases for using AI are writing and editing documents, emails and reports (44%), summarizing information (38%) and supporting data analysis or reporting (31%).

Some of the primary tasks people avoid using AI for are decision-making and planning (28%), data analysis or reporting (25%), coding, debugging or technical work (22%) and scheduling/meeting preparation (20%).

There are many reasons why people stay away from AI in higher-stakes tasks. The most popular are because they prefer their own judgement/creativity (34%), don't trust AI's accuracy (32%), the output feels generic (30%) and confidentiality risks (29%).

Only 6% of respondents consider themselves to be highly skilled and ahead of the curve with AI, with 33% labeling themselves as a beginner or not skilled. Half of the respondents also trust their own judgement more than AI; only 15% trust AI more.

Although over half (54%) claim AI somewhat helps productivity in the workplace, 11% say that it actively slows them down.

In terms of the future of AI in the workplace, 58% believe AI will meaningfully change demand for their role in the next five years, with 32% not believing it will have an impact. Sixteen percent say AI users already have a career advantage.

While 45% say AI hasn't affected team dynamics, others report growing friction: 18% say colleagues are competing to showcase their AI skills and 11% say non-users resent those who rely heavily on AI. This tension is especially pronounced among younger workers – only 23-25% of those aged 18-34 report no AI-related conflict, compared with 64-66% of workers aged 55 and older.

This survey was conducted by Amplitude Inc., a Sydney-based AI analytics platform.

••• senior research

Aging out

Older adults utilize socialization to increase their quality of life

Isolation and loneliness are increasingly concerning for adults but a new survey from residential community builder Del Webb shows that the choices we make about where and how to live can contribute to higher connectedness and overall satisfaction. In a survey of over 1,300 people aged 55+ who live in Del Webb's communities, 91% report feeling socially connected at this stage of life. Seventy-one percent confirm that their living situation makes it easier to form meaningful connections with those around them. Over half (51%) of respondents claimed to be more socially engaged since moving into their current abode.

Connections require a meaningful and fulfilling engagement to directly impact a person's well-being. Eighty percent of those surveyed agree that how they stay connected with others is important to their overall health and well-being.

Young adults and children have far more opportunity to find and build connections through school and work. Older adults don't have these facets to meet people. When asked which moments for connection are most preferred, organized group social activities (41%), sharing meals (41%), coffee and happy hours (37%) or just chatting with friends (41%) are top contenders.

Older adults are looking to stay physically active to connect with others as well. The top choices for staying active are group exercise classes (28%), playing pickleball (27%) and other outdoor activities such as hiking, canoeing and kayaking (21%).

PulteGroup's market research division conducted this online survey of 1,301 Del Webb residents from February 24-26, 2026.

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14 TOP HOME USE TESTING/ RESEARCH COMPANIES

From product testing and packaging evaluations to longitudinal usage studies, IHUTs remain a valuable way for researchers to capture consumer feedback in real-world environments. By placing products directly into participants' hands and homes, brands can uncover authentic behaviors, unmet needs and performance insights that may not emerge in traditional research settings.

The companies featured in this directory offer a range of IHUT capabilities, including participant recruitment, logistics management, sample fulfillment, digital feedback collection and advanced reporting. Whether you're evaluating a new concept, refining an existing product or validating claims before launch, these providers can help streamline the process and deliver actionable findings. Explore the listings below to find partners equipped to support your next in-home research initiative with the operational expertise and methodological rigor today's research demands.

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Founded 1987 | 200+ employees

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Founded 2017 | 300 employees
Keren Novack, President

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Decision Analyst

Founded 1978 | 120 employees
Jerry W. Thomas, CEO
Bonnie Janzen, President

Decision Analyst is a recognized leader in IHUTs and product optimization. Our staff has evaluated more than 2,000 consumer packaged goods and durable goods during the past four decades. We offer research and analytical services to help clients improve existing products and create new products. Our product testing services include: IHUTs, central-location taste tests, product clinics and product optimization techniques using choice modeling. We favor monadic testing of products but also design and execute paired-comparison, sequential-monadic and protomonadic tests. Optima®, our IHUT product testing system, predicts consumer acceptance, determines the optimal set of ingredients or features and optimizes pricing. We own and operate consumer panels for IHUTs and have our own facilities for on-site labeling, packaging and shipping of test products. Decision Analyst is committed to the highest quality standards and maintains certification in ISO/IEC 27001:2022.

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Tara Lyons, CEO

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Phone: 44-20-8245-8000
indiefield.co.uk

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Founded 1984, Relaunched 2024
Robert Clark, CEO

Marketing Analysts delivers flexible, analytics-led in-home use testing programs that help brands evaluate products and experiences in real-world settings. We've managed IHUTs globally across categories, from ice cream to cosmetics to personal care, with strong placement rates and consistent execution. With over 40 years as a quantitative market research firm, we bring rigorous research design and proven methodology to every study. Our IHUT programs support physical product tests, digital experiences and both physical and digital diary methodologies, giving clients the flexibility to match study design to their specific learning objectives. Our team manages the operational complexity behind successful IHUTs (recruitment, logistics, participant engagement, data collection) so clients can stay focused on what the data means rather than how it gets collected. Whether the study is domestic or global, we build programs around dependable fieldwork and analysis that translate directly into sharper product and marketing decisions. The result is an IHUT partner built on deep research experience, not just project management. One that helps clients stay close to real consumer behavior and move forward with confidence.

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MarketView Research

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Jessica Cardella, Senior Vice President

MarketView Research's award-winning in-home use testing (IHUT) programs have powered the success of today's leading brands – and we're ready to do the same for you. Our clients trust us to uncover what consumers truly want through a powerful blend of qualitative and quantitative research, giving them the confidence to invest in the features that matter most. From planning and survey design to fieldwork and analysis, we deliver actionable insights that help you accelerate innovation, reduce risk and bring customer-centric products to market faster. Getting started is simple: send us your product and our expert team handles the rest. With over 25 years of experience, our proven, quality-driven process ensures precision and excellence at every step. With MarketView Research, you gain a trusted partner committed to delivering results – every time.

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Mindfield - Tech Integration and Audience Solutions

Founded in 1980 as McMillion Research LLC
Jay Mace, Senior Vice President

Mindfield, your premier partner for customized research solutions in IHUT studies. As the first platform of its kind, we tailor our offerings to meet your unique needs across all verticals and study types, ensuring optimal follow-up return rates. Our rigorous participant validation process guarantees that every respondent meets our high IQD quality standards. With Mindfield, you're not just choosing a research solution; you're investing in quality and precision. Our cutting-edge technology and diverse audience solutions empower you to make informed decisions with confidence. Elevate your research experience and achieve exceptional results with Mindfield today!

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Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO

When your product goes home, who's testing it matters. Home use tests live or die on the quality of your recruits – and that's exactly where Murray Hill National excels. For 30 years, our executives have built one of the most trusted recruitment and data collection companies in the U.S., delivering the right respondents to your doorstep, every time. We specialize in recruiting everyday consumers for home use tests across virtually every product category – but our reach doesn't stop there. With access to 5 million consumers as our foundation, we also tap into 650,000+ B2B executives and professionals, 750,000 physicians, nurses and more, plus 150+ organized patient panels. Whether your HUT needs a mainstream consumer, a hard-to-reach specialist or an HCP with specific clinical experience – we find them, qualify them and get your product in their hands. What sets us apart? We put data quality at the top of every project. Our teams are committed to high-quality screening, verified recruitment and seamless logistics – so your HUT results are reliable, actionable and delivered on time. Any audience. Any methodology. Coast to coast. Contact us today for your next home use test project.

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Outset

Founded 2022 | 51 employees
Aaron Cannon, CEO and Co-founder
Michael Hess, CTO and Co-founder


Outset is the first and only AI-moderated research platform that listens, sees and understands. Through its instant guide creation, dynamic probing, vision-aware moderation, automated reporting and broad multilingual capabilities, Outset helps customers scale their qualitative research and conduct studies that would be otherwise impossible, all without sacrificing depth or rigor. Often used for concept tests, in-home testing, diary studies, shop-alongs, brand research, creative testing and more, Outset has powered some of the most business-critical decisions at companies like Nestle, Microsoft, Uber, Hubspot and Google. Built by researchers, for researchers. You're in good hands with Outset. Connect with us at sales@outset.ai to learn more.

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Why guess when you can know?

ReadingMinds.ai

Founded 2025 | 12 employees
Stu Sjouwerman, CEO

ReadingMinds.ai is an AI-native voice interview platform that turns real customer conversations into emotional decision signals your agents can act on. You get a platform built for speed and proof, powered by an emotionally intelligent AI interviewer called Emma. She runs natural voice interviews 24/7, no scheduling required. Marketing and revenue teams use ReadingMinds to capture what customers feel, not just what they say, then convert those signals into sharper positioning, stronger messaging, better pipeline quality and higher conversion rates. Every output is traceable and quote-backed, so teams can see exactly what changed and why. Results are delivered in hours, not weeks, with clear themes, emotional intensity scoring and evidence that aligns marketing, sales and leadership around real buying behavior. Collaborate easily across teams while keeping everything centralized, structured and ready for action. Start your Live Test Drive and see the signal for yourself.

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Founded 2016 | 25+ employees
Jason Thomas, CEO
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TestSet

Founded 2024 | 270 employees
Michael Sanfelippo, President

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Turning the field into a feedback engine: Medtronic leverages frontline expertise to accelerate customer insights

| By Alice Lieberman

abstract

Medtronic's Field to Function program reframes B2B research by activating sales teams as a scalable, insight-generating proxy for hard-to-reach customers, delivering faster, lower-cost feedback without sacrificing quality. The model challenges traditional reliance on external studies, showing how structured internal partnerships can accelerate decision-making while strengthening customer-centric strategy.

Medtronic's customers – surgeons, hospital administrators and operating-room staff – are foundational to every decision we make. Yet gathering direct B2B customer feedback is accompanied by familiar challenges: they are geographically dispersed, time-constrained and constantly in demand. The resources needed to obtain their insights continue to increase.

Our goal was to create a mechanism that still lets us hear our customers, reliably and repeatedly, while also minimizing disruption, improving turnaround times and controlling costs.

Our answer to this need was an experiment rooted in internal partnership. Rather than defaulting to external research vendors or large-scale studies, we took a step back and recognized that our sales force already sits at the intersection of customer behavior and business realities. They observe operating rooms. They manage concerns firsthand. They hear perspectives at the scrub sink. They see what works, what breaks down and what is changing often before those signals ever reach a corporate dataset. That is how Field to Function (F2F) was born.

The approach: Sales turns into research strategy

In partnership with our U.S. surgical sales leadership, the customer insights team designed a quarterly program that taps into that powerhouse of frontline expertise.

The model is intentional and simple:

Once per quarter, our team invites stakeholders across strategy, marketing, R&D and product development to submit research questions. These are not academic exercises; they are time-sensitive questions tied to real business decisions.

From those submissions, we select the three topics that offer the most significant business impact.

We work with the topic owners to design an impactful three-to-five-question survey with precise screeners to ensure reliable input and to prioritize the most relevant sales reps within our quotas.

That questionnaire then goes to a national panel of approximately 400 sales reps, who are given two weeks to respond with their feedback.

At the close of fielding, the customer insights team rapidly synthesizes the results and shares them back with the topic owners and the broader F2F community.

To encourage participation, sales reps earn points to put towards a reward as part of Medtronic's peer-to-peer recognition program. But more importantly, we positioned F2F as a formal mechanism for amplifying both field and customer voices into corporate decision-making, giving their perspective an official seat at the table. The program allows reps to amplify not only their own experience but also the voice of the surgeons and hospital staff they support every day.

Early results and feedback

Even before launch, stakeholder response was overwhelmingly positive. One leader shared, "Thank you for the creation, invitation and collaboration on Field to Function. This is a great initiative that delivers market insights and seller perspectives in a timely and cost-efficient way."

At the close of the first pilot wave, the results exceeded both participation and impact expectations.

Nearly half of our eligible salesforce responded – an exceptional outcome for an internal, first-of-its-kind program at Medtronic. More importantly, the quality of feedback consistently mirrored the insights we typically observe in far more expansive external studies.

Now, after two waves, momentum continues to build. Business leaders are actively using the findings to shape discussions, inform priorities and pressure-test assumptions. Early cost comparisons suggest that the first wave alone replaced more than $60,000 in traditional project spend.

What we learned

Our greatest challenge was initial buy-in from the sales reps who have full schedules and strict priorities. Framing matters most. Initial adoption required reframing the program from "another survey" to "your voice influencing headquarters." Emphasizing their unique value to our team and to Medtronic, and how their input can lead to addressing real customer concerns, led to a sense of ownership that translated to participation. Reps already make an impact on their designated accounts every day and F2F provides them with the opportunity to influence Medtronic decisions beyond their traditional territories.

Following that language shift, we discovered that while monetary incentives played an important role, the opportunity to see feedback directly influence decisions was just as motivating. In the second wave, we introduced a structured follow-up process to track the outcomes generated by the input and report those results back to the sales reps, making visible what changed because they chose to engage. This closed-loop structure keeps reps engaged long-term.

Lastly, because this approach relies on reps as a proxy for the customer voice, question design requires additional discipline. Working with topic owners, we focus on practical, observable inputs – what reps can directly see and hear in the field – rather than on their interpretations of customer sentiment.

Why it works

F2F works because it balances two essential elements:

Discipline: A structured process with vetted questions and succinct analysis.

Democratization: Field teams have genuine influence and business teams have ready and reliable access to field-based insights, decreasing hurdles for customer-centric decision-making.

It also reinforces something Medtronic believes deeply: rigorous market research must remain central to business strategy and delivering on our company's mission.

What comes next

We have now completed two successful waves and are moving forward with a quarterly cadence. Our longer-term ambition is to make Field to Function a standing component of our research portfolio and expand from the U.S. to Medtronic's broad global footprint.

We anticipate that F2F will continue to complement traditional voice-of-customer programs while giving leaders a fast signal when time and resources are limited.

As the model matures, we will explore automation and selective qualitative extensions, such as optional post-survey conversations between business partners and reps, to add context without sacrificing speed.

Embrace experimentation

Field to Function demonstrates what is possible when insights teams lead with partnership and embrace experimentation. Strategic clarity doesn't require perfect data. It requires listening early, learning fast and staying anchored in the customer by making smart use of existing resources. Progress belongs to organizations willing to test, adjust and scale quickly with cross-functional teams equally committed to getting closer to the truth.

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MaxDiff's max myths

| By Carl Jago

abstract

A decision framework to save us from overspending, wasting respondent goodwill and misleading stakeholders.

MaxDiff (maximum difference scaling/best-worst scaling) has a stellar reputation. However, it has become a tool we too often reach for by reflex rather than being one option among several, chosen deliberately. You've probably seen this scenario: someone says, "We need to prioritize 8-30 items," and MaxDiff gets treated like the gold standard. We can feel obligated to deploy it if we want to be taken seriously. It is seen as more scientific, more precise and more defensible than simpler options. This isn't the position of one overzealous article or blog post. Rather, it's industry-wide orthodoxy, repeated across major platforms, vendor documentation and practitioner guides.

But that belief is expensive. Here's why:

- It costs money (licenses).
- It costs time (more setup, greater complexity).
- It costs survey respondent goodwill (more survey screens, more drop-offs, fewer follow-ups).
- And it can cost clarity, because stakeholders get handed outputs that often tell one story while appearing to tell another.

This article is a reset. Not "MaxDiff is bad." Not "Hierarchical Bayesian (HB) analysis is useless." Just a practical point: MaxDiff is situational. It's a format for managing cognitive load for survey respondents. It's for estimating win-loss tendencies for all items in lists that are too long for single-screen ranking tasks.

Seen for what it actually measures, the method stops being a default and becomes what it should have always been: one option among several, chosen deliberately.

Before we get to the decision framework, which will help us make those kinds of choices, we need to clear some obstacles. Here are the maximum myths of MaxDiff.

THE "TWICE AS IMPORTANT" RATIO MYTH

This foundational misconception has led many of us to believe that MaxDiff possesses a kind of secret sauce. Here's the myth in plain English: If Item A's MaxDiff score is 10 and Item B's score is 5, then A is "twice as important."

This isn't a fringe misunderstanding; it's standard guidance. MaxDiff is routinely described as "a survey method used to measure relative importance" (SurveyKing, n.d.), its outputs are called "importance scores" (Sawtooth Software, n.d.-a) and Sawtooth's documentation states that rescaled scores "reflect a ratio-quality scale, allowing one to conclude that an item with a score of 10 is twice as important/preferred as an item with a score of 5" (Sawtooth Software, n.d.-b).

That isn't correct. What MaxDiff score differences actually tell us is often far less strategically relevant than true ratio of importance would be. Let's clear this up.

MaxDiff is a voting tournament, not a ruler

A MaxDiff task doesn't ask people "how much" they value anything, it asks them to pick winners and losers from small lineups. So the core construct MaxDiff observes is:

Win tendency: how frequently an item wins (and avoids losing) in repeated competitive choice sets.

From there, models can express a kind of magnitude, but it's a magnitude of choice dominance, not a magnitude of value intensity. Choice dominance tells us how decisively one item tends to win. It doesn't tell us how much more valuable it actually is.

Twice the votes isn't twice the value.

The gaps between scores do carry information. Larger gaps reflect more decisive, consistent wins. But decisiveness is not the same as magnitude of value.

The ratio value test

If the only thing the task records is who wins, then there is no way to tell whether the winner is slightly better versus wildly better in absolute terms.

To demonstrate this, we ran a simple simulation with N = 300 synthetic respondents. The "items" were literal numeric values (not labels) so that a value-sensitive method would have something to detect.

In Survey A, the items were the numbers 1 through 10. In Survey B, the items were 1 through 9 plus 100. For each MaxDiff question, respondents always picked the highest number as best and the lowest as worst.

As shown in Figure 1 the HB utilities were blind to ratios of value. Replacing 10 with 100 produces the same HB utility profile: the intrinsic value of the winner changes but not the inferred spacing from the model. MaxDiff can't "see" if the intrinsic value is much larger or only a little larger; only that it wins consistently.

It does not measure ratios of importance, nor of liking, nor of cardinal utility, nor of business value. Going from "wins twice as much" to "is worth twice as much" is usually an unwarranted leap in interpretation.

What MaxDiff actually measures (and the most transparent way to report it)

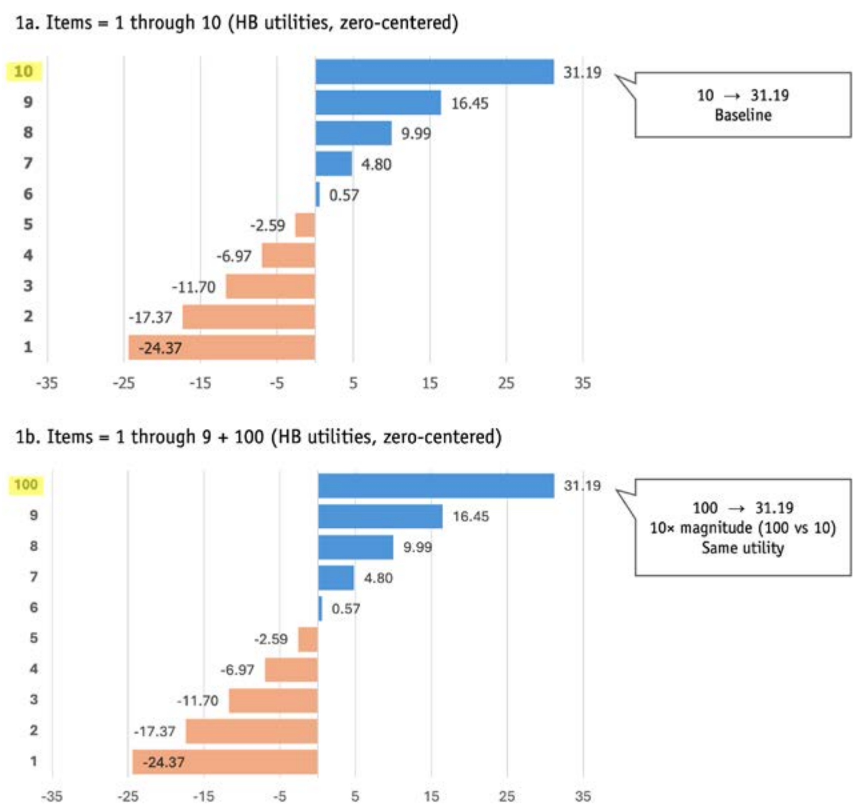
The raw MaxDiff signal is counts. The observations in a MaxDiff study are:

- How often each item was chosen best.
- How often chosen worst.
- How often it was shown but not selected (i.e., "unselected").

That's the raw signal. Everything else is processing.

Figure 2 shows the transparent MaxDiff signal: counts + net win score. MaxDiff records best, worst and unselected outcomes. Net win

Figure 1: HB utilities are blind to magnitude



Note: The entire utility profile is identical across panels; only the top label changes (10 → 100). Relative gaps are unchanged.

score (%best – %worst) turns that raw signal into an ordered, stakeholder-legible decision list.

Why consistency doesn't equal magnitude

Some readers may be thinking: But wait! Doesn't the consistency of winning tell us about magnitude? If someone always beats everyone else, doesn't that mean they're much better, not just slightly better?

A notable defense of MaxDiff's ability to "recover metric differences" is that people are not perfectly consistent (Orme, 2018). When two items are genuinely close, respondents will sometimes flip their rank order; whereas when they are far apart, flips are rarer. And therefore, greater consistency in a preference can be a result of greater separation between the items being compared. However, that same consistency also reflects respondent certainty.

You might like chocolate only slightly more than you like vanilla. But you're certain about it.

Win consistency reflects both differences in value intensity and differences in rank certainty.

For MaxDiff (or any ranking task for that matter) to accurately model metric differences, it must assume that people are equally certain about all items. But in real preference and importance work, certainty is rarely uniform across our lists. People are often more certain about the extremes (top/bottom) and less certain about the middle, so the model can't reliably tell the difference between "This is much better" and "People are simply more certain about it."

Both create fewer flips. Both create separation between scores.

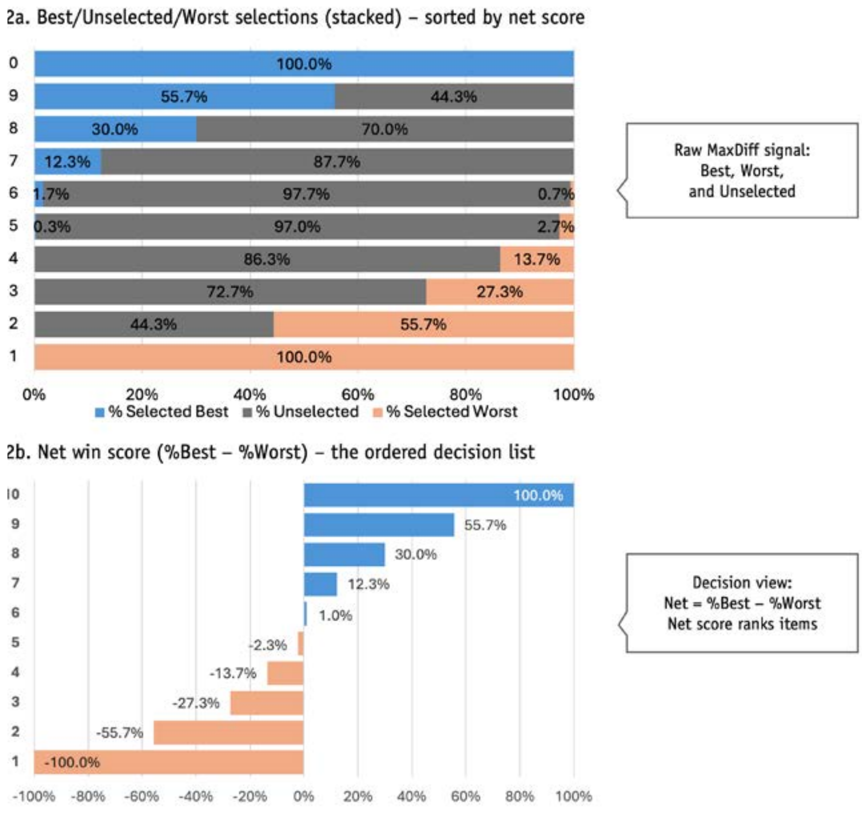
For some business questions, such as predicting reliable future behavior for situations resembling the MaxDiff task, certainty may be exactly the signal we want. But it's still not value intensity and the two shouldn't be conflated.

So here's the summary: MaxDiff measures win tendency. While it can express win tendencies as modeled choice dominance, that's a transformation, not a raw observation.

Here's the reset: MaxDiff is a tournament signal. The simplest reporting is … the votes.

And once we see MaxDiff this way (as a tournament that produces a win-loss signal), then we're ready to dispel an even broader and more consequential myth.

Figure 2: A transparent way to report MaxDiff results: stacked counts + net score



Next: Because real MaxDiff data aren't perfectly consistent (and some argue counts become "invalid" under noise), we inject random responding to test whether HB changes the conclusions versus counting.

THE "ALTERNATIVES ARE LESSER" MYTH

Here's the myth in plain English: If you want a defensible prioritization study, you need MaxDiff. Ranking is simplistic. Top-N selection is amateur. Anything other than MaxDiff is "unprofessional" or lacking in rigor.

Quantilope describes MaxDiff data as "far more powerful than other traditional scale/ranking tactics" (Quantilope, n.d.). Note what's missing: no qualifier. Not "more powerful when lists are long." Not "more powerful when you need the full hierarchy." Just far more powerful, period. This kind of framing turns a situational tool into a default and it turns alternatives into something you settle for.

This myth drives the MaxDiff-by-reflex phenomenon. But it rests on a misunderstanding: the belief that MaxDiff captures something simpler methods can't. In fact, MaxDiff's core measure is win tendency; i.e., who wins how often.

We don't need MaxDiff to count votes.

And to be clear: The alternatives we're proposing aren't rating scales. There are other forced-choice methods (e.g., ranking, Top-N) that also require trade-offs but with less overhead.

Even if "twice the votes" is strategically relevant for us, that's not a MaxDiff-only superpower.

There are simpler methods that produce across-sample win-tendency knit | THE AI-NATIVE RESEARCH AGENCY

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ratios. And often they do it with fewer screens, less fatigue, less cost and less interpretive risk. For example, in simple ranking, if Item A is ranked No. 1 by 40% of people and Item B by 20%, then Item A is "twice as frequent a winner." That is a ratio. And again, we're at a loss as to whether Item A is much better or whether people are just certain that it's better.

MaxDiff does provide more than simple rank order. But so does aggregated ranking data. Both methods produce frequency-based signals with meaningful gaps that reflect preference strength and certainty. Neither method produces the ratio-scaled importance scores that MaxDiff is commonly understood to provide.

Simpler methods produce ratios too. To be efficient and effective, we should ask ourselves: What's the least wasteful approach to give us the win-tendency signal we actually need? The decision framework helps us answer that question.

The decision framework

We can think of this as a "least force" principle.

Situation 1: You have a short list (up to about 10 items)

If your list is short enough that respondents can handle it on one screen, don't run a more involved tournament-type format.

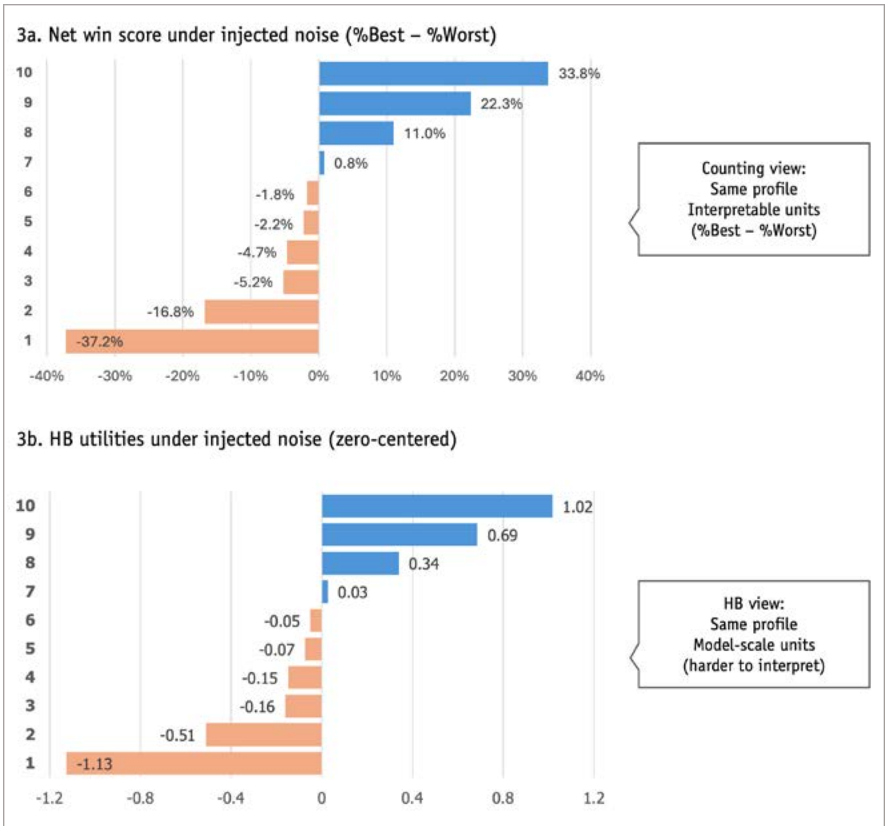
Bonus myth #1: "To save us from the tyranny of rating scales, where everybody can rate everything a 5, we need MaxDiff to force trade-offs."

The reality: MaxDiff is not the only way to force trade-offs nor, more importantly, is it always the best way. The common framing of "MaxDiff vs. rating scales" (e.g., Raynor, 2025) overlooks simpler forced-choice methods. Simple ranking, for example, forces trade-offs too.

Ranking and MaxDiff trade survey difficulty in different ways: ranking asks for one global sort (which becomes increasingly challenging as the list gets longer), whereas MaxDiff asks for many repeated micro-choices (which becomes repetitive and fatiguing). For short lists, the one-screen simple-sort approach is often the least wasteful option.

The decision: Use simple ranking.

Optional upgrade: If you're approaching 10 items and you're worried about cognitive load, you can create a group-and-rank task. This is where respondents first sort the items into buckets (e.g., high importance, medium importance, low importance) and then rank order the subset within each bucket. This can still be completed on just one or two screens.



Result: With majority noise, net win scores and HB utilities are practically perfectly correlated (r = 0.99995); only net win scores have interpretable, auditable units.

Figure 3: Even with heavy noise, net win scores match HB utilities (same profile, different units)

Free tools for MaxDiff design and analysis

When MaxDiff is the right choice, these browser-based tools can help. No installation. No cost. Data never leaves your machine. Access them at milkywaycj.github.io/maxdiff

- MaxDiff analyzer: Count-based analysis with bootstrapped confidence intervals.
- Design generator: Balanced design with proper item exposure and pairing.
- Also available: Windows executables (includes full Hierarchical Bayesian estimation for Situation 4 needs) and Python source code.

Simple reporting options: % ranked No. 1 (winner frequency); top-three frequency; average rank (if you truly need a full ordering signal).

Situation 2: You have a long list but only care about the winners

This is the most common real-world situation. Teams ask for "the full ranking," but what they act on is usually the top few.

Bonus myth #2: "To be rigorous, I need the full hierarchy of everything."

The reality: If the decision is "What do we build next?," measuring the middle of a long list often changes nothing. It just adds cost.

The decision: Use Top-N selection (Top 2/Top 3).

Why it works: Top-N is brutally efficient. One screen. Minimal fatigue. Transparent analysis. Easy to explain ("Here's what people picked").

Optional upgrade: Ask for Top-N and Bottom-N and report a net score. When you aggregate the data, you get most of the same decision signal without turning the survey into a tournament. And by reducing 10 or 12 survey screens to just one, that leaves you lots of room for important follow-up questions like, "Why is this an important factor for you?"

Situation 3: You have a long list and you genuinely need the full hierarchy

If the list is too long to rank and you truly need ordering across most items, MaxDiff can be justified on its own terms.

The decision: Use MaxDiff, but treat it as cognitive-load management, not magic.

MaxDiff also earns its keep here by providing cleaner discrimination in the middle of the list than a single full-list ranking.

First, the non-negotiable: use a decent design (reasonable exposures, balanced appearances, not absurdly sparse). Thin data with sophisticated math is still thin data.

Bonus myth #3: "Counting analysis is invalid. You must use HB."

Many teams treat a MaxDiff study as incomplete until it's run through a Hierarchical Bayes model. Counting summaries ("best" counts, "worst" counts, net scores) get dismissed as naive or amateurish. Some documentation states this explicitly: "Counts analysis is not valid, because it ignores the experimental design" (Displayr, n.d.).

But in standard, balanced commercial designs, the data say otherwise. To show this, we injected substantial noise into our simulation (two-thirds of the data was entirely random) and compared count-based net scores to HB utilities. The correlation between them was r = 0.99995 (or rounds to 1.0 at four decimal places). Figure 3 shows the comparison: the ordering and profile are the same; only the units differ.

When we inject substantial random responding, the count-based net scores and HB utilities remain nearly identical in ordering and profile (units differ; conclusions don't).

This pattern holds in practice. Across our five most recent MaxDiff studies for large technology companies, the correlation between count-based net scores and HB utilities ranged from r = 0.99 to r = 1.00.

This does not mean HB is never useful – see Situation 4 (below) – but for most prioritization studies in our field, counting analysis will give you the same answer with more transparency.

Situation 4: When you need modeled individual-level utilities

Most segmentation doesn't require individual-level modeling. If you're comparing results across known segments (demographics, roles, personas, customer tiers), just run the analysis separately by group. You can do that with any of the earlier approaches.

But if you need to discover new segments from the MaxDiff preference data itself (clustering people by their preference patterns rather than by observable characteristics), HB is the right tool. Individual-level count scores are noisy; HB's smoothing produces cleaner estimates and cleaner clusters.

HB is also the right choice for:

- TURF/reach optimization, where simulation quality depends on stable individual utilities.
- Personalization, where you're making predictions at the individual level.
- Sparse or unbalanced designs, where borrowing strength across respondents is doing real work.

Reporting after HB: Utilities, shares and the scenario problem

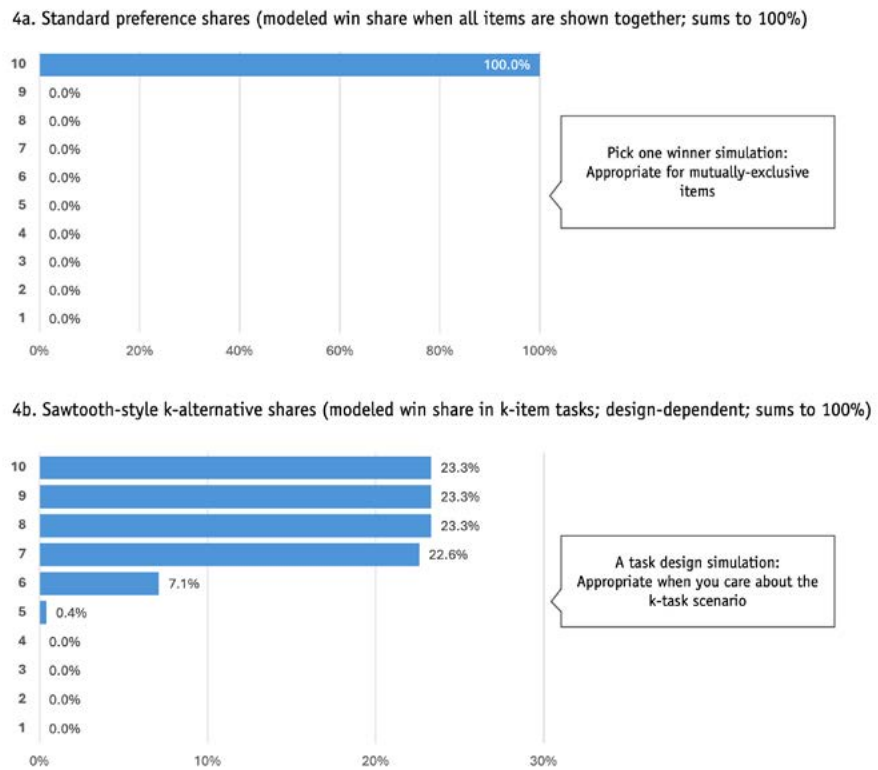
Even when using HB for the reasons above, you might prefer to report the aggregate level with a stacked counts chart and net scores (e.g., Figure 2) because they are transparent and easily understood.

Bonus myth #4: "You can use whatever output your platform defaults to."

This advice is common. A recent textbook recommends using "the default scores that your platform or code reports" and avoiding technical explanation (Chapman and Rodden, 2023). But that guidance suggests the defaults are interchangeable when they're not.

Three things often get blurred.

1. Utilities (HB outputs). Utilities (e.g., Figure 1a) are model parameters. They are not percentages. They are not "importance units." And "twice" doesn't mean much on that scale.
2. Standard preference shares (SoP). Standard shares (e.g., Figure 4a; note: same simulation/data as Figure 1a) typically answer a very



Data note: This is an X-ray test: synthetic 0%-noise data is used so the mechanics are visible. Both share outputs are computed from the HB utilities shown in Figure 1a (and from the same underlying data used to create Figure 2).

Result: These "shares" answer different questions and most prioritization decisions match neither scenario.

Figure 4: Preference shares are a transformation, and different defaults tell wildly different stories

specific question: If all items were shown at once and someone picked exactly one winner, what is the probability each item would win? That can be useful, but it's a scenario output, not value intensity. This scenario (pick exactly one from the full set) matches some real decisions (e.g., which brand will they buy?) but not others (e.g., which features matter most?), so check whether the modeled scenario fits your actual question.

3. K-alternative shares. K-alternative shares (e.g., Figure 4b; note: same simulation/data as Figures 1a and 4a) answer a different question: If items are shown in sets of size k (like the tasks), what is the probability each item wins those k-set contests?
   That can be appropriate only when your real decision environment resembles "choices from small rotating sets." In many prioritization contexts, it doesn't.

Looking at Figure 4, standard shares ("pick one from the full set") and k-alternative shares ("win within k-item tasks") can tell dramatically different stories from the same utilities. Use shares only when the modeled scenario matches the real decision.

Interpretation guardrails: If you show shares, put this on your charts: "Modeled top-choice probability for this scenario: [define scenario in plain English]."

Moving from reflex to deliberate choice

MaxDiff is a useful tool when it solves a real problem: extracting a win-tendency signal from long lists without forcing respondents to do a difficult full ranking. But MaxDiff itself is time-consuming. And it is not a measurement tool for value intensity. And it is not uniquely capable of producing the "who wins" signal teams actually use in practice.

It needn't be the default. We should always ask: What is the simplest method that gives us the answer we need? Then use MaxDiff when it's truly the simplest honest choice.

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How to properly reward customer satisfaction activities

| By Doug Berdie

abstract

Tying incentives to customer satisfaction scores invites bias and erodes data integrity. Shifting rewards to action-plan implementation refocuses teams on real experience improvements and yields more reliable, ROI-linked outcomes.

It is axiomatic that rewarding customer satisfaction score increases leads to gaming the system. Employees select samples of "known to have favorable opinion" customers to be surveyed and suppress "known to be negative" customers from the survey samples. Many retailers try to influence their CSI scores by cajoling customers in various ways to, "Give us all 5s!"

Psychologists are not surprised by this behavior. It is well acknowledged that humans are highly creative in getting what they want. And, if their compensation or other rewards are based on getting high scores, they will find ingenious and effective ways of doing so.

In addition to not getting real scores, the other problem with rewarding CSI scores is that it focuses everyone's attention on the wrong thing – a number rather than actual customer service.

There is a better way – one that has been shown to work:

- Use the CSI scores to identify the elements of the customer experience that need improvement.
- Create action plans that will lead to the desired improvements.
- Get buy-in on the action plans from the people who will need to implement them and from their managers.
- Give the implementers the support and tools they need to put the plan in motion.
- Have the implementers prove they undertook the plan as agreed to.
- Reward the plan's implementation.
- Use subsequent CSI measures to see if the plan implementation did make a difference.

The benefits of this method are:

- Employees focus on changing behavior and systems to better serve customers – not numbers.
- Employees are rewarded for doing what everyone agreed should make a difference (if it doesn't, it's not the implementors' sole fault; others agreed, too).
- Subsequent CSI numbers show whether certain actions do work. If they work, they can be continued and expanded upon and if they do not work they can be amended or dropped.
- No one cares about rigging the numbers, so numbers can be used as indicators that have real meaning.

We used this approach over the years with great success among a variety of past retail clients. In all cases, we saw more improvements in program-participating sites than in other sites. The numbers in the accompanying tables are typical of implementation results at a client with more than a thousand retail sites. (Participation was voluntary.)

ROI analyses showed that the sites that undertook the whole process (did

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the diagnostic measure, defined a plan mutually agreed to by the site and upper-level managers and implemented the plan) saw proportionately more of a sales increase (across their entire product base) and less employee turnover than did sites that did not do the entire process. The differences were huge (see tables).

And, not unexpectedly, participation led to higher customer satisfaction scores.

One of the keys to this program was that the individual retail site managers were compensated via incentives for implementing the action plan they had designed cooperatively with their managers. This rewarding of action differed from the usual practice of rewarding increased scores (which can deflect attention from action). And, as shown in the average CSI data, success in implementing action plans did, in fact, raise the scores that indicate ROI improvements.

It's always challenging to introduce new actions into businesses and much easier to just record and chase numbers.

Program Participation Effect on Sales

Sales Volume Change	Year Before Program	Year After Program	Sales Change
Fully Participating Sites	-8%	+12%	+20 pts
Other Sites	-6%	+6%	+12 pts

Program Participation Effect on Turnover

Employee Turnover	Avg. Turnover Year Before Program	Avg. Turnover Year After Program	Change
Fully Participating Sites	3.92	3.77	-4%
Other Sites	3.29	4.00	+22%

Program Participation Effect on CSI

CSI Change	Avg. CSI Year Before Program	Avg. CSI Year After Program	Change
Fully Participating Sites	38%	43%	+5 pts
Other Sites	35%	32%	-3 pts

But we should always remember that actions speak louder than CSI scores! And there is great satisfaction among both employees and management when they see that implemented action plans do in fact increase sales and employee satisfaction (as evidenced by decreased turnover). Following the program strategy described above can require a lot of effort but the results pay off!

THE HIDDEN HALF

Understanding consumers who aren't buying

BY KYLE RAWN AND LINDSAY ROBERTS

Non-buyers aren't noise – they're signal. Understanding who hasn't purchased and why lets researchers find ways to move beyond incremental gains and instead identify scalable pathways for innovation, acquisition and category expansion. It can shift research from measuring demand to actively creating it.

In the late 1990s and early 2000s, Blockbuster Video was the dominant competitor in the home video rental market, with a valuation at nearly $3 billion. Unfortunately, the company made a mistake in its market research: it paid attention only to buyers of its services. Focused on expanding its selection and increasing the number of brick-and-mortar stores it offered, Blockbuster overlooked the increasing complaints of consumers, such as the hassle of returning videos, wasteful trips when videos were all rented out and, of course, the way Blockbuster made a large portion of its money: late fees. Instead, it doubled down on its existing business model.[1]

However, a new company at the time, Netflix, began to listen to Blockbuster's non-buyers – specifically, its lapsed buyers. Incorporating a mail-based DVD rental service, before moving on to its more famous streaming service, Netflix was driving category innovation and growth by listening to those most influential for change: non-buyers of Blockbuster's services. Since then, Blockbuster filed for bankruptcy in 2010 and its final remaining store, a former franchise in Bend, Oregon, operates as a tourist destination as well as a local video rental store.[2]

Understanding them: who non-buyers are and why they are important

The fall of Blockbuster and the rise of Netflix is perhaps one of the starkest examples of overlooking non-buyers – consumers who do not buy an organization's products or services or don't buy them anymore. It may seem counterintuitive to conduct research on non-buyers; if a company wants to sell more of its product or service, why should it care about consumers who don't purchase the product or, more broadly, the category overall? But the non-buyer category is a largely untapped stream of information for your company to learn from – provided you make some methodological adjustments and practical considerations from a buyer-only-based research design.

Non-buyers of a category can be the key to unlocking the secrets behind increased conversion rates, a higher marketing and advertising ROI and greater profitability. For example, this type of research may uncover specific attitudes that define different groups within non-buyers and even help advertisers learn how to target these individualized groups in specific ways. When done correctly, the information the organization gains extends beyond the simple "Why wasn't our product purchased?" In a recent survey of non-buyers of a warranty company, the company not only received detailed answers to this question but also very nuanced information relating to experiences with its specific product, other products in its category, how consumers felt about the consideration or purchasing process and even the level of interest in hypothetical product lines among certain groups of non-buyers. Non-buyers may also be easier to reach, define, sample and collect data from, giving your company a leg up for a fraction of the cost.

Understanding non-buyers is essential for eliciting information you cannot receive from buyers, such as identifying barriers to adoption, expanding market size and uncovering untapped segments of potential consumers. By exploring the motivations, perceptions and unmet needs of non-buyers, researchers can generate insights that drive innovation and more comprehensive marketing strategies. This article will detail how to determine who non-buyers are, how they can be reached, what information can be gained from them and, ultimately, how to drive forward innovation within an organization.

HOW MANY THERE ARE: SIZING NON-BUYERS

The starting question in research with non-buyers should be: How many non-buyers are out there? This is one point where research on buyers and non-buyers differs heavily. In a buyer-based research design, there are multiple terms for various groups of buyers, such as "total addressable market" or "serviceable obtainable market."

Many fewer terms exist for non-buyers. To create non-buyer counterparts for existing terms, we suggest the "total nonaddressable market" or TNAM, which includes all non-buyers regardless of possibility for conversion and is defined by the following formula:

$$\text{TNAM} = \left(1 - \frac{\text{Category Buyers}}{\text{Category Relevant Population}}\right) * 100$$

However, just as with the difference between the "total addressable market" and the "serviceable obtainable market," not all possible non-buyers can be realistically converted; there are multiple groups who may or may not be interested in purchasing. The difference between all possible non-buyers and all possible non-convertible non-buyers can be referred to as the "convertible non-buyer market" or CNBM. Returning to the example of the warranty company, when examining the non-buyers of its category, people fell into one of four groups. Non-buyers were either: (1) not aware of the category; (2) aware of the category but had not considered purchasing; (3) had considered purchasing but did not purchase or (4) had, at one point in the past, purchased and canceled or lapsed.[3] With this example, if the warranty category had a market size of 10%, then the TNAM for the category would be 90%. However, the four groups above cannot easily be split into "all can be converted" or "all cannot be converted."

These terms are only a starting point for non-buyer research; the real value comes from understanding how much of the TNAM sits within the CNBM, as well as how much of the CNBM sits within each non-buyer group. By distinguishing between those who will never buy and those who simply have not yet bought, marketers can move from a crude headcount to a strategic map of where growth can realistically occur. Sizing non-buyers is not just a numerical exercise; it is the foundation for identifying and focusing on the various groups of non-buyers that offer genuine potential to expand a category.

WHAT THEY REPRESENT: ADDRESSING NON-BUYER ASSUMPTIONS

The benefits of non-buyer research are not instantly attainable; there are some methodological challenges to overcome. First, do not clump together all non-buyers just because they are all non-buyers. Just as buyers are not all the same, neither are non-buyers all the same. There are many reasons a person could be in the TNAM. One non-buyer could have considered purchasing a product but decided against it based on one reason. Another non-buyer could have done the same but for an opposite reason. A third non-buyer could have never considered purchasing that product. A fourth might not even know the category exists. Understanding how to achieve the end goals of non-buyer research also means understanding how to ask certain questions of certain non-buyers. People who have never owned any type of flowerpot are not going to give rich, quality information on what they think about a specific company's flowerpot. Therefore, it is necessary to match the correct type of non-buyer (e.g., considered, never considered, never purchased, etc.) to the correct type of nuanced information that is to be gathered.

An additional methodological concern to overcome is to distinguish non-buyers who cannot purchase versus might not purchase, further carving out who sits within your CNBM. In nearly every category, there exists this dichotomy: a barrier to access or a barrier to purchase. To use an oversimplified explanation, if a product costs more than what people can afford, it's not that there is a certain number of non-buyers because brand recognition is low or marketing efforts are misaligned; it's that there is a certain number of non-buyers because they cannot reasonably or easily afford the product. The end research goals determine which non-buyers should be targeted, but until certain assumptions are highlighted and explored, the true context of the research findings will never be fully understood.

The easiest assumption to fall into can be the assumption of what non-buyers might know or not know. Because the non-buyer population is so large, two things can simultaneously exist in a database: some respondents know much more than the advertiser thought and some respondents know much less. For instance, depending on the broader group to which a given respondent belongs, their information about a category differs. With the previous flowerpot example, there also exists the opposite; someone who knows all about the category. There could be a respondent who might be dedicated to another company in a category, has been a customer with it for decades and knows the category inside and out. There could be a non-buyer who was in the category but, due to a bad experience, is no longer.

Take, as an illustration, the non-buyer research project for a home warranty company. The company was interested in learning more about what its non-buyer TNAM did to manage repairs, replacements and maintenance around the house. The study used a three-phase process: qualitative interviews; a pilot survey to size the non-buyer market and glean the most important issues; and a main survey to explore attitudinal, behavioral, demographic and transactional factors. Each phase revealed critical information that was previously unknown, to be further investigated in the next phase. One crucial piece of information was that consumers were woefully confused about the category, the plan, the coverage and other aspects of home warranty, which would have caused respondents' perceptions of survey questions to vary widely, rendering answers to questions useless, unrepresentative and ambiguous.

Researchers may also tend to assume that non-buyers are overly negative, causing opinions or data to be inappropriately biased and thus not worthwhile. However, this could not be further from the truth.

Researchers may also tend to assume that non-buyers are overly negative, causing opinions or data to be inappropriately biased and thus not worthwhile. However, this could not be further from the truth.[4] Not all non-buyers are lapsed buyers. Even if they are a lapsed buyer, not all have a negative attitude or have had a negative experience causing them to leave the category. Some buyers are cutting out costs they deem unnecessary, some may no longer have a need for a product or service, or some buyers may have just found an alternative. This is exactly the type of useful information that non-buyers, especially those that have lapsed, can offer. Can buyers be reconverted? How might that happen? What are they doing instead of purchasing your product or service? Some may be lost from the category permanently; however, that does not mean their information cannot be leveraged to boost retention rates, inform new product offerings or target similar categories where conversion might be possible. In some situations, a loss can inform a gain.

Different companies in different categories will find different answers to the above questions and different subtleties and nuances in their assumptions about non-buyers. In fact, one of the benefits of non-buyer research is identifying the answers and assumptions for a specific category and/or a specific company. However, across the board, falling into these assumptions can negatively impact the quality of data received, the specificity of conclusions made and the accuracy of conclusions provided to a client. Even more than normal, non-buyer projects should be approached with an especially open mind, acknowledging any assumptions being made and admitting that some pieces of information being provided are, in fact, assumptions.

How to reach them: Sampling non-buyers

One immediate use for TNAM is in the estimation of fielding costs and timelines. For most categories, it is significantly easier, and cheaper, to reach and sample non-buyers. In the most recent example, where the TNAM is 90%, imagine how different fielding efforts, costs and time spent could be with an incidence rate of 90% versus 10%. More specifically, some benefits of this type of research include:

Adjusting the sampling method. Instead of sampling from niche panels that only have access to a category's buyers, cheaper panels or broader sampling methods could be instituted.

Lowering fielding costs. Additionally, an incidence rate of 90% would drastically reduce fielding costs, meaning that for the same amount, data from 3x, 4x or even 5x the amount of respondents could be obtained. As ESOMAR notes, incidence rate is one of the primary determinants of fielding cost with online panels and drastically shifting the incidence rate can reduce the overall cost by several fold.[5]

Reducing fielding time. An easier-to-reach sample also means a shorter field time, an easier qualifying process and more schedule flexibility.

By broadening the sampling methods, reducing the costs involved and reducing time spent fielding, the strategic value of the study can be substantially increased, permitting the delivery of reports both under budget and well ahead of deadlines.

Understanding them: Researching non-buyers

After sizing the non-buyer market, acknowledging key assumptions and developing a sampling plan, the next step is to start the research process. A key part of non-buyer research is ensuring common understanding between customer groups. Each non-buyer may have different levels of knowledge and familiarity with a category. To ensure equal understanding, offer definitions of complex terms throughout your survey. Comprehension and category confusion are directly relevant to the validity of consumer surveys.[6] As mentioned earlier, no assumptions should be made concerning what non-buyers know or do not know. For the majority of categories, there are non-buyers who may not even be aware of the category, so presenting definitions of terms is imperative to ensure that respondents are answering about the correct thing with the correct level of understanding. This may also mean incorporating more knowledge checks throughout a screener or a survey. Luckily, because the sampling of non-buyers is cheaper and quicker, marketers can afford to add in more quality or knowledge checks to ensure that data of the highest quality is being collected.

A non-buyer project is a time to thoroughly explore the unique viewpoints of each of the different groups of non-buyers that may exist in a category. Whereas everyone shares an experience in buyer research (e.g., purchasing a category), not all non-buyers can be lumped together in the same way. There may be specific groups of non-buyers from whom certain pieces of information should be obtained. Here is where the earlier phases of research in a multistep research process come to fruition. Through qualitative interviews and, potentially, a pilot survey, the considerations, concerns and criticisms from specific non-buyer groups can be illuminated. For example, those who considered the category can be asked why they did so and why they did not purchase, whereas those who were aware but did not consider purchasing can be asked what might lead them to consider purchasing in the future. This is the true advantage to non-buyers research: nuanced insights at each incremental stage of the consideration process.

Communicating about them: reporting the results from non-buyers

In buyer-focused marketing research, it is easy to "bin" your respondents when reporting the full results. In the case of a segmentation study, results are broken out by segment. However, it is more ambiguous in non-buyer research. Is it done by non-buyer classification? What about by specific demographics? Maybe by running a cluster analysis? There's no set standard for this practice, which can be both a limitation and an advantage. Moreover, because non-buyer research is rare, the researcher can set the standard; be creative and exploratory with it! And always, when in doubt, provide more information broken out by more groups instead of fewer. Reporting an uninteresting finding does little harm. Failing to report an interesting one can cost the client real opportunity – and the research firm future work.

Building on this idea, be prepared to offer several iterations or cuts of the data. Get groups together from both the research team and various client stakeholders. Start proposing cuts of the data, even if the initial assumption is that they may not be fruitful. See what happens. Build in extra time. Try new analyses. Think about groups differently. Confront your assumptions. Once you discover a new or interesting finding, explore it. For each new finding, make sure the overall context of the finding is well understood before it is reported. Previous research is rife with findings that have been misinterpreted and misunderstood but later become industry-wide assumptions based upon tenuous evidence.

One perfect example of this is the New Coke fiasco of the mid-1980s.[7] In blind taste tests, a new formulation of Coca-Cola was preferred by consumers. However, this research missed the context of the finding. In quick, sipping taste tests, this new Coke was preferred, but does a taste test convert to full-time habits? Will consumers prefer this product day in and day out when it is the only option? Will everyone collectively be okay with replacing an iconic beverage that is so deeply ingrained in American culture? As history shows, the answer to these questions was a resounding no.[8] The insight failed not because the research was wrong but because these researchers missed the deeper context of the finding and instead took it at face value. Anyone can present or deliver results based on two points of data. Whereas you as the researcher understand the why, how and for whom of those two points of data.

Take the following finding: Consumers who are non-buyers of an extended-warranty product both (a) do not spend money on maintenance and (b) have (subjectively) high costs for repairs and/or replacements of a given product that could be covered under said product. On the surface, the takeaway is "Respondents don't spend money on maintenance but they overspend on repair and replacement, so we should offer a product that more thoroughly covers these costs." This is not a bad takeaway but there may be a better one. Let's say it's an established industry fact, not an assumption, that maintenance of some end-product leads to cheaper repairs/replacements or prolonged life of the item. Instead, a better takeaway may be to offer a cheaper warranty product that focuses on preventative maintenance of the end product, while still offering a discount for repair/replacement services if necessary.

For each new finding, make sure the overall context of the finding is well understood before it is reported. Previous research is rife with findings that have been misinterpreted and misunderstood but later become industry-wide assumptions based upon tenuous evidence.

APPLYING THE FINDINGS FROM NON-BUYERS

In addition to fully understanding findings before reporting them, it is also imperative to temper expectations when it comes to applying them. The audience to whom the research is being presented may not be researchers, much less have experience with non-buyer research. Just as it's important not to be too pessimistic about the type and quality of data that could be received from non-buyers, it is just as important not to be overly optimistic when discussing findings. No matter how well-designed and well-conducted a non-buyer research project is, no organization will ever be able to convert all its non-buyers. Setting realistic expectations upfront keeps everyone aligned from the start.

The first kind of inference that critical stakeholders are often interested in is conversion pathways. Marketers might ask: What are some realistic barriers we can remove to increase access? Are there more ambitious changes that would meaningfully increase conversion? Alternatively, on the negative side: What are some things inherent to the category that will always fight conversion? Cross-department groups are highly recommended for this step. Marketing may have suggestions that finance does not agree with. Conversely, IT and finance together might develop a more user-friendly web interface. Just as the research team needs to fully understand the context of the research findings, the broader organization needs to fully understand the implications of the inferences from every angle.

Once potential conversion pathways have been highlighted, these established cross-functional or cross-departmental groups can determine what success looks like. Is it 5% conversion? 10%? Recouping the cost of the research? Does success look the same a year from now as it does today? And is success defined by who converts or simply that conversion happens at all? Each organization will answer these questions differently and that is precisely the point: The value of non-buyer research is not confined to a single metric. Rather, it creates a shared framework for thinking about growth – one that forces teams to confront trade-offs, align around priorities and be explicit about what they hope to change. By thinking more deeply about what the end goals of the research should be, you are no longer just interpreting data from non-buyers; you are shaping how your organization understands, pursues and measures opportunity at the category level.

UNLOCKING NEW PATHWAYS TO GROWTH

In conclusion, non-buyer research is not just an afterthought or a cheap alternative to standard approaches; it is the missing link that holds the key to developing new strategies, revealing demands for new products and unlocking new pathways to growth. The immediate gains are clear: knowledge of who is not purchasing, considering or aware; larger and easier-to-reach samples; and lower fielding costs. If done correctly, these immediate benefits can translate into lasting insights. Non-buyers can highlight why people are not purchasing and what it would take for them to consider, convert or return.

Indeed, this is exactly what Netflix, with a $347 billion valuation, did. It noted the pain of late fees, the desire for a more convenient way to return video rentals and revolutionized how people consumed media, transforming – and effectively ending – a category forever. By listening to the complaints of consumers leaving the category, the experiences of lapsed buyers and understanding the entire TNAM of video rental consumers, Netflix has become nearly 115x more valuable than a company that seemingly had the world gripped by its late fees in the early 2000s.

Non-buyer research is the "glass half-full" approach to market research and can reshape how organizations budget, prioritize and assess growth. It reveals not the limits of a category but the opportunities of a category. Instead of considering only the opinions of buyers who have said yes to a product or service, this research acknowledges those who are leftover: the non-buyers, whose "not yet" or "I've never considered" is the catalyst that propels your organization toward its next horizon.

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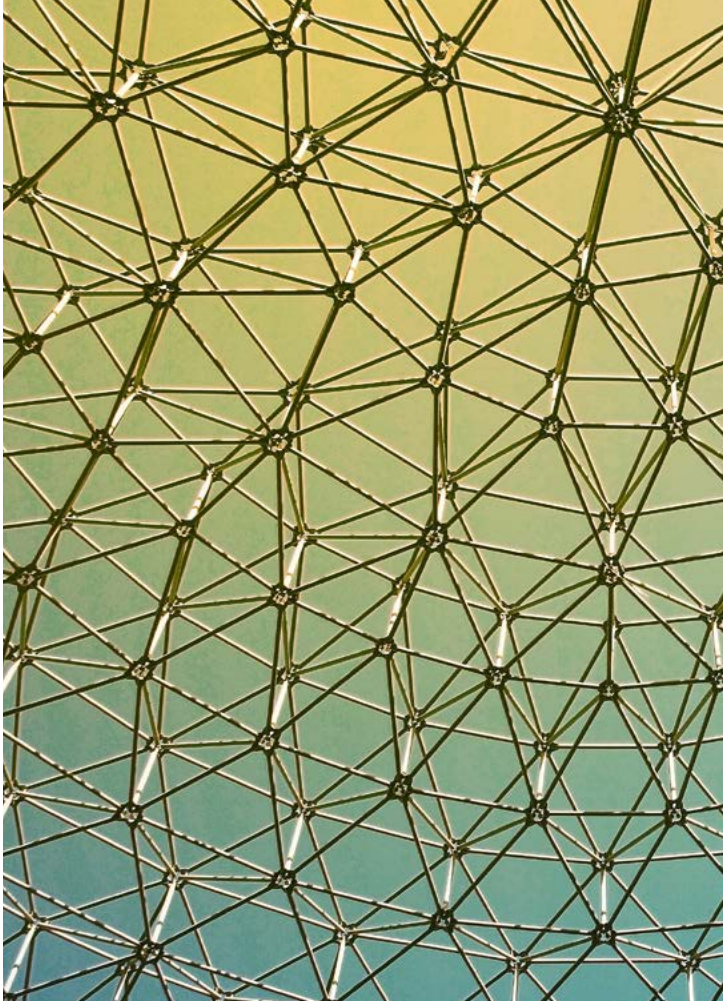
segmentation research

Upcycled segmentation

A 5-step framework for faster innovation decisions

| By Eric Tayce



abstract

Early-stage innovation stalls not from a lack of ideas but from "precision paralysis," where demands for rigor slow decision-making. Upcycled segmentation reframes existing data as a fast, decision-ready asset. This approach enables teams to place smarter bets sooner, reserving full-scale research for moments when risk, scope and investment truly require it.

Front-end product innovation isn't hard because teams lack creativity; it's hard because the situation lacks clarity. After all, it's called a "fuzzy" front end because it lacks definition.

In the earliest stages of product development, when every direction feels possible, segmentation is often pulled in as the compass that turns ambiguity into forward progress. Segmentation feels like progress because it provides direction on who they're building for and why those people choose (or don't choose) a solution. I think segmentation is the right tool, but the challenge I often see is that my clients' stakeholders want the speed and flexibility of an entrepreneurial start-up, right alongside a level of analytical rigor that's only possible with large samples, tight validation and minimal ambiguity. This incongruous juxtaposition can push insights professionals into a state of "precision paralysis," where the project requirements themselves create a bottleneck in the process. The way out? I propose it's through a segmentation approach that embraces the idea that, in some cases, "good enough" can actually be better than perfection.

Segmentation has long been a gold standard technique in the marketing research world and for good reason. Targeting groups of consumers with similar needs has been a cornerstone of marketing strategy since it was introduced in 1956. It has stuck around because it worked and it still does. However, the mistake is in thinking this gold standard cannot change. "Real" segmentations don't necessarily need a blank slate, edgy surveys, big samples or complex clustering algorithms. That's because when we insist on finding a 100% fresh perspective, we ignore the fact that organizations are already sitting on high-value consumer evidence in the form of CRM logs, UX transcripts, customer service records, digital analytics and past U&A work. What teams

need is a way to synthesize existing, high-signal data into actionable insights. I call it upcycled segmentation.

Upcycled segmentation is a way to cut the long cycle times without being forced to make decisions while flying blind. Think of it as creating purpose-built segmentation hypotheses assembled from existing high-signal data. When done right, they give innovation teams the ability to pressure-test ideas now instead of next quarter. The goal here isn't to replace more rigorous approaches but to create decision-ready guardrails that are clear enough to guide choices in early-stage innovation. From there, when capital, scope or risk increases, you graduate to a gold-standard approach but with sharper hypotheses and better screeners because you've already learned what truly matters.

The five-step upcycled framework

To be clear, upcycled segmentation isn't a "lite" version of segmentation based on primary research data and a clustering algorithm; instead, it is a purpose-built approach that delivers targeted strategic direction at the speed required of successful innovation. An upcycled segmentation is provisional in the sense that it is a working hypothesis designed to get your team out of the lab and into the market. Implementing this kind of approach requires shifting the workflow from data collection (i.e., the answer is out there and I need to find it) to data architecture (i.e., the answer is in here and I need to retrieve it). Following these steps will get you a little farther down the path toward reaching that reality.

Step 1: The decision audit

The first move is to work backwards from the leadership team. Before you start exploring the data in hand, ask: "If we knew [X] about the consumer, would we actually change the product or the marketing?" The objective here is to segment the decisions available to the innovation team, not just the people in the database. In practice, that means if a data point doesn't have the power to pivot

Table 1

Data Point	Status	The "So what?" (Actionability)
The Friction Point (e.g., 60% of users drop off at the credit card entry screen).	KEEP	Action: The innovation team prioritizes one-click checkout or Apple Pay integration.
The Mental Model (e.g., users view our service as a “luxury treat” rather than a “daily utility”).	KEEP	Action: Marketing pivots from "efficiency" messaging to "self-reward" or "indulgence."
The Switching Trigger (e.g., users only look for a new provider when their current contract expires).	KEEP	Action: Sales focuses on "contract buyout" offers rather than general feature comparisons.
Generic Demographics (e.g., our target is HHI $75k+, ages 35-50).	DEPRIORITIZE	Action: None. This describes a person's mailbox, not their motivation. It offers no guidance on product design.
Vague Aspirations (e.g., customers say they “value quality and transparency”).	REMOVE	Action: None. Everyone values quality; it is a table-stakes insight that doesn't differentiate a segment.
Historical Trivia (e.g., average brand tenure is 3.2 years).	REMOVE	Action: None. This is a descriptive statistic (archiving), not a predictive lever (architecting).

a strategy, it doesn't belong in your provisional segment. Table 1 provides a few examples of when you may want to keep, deprioritize or remove data points.

Step 2: The data scavenger hunt

The focus of this step is on exploring internal silos to locate high-signal data fragments that already exist but have never been synthesized. You are hunting for evidence of consumer behaviors or decision points that could bring new insight if connected to your larger data ecosystem. When gathering and analyzing these disparate data points, you will begin to see outlines of potential segment schemes that may support your decision-making – all without ever launching a new survey. Here are three areas where we tend to find the most valuable (i.e., drives a decision) data fragments:

Sales/customer experience: Analyze the most frequent cancellation codes, reasons for return or recurring complaints logged in help-desk tickets. These are direct indicators of consumer friction.

Research and development: Review the performance trade-offs made during the initial prototyping phase. Knowing which features were stripped out reveals what the business believes it can deliver and what it believes about its customers' priorities.

Digital marketing: Audit recent A/B testing results to see which value propositions or creative hooks yielded the highest click-through rates. These clicks are strong evidence of what motivates your audience to act.

Step 3: Pattern synthesis (the AI/human mix)

Once you have gathered your fragments, your goal is to find the themes that tie them all together. Before doing this, I apply the 3 Cs framework that I outlined in a previous Quirk's article (https://bit.ly/4t5F1gL). This framework ensures your data COVERS the entire topic, is CURATED to remove noise and is given the right CONTEXT to execute the analysis. Once data are properly prepared, you can leverage AI to run the analysis (and I wholeheartedly recommend you do) but keeping a human in the loop is absolutely critical. Large language models, when analyzing multiple sources of information, can inject many more sources of error than simple hallucinations. To guard against this, I think it's critical for a subject-matter expert to direct the entire analysis and build on AI output to deliver the highest-fidelity recommendations.

Step 4: The naming game

If you feel this next suggestion is ridiculously simple, you may be underestimating the power of your own marketing: Start choosing labels that clearly describe the barrier the consumer faces or the motivation that is driving their decisions. Aiming for names like Friction-Averse Optimizer ensures developers know exactly what to do by removing every unnecessary click from the user interface.

Catchy, cute names that communicate limited information will not create buy-in among stakeholders looking to take action. That's because labels like Carefree Cathy and Fed-Up Fred offer no utility to a product team and they have little room to adjust as segments evolve.

Table 2

	Segmentation w/Upcycled Data	Segmentation w/Primary Data
Speed	Dependent on data availability	Longer timelines
Investment	Moderate setup, low to iterate	Higher
Scope	Broad and shallow	Narrow and deep
Data	Fragmented, evolving	Complete, aging
Precision	Provisional/directional	Rigorous/precise

Step 5: The micro-validation loop

Although I've been trumpeting the value of using existing data, I want to insert a caveat. Before you put your reputation behind an upcycled segmentation solution, do yourself a favor and run the gut check. This could be as simple as a 48-hour "qualitative at scale" exploration among a small, targeted group of consumers. The goal is part validation (pressure-test the logic) and part illumination (support internal communication). If the segments hold water in these customer conversations, they are ready to be used as guardrails in the innovation lab.

While upcycling data allows you to move much quicker, I am not suggesting it is an excuse to abandon rigor. Synthesizing disparate datasets into a new whole requires a structure that survives real-world pressure. Here are three stumbling blocks that can limit the value of provisional segmentations or even turn them into liabilities.

The recency bias trap: In the quest for speed, teams often overweight the newest data point because it feels most relevant. If a dozen qualitative interviews from last week contradict two years of behavioral CRM logs, the interviews shouldn't automatically win the day. Upcycling requires a weighted mind-set. Fresh qualitative data should explain the "why" but not if it derails the "what" established by your larger behavioral datasets.

The inertia risk: Insights leads need to ensure provisional segments are understood as a bridge rather than a semipermanent residence. When an upcycled segmentation is successful and easy to use, stakeholders may attempt to bake it into long-term corporate strategy to avoid the cost of a primary study. This creates "innovation debt" by prioritizing cheaper, more immediate convenience over deep, breakthrough insight. Sometimes you really do need to do the work.

The logic gap: Upcycled is not the equivalent of untested. Just because the data already exists doesn't mean all the connections are known or even self-evident. Every segment needs a defensible thread of logic connecting the behavioral anchor (what they did) to the attitudinal overlay (why they did it). If you cannot observe and explain the connective tissue between a customer's help-desk ticket and their last purchase, your segment is likely just data noise that is being mistaken for a signal.

Choosing an approach, of course, should be based on a clear understanding of what each methodology can and cannot do. Table 2 summarizes a few of the strategic trade-offs between these approaches, to help you determine which tool is best suited for your specific needs and constraints.

The graduation path: When to spend the big bucks

Upcycled segmentation gives you the direction you need to start the journey but it doesn't always provide the exact coordinates for finding the destination you might seek. Once you've determined where you're headed, it's time to transition from a provisional upcycled model to a gold-standard primary study. Knowing when to make that shift usually involves three factors: capital, scope and risk. If your innovation requires a massive capital expenditure, a global launch across diverse cultural markets, organizational restructure or a brand-altering pivot that could alienate your core base, then it is time to invest in a primary study with the enterprise-level precision a CFO might demand.

A benefit of an upcycled approach is that you begin your gold-standard project with a validated set of hypotheses, refined screeners and a clear understanding of the behavioral anchors that truly matter. Pre-verified variables ensure respondents align with the most critical sample characteristics, while the existing data foundation enables a condensed survey design focused exclusively on deep attitudinal probing. Plus, starting with a "Version 1.0" model allows the project to prioritize stress-testing established hypotheses instead of capturing potentially spurious information, enabling the innovation team to more quickly move from raw discovery to validated strategic direction.

An important note here is that finding a research partner who can execute this "architecture-first" approach requires a shift in vetting criteria. Traditional agencies excel at managing large-scale data collection but upcycling requires a partner who functions more like a combination of a strategic consultant and a data engineer. Here are five areas to consider in your vetting process:

- Data synthesis: Ability to merge disparate internal silos and legacy studies into a unified strategic narrative.
- Augmented intelligence: Subject-matter experts leverage AI-driven tools to maximize speed and minimize drift.
- Segment validation: Toolkit that includes agile qualitative and quantitative techniques for rapid pressure-testing.
- Strategic consulting: Process to map your available innovation levers before recommending a specific data collection methodology.
- Iterative design: Understand how to build upon your upcycled findings rather than insisting on a "clean slate" primary study.

Place smarter bets

Precision paralysis during the front end of innovation tends to fade once teams think critically about what segmentation needs to do at this stage. In early stages, the job is to create decision-ready guardrails that help product teams place smarter bets, learn faster and stay aligned as the work evolves. Upcycled segmentation offers a practical path to do that by treating existing customer evidence as a strategic asset. When you build segments this way, you make progress without pretending the first model is the final one. Then, when the stakes rise, you can invest in a primary study with sharper hypotheses and stronger screeners because you already have the groundwork laid. The result is a segmentation approach that keeps innovation moving at the right pace and makes the later rigor more targeted, more defensible and more worth the cost.

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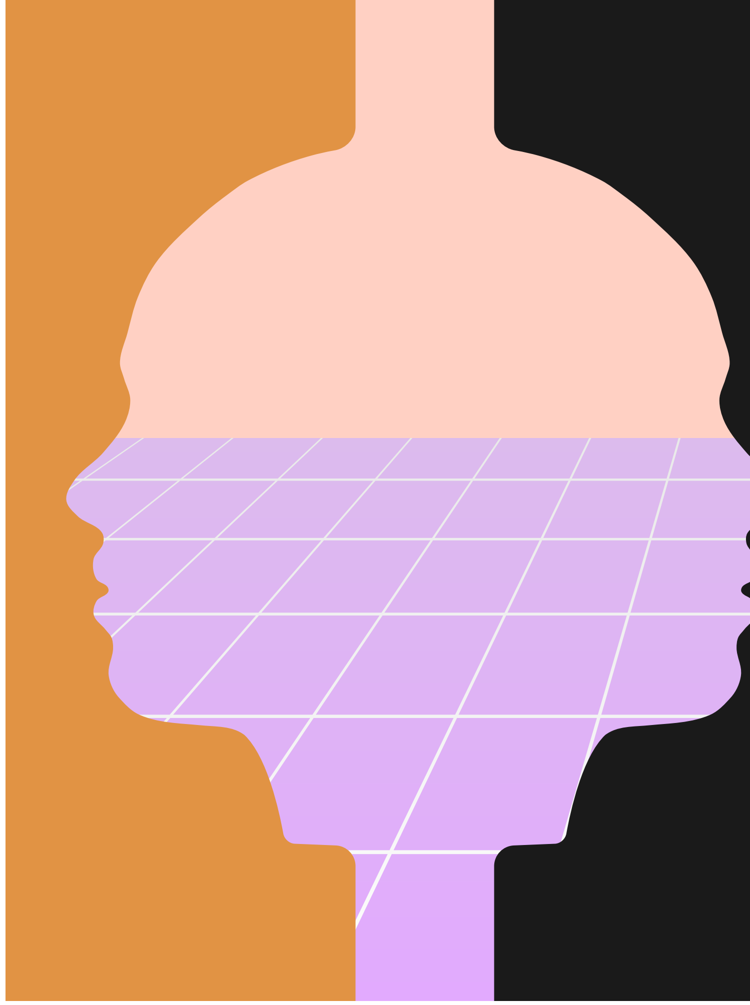
••• consumer psychology

More than meets the I

Why marketing research must rethink identity

| By David Intrator



abstract

Consumers do not act from a single, stable identity; a distinct "consumer self" emerges in marketplace contexts, often contradicting stated values. Recognizing these shifting identity modes enables researchers to better interpret behavior and design more predictive, context-aware studies.

Modern marketing often begins with an appealing simplification: consumers are just people. Their choices, the logic goes, follow naturally from who they really are, as revealed by their culture, politics, values and social affiliations.

This assumption is not wrong but it is profoundly incomplete.

Contemporary psychology, sociology and philosophy converge on a similar insight: the human self is neither stable nor unified. Rather, it is plural, shifting and deeply contextual. Within this multiplicity lies a distinct mode of being that emerges specifically in the marketplace.

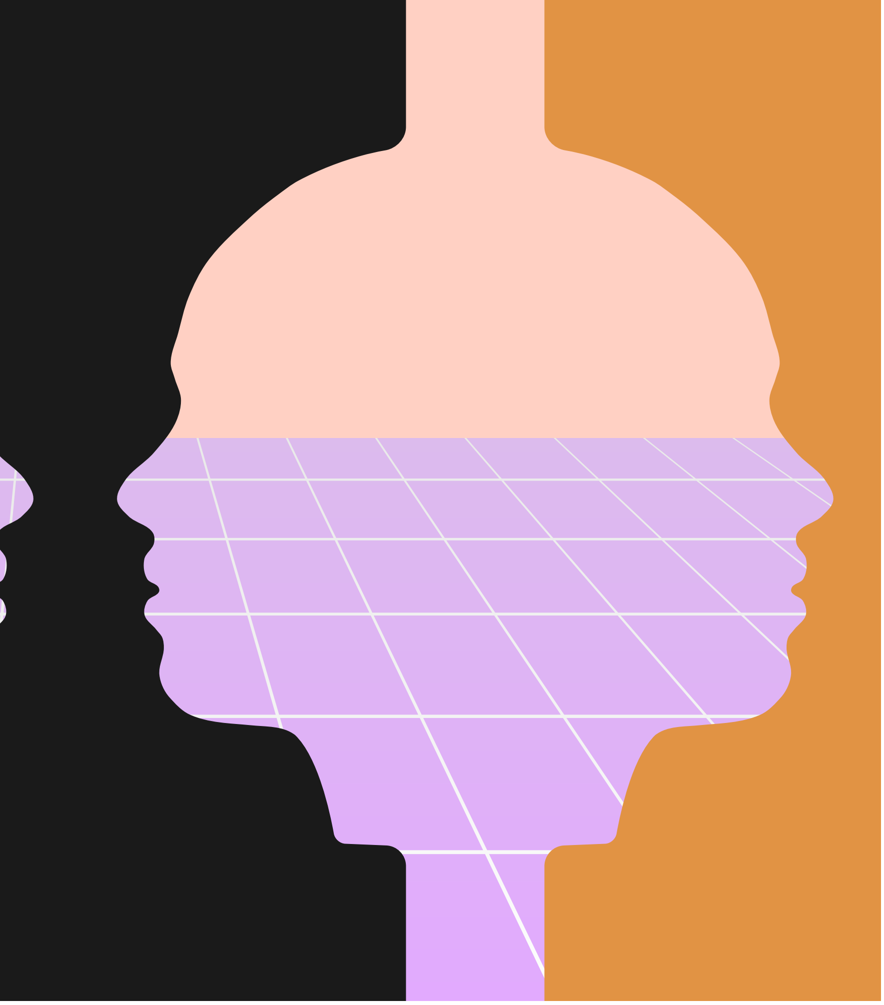
We can call it the consumer self, which both intersects with and diverges from one's cultural and social identity. Recognizing this distinction is not simply an academic exercise. It is essential for how market researchers interpret behavior, design studies and advise brands.

The self as a problematic concept

Before distinguishing cultural and consumer selves, it is useful to acknowledge the instability of the self itself. Western thought inherited from Enlightenment rationalism the idea that the self is coherent, continuous and knowable. Yet across the 20th and 21st centuries, that assumption has been steadily dismantled.

William James described the self as a collection of "I's" and "mes," highlighting its inherent multiplicity. Narrative psychologists later emphasized that identity is an ongoing story rather than a fixed essence. Neuroscientific research adds further complexity: there is no "self region" in the brain, only distributed networks that produce the experience of unity.

Philosophers have reached similar conclusions. From Hume's bundle theory to Derrida's notion of identity as constructed through language, thinkers have long questioned the solidity of the self. Georg Simmel noted that modern life proliferates roles to the point where a coherent identity



becomes difficult to maintain. More recently, Byung-Chul Han argues that late modernity produces selves shaped by performance, visibility and affect.

For market research, the implication is clear: If the self is inherently multiple, then consumer behavior cannot be reduced to a single identity framework. People do not bring the same self to the voting booth, the dinner table and the online checkout page.

What we mean by the cultural self

The cultural self is shaped by the symbolic and normative systems in which we live: family traditions, moral codes, national identities, religious narratives and political commitments. This is the part of us that asks, What kind of person should I be? or What does my community expect of me?

Anthropologist Clifford Geertz famously described culture as a "web of significance." The cultural self is the identity entangled in that web. It operates with a logic of meaning, obligation and continuity. It tends to change slowly and resists quick disruption.

Not surprisingly, much of modern market research attempts to map consumption to this self, through demographics, values segmentation, generational cohorts and political typologies. But this mapping is inherently limited, because the cultural self does not fully govern behavior in marketplace environments.

The consumer self: a distinct mode of being

The consumer self emerges when individuals enter the economic sphere. It is a distinct identity mode activated by the unique conditions of consumption: choice abundance; aspirational messaging; low accountability; identity experimentation without social sanction; and hyper-personalized targeting.

In this identity mode, people frequently behave in ways that contradict their stated values. The ethical environmentalist, for example, who buys fast fashion; the budget-conscious traditionalist who indulges in premium electronics; the rational skeptic who purchases wellness crystals.

These contradictions are not hypocrisy. They are evidence of multiple selves.

The consumer self operates according to a different logic centered on immediacy, desire, narrative escape, reward and symbolic expression. As Baudrillard argued, consumption is not simply the acquisition of objects but the acquisition of signs that support temporary versions of the self.

How the marketplace constructs the consumer self

The consumer self does not simply appear. It is actively cultivated. Retail environments, digital interfaces, algorithmic feeds, loyalty programs, influencer ecosystems and brand narratives all work to activate a version of the self oriented toward desire and self-expression. They reduce the influence of cultural expectations and amplify momentary impulses, fantasies and aspirations.

Sociologist Zygmunt Bauman noted that in consumer culture, identity is increasingly tied to what one can buy or, just as significant, imagine buying. The marketplace thus becomes a site for identity play, experimentation and provisional self-fashioning.

The result is a self that can be more adventurous, more indulgent, more transgressive or simply more fragmented than its cultural counterpart.

Why does this distinction matter for market research? Recognizing the difference between cultural and consumer selves reshapes how insight is generated.

Stated values do not reliably predict behavior. People often answer from the cultural self but act from the consumer self. The intention-behavior gap reflects shifts between identity states.

Segmentation must reflect multiple identity modes. Traditional segmentation cannot fully explain marketplace behavior. Frameworks must include situational, emotional and aspirational identities.

Context matters as much as identity. Stress, time pressure, solitude, social presence and late-night browsing all activate different versions of the self and different behaviors.

Contradictions are not flaws – they are insights. The gap between cultural values and consumer choices reveals tensions, aspirations and compensatory needs.

Consumption rituals increasingly replace cultural rituals. Unboxing practices, curated playlists, skincare routines and signature coffee orders now serve as micro-rituals of identity.

Toward a more nuanced understanding of the consumer

If individuals move among multiple selves – cultural, familial, professional, social and consumer – then the task of market research is not to collapse them into one coherent identity but to understand how they transition between these selves.

This means asking:

- What triggers the consumer self?
- What emotional states sustain it?
- Which cultural norms constrain or liberate it?
- What frictions reveal unmet needs or desires?
- How do multiple selves coexist or contradict each other?

When researchers acknowledge the plurality of selves, they move beyond simplistic models and toward a richer, more accurate understanding of behavior. The marketplace is not merely a reflection of culture; it is a primary arena in which identities are tested, stretched, contradicted and reinvented. And the consumer self, a self that is fluid, fragmented and symbolically charged, is at the center of that dynamic.

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ABOUT THE AUTHOR

David Intrator is chief meaning officer at RTi Research. He has over 30 years of experience working on both the creative and strategic sides of the communications business and now helps RTi turn data into meaningful narratives that can be communicated simply and acted upon effectively.

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One thing doesn't always lead to another

Why what consumers say rarely explains what they do

| By William Cimarosa

abstract

William Cimarosa offers a framework for bridging the divide between stated preference and behavioral reality in innovation testing.

The concept tested well. The appeal scores were strong. Consumers said they wanted it, said they would use it, said the features mattered to them. So the organization invested. Development budgets were approved. Timelines were set. Teams were assembled. And then, somewhere between the research debrief and the market launch, something went wrong.

The product underperformed. Adoption lagged. Engagement never materialized the way the data predicted it would. And now, months or years later, a different kind of research begins: the postmortem. The forensic work of understanding why something that tested so well performed so poorly. This is expensive work. It is slow. And it almost always arrives at the same uncomfortable conclusion: Consumers said they wanted one thing but did something else entirely.

By the time you discover the gap between what consumers say and what they actually do, the damage is already done. The budget has been spent. The opportunity cost has compounded. The original research, which seemed so clear at the time, now looks like a map that led somewhere other than where you needed to go.

This is not a flaw in consumers. They are not unreliable witnesses to their own behavior. They are, more accurately, incomplete ones. The machinery of human motivation runs deeper than conscious awareness can access. People do not always know why they do what they do. This is not a failure of honesty. It is a feature of human psychology (and a reason researchers should be deeply suspicious of synthetic response data).

The question, then, is what we do about it.

The limits of asking directly

Traditional concept testing relies heavily on stated preference. We show consumers an idea and ask them to evaluate it. Do you like this? Would you

use this? How important is this feature? The logic feels sound. If we want to know what people think, we should ask them.

But importance, it turns out, is not something consumers can accurately self-report. Decades of behavioral science have demonstrated that the attitudes people claim drive their decisions often diverge from the attitudes that actually predict their behavior. A consumer might tell you that "having fun" is the most important reason they engage with a product category. The behavioral data might reveal that "feeling like an expert" is what actually correlates with engagement frequency. Both are true in their own way. But only one helps you build something people will use.

This is the derived importance gap. It is the distance between what consumers say matters and what the data shows actually predicts behavior. And it is far wider than most innovation processes acknowledge.

Closing the gap through behavioral prediction

The alternative to asking consumers what matters is to calculate what matters. But this calculation does not happen in a vacuum. It requires a foundational study, conducted before any innovation testing begins, that establishes the empirical relationship between attitudes and behavior.

This foundational work looks different from traditional concept testing research. It is larger in scope, often involving thousands of respondents rather than hundreds. It measures both attitudinal constructs (motivations, values, psychological needs) and behavioral outcomes (engagement frequency, purchase behavior, product usage) within the same sample. And it applies regression modeling to identify which attitudes genuinely predict which behaviors, with what strength and for which consumer segments.

The output is not a report that sits on a shelf. It is a diagnostic framework: a validated set of motivational items, each linked to specific behavioral outcomes through quantified prediction coefficients. This framework becomes the measurement backbone for every innovation test that follows.

Consider a segmentation study that surveys 3,000 consumers on 50 motivational statements and 30 behavioral measures. The regression analysis reveals that for one segment, category engagement is driven primarily by motivations related to mastery and expertise. For another segment, the same behaviors are driven by social connection and belonging. These are not hypotheses. They are empirical findings, validated through behavioral prediction.

When you test an innovation concept six months later, you do not start from scratch. You deploy the diagnostic battery that emerged from the foundational study. You measure how well the concept delivers on the specific motivations that predict behavior for each target segment. The foundational investment pays dividends across every subsequent test, providing continuity and cumulative learning rather than isolated snapshots.

Instead of asking consumers whether they like an idea, you ask whether the idea activates the specific psychological drivers that predict engagement. Instead of generic appeal scores, you get diagnostic specificity. Instead of a pass/fail gate, you get a roadmap for refinement.

Experience as the unit of measurement

There is something elegant about this reframing. The motivations that emerge from derived importance analysis are not abstract constructs. They are experiences. Feeling like you are making smarter decisions. Sensing that you are part of something larger than yourself. Experiencing the satisfaction of going deep into something you care about. These are felt states, not demographic boxes or attitudinal segments.

When you test a concept against these derived experiences, you are asking a more honest question than traditional research permits. You are not asking whether the consumer likes the idea in some general sense. You are asking whether the idea delivers on the specific psychological experiences that the data has proven drive real-world behavior.

This transforms the diagnostic output. A concept scorecard built on derived importance does not just tell you that an idea underperformed. It tells you which experiences the idea fails to deliver, how much that matters (quantified through the behavioral prediction coefficients) and therefore where iteration should focus. The creative team does not receive vague feedback to "make it more appealing." They receive precise guidance: strengthen the concept's ability to deliver on this particular experience, because this experience is what actually moves behavior.

The craft of refinement

There is a tendency in insights work to treat concept testing as a judgment. Good idea or bad idea. Above benchmark or below. But judgment is not the same as understanding. And understanding is what allows iteration.

The derived importance framework treats testing as craft. Each wave of research reveals not just how well an idea performs but specifically where it falls short and by how much. Teams can refine with precision, addressing the gaps that matter most, then retest to confirm improvement. The concept evolves not through intuition alone but through a feedback loop grounded in behavioral validity.

This requires a different relationship between research and creative development. Research becomes less about evaluation and more about guidance. The insights function becomes less of a gatekeeper and more of a collaborator in building something that works.

Looking forward

The derived importance gap is not new. Behavioral scientists have understood for decades that stated preference is an imperfect predictor of action. What has changed is our ability to operationalize this insight at scale. Modern segmentation studies can generate the behavioral prediction models that identify true drivers. Typing tools can assign consumers to segments in real time. Adaptive diagnostics can tailor measurement to stimulus characteristics.

But realizing this potential requires a commitment to foundational research as a strategic asset rather than a one-time project. Organizations that invest in rigorous segmentation and behavioral modeling upfront create a testing framework that compounds in value over time. Each innovation test builds on validated diagnostics rather than reinventing measurement from scratch.

The room will still grow quiet sometimes. Data will still surprise us. But we can at least ensure that when we test ideas, we are measuring the right things. Not what consumers claim drives their behavior but what actually does.

That gap is worth closing.

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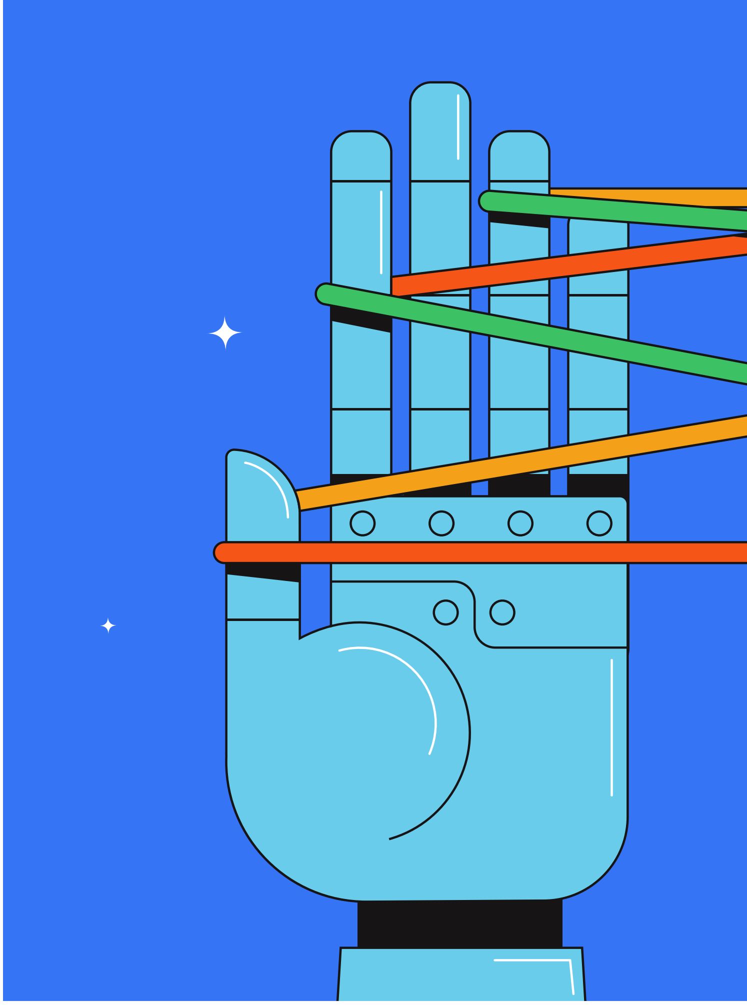
William Cimarosa is director of quantitative insights at Egg Strategy, with 20 years of experience in quantitative research, design thinking and global insights, having worked across both client-side and vendor-side roles. He holds an M.A. from San Diego State University and a certificate in machine learning business implications from MIT Sloan. Find William on LinkedIn: www.linkedin.com/in/william-cimarosa-4a665b5/

Running to stand still

Why the human layer is essential when working with AI insights

| By Eric Karofsky



abstract

AI accelerates analysis but not understanding, leaving a critical gap between surfaced patterns and actionable insight. Closing that gap through stronger research design and human interpretation determines whether findings drive decisions or merely decorate slides.

AI can now analyze a 90-minute focus group almost instantly. It will surface themes, flag sentiment shifts, count how many times a word appeared and generate a tidy summary you can drop straight into a slide deck.

Here's the problem: none of that is an insight.

It's analysis. And analysis is not the same thing as understanding. The gap between the two – between what AI produces and what organizations actually need – is a design and interpretation problem. And it's where the work that actually matters still gets done by humans.

I've watched this play out across different organizations. A research team runs a study using AI-assisted analysis. The platform produces a clean summary: customers value convenience, price sensitivity is high in the 35-54 demographic and there's growing interest in sustainability among younger cohorts.

The stakeholders nod. The slide gets built. Six months later, the product team makes a decision that contradicts what customers actually meant – because no one ever asked why convenience mattered or what trade-offs people were actually making between price and quality or whether "sustainability" meant the product itself or the company's broader practices.

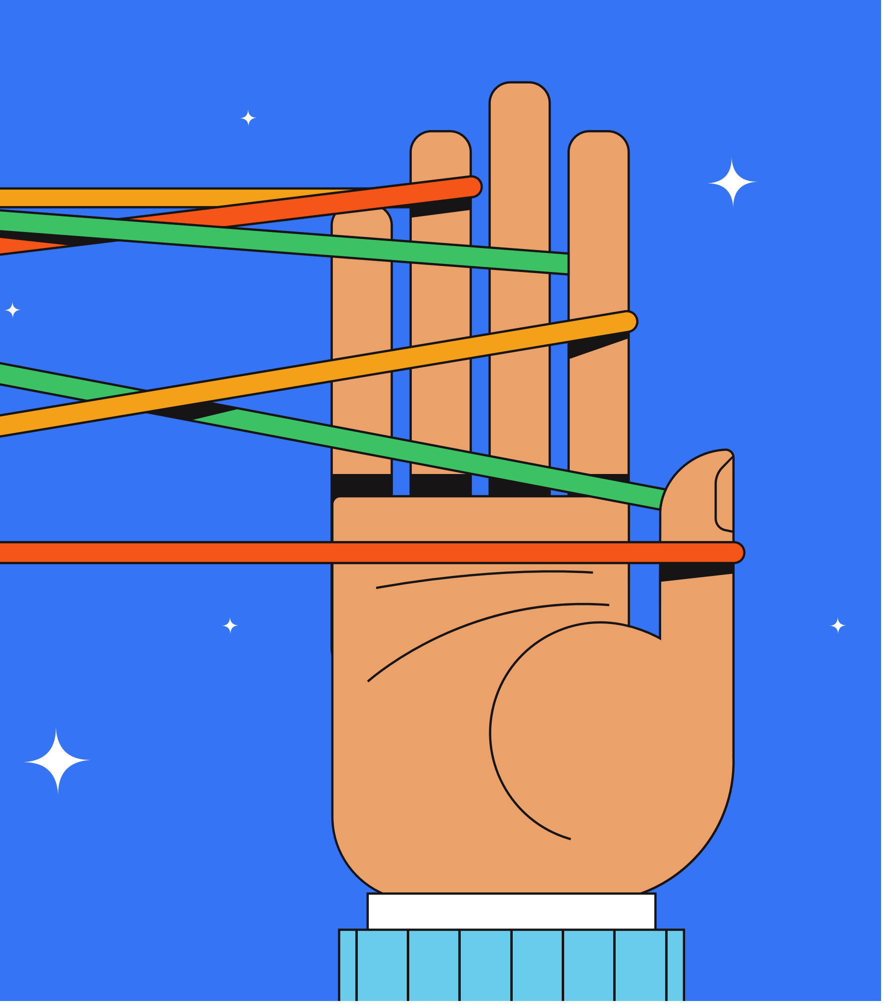
The AI got the what. Nobody got the so-what.

This is the pattern I keep seeing – and it's not a failure of the tools. It's a failure of the process around them.

The front end is where it starts

Strong research design has to be in place before AI enters the picture – not bolted on afterward.

Research design means building the study so that it can actually answer the business question – not just generate data. It means choosing



methods intentionally, asking questions that surface real behavior rather than stated preference and sequencing the work so that early findings can sharpen later questions. None of that is automated. A well-designed study with mediocre AI analysis will almost always outperform a poorly designed study with great AI tools.

Too many teams are applying AI at the back end of a process that was never set up to produce useful findings in the first place. The AI runs fast. It just runs fast in the wrong direction.

And at the other end, interpretation means bringing human judgment to bear on what the findings actually mean for this organization, at this moment. That requires industry knowledge, business acumen and an honest understanding of organizational dynamics – who will act on these findings, what they need to hear versus what they want to hear and how to frame the recommendation so it lands.

What AI is genuinely good at

Let's be clear about what AI does well in research, because dismissing it is as wrong as over-crediting it.

AI excels at speed and scale. It can process thousands of open-ended survey responses in the time it used to take a junior analyst to get through a few. It can identify patterns across qualitative data that would take a human weeks to find. It reduces transcription errors, eliminates a lot of low-value manual work and can run semantic analysis at a consistency that humans simply can't match across a long project.

These are real capabilities. They're changing what's operationally possible.

But here's what I've noticed in client work: teams that hand AI outputs directly to stakeholders – without a translation layer built on real human judgment – routinely produce insights that are accurate on the surface and useless in practice.

In 2025, Deloitte delivered separate AI-assisted reports to government clients in Australia and Canada that were found to contain fabricated citations and references to nonexistent studies – reports that looked authoritative but couldn't be verified.[1]

What AI can't do

AI routinely misses context. It can't determine which theme is strategically significant for your business as opposed to simply frequent in your data. It doesn't know that your company is about to reposition its pricing structure, that your largest competitor just entered a new segment or that one of the "minor" themes it flagged actually maps onto a pain point your leadership team has been arguing about for three quarters.

Context lives with people. It doesn't live in the data.

AI can surface a range of viewpoints – and it's genuinely useful for that. It can represent the spread of sentiment across a dataset, show where opinion clusters form and flag where disagreement is sharpest. But surfacing viewpoints and analyzing them are different things. Deciding which perspectives matter, which tensions are strategically meaningful and what the organization should actually do about any of it – that's human work. The analysis cannot be delegated to the tool that produced the data.

This is where I'd push back on the narrative that AI is shrinking the research function. What I see is more nuanced: AI is eliminating certain tasks while raising the stakes on others.

The researchers who are struggling right now tend to have built their careers around execution – data collection, coding, transcription, summary writing. Those tasks are being automated and the displacement is real.

The researchers who are thriving are the ones who were always doing the harder work: designing studies that get at real behavior, synthesizing across methods, translating findings into decisions that stick. AI doesn't threaten those people. It actually amplifies their impact, because they spend less time on the rote work and more time on the judgment.

1
HUMAN
Define the question
Build the study to answer the real business question – not just generate data.

2
AI-ASSISTED
Generate and analyze data
Surface patterns, sentiment and viewpoints at speed and scale.

3
HUMAN
Interpret and decide
Apply context and judgement to turn findings into decisions that stick.

The shift is uncomfortable because it requires research teams to develop – or honestly assess whether they have – a different set of capabilities. Can your team take an AI-generated theme cluster and turn it into a strategic recommendation? Can they distinguish between a finding that's interesting and a finding that's actionable? Can they sit across from a skeptical CMO and defend a qualitative insight against a dashboard full of conflicting quantitative data?

These are human skills. And they're not evenly distributed.

What this means for how teams are structured

One implication I see playing out: Research departments are reconsidering what they hire for and what they outsource.

The operational tasks – fielding, transcription, initial coding, data cleaning – are increasingly handled by tools or offshore support, with AI accelerating the work. But the interpretation layer is being held more tightly by senior people and in some organizations it's being elevated rather than reduced.

The smart insight teams I see are also building stronger feedback loops between research and decision-making. That means embedding researchers earlier in product and marketing cycles, not just bringing them in to validate decisions already made. It means treating the insight function as a strategic capability, not a cost center that produces reports.

That repositioning is only possible when research teams can demonstrate judgment – not just speed and not just volume.

The question to ask yourself

If your team is adopting AI tools – and you should be – spend some time on this question: Where exactly does the human judgment live in your process?

Not in theory. Not on an org chart. In practice.

Who is responsible for deciding which business question the study is actually designed to answer? Who interprets the AI-generated analysis against the strategic context of your organization? Who translates findings into a recommendation and owns that recommendation in the room?

If those roles are clear and those people are strong, AI will make your team faster and more capable. If those roles are fuzzy or those skills are thin, AI will mostly help you produce better-looking outputs that lead to the same poor decisions.

The technology isn't the bottleneck. The human layer is. That's been true for a long time in research and nothing about AI changes it. If anything, the gap between teams that have built real interpretive capability and teams that haven't is about to become a lot more visible.

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Eric Karofsky is an expert in AI adoption, with a focus on designing user experiences that make AI understandable, usable and trusted. The founder of VectorHX, a human experience agency, he brings more than 20 years of experience in CX, UX and employee experience strategy, working with major brands like Fidelity, The Hartford, Michelin and Reebok.

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CMO Alliance will host the PMM Leaders Summit New York on **June 4**. Visit world.productmarketingalliance.com/location/leadersnyc.

Forrester Research will host the CX Summit EMEA on **June 8-10** in **Amsterdam**. Visit www.forrester.com/event/cx-emea/.

Insight Platforms will host the Demo Days for Research & Analytics Tools on **June 9-10**. Visit www.insightplatforms.com/summits/demo-days-for-research-analytics-tools-june-2026/.

Strategy Insititute will host the 12th Annual Big Data and Analytics Summit Canada on **June 9-10** in **Toronto**. Visit bigdatasummitcanada.com.

Insights Association will host Ignite: Healthcare Research 2026 on **June 10** in **Philadelphia**. Visit www.insightsassociation.org/Events/Full-IA-Calendar.

Quirk's Media will host Quirk's Virtual – Ensuring Data Quality, Security and Ethics on **June 11**. Visit www.quirks.com/events?q=QuirksVirtual.

Fierce Pharma will host the Pharma Market Research Conference West 2026 on **June 11-12** in **San Francisco**. Visit pharmamarketresearchconference.com/bay-area.

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UXPA will host the UXPA International Conference on **June 22-25** in **Las Vegas**. Visit uxpa.org/conferences-events.

EphMRA will host the EphMRA Annual Conference 2026 on **June 23-25** in **London**. Visit www.ephmra.org/events/78.

The Consumer Goods Forum will host the Global Summit: The Consumer Goods Forum on **June 23-26** in **Vienna**. Visit www.theconsumergoodsforum.com/events/the-global-summit.

The Travel and Tourism Research Association will host the 56th Annual TTRA International Conference 2026 on **June 24-26** in **South Carolina**. Visit ttra.com/events/56th-annual-ttra-international-conference.

Mystery Shopping Providers Association will host ShopperFest 2026 on **June 26-28** in **Las Vegas**. Visit members.mspa-americas.org/events/Details/shopperfest-2026-las-vegas-nv-1400476?sourceTypeId=Website.

Forrester Research will host the CX Forum West on **June 29-30** in **San Francisco**. Visit www.forrester.com/event/cx-west.

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CommerceNext will host Retail IT Connect US on **August 1-2** in **Nashville**. Visit retailitconnect.wbresearch.com.

Corinium Global Intelligence will host CDAO Chicago on **August 5-6**. Visit da-metro-chicago.coriniumintelligence.com.

ESOMAR will host ESOMAR Congress on **September 1-4** in **Valencia**. Visit esomar.org/events/congress-2026.

CMSWire will host Customer Connect Expo Atlanta on **September 9-10**. Visit www.cmswire.com/events/conference/customer-connect-expo-atlanta-2026.

Insights Association will host CRC on **September 15-17** in **Chicago**. Visit https://www.insightsassociation.org/Events/Event-Info/sessionaltcd/2026CRC

Quirk's Media will host Quirk's Virtual – DIY Research on **September 24**. Visit www.quirks.com/events?q=QuirksVirtual.

Event details as of April 20, 2026. Please see websites for more details.

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

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10 minutes with...

Sarah Haftings
Insights Manager, Shurtape Technologies

"People want to feel heard ... you have to give people a platform to talk openly about their truths."

What advice would you offer to a researcher who is looking to incorporate AI tools in their qualitative research?

Know what you need, what you want and what you definitely do not want from an AI tool.

Before even talking to potential partners, I have to define the need or the problem. And I usually start by making a list of must-haves, nice to haves and avoids. One of the most important roles of any market research professional is defining the problem to be solved so that we can develop questions that will help us uncover the right insights or solutions. It's easy to get distracted by bells and whistles when it comes to new technology, but just like when we're developing survey questions to get to the bottom of our customer needs, we also have to develop the right questions to solve for our own problems.

Ultimately, there are two main driving factors behind the adoption of new technology. The first is speed, time savings. The second is cost, financial savings that we hope to realize in the long run. No matter the size of your organization, no one can afford to adopt a tool that doesn't save them money or time. And that includes the time that it takes to train on that product. When considering a tool, ask yourself, "How much time do I need to invest initially in learning this product and mastering this technology so that I can run it and be in charge?"

Can you share a recent win for your team and what you learned from it?

My team recently adopted a full-blown AI-powered qualitative platform capable of handling diary/ethnographic studies, mobile device/laptop/desktop usability testing and mixed-method projects, fully equipped with a smart and humanistic AI moderator – a huge win for us! We've already run a couple projects through the platform and the results have been highly impactful. Our ability to leverage this platform for both our consumer and industrial audiences makes it even more exciting. We are going to be able to fully conduct IDIs with the AI moderator within the month, so I see us really leaning into this new capability as a cost-effective and incredibly fast path to deep qualitative insights. That is what's next for us and, in my humble opinion, I think this is the future of market research.

Not to say there won't always be a place or need for quantitative research, but survey research is a dying breed as the primary path to insights. People want to feel heard, but they're very skeptical about survey research and consumers don't want to take the time to do it anymore. To combat this, you have to give people a platform to talk openly about their truths. If you do that, you will find all the insights that you need are at your fingertips.

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