

QUIRK'S

For marketing research and insights professionals

MEASURE, GENERATE OR SIMULATE?

A decision standard
for synthetic data



PLUS

Recommendations from
a survey fraudster

Adopt the respondent's perspective
for better questionnaires

Why context is crucial with
behavioral data

ADVERTISING SECTIONS

12 Top Brand/Consumer Loyalty
Research Companies

10 Top ResTech Companies



Quirk's Marketing Research Review

SEPTEMBER/OCTOBER 2026

VOLUME XL NUMBER 5

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

Jon Ward, VP of Sales at EMEA

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

Paul Markovic, Director of Behaviorally

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

Megan Pollard, President of Fieldwork Network

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

Debby Schlesinger

#facetofacemrx

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

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

Brett Watkins, CEO of L&E Research



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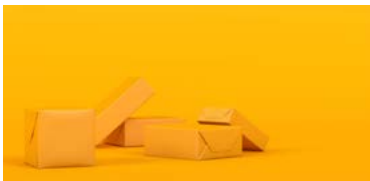


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2026 Quirk's Awards Virtual Celebration

The 2026 Quirk's Awards finalists have been announced! Congratulations to all finalists. You can see a full list of this year's finalists at [QuirksAwards.com/finalists](https://quirksawards.com/finalists). Be sure to attend the virtual celebration on November 17 to find out who this year's winners will be! Register today at [QuirksAwards.com](https://quirksawards.com).

Two days of insights and innovation

The Quirk's Event is headed to you with Quirk's Event – Virtual Global from November 4 to 5. While nothing can beat attending live events, 92% of the Quirk's audience is unable to attend in-person events and our aim with this virtual event is to bring insight professionals together from around the world so they can learn from leading insights experts about the hottest topics in the industry. Registration is now open and free for all: thequirksevent.com.

// E-newsworthy

| Your data isn't as clean as you think

| How to spot when your AI tool is confidently telling you nothing at all

| Work and Play: Coffee shop explorations and fueling curiosity

| Younger consumers are reshaping demand across global markets

| Is there a better way to validate synthetic data?

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// Noted Posts

Quirk's Blog

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National Highways embeds marketing research at every stage

<https://bit.ly/4pRcytw>

B2B project leads to new segmentation method

<https://bit.ly/4pGniKN>

Research Industry Voices

The real AI question in market research is not validity. It's coverage

<https://bit.ly/4q4y12W>

When researchers become the client

<https://bit.ly/4whdfi6>

Quick commerce in India: What the 10-minute shopper means for consumer insights

<https://bit.ly/4ghTLov>

Research Careers Blog

Insights on employee satisfaction, tech adoption and workplace wellness programs

<https://bit.ly/3SFLAe8>

6 issues challenging Gen Z career advancement

<https://bit.ly/4lAX1Lr>

Navigating networking: How Canadian women are handling industry barriers

<https://bit.ly/4twk9zS>



... consumer psychology

E-com shopper assumptions affect hidden-price expectations

Iowa State University (ISU) researchers found that when online shoppers believe a product or store is expensive, revealing the price later in the shopping process can boost purchase interest.

The logic is surprisingly simple. "Without a number in front of them, people fill in the blank themselves – and they tend to imagine something higher. When the real price finally appears and it's lower than what they had imagined, the product suddenly feels like a deal," says Minzhe Xu, assistant professor of marketing in ISU's Ivy College of Business.

Xu and the research team presented their findings in the article "Concealing prices: How delayed price disclosure influences consumer purchase decisions" in the *Journal of Consumer Research*.

Across six studies researchers found that shoppers can develop expectations based on their price beliefs – assumptions shaped by brand reputation, store environment, product category and economic climate. And when you remove the price, those beliefs tend to take over. "We found that delayed disclosure of prices amplified the influence of price beliefs people had," Xu says.

Researchers also found that explanations for hidden prices can backfire. "When retailers explain why a price is hidden – for example, saying a 'minimum advertised price' policy prevents them from showing the number – most shoppers assume the price must be low. This assumption ends up reducing their interest in making a purchase, even for premium items that would normally benefit from the delay," Xu says.

... ad research

Word choice shapes confidence in marketing claims

Research from the University of Florida's Warrington College of Business suggests a subtle linguistic factor – word "reversibility," or how readily a word suggests its opposite – can significantly influence consumer confidence in marketing statements.

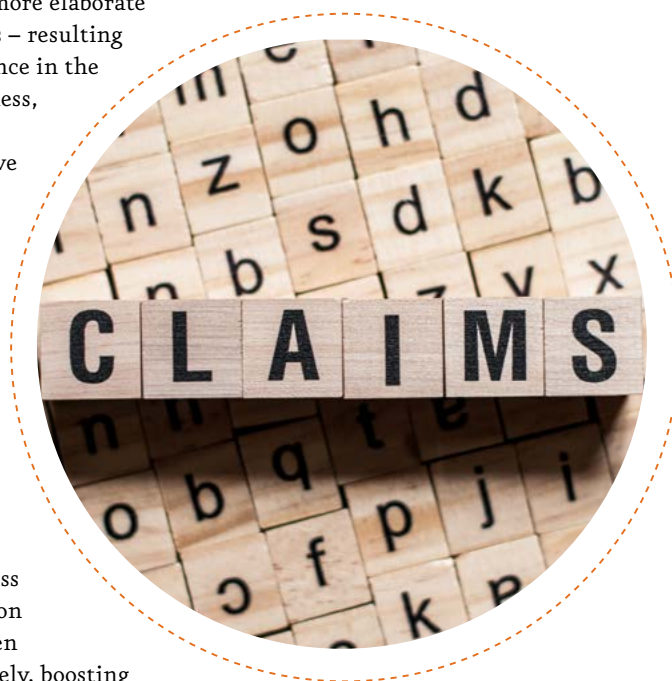
The study distinguishes between unipolar words (hard to negate with an antonym, like "prominent") and bipolar words (easily reversed, like "intense," whose opposite "mild" comes readily to mind). Across two experiments involving more than 1,000 participants, lead researcher Giulia Maimone found that when consumers process negated bipolar words, the mental effort required to reverse them engages a more elaborate cognitive process – resulting in lower confidence in the claim's truthfulness, whether they're inclined to believe or doubt it.

Take a sunscreen marketed for its strong scent: "The scent is intense" (bipolar) versus "The scent is prominent" (unipolar). Consumers process the bipolar version more fluidly when stated affirmatively, boosting confidence among likely believers.

Critically, that same reversibility works in marketers' favor with skeptics too – their doubt becomes less confident because disputing the claim requires the same effortful mental negation.

The takeaway: When testing or crafting messaging for new products, favor affirmative statements built on easily reversible words. This lexical choice can simultaneously strengthen conviction among receptive consumers and soften the certainty of skeptics – a small wording shift with outsized implications for message testing and claims research.

The study, "How word reversibility impacts judgment confidence," appears in the *Journal of the Association for Consumer Research*.





A healthy skepticism toward AI's promises

I realize it's September (or mid-August, really, at the time of this writing) rather than November, the usual month for giving thanks, but with July's New York Quirk's Event now in the rearview mirror, I'm feeling thankful.

First, and selfishly so, it's because planning and pulling off four large-scale events every year takes a lot of work and I'm glad that our staff gets a bit of a breather before tackling 2027's gatherings. (In case you're curious or like to plan ahead, here are the dates and locations for next year: Los Angeles, February 24-25; Chicago, March 24-25; London, April 13-14; New York, August 4-5.)

But mainly I'm thankful that, as an industry, marketing researchers remain an admirably skeptical lot. Specifically I'm thinking about the clear-eyed views of AI and synthetic data that I heard repeatedly expressed at our events throughout the year and most recently in New York.

Rather than rendering in-person (or with-a-real-person!) research methods obsolete, I heard more and more researchers say that data from synthetic respondents has its place in the toolbox, largely and most successfully so far as a kind of directional or first-pass way to cull potential product or ad campaign ideas. As Microsoft's Romani Patel put it in her New York Event session, "Simulated audiences don't replace the researcher's judgment. They extend the number of questions you can afford to ask before you need it."

Those charitable-if-wary views of synthetic data were in stark contrast to the near-doomsday tone of some of the takes on AI offered by audience members

in New York – though the cautionary tales weren't of the "AI is coming for our jobs" ilk but rather alarm-raising about the virulent hatred for AI among young people. During a session on AI that I moderated, panelists Tina Nathanson of Quest Diagnostics and Kerry-Ellen Schwartz of PepsiCo heard and echoed examples from several audience members whose kids not only don't like AI but are angry at any suggestion that companies might be using it to influence their purchasing.

That active dislike raises real questions for researchers who are themselves leaning more heavily on AI-powered tools to study those same consumers. If the subjects of your research resent the technology you're using to understand them, that's not a footnote; it's a methodological problem.

And companies likely won't win any points if they're honest about their use of AI in advertising, according to findings presented in a session from Dynata and Comcast Advertising.

The companies' research with 2,500 respondents showed consumers couldn't always tell which ads were made using AI and which weren't (and actually found some AI-incorporating ads more appealing) but once AI use was disclosed, viewers' assessments of purchase intent, authenticity and quality were all significantly reduced.

Lest it sound like the theme in New York was all anti-AI, there were multiple sessions that illustrated the ways AI can be a boon to the researcher's cause.

In her session with Kirsten Nantz, senior vice president of product at Discuss, Allison Howitt, director



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of insights and analytics at Reckitt Nutrition, talked about the value of the AI-moderated work they've done with healthcare professionals and how AI's always-on nature let the busy HCPs respond when they had time (rather than a waiting-room full of patients). Howitt also cited AI's nonjudgemental nature as freeing up respondents' candor and also lauded the value of letting them talk instead of type for netting responses that are longer and free of the self-editing that can rob typed answers of their color.

So maybe "thankful" is the wrong word for what I felt watching researchers navigate all of this in New York – "reassured" might be closer. Nobody in those sessions was pretending AI and synthetic data are a passing fad. Neither were they viewing them as a silver bullet or a nail in the coffin. What I heard instead, again and again, was a profession doing what it's always done best: asking hard questions of any tool before letting it get anywhere near the data that companies actually act on. If that's the posture marketing research brings forward, I'll take it as a good sign for the industry – and one more reason to be thankful. 🍷

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The researcher stays in charge. Teams shape how the moderator listens and how far it digs and our Visual Intelligence is the first AI researcher with eyes, letting it watch someone use a prototype or handle a product and follow up on what it sees. Microsoft, HubSpot, Glassdoor, Away and Nestlé already use Outset to understand customers and shape what they build. To

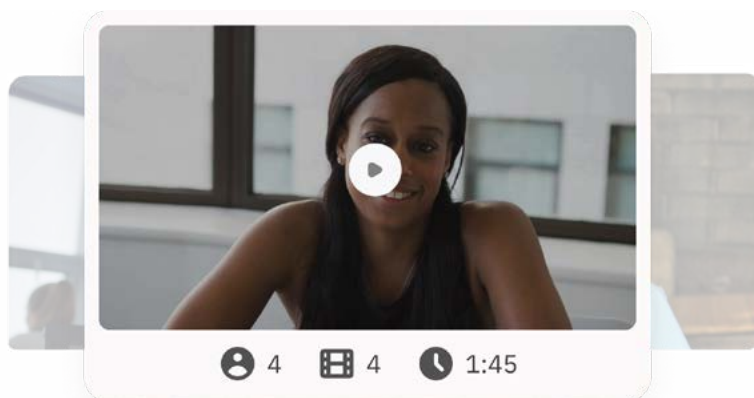
date, the platform has hosted more than 500,000 hours of interviews and 10,000 studies across 85+ countries.

Trust also depends on how the work holds up. In one platform, Outset runs the full range of professional methods: in-depth interviews, concept tests, usability and diary studies, in-home usage tests, shop-alongs, mobile ethnography and brand tracking, all synthesized automatically so

nothing gets lost. It flags fraudulent participants with better than 99% accuracy, works in more than 40 languages, allows you to recruit from over 1 billion participants globally and is never trained on a customer's data, giving enterprise teams results they can defend to stakeholders.

The through line is simple. Outset gives research teams the depth of real human conversation, the control to run studies their way and the scale to keep up with everything the business is asking, without ever trading trust for speed. In a market crowded with tools built for the demo, Outset is built for the work. The teams already using it are not choosing between fast and trustworthy insights. They are getting both. See what professional-grade AI research can do for yours.

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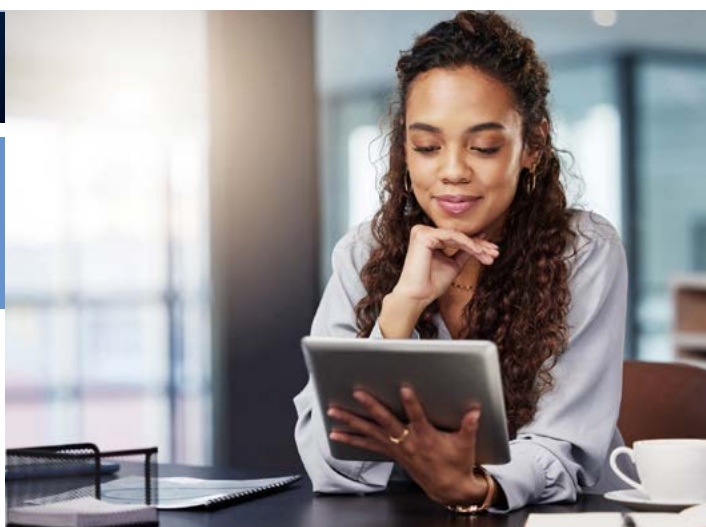
products and grow with confidence. Beyond research engagements, AMS helps organizations build lasting VOC and customer insights capabilities through training and coaching to support better innovation, strategy and decision-making long after the research is complete.

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QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

... travel research

Booking stressors alleviated by technology

AI becomes preferred vacation planning tool

Looking for a getaway? Ask AI. According to a survey conducted by Qlik, the majority of Americans turn to AI as their go-to travel planning resource. Instead of trusting human agents or travel websites, people tend to rely on the burgeoning technology for help.

The race is close, however, with 58% of travelers using tools such as ChatGPT, Gemini and Claude, and 55% relying on traditional travel websites. AI is piquing interest, as 35% of travelers plan on using it in the future for planning purposes.

Despite AI's relatively young age compared to competitors, almost two-thirds (65%) of respondents trust AI-generated travel recommendations to some degree, including 17% who would book travel solely on AI's advice. Another 26% use AI to spark travel inspiration.

About four in 10 respondents (41%) report using AI to feel more organized and confident in their trips. Almost one in three (32%) feel less overwhelmed while planning and are more comfortable trying unfamiliar destinations or experiences. Another 31% say AI is helpful for choosing destinations, accommodations and activities that are personalized to them and their desired vacation.

More than half of travelers (56%) are willing to share personal information such as budget information, location, past booking history, passport information and credit card details with AI tools in order to receive more personalized recommendations and real-time assistance.

Younger generations are more comfortable sharing personal information, with 66% of Gen Z and 63% of Millennial travelers being willing to disclose details compared to 55% of Gen X.

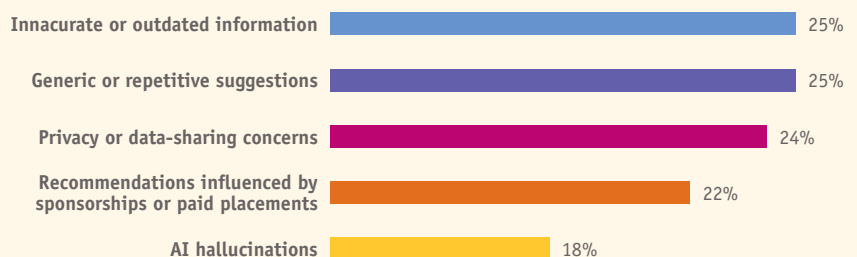
When it comes to budgeting, 41% of AI users say AI helped them stay within their budget and 33% spent less than expected on travel bookings and activities. Almost one in three (28%) found lower-cost transportation

alternatives and 26% saved money on gas or fuel prices.

Trust is not yet completely built with consumers. Their top frustrations with AI in their travel planning include inaccurate or outdated information (25%), generic or repetitive suggestions (25%), privacy or data-sharing concerns (24%), recommendations influenced by sponsorships or paid placements (22%) and AI hallucinations (18%). Another 15% say AI mistakes significantly disrupted or ruined their travel plans, discouraging them from using the tools for future planning.

The research was conducted by Censuswide, among a sample of 2,001 respondents aged 18 years or older who are planning a trip this year. The data was collected between June 5-9, 2026.

Travelers' top frustrations with AI



... food research

Produce is king

Fresh is a competitive advantage for physical retail

In an environment where consumers have seemingly unlimited choices, grocery retailers have to fight for loyalty. Research from Logile Inc. shows the true difference-maker is the freshness.

Over nine in 10 respondents (91%) said the fresh departments strongly influence whether they trust a grocery store, citing produce, deli and bakery execution as the clearest signal of quality. Seventy-eight percent said they have shopped at a different grocery store because its fresh departments looked better. This includes 25% who said they do this frequently. A mere 5% say they have never switched stores due to freshness.

Brand impressions can be influenced by just the produce department with 84% of respondents saying a poorly maintained fresh section impacts their perception of the entire store.

When convenience is the same, 46% of shoppers will choose the store with better fresh departments over the 40% that will choose the one with lower prices. This challenges the belief that price is paramount.

Despite the ease that online grocery shopping presents, 74% said fresh food is a main reason they continue to shop in physical stores. Freshness matters more than convenience.

Freshness is mostly measured by appearance and visual cues directly influence what goes in the cart: 85% of respondents say the appearance of their produce significantly impacts their purchasing decisions.

Once convinced to enter the store, 68% of shoppers said hot prepared meals would encourage them to make a purchase from the deli or prepared foods section. This opens the potential for increased spending.

The Logile 2026 State of Fresh Grocery Shopping Report is a consumer survey about how fresh departments affect grocery shopping behavior. Logile worked with Pollfish in March 2026 to survey 1,000 U.S. consumers ages 18+

about fresh food departments, store trust, shopping frequency, prepared foods and in-store grocery habits.

... travel research

Checking into new experiences

Generational gaps expose differing hospitality preferences

Younger travelers are increasingly attracted to vacation rentals as opposed to hotels while planning trips. Alchemer's 2026 Hospitality Benchmark Study revealed that 64% of travelers 61 and older plan to book mostly hotels in the next year, with just 11% leaning toward short-term rentals. On the other hand, 37% of travelers under 30 prefer rentals versus 29% who prefer hotels.

The world of hospitality is changing, with rental sites such as Airbnb and Vrbo retaining brand loyalty. Short-term rentals score over three percentage points higher than hotels in both the positive experience (93% vs 96.4%) and very positive experience (66% vs 69.2%) categories.

Travelers' response to a positive experience is also different. Rentals turn more guests into promoters (60.9% vs 55.5%) and produce fewer detractors (10% vs 13.7%). This leads to greater loyalty and brand recognition.

Despite this, hotels still win on near-term intent: 42% of travelers over 40 plan to book mostly hotels in the year ahead, versus 23% mostly rentals. Older travelers anchor that gap as they book a lot of rooms.

Vacation rentals may be favored today, but hotels still fill more beds tomorrow. This trend may change as those who prefer rentals are those with the most booking years ahead of them.

Younger travelers are pickier than their older peers. Gen Z aged 18-29 post the lowest satisfaction at only 57% very positive, compared to about 70% for older groups. They are also quicker to report

problems: 35% flagged an issue that needed attention, compared to just 8% of travelers 61 and older. Younger travelers are also quickest to dispute a charge, with only 28% saying they've never done it. This is a stark difference from the 71% of those 61+ who have never disputed a charge. Almost six in 10 are unlikely to return, with 39% "very likely" to rebook at a location.

Of all aspects of a traveler's stay, cleanliness is the primary experience driver at 63%, ahead of both cost and value at 44.8%. It is also the top reason a stay stood out as the best (48.3%), the top complaint when something goes wrong (41.7%) and the top reason guests withhold a five-star review (47.1%). This trend holds everywhere and for every age group; cleanliness is an expectation, not a differentiator. The difference makers are in total cost (44.8%) and comfort (37.5%).

Guests who choose hotels are completely different from guests who choose rentals. Those who pick hotels trust hotels more (25.6%) and feel more safe and secure (19.3%) in them. Hotels are predictable, standardized and regulated.

The primary reason for choosing a rental is the space given the price (55.4%) with a full kitchen closely trailing at 50.7%. Other wanted features are unattainable in a hotel: room for the whole group (44.5%), real privacy (43.3%) and a home-like, local feel (37.2%). These guests want more than just a standard room in a hallway.

With 48% of guests leaving a review after a bad experience, it's important to get it right. Especially considering 87% of 30-44-year-olds read reviews before booking and 37% consider reviews "extremely influential." Only 59% of guests 61+ read reviews before booking and only 8% find them "extremely influential" – a stark contrast from the younger group. Older travelers trust their history and experience while younger travelers lean on one another for advice.

Alchemer's Research Solutions Team surveyed 1,014 travelers across the United States – 540 recent hotel guests and 474 recent vacation-rental guests.

... healthcare research Therapy on the rise

Increasing numbers seek mental health support

Therapy is no longer used purely as a crisis-recovery tool. A survey by Grow Therapy offers insights into how Americans seek mental health support, what they're working through and the benefits.

The primary reason people sought therapy was life transitions, increasing 168% from 2024 to 2025. Coping skills (+152%), trauma and PTSD (+152%), insomnia and sleep (+152%), parenting (+145%) and postpartum concerns (+128%) followed closely behind.

After receiving therapy, the most common benefit was optimism, reported by 38% of recipients. Other benefits included stronger boundaries (34%), better relationships (32%), improved sleep and self-care (29%), more creativity (23%) and enhanced work productivity (16%).

However, therapy is not one-size-fits-all. While anxiety and depression remain the most common reasons, location correlates with secondary reasons: coping skills are most common across much of the Northeast and West Coast; trauma and PTSD led across large portions of the South and Midwest; life transitions topped in the Southwest and Florida; parenting was king in Utah and insomnia was common in Wisconsin and Alaska.

Over two-thirds of respondents who experienced improvement said they noticed positive change within their first nine therapy sessions. Almost one in three (28%) reported improvement within just four sessions.

Due to the growing flexibility in the field, therapy has become a part of everyday life for respondents. Outside of the clinic, 39% said they've taken a virtual session from bed, 29%

from a parked car, 19% from work, 14% outdoors and another 14% while traveling.

In terms of attitudes around therapy, only 2% of Americans not currently in therapy cite shame or stigma as a barrier to seeking care. The national average wait for a first session is 48 days, highlighting a need for more therapists.

The report measures mental health trends between 2024 and 2025 using Grow's internal platform data, representing 15 million patient hours and a nationally representative consumer survey of 1,243 U.S. adults conducted by YouGov in November 2025. YouGov data are weighted to be representative of the U.S. adult population. Margin of error is approximately ±2.8 percentage points at the 95% confidence interval.

... shopper research Technology and back-to-school shopping

Using AI to win on value

According to a survey conducted by Minty, the back-to-school (BTS) process is no longer a sprint before classes begin; rather, consumers plan ahead before the current school year has even ended. Digitally native, deal-seeking consumers transition from short-term spenders to increasingly sophisticated long-term budgeting strategists, using AI tools to find the best value and even shop on their behalf.

Almost two-thirds planned to start back-to-school shopping before July, with the majority of purchases expected to be online and mobile. The concept of BTS shopping has also expanded beyond traditional school supplies, with 34% of consumers shopping for themselves and 25% for non-children members of their family as well.

Nearly 90% of respondents plan on buying the same amount or more during BTS season this year compared to last. AI assistants rank among the most trusted savings sources followed by cash-back and savings apps, review sites and recommendations from loved ones.

More than three in four (77%) of BTS shoppers intend to use AI to shop. Almost half will rely heavily on AI for their online shopping and plan to use it daily. Three-fourths of respondents are open to AI driving discovery and making personalized recommendations based on their shopping behavior.

The primary reasons shoppers turn to AI are value and price. Almost eight in 10 BTS shoppers (77%) will use AI to evaluate what to buy and how to get the best possible price. There are many ways in which AI can be used in this context: comparing products for better value (66%); optimizing product searches (65%); discovering deals (65%); educating themselves on smarter shopping strategies (61%); curating personal product options (60%); optimizing value for specific items (55%); optimizing total budget (54%); validating deals in real time (54%); and finding alternative options at a lower cost (53%).

Over half of the respondents (54%) have already used a cash-back app as part of an AI-assisted search and 77% said they would in the future.

AI assistants used to be the norm, but trends are changing. Rather than helping a consumer, tools are becoming the decision makers as habitual use evolves into autonomy. Nearly half of respondents have had an AI tool make a purchase decision on their behalf and expect it to compete a purchase for them within the next six months. Two-thirds would also let a cash-back or savings app make a purchase on their behalf.

... financial research Home sweet loan

Homeownership feels just out of reach

As the next generation begins the home-buying process, they're finding various difficulties with the climate. A survey conducted by The Harris Poll and FICO found that affordability is the defining factor. The top financial barriers cited by prospective homebuyers in 2026 are high home prices and high interest rates. Nearly three-fourths say financial obstacles have already delayed or caused them to cancel their purchase.

Despite these hurdles, the desire to own a home remains strong. About one in seven Americans plan to buy a home in the next 12 months, with those aged 18-44 being more than twice as likely as older adults to have near-term buying plans. One-third of those prospective buyers are entering the market for the first time.

Although many are interested in homeownership, more than half of Americans admit they don't fully understand the homebuying process. One in four prospective buyers underestimate how significantly their credit score affects mortgage rates.

62% of Americans who don't currently own a home believe homeownership to be out of reach for them today.

Half of renters are unaware that on-time rent payments can help build credit history. Nearly half have never asked their landlord whether those payments are being reported to credit bureaus.

There are many strong connotations around owning a home: 57% of Americans say owning a home represents independence, 53% say it represents financial stability and 49% associate homebuying with achieving a major life milestone.

The desire and positive attitudes are not enough, however. Perceived attainability is lacking with 62% of Americans who don't currently own a home believing homeownership to be out of reach for them today. A similar number of first-time homebuyers (57%) feel the same.

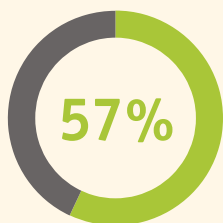
Among first-time homebuyers, the top financial barrier causing delays and reconsiderations is high home prices, with 39% citing this as their primary deterrent. More than half of Americans (51%), 73% of prospective

homebuyers and 81% of first-time homebuyers say the rising interest rates have impacted their decision to buy a home.

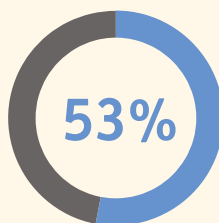
Almost a third of Americans (32%) and 34% of prospective buyers say they would feel more prepared to buy a home if they had a better understanding of down payment requirements. Thirty percent of Americans, and 42% of prospective homebuyers, say understanding how their credit score impacts mortgage eligibility would make them feel more prepared to purchase a home and similar proportions (31% of Americans, 39% of prospective homebuyers) say the same of knowing the steps they can take to improve their credit score.

This survey was conducted online by The Harris Poll on behalf of FICO from June 4-8, 2026, among 3,047 U.S. adults ages 18 and older, among whom 449 plan to buy a home in the next 12 months, of which 175 are first-time homebuyers.

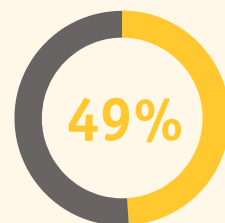
Americans attach deep meaning to homeownership



57% say owning a home represents **independence**



53% say it represents **financial stability**



49% (first-time homebuyers specifically) say it represents achieving a **major life milestone**

... special advertising section

12 TOP BRAND/ CONSUMER LOYALTY COMPANIES

Consumer loyalty is becoming increasingly important as organizations look for new ways to build lasting relationships with customers, increase engagement and encourage repeat business. From loyalty and rewards programs to customer retention platforms, personalized offers, membership programs and loyalty analytics, businesses across industries are using new technologies and strategies to better understand their customers and create more meaningful experiences.

These companies lead the pack in consumer loyalty to help organizations strengthen customer relationships and drive long-term value. Read about leading consumer loyalty companies helping organizations build stronger customer connections and drive lasting growth.



Applied Marketing Science

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

Customer loyalty isn't built through surveys alone, but by understanding what customers experience, what they value and where organizations



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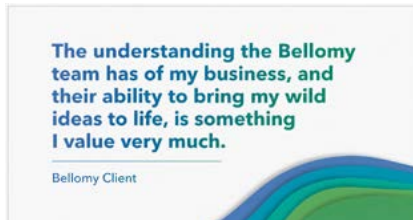
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Bellomy

Founded 1976 | 80+ employees
John Sessions, CEO



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Customer Lifecycle

Founded 2008 | 12 employees
Karin A. Ferenz, CEO

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Founded 1978 | 100 employees
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Founded 1980 / Insights 1960 | 350 employees
Nikki Darre, President



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Harmon Research

Founded 2009 | Employees 125
Stephanie Vincent, Executive Vice President

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We help brands understand their customers through consumer-focused research including customer experience, brand perception, usage and attitudes and shopper behavior studies. DataDefense, our quality-assurance program, checks data before, during and after collection to ensure every result meets the highest standards. To keep surveys safe and accurate, we use specialized online tools. NoBot uses simple puzzles to make sure only real people (not bots) enter a survey. It also adds extra protection using Microsoft-powered backend smart firewall-style technology to block suspicious IPs, filter out bad actors and stop automated attacks. LiveShield works in real time across quantitative and qualitative research, identifying suspicious behavior patterns, device anomalies and response signals that don't align with human interaction. Teams using our sample that includes these technologies have been able to block significant volumes of fraudulent data before it impacts reporting, insights or business decisions.

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Ironwood Insights Group LLC

Founded 2017 | 300 employees
Brian Cash, VP, Research Services

Strong brands aren't defined by recognition alone, but by the strength of consumers' commitment to them. Ironwood Insights Group developed the IronBrand™ Brand Intelligence System to help organizations understand not just how consumers perceive their brands, but how deeply they are committed to them. Built on a dynamic, commitment-based framework, IronBrand™ integrates functional, experiential and emotional drivers to measure the strength and resilience of consumer-brand relationships. Moving beyond traditional brand health tracking, IronBrand™ identifies the factors that strengthen loyalty, uncover competitive vulnerabilities, reveal growth opportunities and prioritize the investments most likely to improve brand performance. The result is a more actionable understanding of competitive market position, along with a clear roadmap for building stronger brands and driving long-term business growth. Contact us to discover how IronBrand™ can help your organization transform its brand health measurement to provide smarter marketing decisions and measurable business results.

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Bruce Tinncknell, Managing Director



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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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Prodege

Founded 2005 | 600+
Andre Leb, Chief Business Marketing Officer

Prodege is a full-service brand health tracking and consumer loyalty research provider. Prodege enables enterprise market research teams to measure, track and



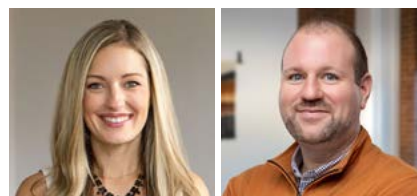
optimize brand health and customer retention across the entire buyer funnel – from awareness to repeat purchase. What differentiates Prodege in consumer loyalty research is its proprietary first-party audience panel of 100+ million global respondents. Rather than relying strictly on self-reported survey data, Prodege verifies real-world customer loyalty using behavioral signals, including item-level receipt uploads, verified store visits and purchase history. By validating attitudinal feedback with receipt capture, Prodege bridges the gap between what shoppers say they buy and what they actually buy. This eliminates recall bias, allowing research teams to measure exact repeat purchase frequency, basket size and share of pantry with absolute confidence.

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SMARI

Founded 1983 | 15 employees
Katie Ittenbach, CEO
Mike York, COO



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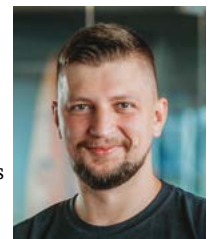


YouScan

Founded 2009 | 100 employees
Leonid Lytvynenko, CEO

YouScan is an AI-powered social listening and consumer intelligence platform. It analyzes online mentions to help researchers understand how consumers really feel about the brands, products and services they use. Coverage spans social networks, blogs, forums, news platforms and review sites. YouScan surfaces genuine consumer sentiment across every touchpoint that matters – price, quality, packaging, customer service – filtering out promotional noise to reveal the authentic voice of the customer. AI-driven trend detection catches shifting behaviors and emerging preferences in real time, often before they show up in traditional surveys. The platform brings together textual, visual and audience insights in one place. Image recognition uncovers brand mentions in photos and videos, while audience analysis reveals the demographics behind key consumer segments. The result: a real-time picture of what customers say, do and who they are. See YouScan in action – request a demo at youscan.io.

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Recommendations from a survey fraudster

| By Rich Ratcliff

abstract

Fraudsters exploit predictable survey design more than technical sophistication. Drawing on years of white-hat interviews, here are five low-cost fixes that close the doors researchers keep leaving open.

In 2022, I spent months tracking down two active survey fraudsters and interviewing them on Zoom. One ran a virtual device farm of 25 machines, producing 100 fraudulent survey completes a day. The other was a physics student in Bangladesh who had turned survey fraud into a side business – and was teaching it to hundreds of others through a YouTube channel with over 300 tutorials. I brought those findings to the stage at ESOMAR Congress. That became the beginning of discipline for us.

Over the past few years, I've continued conducting white-hat conversations – structured interviews with reformed or cooperative fraudsters willing to walk through exactly how they exploit the survey ecosystem. These are backed by video footage, data logs and ethical hacking-style evaluations of recruitment environments, survey flows and incentive systems.

What comes through in every conversation is the same thing: Fraudsters aren't winning because they're unusually sophisticated; they're winning because the industry keeps leaving the same doors open.

Below are the most actionable findings – some directed at sample companies, some at research operations teams, all grounded in what fraudsters actually told me.

FOR SAMPLE COMPANIES: CLOSE THE PAYOUT WINDOW

Fast incentive payouts are the single most exploited vulnerability at the supplier level. Fraudsters target platforms that pay out quickly – especially those that allow cash-outs within 30 days of sign-up or before reconciliation is complete.

The playbook is consistent: complete as many surveys as possible in the first 25 days, cash out along the way, then wipe the device and start over under a new profile before detection systems catch up. It works because fraudsters move fast and quality control moves slowly. When incentives are paid immediately and flagged accounts are reconciled weeks later, the fraudster has already won – often without a trace.

A useful diagnostic: look at how many accounts in your system were active for fewer than 30 days. If that number is high, fast payouts are likely feeding it.

The fix isn't eliminating incentives – it's restructuring the timing. Review payout timelines for new users specifically. Ensure reconciliation windows precede cashout eligibility.

And if you work with third-party fulfillment partners, audit their payout systems and build contractual accountability for fraud losses into the relationship. These aren't easy conversations, but they're necessary ones.

**FOR RESEARCH OPERATIONS TEAMS:
FOUR THINGS TO CHANGE NOW**

The following recommendations come directly from white-hat conversations about how fraud operates inside surveys themselves. None require major platform overhauls. All of them close real, documented exploits.

1. Rotate your tracker links – every wave, without exception

Static survey links that stay live across waves become what one white hat called "fraud annuities." When a fraudster successfully infiltrates a survey, they save the link, document how to qualify and share it on community boards. If the same link goes live again in the next wave, they're back in immediately – armed with pre-tested answers, the right device configuration and a thread full of coconspirators.

One white hat described a tracker link that had been active, on and off, for over three years. Every time quotas reopened, the thread lit up: "Quotas open. Go now." The damage compounds quietly – a few bad completes per wave don't always trigger alarms, but over time your tracker data degrades and client trust erodes.

The fix is simple: generate a new link at the start of every wave. The survey content, logic and quotas don't need to change – just the access point. Also avoid naming conventions like "tracker" or "monitor" in link titles; those terms are flagged by crawling tools fraudsters use to find longitudinal studies. Done right, this takes under 15 minutes.

Table 1

Field	Entry	Completion
IP Address	38.13.135.126	105.112.179.23
Time Zone	America/Los Angeles	105.112.179.23
ISP	FIBERPOWER-AS	VNL1-AS
Country	United States	Nigeria

Different IP. Different ISP. Different country. That's not a technical glitch – that's a proxy dropping mid-survey.

2. Check IP addresses twice – at entry and at completion

Cheap rotating proxies – the kind fraudsters use to mask their location – drop or flip mid-survey without warning. That means a respondent who entered from an apparent U.S. IP address may finish from a completely different country on a completely different ISP. Most quality systems only check IP at entry. They never look again.

Adding a check at completion and comparing the two is straightforward. A mismatch in IP alone isn't necessarily fraud – there are legitimate reasons an IP can shift. But when the IP, ISP and country all change between entry and completion, there is no legitimate explanation. This is a triple-flag that should result in automatic termination.

Table 1 shows a real example from our own data logs.

3. Rotate screeners and split your LOI calculation

Fixed screener sequences are a gift to fraud rings. Once a fraudster successfully navigates a screener, that path gets documented and shared. Answer keys circulate on community boards. Automations and AI agents get built to follow the same button pattern every time. Non-English fraudsters – who often aren't reading your questions at all – just follow a positional cheat sheet.

Where methodology allows, rotate screener question order and answer options within questions. You're not trying to confuse genuine respondents – you're eliminating the value of a static cheat sheet. Automation breaks down quickly when the path isn't predictable. Just don't rotate where order clearly matters: concept monads, exposure sequences or brand lists tied to shelf position.

On length of interview (LOI): Most researchers calculate LOI from start to finish. Fraudsters know this and they exploit it by racing through the screener and core survey, then parking on the demographic section at the end – running another survey in the background while they wait for enough time to pass. Measure LOI excluding demographics, from the end of the screener to the last non-demo question. You're not penalizing fast, thoughtful readers. You're targeting respondents who treat your core survey like a race and your demographic section like a waiting room.

4. Ask respondents what the survey was about

This is the simplest recommendation in the list and one of the most revealing. At the end of the survey, add a short open-end: "In your own words, what was this survey about today?"

Many fraudsters can't comfortably read English and rely on answer patterns and copy-paste open-ends to get through. By the end of a survey – especially a technical or niche B2B study – they often have no real sense of the subject matter. Authentic respondents give short, specific answers: "pricing for cloud software," "a new snack brand." Fraudsters produce generic noise: "It was about my opinion," "the survey is good," or something obviously pasted.

As a bonus, genuine respondents use this question to give you useful UX feedback – where the survey was confusing, too long or repetitive. It's a fraud check and a research quality signal in one.

5. Monitor what respondents do, not just what they answer

I asked a member of our white-hat team a simple question: Do you know when you are being watched inside a survey? Without hesitation: Yes. Then they told me how they know. Most surveys, they said, are obvious. Some require a quick look at the page code. But they rarely have to worry about it.

Their exact words: "I open the survey, switch back and forth between tabs, let Google or AI help me understand the subject, pull the answer and move on. The survey has no idea. It just sees answers."

That is not a sophisticated attack. That is a Tuesday. And it is happening across studies right now, undetected and indistinguishable from a legitimate respondent by every metric the survey was designed to capture. The survey records what they answered. Nobody is watching how.

There are approximately 150 measurable behavioral signals available inside a browser session: keystroke cadence, response time, characters per second, mouse movement patterns, scroll behavior, tab visibility, window focus events and more. E-commerce platforms use these signals to catch bots. Banks use them to flag account takeovers. Market research, by and large, does not use them at all.

The recommendation here is different from the others in this series. The previous four are relatively simple operational pivots. This one requires outside expertise. Attempting to self-instrument behavioral signals without proper calibration will produce misread data and misfired logic – which is arguably worse than not measuring at all. The right path is to partner with technology built specifically for

this purpose, embed it into the survey environment and receive a clean risk flag in return. The survey programmer's task is then simple: If risk flag equals true, terminate. One logic branch.

If a client asked you today to demonstrate how you monitor respondent behavior inside the survey, what would you show them? If the answer is nothing, that gap is worth closing.

The bigger picture

None of these recommendations replace device-level fraud detection, behavioral monitoring or post-survey QC. They're not meant to. What they do is close the easy doors – the ones fraudsters rely on

precisely because the industry has left them open for so long.

The most consistent thing I've heard across all of these white-hat conversations is that fraudsters aren't impressed by our defenses – they're impressed by our complacency. They share notes on which platforms audit payout accounts, which studies rotate their links, which surveys check IP twice. The ones that do those things get avoided. The ones that don't keep showing up on the community boards.

These changes are low-cost and implementable now. The harder question is whether our industry will treat fraud prevention as an operational standard rather than an afterthought. The fraudsters are already treating it as a full-time job. 

ABOUT THE AUTHOR

With 30+ years in market research and business intelligence, **Rich Ratcliff** has spent his career turning complex technology challenges into operational results. As chief trust officer at OpinionRoute, he leads the charge on data integrity and trust – bringing a deep, hands-on understanding of the insights ecosystem and what it takes to deliver research that's accurate, reliable and scalable.

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Biking:

1. **Cheryl Muldoon**, *Team Sago*, 1,432 miles
2. **David Breihan**, *Team PureSpectrum*, 1,387 miles

Walking:

1. **James Huff**, *Team Research Results*, 518 miles
2. **Mark Bushey**, *Team Fieldwork*, 456 miles

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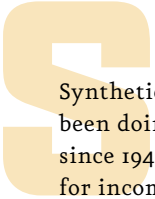
A decision standard
for synthetic data

| By Alex Mangoff



ABSTRACT

Synthetic data is becoming central to market research because it promises faster learning, broader exploration and more value from existing data. But can it support the decision at hand? To find out, start with the evidence the decision requires and the consequences of being wrong, then determine whether the method, source data, validation and uncertainty are appropriate for that risk.



Synthetic data is not new. We've been doing Monte Carlo simulations since 1949 and predicting answers for incomplete data through conjoint for decades. But it's more ubiquitous now and the discourse around it is intensifying as large language models enter the mix of methods, and academics, vendors and researchers all weigh in. Business teams are inundated with promises of instant samples and lower costs. They wonder whether synthetic data – and AI, more broadly – is the solution that can help them test more ideas, reach hard-to-find audiences or simply move faster than the competition. This interest makes sense. Synthetic data offers a compelling answer for marketers and insights leaders facing tighter deadlines and shrinking budgets.

The promise is real. But so is the risk.

Synthetic output can sound human, look precise and still lead a team to a different conclusion than data from human respondents would. So, the debate shouldn't start with whether AI can "be human." It should start with a more practical question: can it support the decision we're about to make?

That question changes the conversation. Instead of treating synthetic data as a novelty or a golden ticket, we can treat it as part of a larger decision system; one made up not of a single tool but many.

KNOWING YOUR TOOLS

Synthetic data is a well-known term, but different methods sit underneath it. Treating them as interchangeable creates confusion.

Broadly, there are two families: large language models (LLMs) and generative data models.

When most people think of synthetic data, they picture LLMs: systems that generate plausible, human-sounding responses without an actual person behind them. Synthetic personas, digital twins and synthetic panels all fall under this umbrella.

Generative data models work differently and are what we've seen leveraged in market research for decades. Instead of starting with language, they start with structured data already captured in a study or dataset and they estimate new responses based on what's already known. They're especially useful, then, for filling gaps and creating more stable reads from high-quality source data.

Language models are great for language. Generative data models are great for data.

That distinction matters because many business decisions need more than plausible responses; they need reliable evidence. And the riskier the decision, the more reliance we should place on the evidence. If a decision requires a measured read on what people think, do or intend, then the method behind it needs to be judged on one thing: whether it preserves the conclusion a trusted source of truth would support.

In practice, that judgment usually starts with one number: accuracy.



...accuracy alone does not answer business questions.

ACCURACY IS NOT DECISION RELIABILITY

A lot of the conversation around LLM-based synthetic methods centers on accuracy. Published research often cites performance around 80% compared to live data or human consistency.¹ On the surface, it sounds encouraging. Eighty percent feels close and it's tempting to read that number as proof that synthetic methods are ready to replace or scale back parts of the traditional research process.

But accuracy alone does not answer business questions.

Data can look close overall and still change the recommendation. A synthetic panel might produce responses that feel coherent while still misstating the market underneath them. Even a model that holds up on broad patterns can flip the one number that drives a decision: the top-ranked concept, the majority view, the leading brand.

As an example, many researchers have experience working with typing tools for segmentation, where 80% or greater accuracy in predicting across segments is an acceptable baseline. But, hidden in that overall accuracy could be a single segment where accuracy is no better than the flip of a coin.

This reality has also been reflected in our own validation work. We found that LLM-based synthetic results landed in that same general range often cited by others in the marketplace, but at roughly 80% accuracy, the synthetic data gave us a different answer three out of five times.² Here's what we can take from that: Eighty percent accuracy isn't meaningless, but it also isn't automatically decision-grade. It might be enough for exploration, early language development or first-pass prioritization. However, it's a harder case for final validation or an investment-level call.

In other words, accuracy tells us whether the data looks close to the source of truth. Decision reliability tells us whether the recommendation holds. For business leaders, that's a critical distinction.

A DECISION STANDARD

Synthetic data needs a decision standard because not every decision requires the same level of evidence.

A team narrowing 100 early ideas into a shortlist can tolerate more uncertainty than a team choosing which concept to launch. Pressure-testing objections to a marketing message is a different bar than deciding which campaign gets the budget. The gap shows up in analysis too: a broad hypothesis about which drivers might matter needs far less

GENERATIVE DATA RESULTS

At a 25% boost, **generative data models** were able to produce a final dataset that aligned strongly across attitudinal selections, behavioral claims and various metrics across demographic cuts.



Figure 1

certainty than a final, ranked model used to guide spend.

The standard itself doesn't need to be complicated. Synthetic data is fit for a decision when its method, source data, validation and level of uncertainty are all appropriate for the business risk of being wrong.

To apply that standard, teams need to answer three questions:

1. What decision are we trying to support? Are we exploring, prioritizing, validating or deciding?
2. What evidence does that decision require? Does it need a current read from people or can it lean on data that's already been measured?
3. What happens if the result is wrong? If a different source of truth changes the recommendation, that's a business risk, not a theoretical one.

Once those questions are answered, the evaluation becomes more practical. Instead of asking only whether the synthetic data looks accurate, we're asking what kind of risk remains and whether it's one we can live with. A broader quality framework is what turns that question into something a team can actually use.

We've already separated accuracy from decision reliability. What decision reliability actually demands is a sharper set of questions: Do the topline hold? Do individual records look plausible? Do the relationships

needed for deeper analysis survive? Accuracy alone can't answer any of those, which is exactly the gap the next framework needs to close.

REFRAMING THE DECISION

Burke evaluates synthetic data using three dimensions: fidelity, authenticity and resolution. Together, they form the FAR Quality Score. The aim of FAR is to separate different kinds of quality that are not captured in a single accuracy claim.

Fidelity asks whether the topline picture holds. If a trusted dataset shows that 40% of respondents are top-box on purchase intent, does the synthetic data produce a similar read? Fidelity matters because many business decisions start with topline: who leads, what changed and which option is strongest.

Authenticity asks whether the records look realistic. If you inspect individual synthetic rows, do they look like plausible respondents or do they show unrealistic patterns? Authenticity also helps guard against simply memorizing or copying real records. It gives us a reason to believe the generated data behaves like usable respondent-level data.

Resolution asks whether the important relationships in the data still hold. This is where many important research decisions live. Do we see the same differences across subgroups? Do relationships between attitudes and behaviors remain intact? Do the patterns needed for drivers, segmentation and crosstabs survive? A dataset can preserve the

topline and still fail to preserve the relationships needed for deeper analysis.

FAR connects naturally to decision reliability as a result. Weak fidelity puts topline conclusions at risk. Weak resolution threatens the analysis underneath them. And if authenticity is weak, the data may not be plausible or responsible enough to use in the first place. Together, the three dimensions help move the conversation from "How accurate is it?" to "What kinds of decisions can it support?"

A high-level score is still not the whole answer. Some decisions depend mostly on topline stability. Others depend on relationships, rankings or subgroup patterns. But FAR is designed to give teams a more useful way to evaluate synthetic data than a single broad accuracy claim.

WHY CHOOSING THE RIGHT METHOD MATTERS

The validation study referenced earlier not only informed the development of the FAR Quality Score but also provided clear examples of the gap between LLMs and generative data models when simulating quantitative data. In the study, we surveyed 5,000 people, generated 1,000 synthetic personas and built several test datasets to compare against a human baseline.

One comparison paired a fully human dataset against a blended one; 75% human responses extended with 25% generative estimates (Figure 1). The results showed the

LLM-BASED SYNTHETIC RESULTS

The synthetic panel showed more variance with difficulty measuring the ends of Likert scales, missing general distributions and exemplifying demographic stereotyping which biased results.



Source: Burke, Inc. (March-June 2026). Synthetic Data and Decision Reliability Study.

Figure 2

promise of generative methods at every level of the FAR framework, not just in aggregate. On fidelity, topline on attitudinal questions like saving-money intent were nearly identical between the two datasets. On resolution, that consistency held at a more granular level too, with behavioral measures like weekly online shopping activity tracking closely, even when broken out by age group.²

That result comes with a catch. It still required collecting three-quarters of the data upfront. That's not a flaw in generative methods; it's the trade-off they're built around. They extend real data but not the need for it.

We pushed further in another comparison and asked what happens with zero measured data, relying entirely on a synthetic panel built with no pretrained knowledge of the study. Results here were markedly different. Strong saving-money sentiment came in well below the human figure and overall weekly shopping activity undershot by a wide margin, with the gap widening consistently for respondents over 35. This indicates a bias in LLM models and public data that skews our understanding of real human behavior (Figure 2).

This example is a strong argument for validating any fully synthetic panel against a trusted source. It also demonstrates why LLMs are better suited for early-stage decisions versus higher stakes and final assessments.

MEASURE, GENERATE OR SIMULATE?

These results reinforce the need to properly address the practical question of what role AI or synthetic data should play in business decisions.

The results also show that we don't need to frame the discussion as real data versus synthetic data. Instead, it's a more nuanced conversation about whether the data needed should be measured, generated or simulated.

When you need data, measure it

What is the temperature outside? This is a question that warrants measurement.

If the decision requires a current, direct read from people or from the world, synthetic data should not be in the consideration set. AI is not a sensor. It can reason over information but it doesn't automatically know what people think, feel or choose at a given moment. In these situations, there's no substitute for measuring directly, especially when the business question depends on measured reality: how consumers respond to a new offer, which message changes intent or how a specific audience experiences a different brand position. Done well, direct measurement remains essential.

Not every decision requires a large traditional study but we cannot treat synthetic output as measured evidence in absence of foundational data and understanding.

When you need better data, generate it

I have temperature data in many Texas cities. Can you estimate it for Fort Worth? This is a question

AI is not a sensor. It can reason over information but it doesn't automatically know what people think, feel or choose at a given moment.

generative data is built for.

Generative data models are ideal when trusted data exists but needs to be made more useful than its current form. They can fill gaps, boost small segments or repair trend breaks in data that's already been collected. In each case, the output is a more complete dataset extended from real respondents, not invented to replace them.

Generated data is still grounded in what was originally measured, which is an important difference. It can create more stability, more usable coverage and more room to examine smaller groups, but it shouldn't be

interpreted the same way as additional, independently measured respondents. Generative models make high-quality data work harder; they do not turn weak data into strong evidence.

When you need reasoning, simulate it

Should I bring a rain jacket with me to Houston? This is a great question for a language model, because there's no single right answer, just better and worse ones. Language models are built for exactly that kind of reasoning – helping people think through a problem and how to approach it.

LLM-based methods are strongest when the goal is exploration, not measurement. They can help teams pressure-test early ideas, surface objections and reason across different perspectives before deciding where stronger evidence is needed.

The watchout is treating simulation as measurement. LLMs can help teams think better but they should not automatically be used to decide what a market believes, what share of consumers will behave in a certain way or which concept will win. Used intentionally, they improve the path to a decision. Used carelessly, they can make weak evidence feel more convincing than is deserved.

WHAT THIS LOOKS LIKE IN PRACTICE

The value of a decision standard becomes clearer when the method is matched to the job.

In early-stage innovation, LLM-based simulation can help teams narrow a wide field of ideas before investing in human testing, the same kind of decision we described earlier. In one project, synthetic personas weren't reliable enough to pick the winning idea but they were useful for narrowing a field of 92 candidates down to a workable shortlist. This is simulation doing exactly what it's suited for: not the final call but the work of deciding where stronger evidence is worth collecting.

Generative data models play a different role. In brand measurement, for example, they can help extend trusted respondent data when coverage is uneven across brands, segments or attributes. The goal is not to replace respondents

or invent a market from scratch. It is to make already-measured data more complete and more useful for decision-making.

Both examples point to the same conclusion: Synthetic data works best when the method fits the decision. Use simulation to explore and prioritize. Use generative models to extend trusted data. Use direct measurement when the decision requires current evidence from people or the market.

WHAT INSIGHTS LEADERS SHOULD OWN

For insights leaders, the real opportunity is building better decision systems not just adopting synthetic data faster.

Practically, it comes down to creating a shared language for when to measure, when to generate and when to simulate, plus clear expectations for what each method is actually suited to support. Skip that discipline and teams end up using synthetic data because it's available rather than because it's appropriate. Build it in and synthetic data can expand the reach of research and make data strategy more responsive to the business.

The questions leaders should ask are straightforward. Two of them are the same ones from the decision standard: what decision are we trying to support and what evidence does it require? The rest speak to how the organization uses synthetic data at all, not just this one decision:

- Are we measuring, generating or simulating?
- What source of truth are we validating against?
- What decisions should this output not be used for?

These questions are not barriers to using synthetic data. They're what

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make it usable. Synthetic data stops being a shortcut around evidence and becomes one input in an intentional decision system – one that builds confidence without overstating certainty.

DEFENSIBLE CONFIDENCE

Synthetic data doesn't replace human data. It stretches what we can do with it. The future of research isn't synthetic versus human; it's an integration of direct measurement, generative models, LLM-based simulation and expert judgment, each used where it fits.

Defensible confidence comes from using human data where current evidence matters, extending trusted data where the evidence holds up and simulating where it helps a team think through a problem. It is not artificial certainty or a shortcut around understanding people.

Synthetic data is not “the decision.” It's one input among several and it's fit for use only when the method, the evidence and uncertainty match what is at risk if the answer is wrong. 

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... questionnaire design

Help them help you

Designing a better questionnaire by considering
the respondent's perspective

| By Erwin Chang



abstract

These days, AI can produce
a logical, comprehensive
questionnaire in minutes. The
harder task is building it around
how respondents actually notice,
read, decide, tire, engage
and remember.

As I started experimenting with using AI as part of my questionnaire workflow, I noticed a pattern in the revisions I kept making. The more questionnaires AI generated for me, the more often I found myself making the same edits.

At first, I assumed I was refining the wording or adapting each questionnaire to the objectives of a particular study. But after making similar revisions across project after project, I began to notice a pattern. Most of my edits had little to do with research methodology; they were almost always about respondent behavior.

That surprised me because, with the right prompt and enough context, AI had become remarkably good at writing questionnaires. It consistently produced logical, comprehensive instruments grounded in established research practices. They were often excellent starting points. Yet they still assumed that respondents would behave the way questionnaires expected them to behave.

Researchers experience a questionnaire very differently from respondents. When we design or review one, we understand why every question matters. We know the objectives, the logic and how the answers will eventually be analyzed. Respondents usually see one screen at a time – often on a phone and often while doing something else. They scan before they read, shifting attention among the stimulus, the question and the response options. As effort accumulates, they rely on familiar patterns and shortcuts to keep moving.

As I reflected on those recurring edits, the underlying issue became clearer. The greatest opportunity was not necessarily writing better questions; it was designing questionnaires around how people actually answer them.

To explore that idea, I conducted a series of randomized online survey experiments which, together with more than 20 years of



human behavior – or unintentionally works against it.

Methodological note: Unless otherwise indicated, the experiments below are based on 800 qualified U.S. respondents, divided into two randomized groups for each comparison. The behavioral-validation analysis began with 1,479 screened respondents; 679 did not meet the validation criteria, leaving a qualified net sample of 800.

PRINCIPLE 1: ATTENTION PRECEDES EVALUATION

Attention is the first moment in the respondent journey because people cannot evaluate what they never fully noticed.

For years, I shared an assumption that I suspect many researchers make when designing concept tests: If respondents were shown a concept, package or advertisement before answering a question, I assumed they had processed it. After all, the stimulus was right there on the screen.

designing consumer research on both the supplier and client sides, led me to six connected principles that form what I call The Respondent Journey – a behavioral lens for understanding what people experience as they move through a questionnaire (Figure 1).

These are not rigid stages that occur only once. They overlap and influence one another throughout the questionnaire. Together, however, they offer a practical way to ask whether a survey works with

Figure 1

The Respondent Journey™

Six connected moments in the experience of answering a questionnaire.



Over time, however, I began to question whether seeing and processing were really the same thing. A typical concept test may require respondents to examine a stimulus, interpret what they see, read the question, understand the response scale, compare the options and decide what to select – all on the same screen. Faced with several competing tasks, people naturally prioritize the one that appears most immediate. That task is usually answering the question, not carefully studying the concept.

To test the effect, I created a fictional ready-to-drink vanilla coffee label. One group viewed the package by itself for several seconds before advancing to the evaluation questions. A second group saw the identical package alongside those questions, reflecting the way many concept and package tests are commonly designed. Both groups were later asked what type of product they had seen and what brand appeared on the package.

Among respondents who viewed the package before answering any questions, 89% correctly identified the product category. When the package appeared alongside the evaluation questions, that figure fell to 72%. Brand recall showed a similar pattern, declining from 92% to 75%. Both differences were statistically significant at the 95% confidence level.

The package was identical. The questions were identical. The meaningful difference was whether people were allowed to complete one cognitive task before beginning the next. They were not behaving carelessly; they were behaving efficiently. When observation, interpretation and evaluation compete for the same limited attention, one of them will receive less attention than intended.

Research implication: Separate exposure from evaluation. Whenever possible, give respondents a brief opportunity to process a concept, package or advertisement before asking for their opinion. Reducing competing cognitive demands allows them to focus on one task at a time

and can improve attention, recall and the quality of the data that follows.

PRINCIPLE 2: RESPONDENTS SCAN BEFORE THEY READ

Once respondents have processed the stimulus, the next question is whether they notice what the questionnaire is asking them to do.

Most people do not approach a questionnaire as researchers do. They scan the screen for cues that will help them complete the task efficiently. Their eyes are drawn to words that stand out, familiar visual patterns and information that appears immediately relevant. Only then do they decide what deserves closer attention.

Recognizing that changed the way I approached questionnaire writing. My objective was no longer simply to write questions respondents could understand. It became equally important to ensure they immediately noticed the few words essential for answering accurately.

To test this idea, one group received the instruction, "From the following list, select the option other." A second group received the shorter instruction, "Select OTHER." The response options were identical – male, female and other – but in the second version, the critical word was capitalized and visually emphasized.

Only 11% of respondents who received the first instruction selected the requested answer, compared with 42% of those who saw the shorter, emphasized version. The task itself was identical; only the visual guidance differed.

Formatting is not merely cosmetic. Used deliberately, bold text, capitalization, underlining and, when appropriate, color can guide respondents toward the information they need most. If a question asks about behavior during the LAST 7 DAYS, making that time frame immediately visible may improve data quality more than adding another explanatory sentence.

There is an important qualification: These experiments were conducted among U.S. respondents and the application should reflect local expectations. In some markets, concise wording and

visual emphasis feel intuitive. In others, respondents expect questions to be more courteous, contextualized or indirect. The behavioral principle remains the same, but its execution should fit the culture and conventions of the population being studied.

Research implication: Emphasize the words respondents must notice. Write questions not only for comprehension but also for attention. Rather than adding more words, make the time frame, instruction or decision criterion easy to find using the visual and verbal conventions that feel natural in the market.

PRINCIPLE 3: FAMILIARITY REDUCES COGNITIVE EFFORT

Even when respondents notice the right words, the response format itself can create unnecessary mental work.

Researchers spend considerable time discussing measurement scales: five-point versus seven-point scales, verbal versus numeric labels and the circumstances in which a semantic differential is most appropriate. Those decisions matter but they sometimes overlook a more basic question: Which format feels most natural to respondents?

A scale can be methodologically sound and still require avoidable effort. Every moment people spend figuring out how to answer is a moment they are not thinking about the product, concept or experience we want them to evaluate.

I compared three response formats: traditional checkbox ratings, star ratings and semantic differential scales. After answering equivalent questions using each format, respondents were asked which one they preferred. Just over half, 52.4%, preferred star ratings, compared with 29% for traditional checkboxes and 18.6% for semantic differentials.

Their explanations were revealing. Many described the semantic differential as confusing, while others said they tended to gravitate toward the extremes without paying much attention to the options between them. By contrast, people encounter star ratings routinely when they shop online, review

restaurants, book hotels or rate entertainment. Because they already understand the format, they can concentrate on the evaluation instead of first decoding the scale.

This does not mean stars are always the right choice or that semantic differentials should disappear from research. Every format has circumstances in which it is methodologically appropriate. The lesson is narrower: When two formats answer the same business question equally well, the more familiar option will often create a better respondent experience.

Research implication: Choose familiar formats when the methodology allows it. The hard part should be evaluating the subject – not figuring out how to use the scale. Reducing unnecessary cognitive effort leaves more attention for the decision that matters.

PRINCIPLE 4: FATIGUE REDUCES CONSISTENCY

Cognitive effort does not remain constant throughout a questionnaire. As the experience continues, it accumulates.

Researchers often focus on survey length but questionnaire experience matters just as much. Two surveys may contain the same number of questions and still feel very different depending on how they are designed. Long grids, repetitive formats and uninterrupted blocks demand sustained concentration from people whose attention naturally declines over time.

The problem is not simply boredom. It is the gradual depletion of mental resources. As a questionnaire becomes more repetitive, respondents are more likely to rely on shortcuts, respond automatically or pay less attention to subtle differences between questions.

To test whether a small interruption could help, one group completed a long evaluation grid without a break. A second group answered the identical grid but, after several rows, encountered a page break displaying a brief message: "You are doing great. We are loading your next questions." Five seconds later, the survey continued.

The questionnaire also included two questions that were intentionally repeated later. If respondents remained engaged, their answers should remain reasonably consistent. For one repeated item, consistency increased from 78% to 86%. For the second, it improved from 88% to 94%.

We did not shorten the questionnaire, simplify the questions or reduce the number of evaluations. We simply acknowledged that respondents are human. A brief opportunity to pause was enough to restore attention and improve consistency.

The point is not that every survey needs a five-second timer. Depending on the study, the better choice may be to divide a grid across pages, vary the response format, provide a progress cue or remove repetitive questions that do not materially improve the decision. The broader point is that analytical efficiency and respondent efficiency are not always the same.

Research implication: Break long tasks and vary the pace. Design the respondent's experience, not just the questionnaire's structure. Brief mental breaks, changes in format and smaller task units can reduce fatigue and improve response consistency without sacrificing the information needed for business decisions.

PRINCIPLE 5: NEVER ASSUME ENGAGEMENT

Even a thoughtfully designed and well-paced questionnaire still requires evidence that completion reflects plausible engagement.

This principle has influenced my thinking more than any other. The quality of our analysis can never exceed the quality of the data we collect. Sophisticated models, segmentation techniques and artificial intelligence can reveal important patterns but none of them can compensate for answers that do not realistically reflect consumer behavior.

In a separate study, 65% of respondents reported taking surveys every day, completing an average of 7.6 surveys daily. One participant reported taking as many as 30 in a single day. Those findings should not be interpreted as evidence

that frequent respondents provide poor-quality data. Many panelists are thoughtful and conscientious. They simply remind us that survey participation has become routine for many people and engagement naturally varies from one respondent and one survey to another.

The question, then, is not whether respondents ever make mistakes. It is whether the overall pattern of answers reflects something a real consumer could plausibly have done.

To explore that question, respondents were asked which products they had consumed during the LAST 7 DAYS. The list included real products and a small number of fictitious ones. Some respondents reported consuming products that did not exist. Others claimed to have consumed 10 or more brands in the same category during that seven-day period. Neither response alone automatically proves poor-quality participation. Together with other answers, however, they can form a pattern that is internally inconsistent or realistically unlikely.

Again, of the 1,479 people screened, 679 did not meet the behavioral-validation criteria, leaving 800 qualified completes for the final sample.

The difference between validation methods was substantial. Traditional open-ended checks flagged approximately 1% of the screened sample, while conventional control questions flagged 8%. Behavioral validation – combining fictitious products with an assessment of response plausibility – flagged approximately 46%.

That result should be interpreted carefully. It does not establish that 46% were consciously dishonest. It means their overall response patterns did not meet the study's behavioral-validation criteria. The objective is not to punish an unusual answer or catch someone making a mistake. It is to determine whether the complete pattern is internally consistent and realistically possible.

More recently, I have expanded this approach by incorporating AI-generated product images, package designs and fictitious innovations into validation exercises. The purpose

Design better journeys

Six moments. Six design choices.

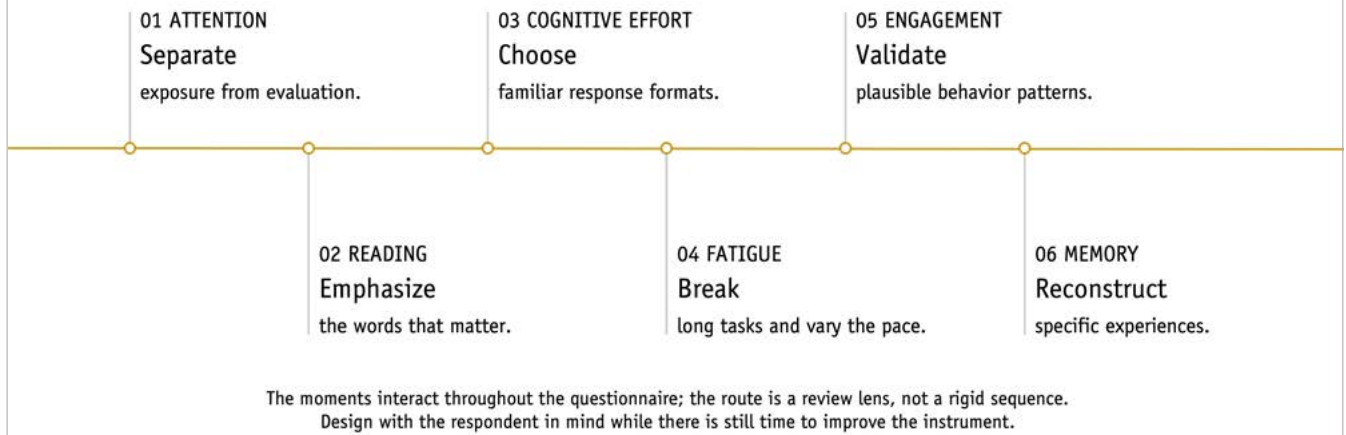


Figure 2

remains the same: not to create a more elaborate trap but to increase confidence that the data reflects behavior that could exist in the real world.

Research implication: Validate plausible behavior, not completion alone. Treat respondent validation as part of questionnaire design rather than as an afterthought. Evaluate patterns across answers, use more than one indicator and distinguish between an isolated mistake and a response profile that does not meet the study's plausibility criteria.

PRINCIPLE 6: RICHER QUESTIONS DRAW FROM MEMORY TO PRODUCE RICHER ANSWERS

Once the quality of participation has been protected, the final opportunity is not merely preventing weak data; it is helping people communicate their experiences more completely.

For decades, researchers have used open-ended questions to understand motivations, emotions and consumption occasions. The limitation was rarely the value of the responses. It was the cost and effort required to analyze them. Coding hundreds or thousands of verbatims demanded significant resources, so many quantitative studies limited the

number of qualitative questions they included.

That constraint shaped the way we asked people to remember. A prompt such as "Describe your most common consumption occasion" asks someone to retrieve several experiences, decide what is typical, organize the details and summarize everything in one response box. Unsurprisingly, many answers consist of only a few words – not because people have nothing to say but because summarizing an experience from memory is difficult.

Instead of asking respondents to summarize, I began asking them to reconstruct one specific occasion through a battery of short open-ended questions. Thinking about the last time they consumed the product, they were asked: What time of day was it? Where were they? Who were they with? What were they doing? Why did they choose that brand? How did they feel?

Individually, none of those questions is remarkable. Together, they guide people through the natural process of remembering. A specific moment begins to reappear and the added context reveals motivations, routines, emotions and social influences that often remain hidden in one broad open-end.

This is also where AI genuinely changes the equation. Years ago, I might have hesitated to recommend a qualitative battery because analyzing that volume of text was expensive and time-consuming. Today, AI can rapidly organize themes, identify recurring patterns, compare segments, estimate prevalence and surface representative verbatims. Its greatest contribution may not be helping us analyze more responses; it may be giving us the freedom to ask richer questions that were once too costly to analyze.

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Erwin Chang is head of marketing research (consumer insights) at Novamex (Jarritos soft drink company). With more than 20 years of experience, he helps organizations improve business decisions through consumer insights, research innovation and a deep understanding of consumer behavior across CPG, beverage, telecommunications, automotive and healthcare.

These batteries should still be used selectively. They require more effort from respondents and do not replace traditional qualitative research or the structured measures needed for longitudinal tracking. But when a deeper understanding will influence an important business decision, helping people remember can produce more useful insight than asking them to summarize.

Research implication:

Reconstruct a specific experience. Replace one broad open-ended question with a focused sequence that helps respondents retrieve context, motivation and emotion. Richer answers do not come from asking people to write more; they come from making remembering easier.

From six principles to one journey

Viewed together, the six principles become a practical prelaunch review. Did respondents have a fair opportunity to process the stimulus? Will they notice what matters? Is the response format intuitive? Does the survey manage fatigue? Do the

answers form a plausible behavioral pattern? And when memory matters, does the questionnaire help people reconstruct an experience?

Together, those questions form The Respondent Journey (Figure 2). The framework connects six behavioral moments with six practical design actions.

The framework does not replace methodological judgment. How each action is applied will still depend on the research objective, population, culture and methodology. Its value is that it adds the respondent's perspective while there is still time to improve the instrument.

Advances should be welcomed

Artificial intelligence will continue transforming consumer research. Questionnaires will become easier to generate, qualitative data easier to analyze and reports faster to produce. Those advances should be welcomed because they allow researchers to spend less time on routine tasks and more time thinking about the business decisions our work is meant to inform.

AI will also become better at recognizing many of the behavioral principles described here. Even then, applying them will require judgment, context and an appreciation of the people behind the data. A questionnaire can be well written, logically organized and methodologically defensible – and still create an unnecessarily difficult respondent experience.

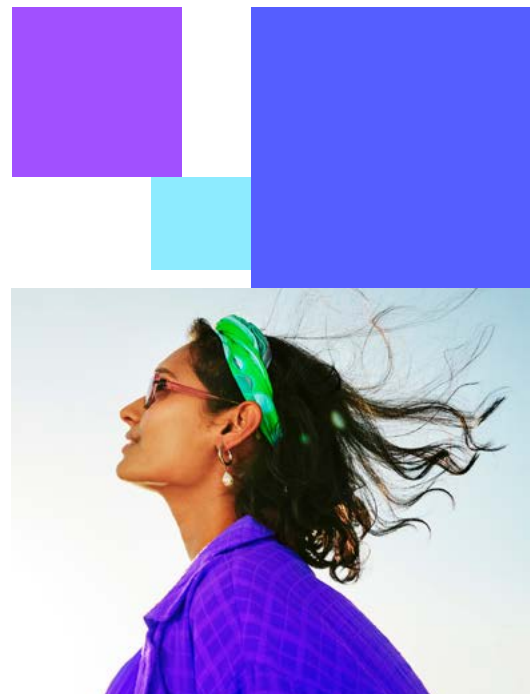
A better respondent experience does not guarantee a better business decision. It does, however, improve the quality of the evidence behind it. When a questionnaire supports attention, reduces unnecessary effort, manages fatigue, validates engagement and helps people remember, the data has a better chance of reflecting the consumers we are trying to understand.

AI can help us write questionnaires. Our job is to design respondent journeys – not around how researchers think but around how respondents actually behave. 

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What's my motivation?

Pushing past product features into a buyer's emotional territory

| By Sergey Veselovsky



abstract

Mapping consumer needs across two dimensions – what's sought in a product or service and how intensely – aims to turn abstract psychology into a tool for concrete strategic choices.

Companies invest heavily in understanding customer needs, yet translating those needs into clear product, pricing and marketing decisions remains difficult. Existing approaches – including Maslow's hierarchy of needs, jobs-to-be-done, means-end chains, self-determination theory and identity-based motivation – each explain an important part of customer motivation. But most focus on either what customers are trying to achieve or how deeply that motivation matters. What is often missing is a practical way to combine both dimensions, measure them consistently and use them to guide strategy.

Need architecture was developed to address this gap. Its central contribution is that it separates customer needs into two dimensions: need domain – what the customer is ultimately seeking (such as safety, status, freedom) and need level – how deeply that motivation is experienced (such as functional, emotional, identity).

Together, need domain and need level define a customer's motivational territory – the need space a product or a brand can choose to occupy. Every downstream decision – from personas and product design to pricing and customer experience – flows from the motivational territory an organization chooses to occupy.

What customers are seeking

Need domains describe the underlying motivation shaping customer demand. Examples include those shown in Table 1.

Most products do not operate within a single need domain. They typically have one primary domain – the dominant motivation that defines their core strategic territory – supported by one or more secondary domains that reinforce credibility, differentiation or adoption.

Customers may pursue the same need domain at very different levels (Table 2). Levitt famously observed that people do not want a quarter-inch



drill; they want a quarter-inch hole. The need architecture approach extends this logic further. The hole itself (the functional level of the need) may simply be a solution to a deeper need. The real need may be to hang a picture (task level), make a home feel warm and personal (emotional level) or be a good homeowner (identity level). The deeper the level, the less the product competes only on features and the more it competes on emotional outcomes, identity and belonging.

Need domains and need levels work together to define a customer's motivational territory. The example in Table 3 illustrates motivational territories for a financial services category. Rows show what customers are trying to achieve (need domains); columns show how deeply that motivation is experienced (need levels). Each cell is a distinct territory with its own strategic implications, expressed as [need domain] @ [need level].

For example, a brand might choose to compete at control @ emotional. That single choice shapes every downstream decision. Its competitors are brands that help customers feel financially stable, not those focused on excitement or belonging. Its value proposition, pricing and customer experience must all reinforce that emotional promise. The motivational territory a brand chooses ultimately determines how it competes.

Table 1

Need domain	What the customer is seeking
Control	"I want to feel in charge of what happens."
Freedom	"I want fewer restrictions and more choices."
Safety	"I want to feel protected from bad outcomes."
Status	"I want others to recognize my success."

Table 2

Need level	Example	Strategic implication	Design approach
Functional	A drill	Most crowded, lowest margin. Compete on features and parity.	Design for specifications and reliability.
Task	Hang a picture	Compete on task completion, UX and reliability.	Design for seamless flow and friction reduction.
Emotional	Make home feel warm	Compete on emotional outcome. Commands a premium.	Design for the feeling the customer is seeking.
Identity	Be a good homeowner	Most defensible. Compete on self-concept.	Design for identity reinforcement and signal.
Belonging/ Ecosystem	Create a home others gather in	Rarest. Compete on belonging and participation.	Design for community and shared meaning.

Table 3

Need domain	Functional	Task	Emotional	Identity	Belonging/Ecosystem
Control	Track expenses	Manage money reliably	Feel financially stable	Be a responsible adult	Be the anchor others depend on
Freedom	Access money anywhere	Simplify financial life	Feel unencumbered	Be financially independent	Create freedom others admire
Safety	Protect against fraud	Have reliable backup	Feel financially safe	Be always prepared	Create safety for those around me
Status	Own premium products	Maintain high standing	Feel financially ahead	Signal financial success	Lead communities of achievers

Why does this matter? Customers may share the same need domain but occupy very different need levels. Treating them as a single segment masks important differences in product expectations, pricing sensitivity and customer experience. A customer-needs framework is only useful if it leads to better strategic decisions.

Case study

A proof of concept utilizing a nationally representative sample of Canadian consumers illustrates how this methodology moves beyond superficial product features to isolate underserved market segments.

A study was fielded in May 2026 with a nationally representative Canadian sample of $n = 500$ respondents who indicated they would be open to a prepaid card. Need domains were measured with a MaxDiff exercise; need levels were coded from AI-guided interviews conducted within the same study. (Figures are directional and intended to demonstrate the methodology rather than to size the market.)

As in other markets, most prepaid cards in Canada all look the same. Whether for budgeting, travel or gifting they compete on a similar mix of features, fees and use cases. But people don't choose products based only on features. They choose them because they satisfy underlying human motivations.

We mapped those motivations across the market and found something surprising: the single-largest customer motivation – shared by one in five consumers – is barely addressed by today's offerings.

PREPAID CARD NEED ARCHITECTURE

The need architecture matrix is category-independent. The following example applies the same methodology to identify motivational territories within the market for prepaid cards in Canada.

Step 1 – Measure need domains using MaxDiff: Need architecture is built around 14 fundamental need domains representing broad human motivations (see sidebar). Because these domains are universal, they must be translated into category-

specific expressions before they can be measured. All need domain statements were intentionally written at the functional need level to avoid introducing need level bias into the MaxDiff exercise. For example, the safety domain was expressed as "Safety: I want to protect my primary bank or card when making purchases online," and the control domain as "Control: I want to manage my spending and stay within my budget."

The five leading need domains selected by respondents for a prepaid card are shown in Figure 1.

Step 2 – Code need levels from AI-guided interviews: The dominant need level was identified by coding AI-guided interviews conducted after the MaxDiff exercise. The interviews focused on the need domains each respondent selected most often during the MaxDiff exercise, exploring why respondents made those choices to determine the depth at which the underlying need is experienced (functional, task, emotional, identity or ecosystem).

Viewed in order of demand, the map (Table 4) tells a clear story. Different need domains gravitate toward different

Table 4: Output – the motivational territory map

Need domain	Functional	Task	Emotional	Identity	Belonging/Ecosystem
Safety	4.9%	1.1%	21.1%	0.0%	0.0%
Caregiving	6.4%	12.5%	1.8%	1.3%	0.0%
Control	4.0%	9.4%	1.3%	1.3%	0.0%
Freedom	7.7%	3.5%	2.5%	0.3%	0.0%
Self-expression	2.0%	3.0%	3.8%	4.3%	0.0%

need levels and the largest pockets of demand are concentrated in a handful of cells.

Safety @ emotional (21.1%) – by far the largest single cell. Safety is experienced as reassurance, not as a feature.

“I do some online transactions and I’m always afraid of cyberattacks on my card. It would be nice to have peace of mind and the card not linked at all to my bank account.”

Caregiving @ task (12.5%) – caregiving is expressed as a convenient way to provide for others.

“I usually give gift cards to friends & family, so they can purchase whatever they want. It makes things easier for me, eliminates the cost of shipping & presents that don’t fit or the recipient would never use.”

Control @ task (9.4%) – control is about managing spending with less effort.

“As a student I have a hard time with budgeting and often end up spending too much money. If I had a prepaid card I think it would help me better manage my finances.”

Freedom @ functional (7.7%) – freedom shows up as practical travel utility.

“I think it’s very helpful to be able to load multiple currencies especially for traveling to different countries in a short period of time without the hassle of carrying a bunch of different currencies.”

Self-expression @ identity (4.3%) and emotional (3.8%) – the only domain that reaches the identity level.

“Gambling is my thing and I like keeping it on its own card, separate from my everyday life. It’s my own little world.”

In short, several need-specific opportunities emerge – safety @ emotional, caregiving @ task, control @ task, freedom @ functional and self-expression @ identity and emotional. We can now compare this demand side with a supply-side reading of the Canadian market.

Step 3 – Overlaying the supply side: The previous step identified where customer demand is concentrated. The next step is to compare that demand landscape with the current supply of prepaid card offerings.

The supply side reflects a market-level analysis of the current Canadian prepaid card market. Each publicly marketed card was coded to its primary motivational territory (domain @ level) based on its publicly communicated value proposition. This is an assessment of brand positioning rather than consumer perception and is intended to illustrate the methodology rather than provide a definitive classification of the market.

Based on this analysis, current market supply is concentrated in three of the five major demand territories: Control @ task and functional (BMO Prepaid, EQ Bank Card, Neo Money, KOHO) Freedom @ functional (Wise, Cash Passport, Wealthsimple Cash) Caregiving @ task (Vanilla gift cards, Neo JA card)

Concrete opportunities

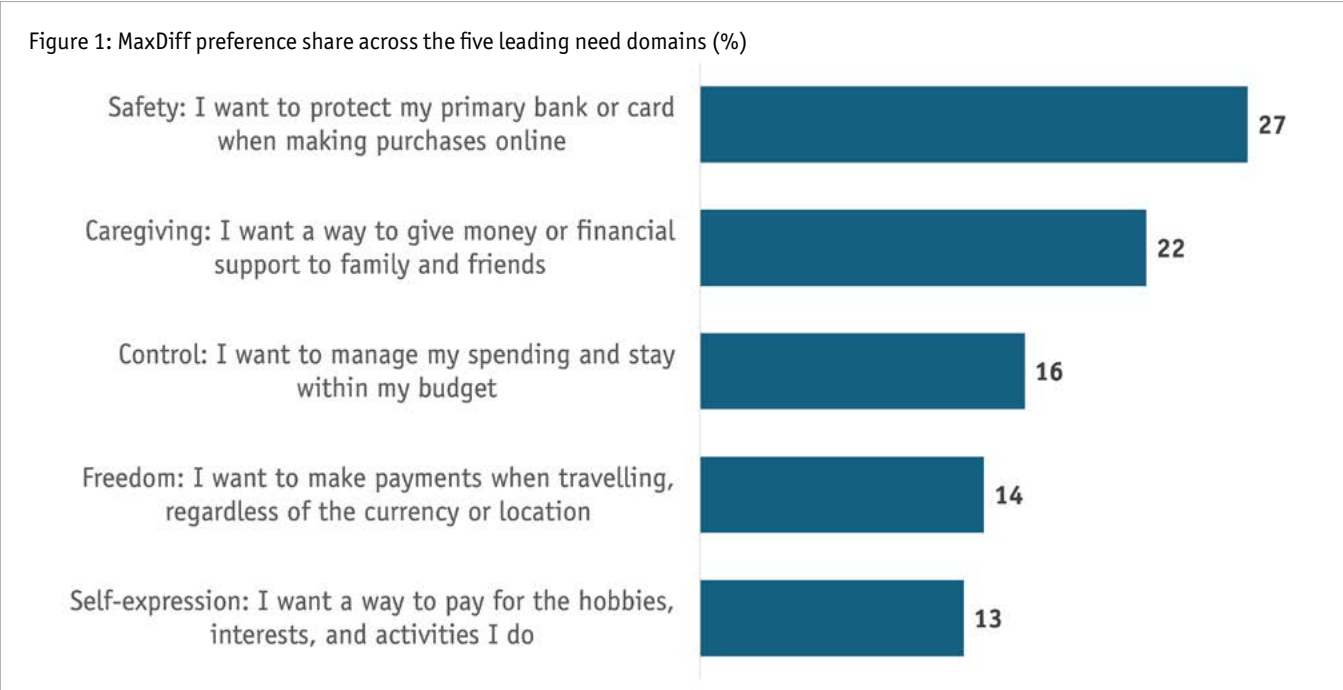
The two clearest demand-supply mismatches point to concrete opportunities.

Safety @ emotional is the single largest underserved cell. Very few brands have built their value proposition around emotional reassurance. Most emphasize security features such as encryption and fraud protection but few position themselves around the emotional promise of “the card that lets you stop worrying online.”

Self-expression @ identity represents a genuine white-space opportunity. The underlying need already exists but no dedicated prepaid card currently addresses it directly. Even the Joker Mastercard has expanded beyond its original focus on gambling and gaming. Instead, consumers satisfy this need indirectly through generic prepaid cards used for privacy rather than self-expression.

Key takeaway: Most prepaid cards look the same because they compete within the same motivational territories. The greatest opportunities emerge where customer demand exceeds competitive supply.

This case study demonstrates how need architecture helps organizations identify those opportunities. By combining MaxDiff with AI-guided interviews, it measures both what customers are trying to achieve and how deeply those motivations matter.



THE FULL LIST OF CUSTOMER NEED DOMAINS

Need domain	Belonging/ecosystem
Control	The need to direct, manage and have mastery over one's environment and outcomes. "I want to be in charge of what happens."
Freedom	The need to be unencumbered, unrestricted and autonomous. "I want fewer obligations and more choices."
Safety	The need for safety, protection and predictable stability. "I want to know I am protected against bad outcomes."
Status	The need to be recognized as successful, capable or elite by others. "I want others to see that I have succeeded."
Simplicity	The need to reduce complexity, cognitive load and friction. "I want life to feel effortless and organized."
Belonging	The need to be part of a community of similar people. "I want to be with people who share my values."
Achievement	The need to accomplish, progress and reach meaningful goals. "I want to keep getting better and hitting my targets."
Competence	The need to feel genuinely capable, skilled and knowledgeable. "I want to know what I am doing and do it well."
Self-expression	The need to communicate identity, values and personality through choices. "I want my choices to reflect who I am."
Progress	The need to be moving forward, developing and continuously evolving. "I want to feel like I am always advancing."
Stability	The need for consistency, predictability and groundedness. "I want things I can count on, not constant change."
Caregiving	The need to protect, provide for and support others. "I want to take care of the people who depend on me."
Recognition	The need to be seen, appreciated and acknowledged. "I want my contributions to be noticed and valued."
Exploration	The need for novelty, discovery and new experience. "I want to keep discovering things I have not encountered before."

Note: In the prepaid card example, the security domain is expressed as "safety" to match the category-specific language used with respondents.

Overlaying customer demand with current market supply reveals the motivational territories that remain underserved.

In the Canadian prepaid card market, that analysis uncovered two opportunities: an emotionally positioned safety proposition and an identity-driven self-expression proposition.

The same approach can be applied to virtually any category. Identify the motivational territories customers seek, compare them with the territories competitors occupy and build products, pricing and experiences around the greatest demand-supply mismatch.

This workflow summarizes the need architecture process – from identifying customer motivations to translating them into actionable strategic decisions:

Need domain → MaxDiff → AI-guided interviews → need level → motivational territory → demand–supply gap → strategy

Need architecture is the foundation of the five-module demand architecture framework:

- *Need architecture* – What motivates demand?
- *Persona architecture* – Who creates demand?

- *Product and value proposition architecture* – What should we build?
- *Pricing architecture* – How should we capture value?
- *Experience architecture* – How do we reinforce long-term customer commitment?

Learn more about the framework at demandarchitecture.org and read the full need architecture methodology at demandarchitecture.org/need-architecture. 

ABOUT THE AUTHOR

Sergey Veselovsky has spent more than 25 years in applied marketing research, turning complex quantitative data into decisions companies can act on. His work – spanning new product design, value proposition, persona development, pricing, consumer experience and marketing strategy – has shaped major strategic investment decisions for some of the world's largest organizations. He is a partner at Research Etc. and a lecturer at the University of Prince Edward Island, Canada.



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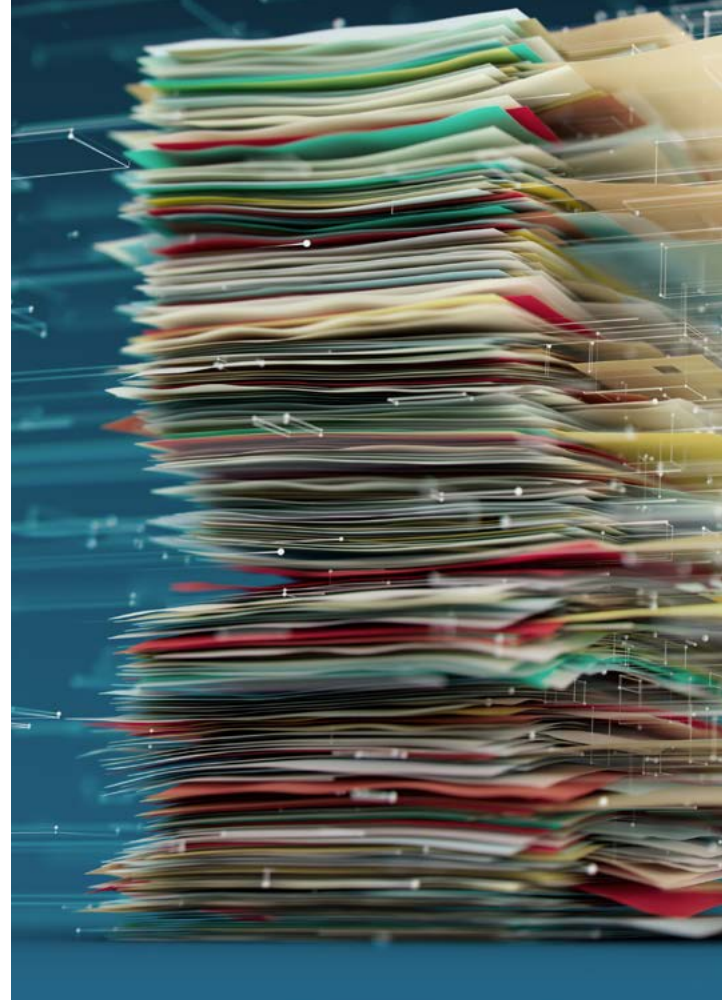
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Giving ourselves a head start

Experiences in developing an archive of past questionnaires

| By Raghavi Ravi and Emma White



abstract

A research firm built an AI-powered search tool that makes years of survey questionnaires searchable by meaning, with the goal of helping researchers work more efficiently, maintain consistency and leverage institutional knowledge.

Most research teams have a shared drive full of past questionnaires. Very few teams use it as well as they could.

Not because the documents are disorganized but because retrieving something specific from a collection of Word files requires knowing where to look – which project, which year and roughly where in the questionnaire. Without that prior knowledge, digging through the archive is slow, frustrating and often not worth the effort.

At our firm, we decided to do something about it. Over the past year, we built a tool in-house that makes our questionnaire archive searchable in plain English, not by file name or keyword but by meaning. Ask it how we have measured brand satisfaction across our studies and it tells you: exact question wording, response scale, audience group, study name and year, drawn from every document we have uploaded. This article explains why we built it, how it works and what it might mean for how we can use AI to enhance, not replace, the work we do as researchers.

Accessing the work we've spent years developing

We knew we were sitting on a valuable asset: years of carefully constructed survey instruments. Every questionnaire that has gone into the field represents real intellectual effort: deliberate question wording, tested response scales, carefully sequenced sections. But that accumulated know-how is locked inside Word files in our drives and getting to it is harder than it should be.

This impacted our work in a couple of ways:

- We were at times starting from scratch writing questions, even if it was a topic we had tackled before. Especially if newer staff were working on a project, they would not know where to look to find all the questions we had already developed and vetted.



- We sometimes lost comparability to past results because the questions we were using didn't match exactly – and so we couldn't tell whether the difference was time or if different wording drove different results.

We built a tool to solve this. To make a searchable questionnaire database, we had to first standardize the information into a format that could sort the relevant question data. Questionnaire documents consist of variously-structured components – individual questions, response options (if applicable) and metadata like audience, name of the study and year. We needed to reconstruct question numbers and hierarchy from Word files, where this information is captured by formatting rather than plain text. And since questionnaire documents are not naturally structured for machines to read, we had to define what a “unit of retrieval” should look like or, in other words, teach the tool how to determine the boundaries of an individual question with its response options and any programming instructions or branching logic if applicable. This allows it to return a full question with all relevant information as the result of a search.

To enable searching, the tool stores the questions from these documents in two forms. First, the question text, response options (if applicable), study name, audience, year and the source document itself are stored as structured metadata. Additionally, the questions are stored as an embedding, which is a numerical representation of their meaning. The user's query is also converted into the same kind of representation and is then compared to stored question embeddings. The system then retrieves a set of the closest matches, along with their metadata and source references.

The final stage is the search function and retrieving results. A large language model pulls the results together, showing exact examples and, when useful, a summary of how the topic has been asked before. This AI-

powered search tool lets us go beyond traditional search methods that rely on exact keywords. If you type “brand recognition” but the question in the archive says “brand awareness,” a keyword search may miss it entirely. AI-powered search understands that those two phrases are likely describing the same thing and finds both. It can also summarize how a topic has been asked over time – not just a list of questions.

Every result links back to the original source so you can see exactly where it came from. We designed it to pull only from our documents and cite every source it draws on so we are not dealing with AI hallucinations or inventions.

The outcome

We can take all of our past questionnaire documents and feed them into a system that reads and understands them, not just as text, but as structured instruments with questions, response options and context. The system is searchable in plain English.

Instead of opening files one by one, we just ask the system what we are looking for. The system finds the relevant questions across the entire archive, tells us where they came from and shows us the exact wording.

Let's say a researcher is building a proposal for a new brand health study. She knows our agency has run similar work before. She wants to know how brand perceptions have been measured in past projects: what the question wording was, what response options were used and whether it was asked differently to different audience groups.

This method retrieves all variations of how we had asked a question across multiple studies from Likert scales to matrix questions. This changes what is possible within a working day and it changes the confidence with which a researcher can design and refine questionnaires.

The question every research director will ask: What about client confidentiality?

A system like this can be designed to run within your environment, meaning client data stays within the boundaries you already

The traditional way

Opens the shared drive. Tries to remember which client the previous brand health study was for. Searches by client name, finds three folders. Opens each one looking for a questionnaire file. Finds two. Reads through both. One matches. Notes the question wording. Wonders if there were earlier studies she is missing. Spends 30 minutes to find one confirmed example.

The advanced way

Types: "How have we measured brand perceptions across our studies?" Receives a list of every relevant question from every uploaded questionnaire, exact wording, response scale, audience group, study name, and year – in under 10 seconds. Cites three examples in the proposal, all verified.

maintain. Any tool that handles research data should fit your existing data governance framework and you should review any third-party data processing agreements carefully. This means that the material stays yours and the tool serves the team rather than the other way around.

How to begin

At our firm, we started small.

Start with one client or category. We began with a single long-running client where we already knew the questionnaires well. This made it easier to evaluate the outputs the tool was returning before expanding further.

Treat the archive as a living resource. We made it a habit to upload each questionnaire at the end of a project. We believe that over time, this builds a more relevant library that becomes more useful with every study.

Be clear on what the system is for. Like most tools, its value depends on how it is used. The tool does not make any decisions; it instead finds what's been done before. We then take the outputs and decide what to do next. It is very important to keep in mind that just because a question exists in the archive does not mean that it is the right choice for a new study. This distinction is important for maintaining research quality as usage scales.

What this tool changes

The most immediate impact is time. Researchers can spend less time digging through past studies or relying on memory. They can quickly see how similar questions have been handled in the past and build from that.

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Over time, we think that this should improve consistency. When our team can easily get to past wording and response scales, they are less likely to introduce small variations by mistake which can make comparisons harder later.

It also changes how quickly new researchers can get up to speed. Instead of relying on institutional memory or knowing who to ask, they can see how the team has approached similar problems in the past.

This is a starting point. Systems like this could gradually extend beyond just questionnaires and into discussion guides, reports and other research artifacts.

AI as an operations tool, not a research replacement

The conversation about AI in market research often focuses on flashier possibilities – synthetic respondents, automated analysis, AI-generated surveys. While we believe it is critical that research continues to engage real people and not rely on synthetic data, there are overlooked places

where AI tools can be an enormous aid to researchers by making research operations significantly more efficient and freeing time for work that can only be done by humans.

Finding a past question is not a glamorous problem. But it is a real one and it takes real time away from the work that actually requires human expertise. Finding questions, checking consistency and auditing methodology – these are exactly the kinds of tasks where AI performs well and where its limitations can be mitigated. We believe this creates a

more connected view of how research is designed and executed with the help of AI.

For Emma White Research, building this capability in-house has shifted what feels possible during a working day. The same will be true for any research team willing to put in the work to make their questionnaire archive a more usable resource. The knowledge is already there. The question is whether you can get to it. 

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Go beyond the numbers

Why behavioral data needs behavioral understanding

| By Asma Qureshi



abstract

Data can reveal what users do, but not why. Combining analytics with human insight helps teams interpret metrics, avoid false signals and make decisions grounded in real experience.

Companies collect massive behavioral datasets (clicks, page views, conversions, etc.) to guide decisions. Yet analysts caution that “Data without context is just plain dangerous.” A sudden spike or drop in a metric can mislead us when we don't know why it happened. A 40% surge in web traffic looks great until you realize visitors quickly bounce. In other words, behavioral data is not the same as behavioral understanding. Numbers may show what happened (e.g., visits went up) but not the motivation or experience behind it. Without a qualitative context, customer interviews, surveys or field research, dashboards become noise masquerading as insight.

The KPI illusion: When metrics mislead

Many dashboards report simple KPIs (pageviews, conversion rates, time on site, etc.), but these unsegmented numbers often mislead. As retail and web analytics consultant Gary Angel notes, “Straightforward KPIs seldom work” in behavioral analytics. For example, companies often assume that longer on-site time is better. But that's not always true: a frustrated customer who is lost on a confusing site will also spend a long time there. In fact, Angel quips that one could “improve” time-on-site simply by slowing page loads or opening fewer checkouts (to reduce congestion), yet this would be bad for customers.

Similarly, a rising conversion rate can deceive. Angel notes a scenario in which heavy discount campaigns drove many low-value shoppers through the door: conversion rates increased, but profit and sales quality declined. Conversely, a fall in conversion might signal healthy growth (e.g., more foot traffic diluting the purchase ratio). In one hotel web analytics case, a website's “look-to-book” ratio exploded, flagging a problem. But the investigation showed the change was caused by a new on-property Wi-Fi login: Guests clicked through from their room Wi-Fi, inflating visit counts for people already staying there. These are exactly the kinds of “confusing signals” Angel warns about.



The cure, as Angel suggests, is segmentation and context. By isolating distinct user groups (loyal shoppers vs. bargain hunters, in-room Wi-Fi users vs. genuine bookers), a company can interpret KPIs more accurately. Until then, a downward arrow on a report can actively encourage people to make bad assumptions.

Case studies

Beyond aggregate KPIs, many concrete examples show the perils of taking behavioral data at face value.

Checkout button test: A tech product team A/B tested five variations of checkout button copy with 20,000 users each. The winning variant statistically improved conversion (from 12.40% to 12.65%, $p=0.03$). However, the effect size was trivial (Cohen's $d \approx 0.08$) and had a narrow confidence interval. Crucially, follow-up user interviews revealed no one noticed the difference. In effect, the test had detected noise rather than a meaningful change. Users don't experience p-values, they experience your product. The data was a statistical "win," but it produced no real shift in user behavior. The team concluded they were optimizing measurement error, not building a better experience.

Poorly modelled data: A common issue in customer analytics is misaligned metrics. For instance, in self-serve BI setups (such as Looker dashboards), teams sometimes define measures in database terms rather than in terms of human behavior. For example, a company defined success as "product added to cart." After expert review, they realized that real purchase intent required a richer definition: repeat product views over five days, cart additions and no view of a competitor. The old metric ("added to cart") was too crude and lacked context for user intent. Poorly defined measures skew your insights by showing incomplete, incorrect or contextless data. In

essence, they were measuring database events rather than understanding the customer's decision process. Common pitfalls include over-aggregating (averaging together new and loyal users) and mis-segmenting (slicing by age instead of by need state). Without modelling data around the actual user journey and motivations, dashboards produce confusing results.

Biased research: Even in formal UX studies, cognitive biases can warp interpretations. A UX analysis warns that teams often "track every possible interaction metric" (information bias), leading to analysis paralysis and a loss of insight into which data truly predict user satisfaction. For example, a very high task completion rate might mask usability problems (users struggling but persisting) and time-on-task can be misleading if some users are novices and others are experts. Often, confirmation bias leads teams to ignore negative feedback or design tests that guide users toward expected behavior. The result is dashboards and reports that reflect the research design more than real customer needs.

These examples again highlight a common theme: Without a behavioral lens, metrics can lie. Data can reflect "what" happened (sales, clicks, sessions) but we also need to ask "why." As one data guide puts it, "Layer in qualitative insights. Numbers tell you what's happening, but qualitative data explains why."

Frameworks in practice: Bridges and limitations

To move from raw data to understanding, many organizations rely on behavioral science frameworks. These offer structured ways to diagnose and influence behavior. Some of the most popular include:

COM-B/behavior change wheel (BCW): Developed by Michie, Van Stralen and West in 2011, COM-B argues that any behavior (B) arises from capability, opportunity and motivation. It's often embedded in the BCW, a wheel of intervention functions. In practice, COM-B/BCW gives teams a diagnostic toolkit to identify barriers. For example, if users aren't completing onboarding, COM-B prompts questions: Do they have the capability (skills), the opportunity (time/interface) or the right motivation? The BCW then links these to intervention strategies. However, experts note limitations: COM-B is broad and diagnostic but not predictive. It clarifies where to look for issues but doesn't specify how the

factors combine to change behavior. Its strength is its versatility across settings, but teams often need to pair it with more specific theories (such as TDF domains) for detailed design.

Fogg behavior model: BJ Fogg's model (motivation, ability, prompt) is widely used in tech and product design. It's great for driving short-term actions (e.g., nudges to click a button). In practice, it reminds designers to ensure that users have sufficient motivation and ability when prompted. Yet critics argue Fogg is too simplistic for complex behavior change. It often overlooks deeper motivational shifts and long-term habits. As one behavioral consultant puts it, Fogg "focuses only on immediate behavior" and can fall short for sustained change. In industry, teams might use Fogg for quick wins (e.g., an app walkthrough) but combine it with richer frameworks for long-term engagement.

EAST and MINDSPACE: Developed by the U.K.'s Behavioural Insights Team, these mnemonic frameworks guide the design of interventions. EAST (easy, attractive, social, timely) suggests making desired actions frictionless and appealing. MINDSPACE (messenger, incentives, norms, defaults, salience, priming, affect, commitments, ego) catalogs psychological levers. These are widely taught to policymakers and marketers. In practice, they encourage teams to ask questions like: Can we default to opt-in for a beneficial feature? Can we highlight norms (what most users do)? However, like all frameworks, they have limitations. They are collections of insights rather than predictive theories; using them well still requires judgement. Some argue that methods like EAST or MINDSPACE can oversimplify behavior into a few rules. For example, making a behavior "easy" is helpful but underlying beliefs and emotions might still block change. Indeed, critics note that frameworks such as MINDSPACE were designed for policy nudges and may not capture all industry scenarios. They should be used as guides, not silver bullets.

Other models: The industry also uses tools such as the theoretical domains framework (TDF) (for granular barriers), jobs-to-be-done (focused on customer goals), the hook model (drivers of product engagement) and

classic marketing funnels. All can be useful. But no framework replaces real-world testing and research. In fact, thought leaders emphasize that frameworks often need to be fused with data and iterated.

A human-centered approach

Across these examples, the same lesson keeps surfacing: Data analytics and behavioral science are strongest when they work together. Metrics give us hypotheses; behavioral understanding verifies or refutes them. Successful companies treat quantitative results as the starting point, not the final word. The goal isn't to abandon statistical rigor, it's to complement statistical significance with behavioral understanding.

In other words, a headline A/B test result or a dashboard trend means little without determining if users will actually notice or care about this change.

Before acting on a test result or dashboard trend, teams should ask three questions: Is the effect real in the data? Is it large enough to matter? And would an average user actually notice the difference?

For example, psychological research suggests that users rarely notice improvements in page speed of less than ~20%. So a statistically significant 0.5% boost likely won't change behavior. Also weigh costs and context: A 0.5% lift in conversion rate might not justify a major redesign if it would require three months of work. These considerations turn a cold metric into a real business decision.

Another key practice is to triangulate data. When something is detected in quantitative data, follow up qualitatively. For instance, if analytics show lower engagement, quickly run user interviews or session replays to understand the root cause. If a data trend is unexpected, search for alternative data sources or experiments. In short, don't let a black-box algorithm or dashboard lull you into

complacency. Treat every metric as a clue to be investigated, not a fact.

Finally, think holistically. Many mistakes arise from viewing data in isolation. A marketing e-mail open rate might rise, but did click-through or revenue also rise? A new feature might boost daily active users, but did retention improve? Asking these higher-order questions ensures we don't chase vanity metrics. One useful tip is setting minimum practically significant effects before any test; decide in advance what lift would truly move the needle and ignore anything smaller. This forces teams to focus on meaningful changes and to consider whether the data aligns with real customer value.

Springboard for understanding

In sum, behavioral data is a valuable but incomplete window into human action. The raw numbers tell what is happening but not why or how people feel. Thoughtful organizations use data as a springboard for understanding, blending analytics with behavioral science. They apply frameworks such as COM-B, Fogg and EAST to structure insights while remaining aware of each tool's blind spots. They segment their audience, add qualitative validation and always ask whether a metric's rise or fall aligns with the real user experience. After all, as one observer notes, "Users don't care about your p-values; they care about whether your product better serves their needs."

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Asma Qureshi is a research strategist with over 15 years of experience leading user, customer and experience research across financial services, SaaS, technology and not-for-profit sectors. Holding a Ph.D. in consumer decision behavior and a master's in AI, she combines academic rigor with deep industry application to deliver evidence-based, decision-ready insights. Find Qureshi on LinkedIn: www.linkedin.com/in/draaq/

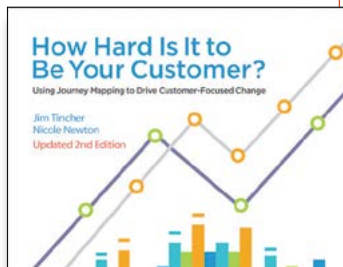
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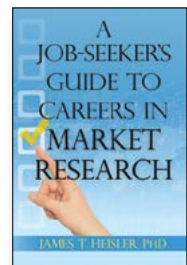


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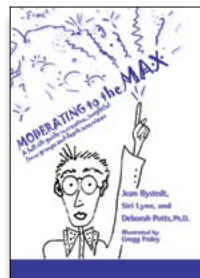


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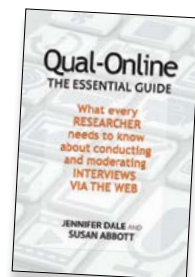


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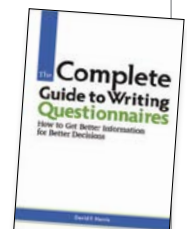


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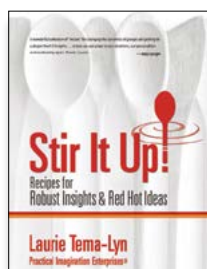
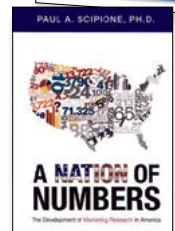


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●●● automotive research

Armageddon or acceleration?

A look at what China's expansion into North American markets may mean for electric vehicle makers and marketers

| By Tim Grainey

abstract

Tim Grainey offers recommendations for researchers working with Chinese car companies as they prepare to enter Canada and eventually the U.S., as well as for those guiding current client companies – domestic and imports – in the North American markets.

China, the world's leading car producer, finished 2025 with a record 34.5 million units (gas engines and electric vehicle combined). China's electric vehicle exports to Europe, Latin America, Africa and Asia exceeded 7 million units.¹ The United States, the No. 2 global producer, finished with about 10.5 million units produced² and 16 million vehicles sold in 2024.³

Chinese automotive manufacturers – of which there are more than 100 brands from over 35 manufacturing groups for cars and light trucks – are finally entering the North American market. After acquiring well over 50% of their home market in 2025⁴ and achieving rapid inroads in Europe and Latin America in recent years, Chinese manufacturers have this year been permitted to sell up to 49,000 electric vehicles per year in Canada (2.6% of current sales) at the country's most-favored-nation tariff rate of 6.1%,⁵ which will increase to 70,000 units in five years' time.⁶ An automotive expert source in Canada said that these companies would likely initially focus on three major metropolitan markets – Vancouver, Toronto and Montreal – utilizing existing dealers to market their products. There is also an expectation that the upper limit on imports to Canada could be expanded or even eliminated within a few years, if their vehicles prove popular through robust sales.⁷

Mexico is the seventh-largest automotive producer in the world and fourth-largest in exports, despite not having any major local brands. The country has been a major new-vehicle exporter to the U.S. for many years. EV sales have grown in the market since 2021 and Chinese manufacturers have an 11.2% share of the market as of 2026 Q1, matching the traditionally popular German manufacturers for the first time.⁸ This success has led to Chinese manufacturers currently examining local production options, led by GAC and BYD, to support local sales growth, while also building sales throughout Central and South America and preparing for the possibility of entering the United States.



Regarding the U.S., it is no secret that China's auto firms have been exploring the market for years but have been kept out due to tariffs, national security concerns with their software technology on vehicles and other obstacles. With increasing success in Mexico and imminent entry into Canada, some believe that Americans will have the opportunity to shop for their EVs within a year or two, particularly if these companies establish manufacturing operations in the country.⁹ Two Chinese companies have a unit or a parent company who currently produce in the U.S. – Zhejiang Geely Holding through Volvo and Leapmotor through Volkswagen – while global EV sales leader BYD has been manufacturing electric trucks and buses in Southern California since 2013 and is now the largest battery-electric bus manufacturer in North America.¹⁰

In 2025, Kerrigan Advisors found in a survey of U.S. automotive executives that 76% of the respondents felt that Chinese carmakers will eventually begin selling vehicles in America¹¹ but 70 percent expressed concern about the financial implications of Chinese automakers' rising global market share.¹² This is particularly interesting as the National Automobile Dealers Association is virulently against the idea of Chinese vehicles launching in the U.S. The Alliance for American Manufacturing has called the entry of Chinese EVs into the U.S. potentially an "extinction-level event" for America's auto industry.¹³ Others feel that their entry would be a positive for the growth of electric vehicles, particularly as 2026 has seen a drastic loss of market share from a high of 7% in 2025, after the repeal of the \$7,500 tax credit for many new EVs on September 30, 2025, the loss of incentives for manufacturers to build EVs, concerns about the lack of charging infrastructure in some regions of the country and rising vehicle prices in general. They theorize that increased EV sales could speed up investment in charging stations and force vehicle prices down. Christine McDaniel, based at George Mason University's Mercatus Center and who was a

trade official in the George W. Bush administration, felt that eliminating tariffs and opening up the market is the best approach: "Yes, it would be disruptive. But EVs would get on the road in the U.S. a lot faster."¹⁴ Volvo CEO Hakan Samuelsson told Automotive News Europe: "I would not rule out that electrification will happen in the U.S. independent of the incentives. It started in the U.S. with Tesla without any incentives." The author went on to say that Samuelsson "considers the U.S. the ideal market for electric cars" because more people have the ability to charge an EV at home than do owners in Europe, where many have to park nightly on public streets.¹⁵

There is another myth that Chinese manufacturers would focus on the low-priced segments, much as the Japanese and Korean manufacturers did when they entered the U.S. decades ago, with have often been derided as "cheap Chinese knockoffs." Chinese EVs have done well in international markets due to their strong pricing advantage: "Models that cost the equivalent of \$7,000–\$10,000 in China can still undercut many rivals abroad, even if marked up for profit. In fact, BYD often sells its cars for much more in Europe than in China, sometimes double the price, but even those export prices are highly competitive."¹⁶ It's clearly established that China could enter the U.S. with the least-expensive vehicles in the market; in China, they cost on average \$20,000 less than the current EVs in the North American market. The average new car in the U.S. reached \$51,456 in March. In China, more than 200 battery-powered models, including hybrids, are priced below the equivalent of \$25,000, based on data from the platform DCar. Five of the best-selling electric vehicles in China each start under \$12,000, illustrating how competition has pushed costs down across the segment.¹⁷ European markets have seen rapid market share gains by EVs from China.¹⁸ Their flexible pricing, thanks to heavy incentives from Chinese government agencies, have also been utilized in Latin America, where the Chinese makers have gained 86% of the total EV market. For example, the JAC E-Sei4 is priced at \$45,000 in Mexico and is only \$27,500 in Costa Rica.¹⁹

The worst-case scenario for the U.S. is that Chinese EVs conquest not only the lowest-priced vehicle buyers but capture multiple segments with their price advantage, drastically reducing market share of GM, Ford, Toyota, Nissan, etc., and ultimately necessitating work layoffs across the country. Chinese EVs now boast competitive

range and technology.²⁰ In Europe, companies such as BYD, Xpeng, Nio, Great Wall, Geely and SAIC are offering models viewed as less-expensive equivalents of high-end luxury manufacturers such as Audi, BMW and Mercedes.²¹

Market research professionals working with manufacturers and their advertising agencies will face a complicated situation, with Chinese EVs potentially arriving shortly into Canada and at some point following into the U.S. We present some recommendations for those working with Chinese companies as they prepare to enter Canada and eventually the U.S., as well as for those guiding current client companies – domestic and imports – in the North American markets.

Leading Chinese EV companies into the U.S.

Market entry research

When companies are deciding whether to expand into a country, they typically conduct market entry research. That research identifies the opportunities in the market, including: competitors in the market; current brand imagery; infrastructure needs to support their products/services; distribution and sales channels; realistic product/services price points; financial projections (including prospective currency exchange rates); cultural (local market) considerations; legal considerations.²²

These companies from China have recently entered sophisticated automotive markets such as Brazil, Germany, Mexico, Norway and the U.K., so they have a marketing model with plans to address many of these topics, but could use assistance with some specific issues, particularly in understanding the North American auto consumer and setting effective marketing approaches.

Advanced product research

Advanced product research (APR), colloquially referred to as “car clinics” by researchers, allows manufacturers to test new vehicle concepts before launch. In this case, the Chinese manufacturers will be primarily focused on marketing clinics – typically conducted less than 12 months before the vehicle enters the market. These studies are less focused

on making changes to the vehicle than marketing the unit after it launches. Within a typical three-to-four-hour consumer product test, respondents will evaluate one-to-two test vehicles versus three-to-five similar segment offerings already in the market. Conjoint analysis of feature pricing and acceptance of different models’ pricing and financing can also be assessed in this environment. Consumers love drive tests but they are comparatively rare; the Chinese makers should implement them to start, to test consumer reactions to operating these vehicles since they have little knowledge of these brands/models, rather than just conducting static interior and exterior evaluations.

Awareness/consideration/ purchasing/brand tracking

This element can be crucial for these new vehicles to help the Chinese companies develop sales projections across regions, customer segments, brands and models. There have already been benchmarks done on interest in Chinese vehicles in general and some specific brands but these will need to be expanded as brand/model marketing efforts launch.²³ The purchasing tracking element will allow them to assess dealership sales. Qualitative interviews with dealers could uncover suggestions for improvements to better support the selling process. Early buyer surveys will provide input on what delights the buyer, what could be improved and early reads on brand retention ahead of their next purchase. There should be an initial concentration on brand awareness and acceptance in Texas and California and other border states with Mexico, which see a lot of cross-border traffic for these vehicles. Over time, brand tracking measures can be added to assess brand health and overall consumer perceptions of these new-to-market companies.

Advertising effectiveness

Combined with awareness and brand tracking, advertising effectiveness studies will be crucial to the success of these new brands/models. Market researchers will be essential in guiding the companies and their advertising agencies in developing effective advertising and promotional campaigns

for both traditional and social media channels. The idea of using influencers to test or drive a vehicle for a limited time could be effective for creating initial interest in these brands but should be used conditionally and not as the only approach, as one new vehicle company to the U.S. market found to its chagrin a few years ago, when it dedicated a substantial portion of its first-year marketing budget, including the gift of a new model, to a television personality for social media videos and posts; unfortunately this person had virtually no impact on disseminating information on the brand and subsequently lost interest in their new vehicle.

Quality tracking

After the vehicles launch, the Chinese manufacturers will want to leverage existing quality tracking studies, which will help to benchmark customers’ service experiences with the new vehicles.

Dealer attitudinal assessments

The Chinese manufacturers should begin tracking dealers’ attitudes towards working with them and use qualitative approaches to fully understand their reactions on a number of issues, including sales margin expectations, after-sales infrastructure for service and parts, marketing support and other issues which impact success. Dealerships in Mexico and Europe have expressed some issues in working with Chinese manufacturers as they have entered these markets.²⁴

Message testing for EV adoption in general

Although EVs are more common in the U.S. and Canada than even a few years ago, thanks in no small part to Tesla and the traditional manufacturers offering alternate fuel vehicles, message testing of concepts for dissemination of clear information to offset key concerns about EV ownership, such as reduction in battery costs, miles on a charge, charger availability and other issues is still needed. Qualitative interviews followed by tracking studies would help manufacturers, dealerships and their advertising agencies adjust

their messaging, particularly to drive increases in EV sales over the next few years.

Guiding current domestic and import companies in the U.S. and Canada

As the Chinese manufacturers become competitors in North America, market researchers working with domestic and import companies currently selling in the U.S. and Canada can assist their clients in other important ways beyond traditional sales and customer experience/quality measure research, including the following.

Understanding the strategies of the Chinese companies

This focus would include pricing strategies, model launch timelines, regions of focus (such as the three major markets in Canada) as well as sales and service policies and emphases.

Advertising and marketing campaign research

The Chinese companies have been hugely innovative in their product design, including over-the-air updates and features. Chinese makers also refresh their vehicles every 1-to-1.5 years versus 4-to-5 years for legacy makers – which was unheard of only a few years ago – and could be a key selling advantage to prospective customers, as they are receiving the latest technology in their new vehicle.²⁵ We can expect companies such as BYD, Great Wall Motor, Geely, Chery, SAIC (MG), Nio and Zpeng Motors²⁶ to be equally innovative as they plan to enter the North American markets and their competitors must understand what is working for them in order to adjust their own approaches.

Sales projections

The current manufacturers producing and selling vehicles in North America already have solid sales projection applications that they utilize. Adding the Chinese models to their databases

will help them understand potential effects of these new models at the model, segment, brand and regional levels and for other key metrics. Market research data can help understand these changes and implement improvements in these projections, which drive key strategy development plans.

Effect on EV consideration and purchase

A longer-term research focus would be to measure the effect of the Chinese EV entries on overall EV consideration and purchase. Measuring the follow-on effect for the development of the existing charging infrastructure in the two countries, as well as customer use of these new vehicles for daily driving and for longer-distance trips, will be beneficial as well for the industry as a whole.

Cognizant of the changes

Perhaps the arrival of Chinese EV manufacturers will not be Armageddon for the domestic U.S. car brands and imports who are currently building and selling in North America, but it will be a major market upheaval. Existing manufacturers will need to be cognizant of the changes in their markets and conduct extensive research projects in order to maintain their current market positions, profitability and even exploit some opportunities in what could be a very different looking North American automotive milieu within the next three to five years. 

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••• pricing research

The 99-cent pricing puzzle

What AriZona iced tea teaches us about price anchoring and consumer expectations

| By Ted Benzing

abstract

AriZona iced tea has held its 99-cent can price for over 30 years despite rising costs, offering a case study in brand loyalty, cost pressure and the psychology behind resisting price increases.

Recently, two of my sons (aged 10 and 12) discovered AriZona iced tea. When I was a young buck in the 1990s, the product had just launched and it was very popular. I was also a big fan around that same age.

When I looked at one of the cans they had finished downing I was quite surprised to see that it still said “99 cents” on it. Now, I’m pretty sure it was 99 cents when I was a kid and after all these years of inflation and tariffs, not to mention higher raw material costs, how can the product still be 99 cents? To find out, I dug into things a bit more. The story is truly amazing!

AriZona, price anchoring and inflation – a brief recap

AriZona has indeed held the 99-cent price point for over 30 years (since 1992), which is almost unheard of in the world of consumer packaged goods. What makes this even more interesting is that the company didn’t just keep the price – it turned it into a brand promise by printing “99¢” directly on the can in the late 1990s to prevent retailer markups. And all these years later, it’s still fighting that same battle!

Now let’s layer in inflation:

- Something priced \$0.99 in 1992 would be about \$2.30–\$2.40 in 2026 dollars. Source: U.S. Bureau of Labor Statistics CPI Inflation Calculator.
- That’s roughly a +130% to +140% increase in general price levels.

So, in real dollar terms, AriZona has effectively cut its price in half over the past 30 years.

From a pricing research perspective, this is a classic example of extreme price anchoring. Consumers don’t just prefer the 99-cent price – they expect it, and anything above it feels like a violation of the brand.



Don Vultaggio, the current chairman and founder of AriZona, has made affordability and value part of the brand for years. “When somebody lays their hard-earned dollar on the table and gets a can of tea or juice and says, ‘Wow, that’s a good deal,’ that’s what makes me happy,” he has said.

Through the lens of my kids, the appeal of a 99-cent can of AriZona iced tea (or Mucho Mango or any of the other varieties) is obvious: It’s cheap! It’s hard to get anything for a dollar these days, especially in a convenience store setting. So, when one of my kiddos goes in with five bucks, he’s aiming to maximize value, snagging a drink, a snack and some candy.

Side note: Recently, at the IGA grocery store in East Hampton, N.Y., a can of AriZona iced tea was going for \$1.29 – blasphemy! Now, take into consideration that the east end of Long Island – and specifically East Hampton – is a vacation community and one of the most expensive places in the country. And even there, the retailer barely moved off the 99-cent price (which, of course, was still on the package). Everywhere else in our experience, the price has been 99 cents!

As an expert in pricing elasticity research and shrinkflation, here are the main questions I wanted to answer:

- Has AriZona changed the size of the can? Nope – still 22 ounces, same since the late 1990s. (Although it was 23.5 ounces at the very beginning. We will ignore that little piece of shrinkflation.)
- Has the company changed the actual product in the can? My initial thought was that watering it down would be an easy way to save on margins. AriZona claims it has not done so and I do believe the company. The nutrition labels and ingredients have looked similar over the years.

- What about profitability? Does the company have investors? AriZona claims it has taken a margin hit over the years – obviously! But, it’s privately held, with Vultaggio holding close to 100% of the company. The firm doesn’t have debt and just maybe profits aren’t the No. 1 priority, since Vultaggio and his family are worth \$5.9 billion, according to Forbes.

To be fair, AriZona also has other product formats – like the 12-pack of cans, a one-gallon jug and more. It presumably has higher margins on those SKUs, to help with the overall bottom line. The 99-cent can is only a fraction of AriZona’s overall sales. So, it may barely break even and still be OK for the company.

A historical example of price anchoring

Coca-Cola faced a similar pricing issue. From roughly 1886-1959 coke was 5 cents. You read that correctly. That is over 70 years with the exact same product and price! (AriZona still has a way to go.)

Coke faced a lot of price anchoring issues over this period; the main one was that a very large percentage of Coke was sold in vending machines. By design, these machines only accepted nickels and they didn’t give change. This was a problem.

When Coca-Cola seriously tried to raise the price after World War II, it was very tricky, because of the distribution system and consumer perception. Eventually, around 1959, Coke managed to reconfigure the machines to accept dimes and give change. This is when the pricing went to 10 cents a bottle – a 100% increase! But it wasn’t smooth for about a decade. Coke messed with vending machine configurations and even lobbied the U.S. government to mint a 7.5-cent coin, understanding that going directly from 5 cents to 10 cents was a huge increase and could seriously damage the brand.

The tipping point for AriZona

Assuming AriZona iced tea stays in business for another 40 years, it will have to raise the price at some point – or will it?

There are several factors that could push AriZona over the tipping point and here are my leading candidates:

1. Aluminum prices. Aluminum is one of the biggest pressure points for AriZona and it has been extremely volatile. Prices have increased significantly over the past decade and spiked during supply shocks.
 - In recent years, prices have hovered around \$2,200-\$2,600 per metric ton, compared to closer to \$1,500-\$1,800 in the early 2010s.
 - At the peak of recent tariff-driven shortages, U.S. aluminum buyers paid over \$4,500 per metric ton when combining the global aluminum price, U.S. delivery premiums and tariffs.

Source: World Bank Commodity Data / IMF Primary Commodity Prices

2. Sugar prices. While sugar prices are often discussed when talking about beverage costs, most iced tea and soda products – including many AriZona varieties – are sweetened with high fructose corn syrup (HFCS). When AriZona launched its 99-cent can in the early 1990s, HFCS prices were relatively low.

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Ted Benzing is a vice president at TRC Insights. He has spent 20-plus years helping brands answer tough pricing questions through custom quantitative research. He earned his MBA in marketing insights and analytics from the University of Wisconsin–Madison and previously worked at Villanova University and MetrixLab. The author wishes to thank Allan Peters for his support with this article and its imagery.

- Mid-1990s HFCS price: roughly \$0.13-\$0.17 per pound (dry weight equivalent).
- Recent HFCS prices: roughly \$0.30-\$0.40 per pound.

Source: USDA Economic Research Service
Corn Sweetener Price Series

That means HFCS prices have roughly doubled to tripled since the 1990s, creating another source of cost pressure for beverage producers trying to hold retail prices steady.

For a beverage company selling billions of cans, even small ingredient cost increases matter – especially when the retail price of the product hasn't changed in more than three decades.

3. Water costs. AriZona Beverages is headquartered in Woodbury, N.Y. (Long Island), but production is spread across the U.S. to reduce shipping costs. Water itself is relatively low-cost, but:
 - Industrial water + treatment + energy costs have risen recently.

- Northeast utilities (N.Y. region) tend to be higher than national averages.
- Water isn't the biggest driver but it contributes to overall cost pressure.

4. Shipping costs. As I write this article in mid-2026, gas prices have gone nuts, therefore shipping prices have risen too. Any liquid product, like AriZona, is very heavy and expensive to ship.

It could also be a combination of these factors that pushes AriZona to the point where it can no longer survive selling 99-cent cans.

Recommendation for AriZona – price optimization research with consumers

If AriZona is ever in a position where the company is seriously considering raising prices, it should conduct some price elasticity research to measure consumer perceptions and response to a higher price.

Any increase will have some impact on consumer demand and brand equity and it is a delicate balance for AriZona.



The best way to conduct this type of price sensitivity analysis is to run a choice-based conjoint analysis with AriZona and competitive products. Here are the basics:

- Run an online survey with U.S. consumers who drink iced tea on a fairly regular basis.
- Obtain a decent sample size to reduce sample error and increase statistical reliability – $N=1,000-2,000$ would be good.
- Give consumers a shopping exercise with varying brands and prices – include competitors like Snapple, Lipton, Peace Tea, etc.
- Run simulations that show pricing demand curves, revenue curves and profitability.
- Give recommendations on pricing strategy for AriZona.

AriZona should test a few different prices in this research:

- \$0.99 – Use as a benchmark price, to reference against competition and other AriZona prices.

- \$1.29 – a very safe price increase that many consumers will likely be OK with. AriZona would still be very favorably priced against competition. Downside is that the margins may still be slim and AriZona might have to consider another increase over the next few years.
- \$1.49 – This may be the best balance of consumer perception and increased margins. It would also be a good price to lean into over the next 20+ years.
- \$1.79 and/or \$1.99 – It would be interesting to test these prices to see the drop in consumer demand and perception. \$1.99 would make AriZona comparable to other brands; would customers still buy it? Also: \$1.99 may have a massive impact on brand equity and trust.

A simple promise

The AriZona story is ultimately a lesson in price anchoring. For more than 30 years, consumers have associated the brand with a simple promise: a large can of iced tea for 99 cents. Over time, that number

has become part of the product itself, which makes any future price increase a brand decision and a financial one.

AriZona may eventually reach a tipping point as aluminum, sweetener and shipping costs continue to rise. If that moment comes, careful pricing research will be critical. Understanding consumer price sensitivity, competitive context and demand elasticity can help brands navigate price changes without damaging long-term brand equity.

There are many ways to conduct pricing research, the simplest being monadic-split cell research, Gabor-Granger or Van Westendorp price sensitivity meter.

Conjoint research is more complex and always includes competitive context, so it is more accurate for big decisions, like AriZona may face soon.

Until then, AriZona's 99-cent can remains one of the most remarkable pricing stories in the CPG world and a great reminder that sometimes the most powerful number in marketing is simply the price. My kids definitely agree! 🍷



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Adding observational location data to the marketing research toolkit

| By Ed Lorenzini



abstract

Opt-in mobile location data is emerging as a complementary research tool, revealing movement and visitation patterns that add behavioral context to traditional surveys and transaction data, when used carefully.

Marketing research has long relied on two primary sources of behavioral insight: what people say and what they buy. Surveys, interviews and panels capture intentions, attitudes and self-reported behavior. Transaction data shows completed purchases.

But many research questions unfold in the space between those two points. Researchers studying retail, events, services or place-based behavior often need to understand not only what people say they intend to purchase or ultimately purchase but how they move through the physical world in between. Observed movement and visitation patterns can provide additional context for interpreting emerging intent, showing where interest may be forming before a transaction occurs. Where do potential customers travel from? How often do they visit certain locations? What other destinations are part of the same routine or trip? These questions have traditionally required inference, small-sample observation or proxy measures.

Over the past several years, opt-in mobile location data has emerged as a complementary observational source that can help fill some of these gaps. When used carefully and interpreted in context, this type of data can add a behavioral layer to traditional research programs. It does not replace surveys or transactional data. Instead, it provides an additional lens on real-world activity that can be particularly useful in projects where location and movement are central to the research question.

This article looks at how researchers are incorporating observational location data into applied studies and where it can strengthen – and where it should be used cautiously within – the broader research toolkit. The goal is not to introduce a new technology but to examine how an additional observational source can bolster familiar research tasks.



Observing behavior in context

In many research programs, understanding physical-world behavior requires combining multiple sources. A brand may conduct surveys to understand awareness and intent, analyze transaction data to see who purchased and when and then model likely trade areas or audience composition. These approaches are well established and remain essential.

Observational location data can add context to this process by providing aggregated, opt-in records of where devices have been observed over time. When analyzed in aggregate and with appropriate safeguards, these records can be used to identify patterns such as visitation frequency, travel distance, timing of visits and overlap between different types of locations.

For researchers, the value of this data lies less in the novelty of the source and more in how it can support familiar research tasks. It can help validate assumptions about trade areas, provide independent estimates of attendance or visitation and offer additional evidence when interpreting survey responses. In most applications, it works best as one input among several rather than as a stand-alone answer.

The following examples illustrate how this observational layer is being used in applied research settings.

Estimating event attendance and audience composition

One common challenge in event-related research is estimating how many people attended and where they came from. Organizers may have ticket scans or registration data for some events, but many gatherings – such as festivals, trade shows or open public events – involve a mix of registered and unregistered visitors. Even when attendance counts are available, understanding the geographic draw and composition of attendees can be difficult.

Researchers are beginning to use observational location data to develop independent estimates of attendance and visitor origins. By defining the physical footprint of an event venue and examining observed visitation during the event window, analysts can estimate the number of devices present, how long they remained and where they were observed before and after the event.

In one recent project involving a regional home and garden show, researchers combined organizer-provided attendance estimates with observed visitation patterns. The location-based analysis provided a time-of-day view of traffic flow across the event days and an estimate of how many visitors came from within the local metro area versus surrounding regions. This helped organizers and sponsors understand the geographic reach of the event and evaluate whether it was drawing primarily local attendees or a broader regional audience.

The analysis also provided context for follow-up survey work. Knowing the relative share of local versus out-of-market visitors allowed researchers to weight responses more accurately and interpret satisfaction and purchase-intent measures in light of the audience composition. In this case, the observational data did not replace survey-based feedback; it helped frame it.

Validating trade areas and destination draw

Trade-area analysis is another area where observational data can complement traditional methods. Researchers often rely on customer address files, loyalty program data or survey responses to estimate where visitors originate. These sources are valuable but may not fully capture occasional visitors or those who are not part of a brand's customer database.

Aggregated location observations can provide an additional perspective by identifying the general areas where devices observed at a location are typically present at other times. When examined at an appropriate geographic level, this can help researchers estimate the distribution of visitor origins and travel distances.

In a study involving a destination retailer known for drawing customers from a wide region, researchers used this approach to better understand the store's geographic pull. Traditional customer data suggested a strong local base, but the observational analysis indicated that a substantial share of visitors were traveling from outside the immediate trade area, often combining the visit with other regional destinations.

This information helped the research team refine assumptions about the retailer's market reach and evaluate the potential impact of regional advertising. It also informed the design of a subsequent survey, which included questions tailored to visitors who traveled longer distances. By grounding the survey design in observed behavior, the researchers were better able to capture the full range of visitor motivations.

Examining competitive and co-visitation patterns

Understanding how different locations fit into the same consumer routine is another recurring research challenge. Surveys can ask respondents which stores or venues they visit, but recall may be incomplete and the sequence or timing of visits can be difficult to capture accurately.

Observational location data can be used to examine patterns of co-visitation at an aggregate level. For example, researchers may analyze which types of locations are commonly visited by the same group of devices over a defined period. This can reveal overlap between competitors, complementary destinations or lifestyle patterns associated with certain types of visitors.

In a competitive retail study, analysts examined visitation patterns across several stores within a category. The observational analysis suggested that a meaningful portion of visitors to one retailer were also frequenting a nearby competitor within the same time frame. This finding prompted a closer look at survey data to understand how shoppers perceived differences between the stores and what factors influenced their choice on a given trip.

By combining the two sources, the research team was able to develop a more nuanced view of cross-shopping behavior. The observational data

identified the overlap; the survey data explained the reasons behind it.

Integrating observational data with traditional methods

In each of these examples, location-based observation served as a complement rather than a replacement for established research approaches. Surveys provided attitudinal and motivational context. Transaction data showed actual purchases. Observational data added a view of movement and presence in the physical world.

For research teams, the key is integration. Observational findings can be used to inform sampling, validate assumptions, identify segments for deeper study or provide context when interpreting results. They can also help highlight discrepancies between reported and observed behavior, which can then be explored through qualitative or quantitative follow-up.

As with any data source, interpretation requires care. Observational location data typically represents a subset of devices and reflects opt-in participation from mobile applications. Coverage and density can vary by geography and context. Researchers should treat findings as indicative rather than definitive and consider them alongside other available data.

Limitations and considerations

Several considerations are important when incorporating observational location data into research design:

Representativeness. Not all consumers are equally represented in opt-in mobile data. Researchers should assess coverage relative to the population of interest and avoid overgeneralizing from small samples.

Context. Presence at a location does not necessarily indicate intent or engagement. A device observed within a geofenced area may reflect a brief stop, a pass-through or a longer visit.

Careful definition of visit criteria and interpretation of results is essential.

Privacy and aggregation.

Responsible use of location data requires adherence to privacy standards and aggregation practices that prevent identification of individuals. Most research applications rely on aggregated patterns rather than individual-level tracking.

Triangulation. Observational findings should be compared with survey, transactional or other data sources whenever possible. Differences between sources can be informative but should be examined carefully.

By approaching observational data as one component of a broader evidence base, researchers can make use of its strengths while mitigating its limitations.

A growing role for observational data

As mobile devices have become a routine part of daily life, the volume of opt-in location data available for analysis has increased. For researchers working on projects where physical-world behavior matters – retail, events, travel, services or community-based programs – this has created an opportunity to observe patterns that were previously difficult to measure at scale.

The value of this data lies not in replacing established research methods but in enriching them. Surveys remain essential for understanding attitudes and motivations. Transaction data remains the most direct record of purchases. Observational location data adds context by showing how people move through the environments where decisions occur.

Used thoughtfully, it can help researchers move closer to answering a familiar question: not only what consumers say they will do or what they ultimately purchase but how their decisions unfold in the spaces in between. 📍

ABOUT THE AUTHOR

Ed Lorenzini is CEO of Analyze Corporation and has spent most of his career in big data analytics and SaaS program management. He specializes in applying large-scale consumer datasets to identify real-world behavior and improve marketing effectiveness. His experience spans commercial enterprises and federal programs. Find Lorenzini on LinkedIn: [linkedin.com/in/edlorenzini](https://www.linkedin.com/in/edlorenzini)

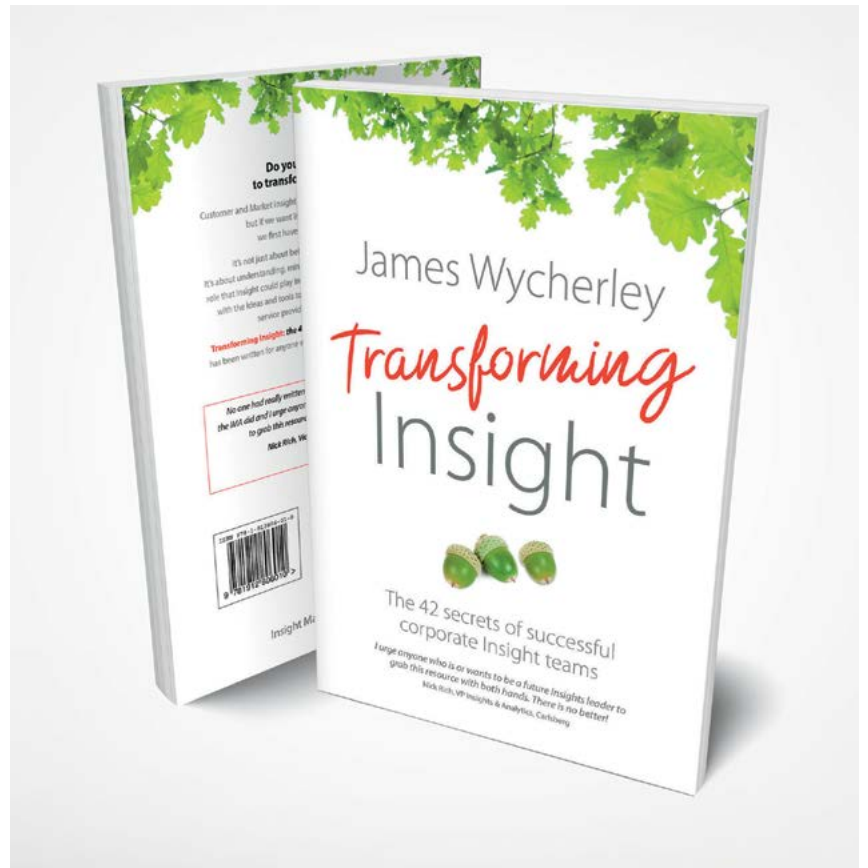
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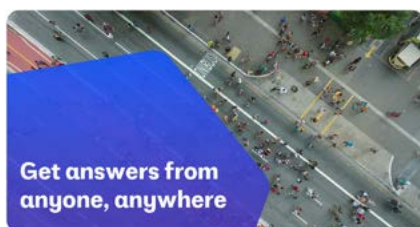
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Founded 2022 | 10-25 employees
Megan Daniels, CEO

MX8 Labs is an AI-native research technology platform that takes a study from brief to insight in days rather than weeks. Founded in 2022 by veteran researchers, MX8 Labs unifies the entire workflow on a single platform: survey programming, automated quality assurance and link testing, respondent sourcing, quota management, weighting, open-end coding, significance testing and automated report writing. Nothing about the sample, weighting or statistics is compromised. What changes is how much human time it takes to get a defensible number in front of stakeholders. Clients typically see 80% faster delivery and 70% lower total cost on like-for-like custom studies, running roughly three times the research on the same budget. Built by researchers for researchers, MX8 Labs keeps humans in control of strategy and insight.

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Aaron Cannon, CEO and Co-founder
Michael Hess, CTO and Co-founder



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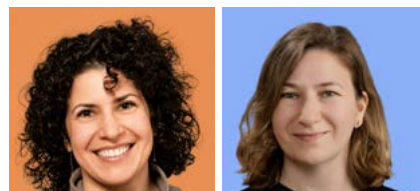


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CMSWire will host Customer Connect Expo Atlanta on **September 9-10**. Visit www.cmswire.com/events/conference/customer-connect-expo-atlanta-2026.

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

WBR will host eTail Australia on **September 22-23**. Visit etailaustralia.wbresearch.com.

Empresarial will host Le printemps des études on **September 24-25** in **Paris**. Visit [www.printemps-etudes.com/en/accueil-english](http://printemps-etudes.com/en/accueil-english).

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

Outset will host Outliers on **September 24** in **San Francisco**. Visit www.outliersfest.com.

Forrester Research will host B2B Summit EMEA on **September 28-29** in **London**. Visit www.forrester.com/event/b2b-emea.

Informa Connect will host TMRE on **October 5-7** in **Denver**. Visit informaconnect.com/tmre.

MRSI will host its 34th Annual Market Research Seminar on **October 13-14** in **Mumbai**. Visit www.mrsi.co.in/event/34th-annual-market-research-seminar-the-next-human-156/synopsis-guide.html.

ESOMAR will host ESOMAR North America Unfiltered on **November 3-4** in **Atlanta**. Visit esomar.org/events/north-america-2026.

6sense will host 6sense Breakthrough on **November 2-5** in **Las Vegas**. Visit 6sense.com/breakthrough.

Quirk's will host Quirk's Event – Virtual Global on **November 4-5**. Visit thequirksevent.com/virtual-global-2026/about-quirks-event-virtual-global.

Insight Platforms will host the Qualitative Insights Summits on **November 10-11**. Visit www.insightplatforms.com/summits/the-qualitative-insights-summit-2026.

Reuters Events will host Strategic Marketing 2026 on **November 16** in **New York**. Visit events.reutersevents.com/marketing/sm.

National Retail Federation will host NRF 2027: Retail's Big Show on **January 10-12, 2027**, in **New York City**. Visit nrfbigshow.nrf.com.

Customer Management Practice will host Customer Contact Week Orlando 2027 on **January 25-27, 2027**. Visit www.customermanagementpractice.com/ccw/orlando.

Travel and Tourism Research Association will host TTRA Marketing Outlook Forum 2027 on **January 25-27, 2027**, in **New Orleans**. Visit ttra.com/events/2027-marketing-outlook-forum.

Merlien Institute will host Qual360 EU 2027 on **January 27-28, 2027**, in **Berlin**. Visit eu.qual360.com.

QRCA will host QRCA Annual Conference 2027 on **February 9-11, 2027**, in **Palm Springs**. Visit www.qrca.org/site/2027-conference-information.

Medallia will host Experience '27 on **February 9-11, 2027**, in **Las Vegas**. Visit www.medallia.com/experience.

IQPC will host CX USA Exchange 2027 on **February 22-23, 2027**, in **Fort Lauderdale**. Visit www.cxnetwork.com/events-customer-experience-exchange-usa.

WBR will host eTail Palm Springs 2027 on **February 22-25, 2027**, in **Palm Springs**. Visit etailwest.wbresearch.com.

Quirk's Media will host the Quirk's Event – Los Angeles on **February 24-25, 2027**. Visit thequirksevent.com.

Corinium Global Intelligence will host CDAO Financial Services 2027 on **March 1-2, 2027**, in **New York City**. Visit cdaofs.coriniumintelligence.com.

WBR will host eTail Connect Spring 2027 on **March 2-3, 2027**, in **London**. Visit etailconnecteu.wbresearch.com.

Corinium Global Intelligence will host CDAIO Sydney 2027 on **March 2-3, 2027**. Visit cdaio-sydney.coriniumintelligence.com.

Connect Media will host Sustainability Leaders Forum 2027 on **March 3-4, 2027**, in **Melbourne**. Visit sustainabilityleaders.com.au.

SampleCon will host SampleCon on **March 15-17, 2027**. Visit samplecon.com.

Event details as of August 14, 2026. Please see websites for more details.

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Kelsey Almaguer

VP, Marketing and Creative Strategy, Neighborly

“Go deep in a few areas that you’re most passionate about but make sure to stay nimble and an easy sell to multiple different opportunities.”

What inspires you as a researcher?

I am perpetually curious about why humans behave the way that they do, and well-designed research can help uncover those insights. It is exciting to me when insights lead to business solutions that change the growth trajectory of the business.

Do you have any tips for insights professionals looking to build their resumes and stay competitive in today’s job market?

Based on my experience, I recommend building a broad range of industry and subject-matter expertise to make yourself marketable to a wide variety of roles and companies. Go deep in a few areas that you’re most passionate about but make sure to stay nimble and an easy sell to multiple different opportunities. Sometimes this may mean – intentionally and carefully – making a lateral or even downward title or pay scale move in order to gain experiences you’re missing. A successful career is not always a 45-degree angle trajectory.

Are you planning on leveraging any new tools or techniques in the next year?

My team is continuing to explore the right places for AI to play a role. One place I have found it very valuable is to be able to leverage open-end text boxes more in simple surveys, and leverage AI to take the first pass at analyzing the results. Especially in the early stages of a project, I often worry that forcing consumers into a “select all” or other answer choice question can miss the real insight or ascribe false importance to a list that the corporate team came up with rather than more purely hear from consumers.

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