

# ***Back to the Future***

***Traditional & AI-led Methods to Broaden your Insights Toolbox***

**July 24, 2025**



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# ***Session Overview***

**Introduction: Who is Ironwood?**

**The History of Market Research... in Under a Minute**

**A Closer Look at the Online-Mobile Phenomenon**

**Back to the Future: 3 Integration Strategies to Improve your Online-Mobile Leverage**

- 1. Integrating AI- AND Human-led Quality Control Protocols**
- 2. The “Back:” Leveraging Traditional MR Methods**
- 3. The “Future:” Integrating Segment-Based Synthetic Respondents**

# IRONWOOD INSIGHTS

group, LLC

Ironwood  
Online

Data  
Collection  
(Multi-Modal)

Integrated Full-  
Service Solutions/  
AI

Customer Experience

Communities

Telephone

Mail Surveys

Product Development

Multivariate

Qual

A-I  
Segmentation

Focus Groups

Online  
Surveys

Surveys

OL Message  
Boards

Strategy

Dashboards

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PersonaPanels



voxco

TANJO.ai



FastFocus

indico  
LABS

Quant

# Historically MR has Adapted to Change...and Thrived!

## Pre 1930

- **Mail survey/postal cards** first used
- **Door-to-door** pioneered
- Random samples first used to represent populations



## 1950-1960

- **In-depth interviews** pioneered
- Electronic data collection pioneered via TV
- First message sent via **internet**



## 1990-2000

- **Online** pioneered
- **Online qual** pioneered
- **MROC's** pioneered
- **Qual-quant** first blended



## 1930-1940

- First Gallup Poll launched
- **Focus groups** pioneered
- First audience measurement system launched (radio)



## 1970-1980

- **Mail surveys/mail diaries** take off
- **CATI/WATS telephone** takes off
- **In-Person** quant takes off
- **CAPI** pioneered



## 2010-2020

- **Online/mobile** takes off
- DIY platforms take off
- Social media analytics take off
- **GenAI** Agents first used
- **Synthetic respondents** first used



## Est. Industry Revenues

Pre 1930  
**\$1-\$2M**

1930-1940  
**\$10-\$15M**

1950-1960  
**\$200-\$300M**

1970-1980  
**\$2-\$3B**

1990-2000  
**\$15-\$18B**

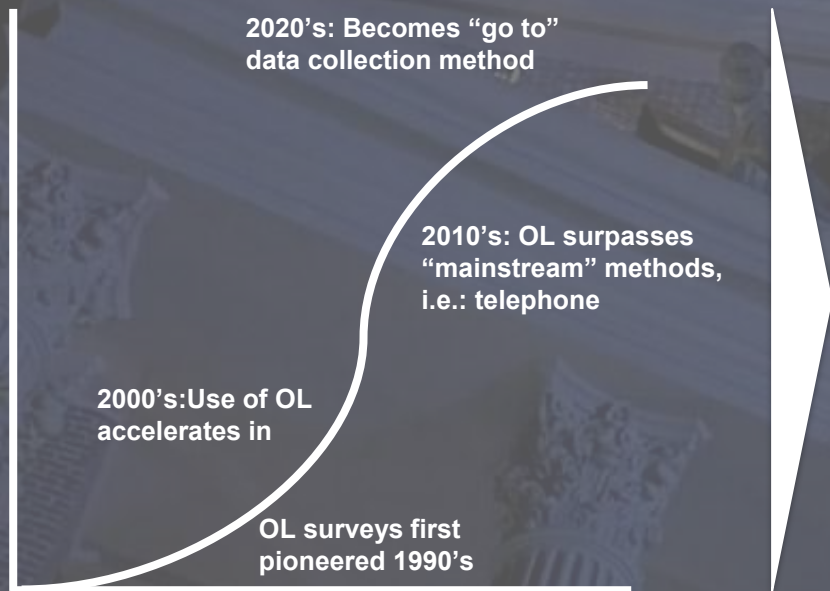
2024  
**\$75-\$80B!!\***

\*Categorizations of research activities have broadened significantly in the past 25 years

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# Growth of Online-Mobile

And ~35-40% of '24 spend = OL-Mobile!



## Why?

### Technology Trends & Drivers

- Mainstreaming of high-speed internet & smartphones
- Integration of online-mobile for work/personal/social
- Mainstreaming of virtual meeting platforms (i.e., Zoom)
- API integrations w. CRM's, customer experience tools

### Societal Trends & Drivers

- Mass adoption of digital forms of communication
- Mainstreaming of digital self-expression, i.e., social media videos/pics/posts
- Prevalence of a 24/7, "on demand," mindset
- WFH models that blur work/home/social lines

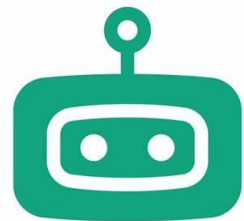
### Insights Trends & Drivers

- Relentless pressure on MR budgets, speed to insights
- Widespread need for global research
- Proliferation of DIY platforms, agile MR solutions
- Mainstreaming of access panels, targeted audiences
- Increasingly sophisticated MR techniques/designs/tools



# The State of Online-Mobile Today

Online-mobile has become the “go to” data collection method and fueled tremendous advancements in the industry... *And then these guys showed up!*



**CHAT GPT**



# The State of Online-Mobile Today

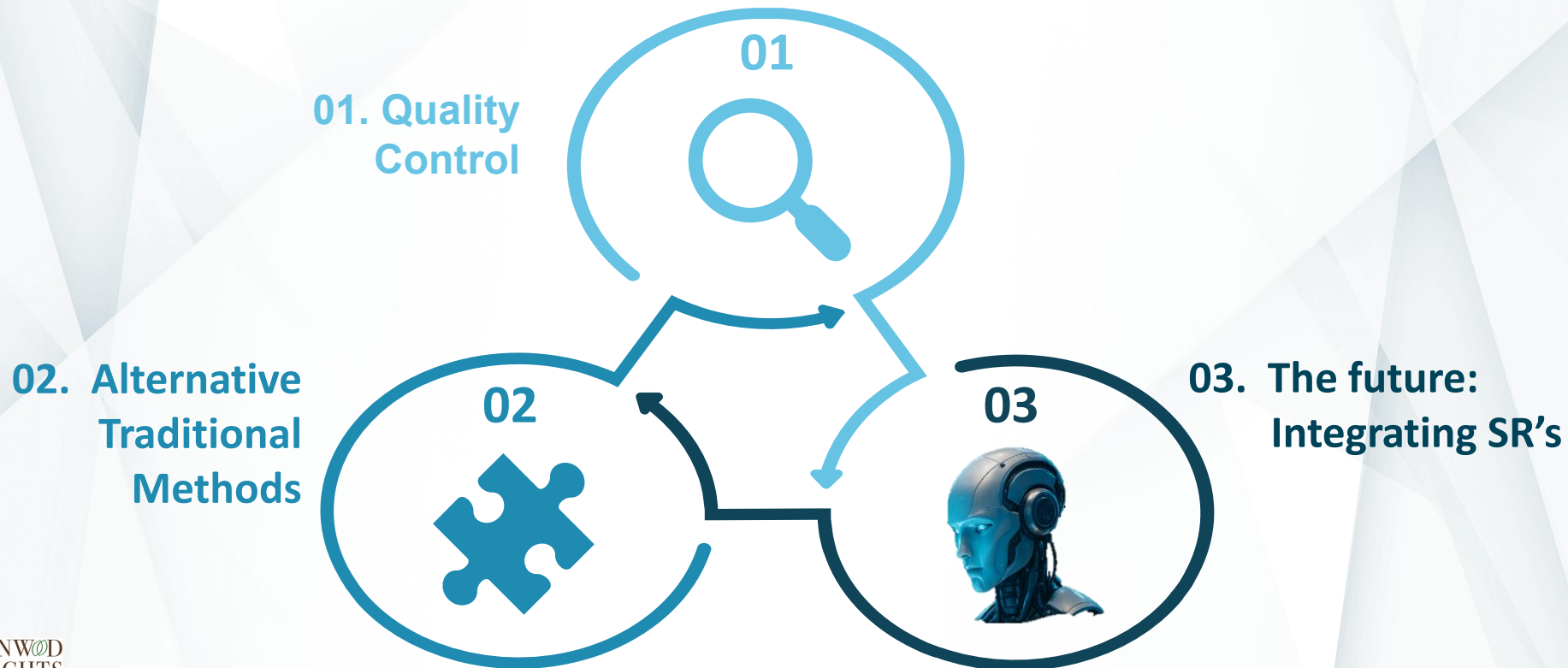
But the pursuit of low-cost, quick turn insights has also led to the overuse and misuse of the online method

- 1** Response rates are lower for some segments, i.e.: older, lower socioeconomics
- 2** Samples can be under-represented/not truly representative demographically, geographically
- 3** Does not align well with informational objectives that require capture of depth, context or emotion
- 4** Difficult to authenticate some populations, i.e.; B2B, Healthcare roles, geographies



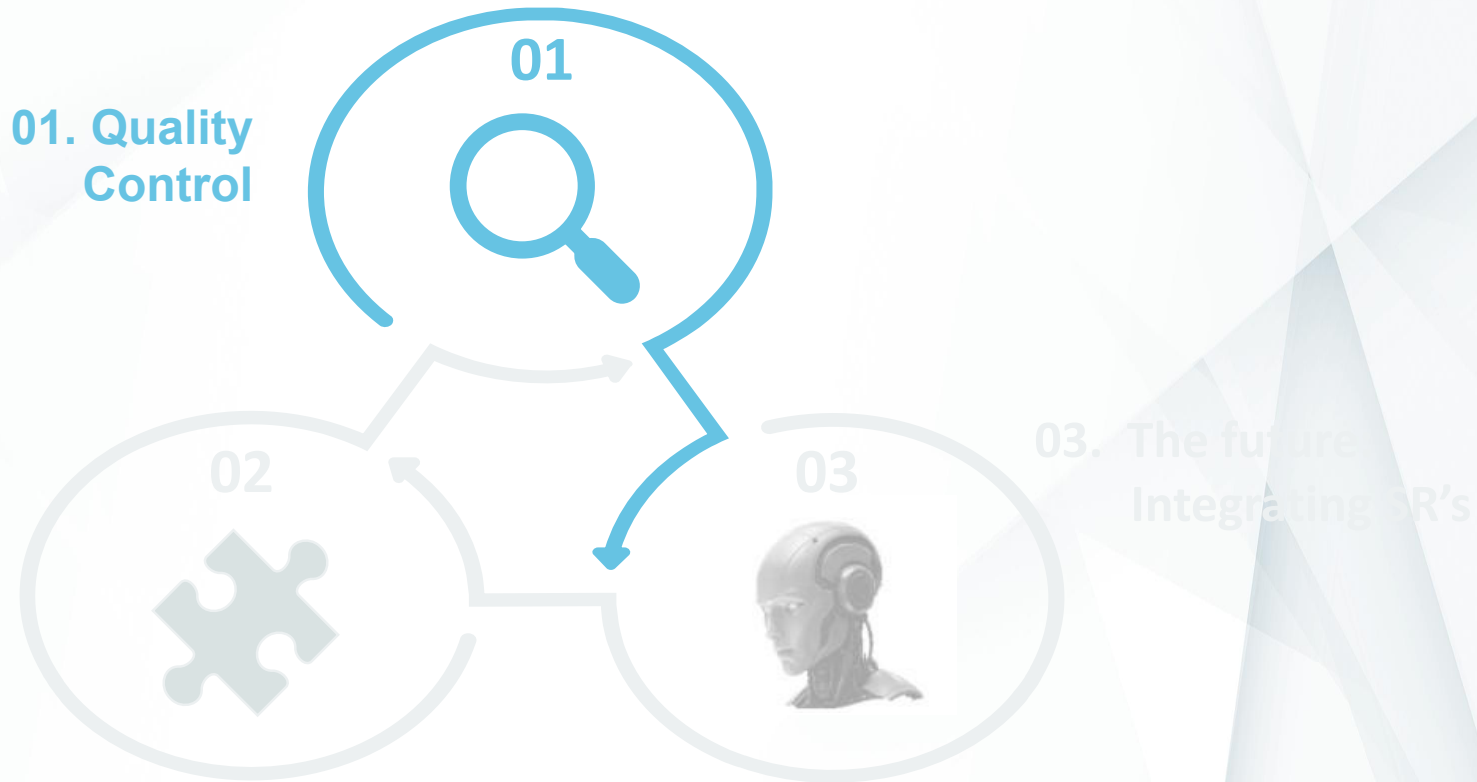
# Strategies to Better Leverage Online-Mobile

**Fear Not!** Since Online-Mobile spend is approaching 40% of industry spend... it's here to stay! **But a multi-pronged approach is necessary to improve outcomes!**





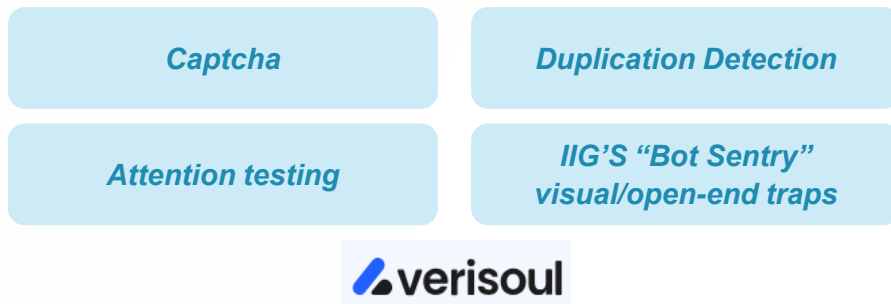
# Strategies to Better Leverage Online-Mobile



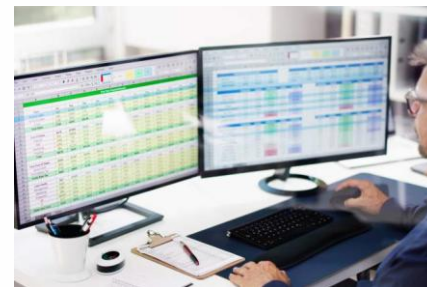
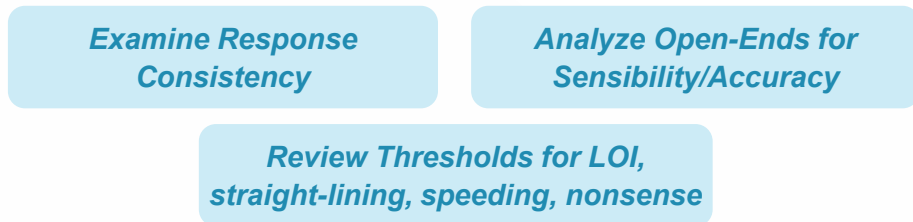
# 1. Better QC to Improve Online-Mobile Data Quality

A multi-layered protocol is required to keep pace with the ever-changing types of fraud...

- **Technology-led Countermeasures...** AI-powered technology and complex scoring algorithms *detect, identify and prevent* mal activity:

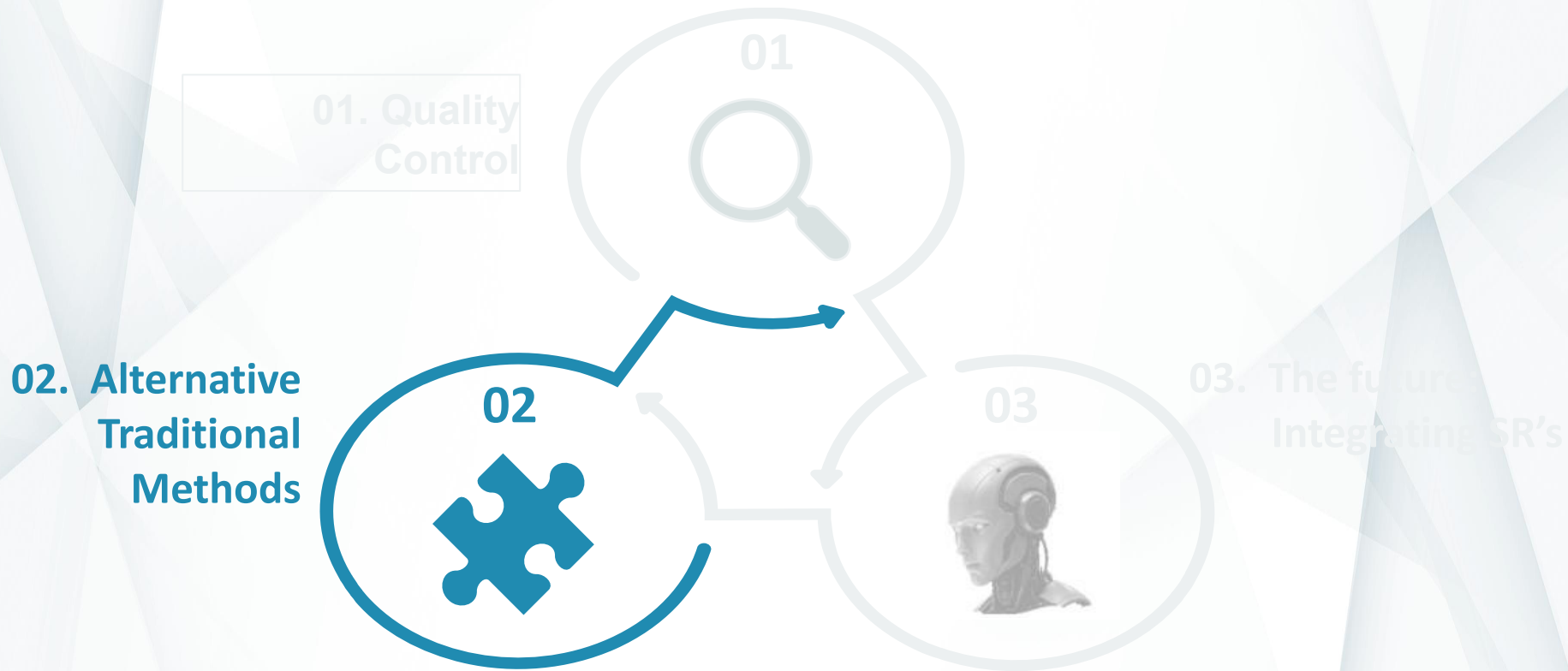


- **Human-led Analyses:** Integrated analyses of the in-survey QC breaches:



Smart Humans

# Strategies to Better Leverage Online-Mobile



## 2. Use Alternative/Complimentary Methods

“Traditional” and mixed mode data collection methods can be cost-effective AND provide greater informational accuracy, depth and respondent engagement than online alone.



Online/Mobile



Telephone/CATI



In-Person/F2F



Text/SMS



Mail








QR Code



Mixed Method

**The RIGHT mix of methods leads to BETTER quality insights & business decisions**

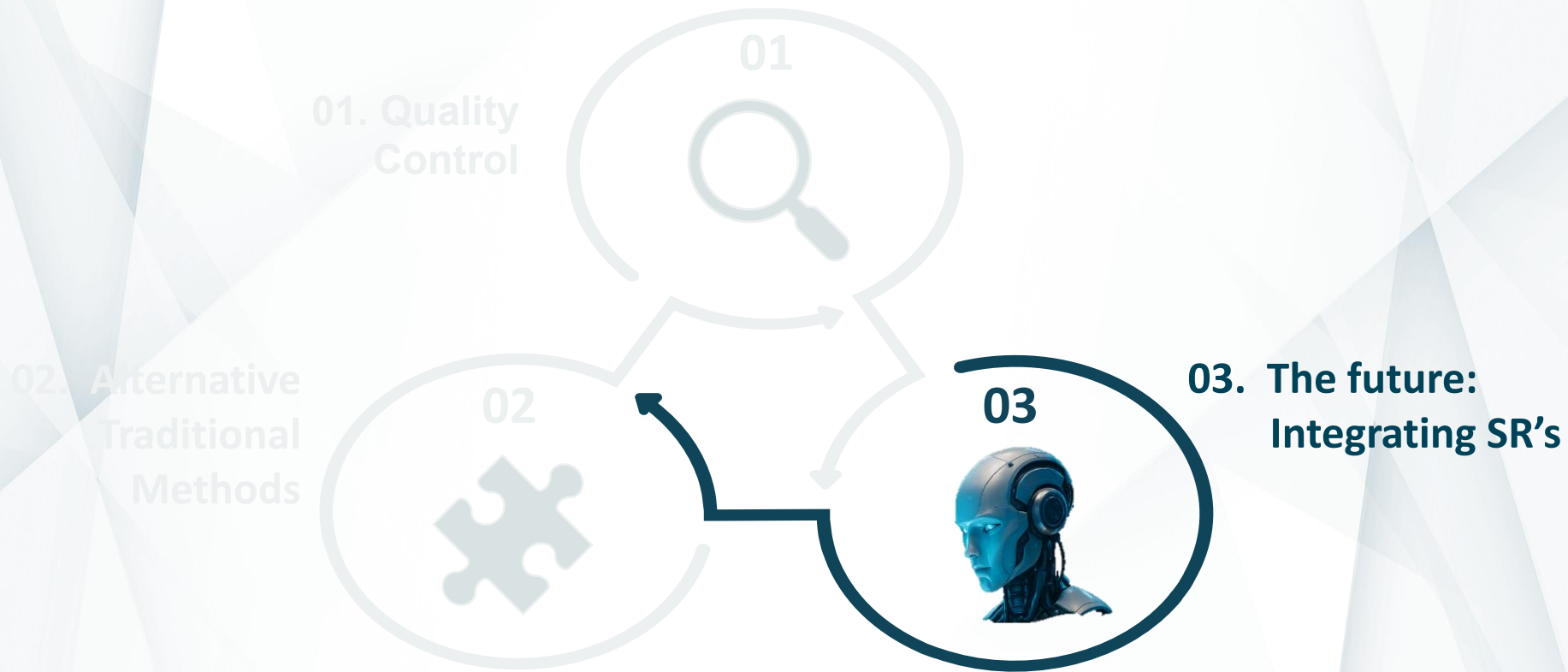
# A Guide to Integrating Alternative Methods

Dimension	    				
	Online/Mobile	Telephone/CATI	In-Person/F2F	Text/SMS	Mixed Method
Efficiency/Speed to Insights	●	●	●	●	●
Geographic Reach	●	●	●	●	●
Representativeness of Sample	●	●	●	●	●
Response Rates	● -- ●	●	●	●	●
Respondent Engagement (Interaction)	●	●	●	●	●
Depth of Information (i.e., open-ends)	●	●	●	●	●
Content Flexibility (exercises, interactive tools)	●	●	●	●	●
Respondent Authenticity/Fraud	● -- ●	●	●	●	●
Data Quality	● -- ●	●	●	●	●
Cost	●	●	●	●	●
Value	●	●	●	●	●

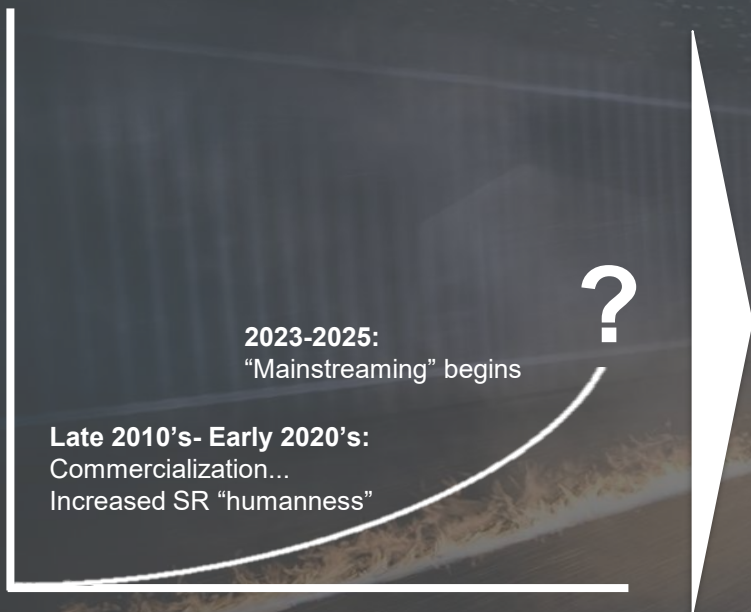
 = Excellent
  = Good
  = Fair
  = Poor



# Strategies to Better Leverage Online-Mobile



# Adoption of Synthetic Respondents (SR's)



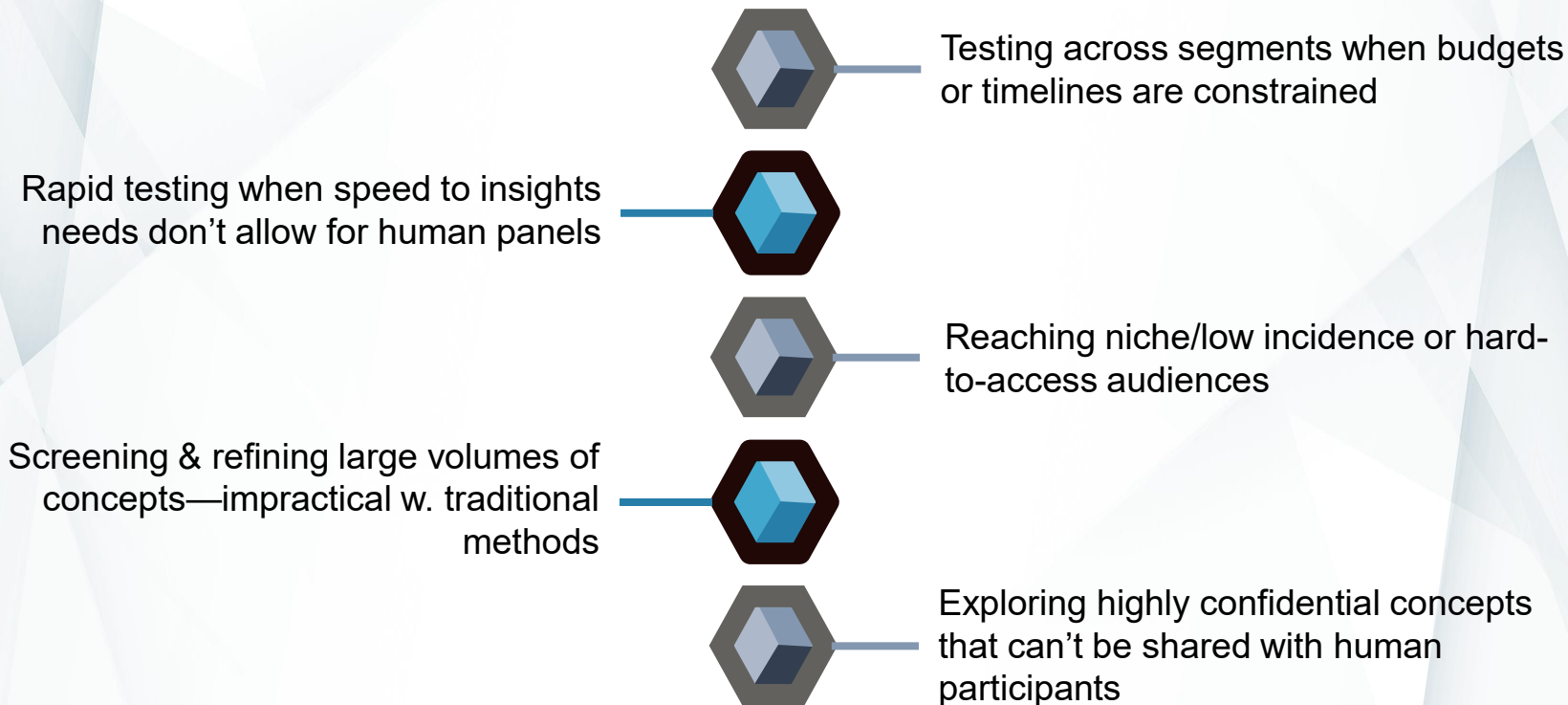
## *What's driving this rapid adoption?*

- General AI experimentation, mgt. mandates
- Broader business issue applications
- Modeling advances → improved human replication
- Modeling advances → scalability of SR sampling

- Growing advantages over human online research:
  - ✓ Lower cost, faster speed to insights
  - ✓ Efficiency replicating low incidence/niche targets
  - ✓ Prevention of online sampling issues/fraud
  - ✓ Improved data quality, consistency

# Common/Best Uses of SR's

A Synthetic Respondent is a machine learning model that has been designed to replicate certain traits of a consumer profile, persona or segment





- Ironwood Insights Group and **PersonaPanels™** leverage combined expertise to build and analyze **SEGMENT-BASED Synthetic Respondents (SR's)** to supplement human samples throughout the research process.
- Most SR's rely on broad demographics or generalized data. **Segment-Based SR's are modeled after real, behaviorally-defined human segments.**
- Segment-Based SR's deliver more realistic, targeted, and predictive insights — to inform marketing strategies with insights from that matter from your key segments .

**Next Gen Respondents. Next Level Insights.**



# Advantages of SEGMENT-BASED SR's

Dimension	 Segment-Based SR's	 Common SR's
Lower project cost/faster turnaround than human panels	✓	✓
Improved sample quality/minimal sample fraud	✓	✓
Improved data quality, i.e. no... bias/contamination (multiple concept exposures)/respondent fatigue	✓	✓
SR's profiled to match key demographic profile traits	✓	✓
SR's behaviorally/psychographically-profiled to emulate key generational & custom segment traits	✓	
SR's refined to model category-specific segment behaviors	✓	
SR's always up-to-date with current general & category events	✓	
Deeper/more actionable outcomes to inform marketing efforts	✓	
"Always on," continuous streams of learning (no project stops/starts)	✓	



# Developing & Applying the Segment-Based SR Platform

## Developing Segment-Based SR's

## Applications for Segment-Based SR's

1

### DEVELOP & VALIDATE

SR's designed to mirror key traits & behaviors of generational (i.e., Gen Z, Boomers) or custom segments

2

### TRAIN SEGMENT SR'S

SR's "trained" to emulate relevant segment Internet content consumption; *updated with current events*

3

### MARKET MONITOR

Continuous interest updates allow for monitoring of segment-relevant trends & events

4

### CONCEPT EVALUATION

Screen, refine, optimize concepts... develop the *right* ideas for the *right* segments using KnowNow™ testing platform

# A Closer Look at Steps 1 & 2: Developing Segment-SR's

## 1 How are Segment-Based SR's Developed?

→ **Generational/Custom Segment Dev:** SR segments built from demographics/psychographics/category-specific behaviors

→ **Modeling Process:** Segment-specific *demographic, attitudinal, behavioral data* fed into machine learning software via...

*Published/Secondary*

*Segmentation data*

*Ad hoc primary data*

*Social listening data*

→ **Validate:** Quality control testing ensures each segment-based SR is fully representative of their relevant segment

## 2 How are Segment-Based SR's "Trained"?

→ **Training:** Segment-Based SR's trained to have Internet content consumption interests that match the targeted segment (2 wks.)

→ **Consumption:** SR's sent to Internet to find content that aligns with their *specific* interests—can consume *20K articles daily*

→ **Scoring:** Interest Score generated to reflect degree of alignment between article content and SR segment interests

→ **Evolution:** SR's continuously evolve in areas aligned with their traits...always up-to-date with *current category trends, changing preferences*

# A Closer Look at Steps 3 & 4: Segment-Based SR Uses

## 3 How do Clients use Market Monitoring?

**Data Collection:** SR's access Internet to stay updated (every 15 seconds) on content of interest to the segment they represent.

**Impact on SR's:** Real-time updates ensure SR's always reflect current preferences of the target market.

### Monitoring Reports & Applications:

Segment-relevant news, category events, competitive news, social/political events used to ***generate reports AND develop concepts.***

*Track digital campaigns*

*Monitor specific brands*

*Monitor category events*

*Track top topics of interest*

*Product launches/recalls*

*Track event impact (i.e., tariffs)*

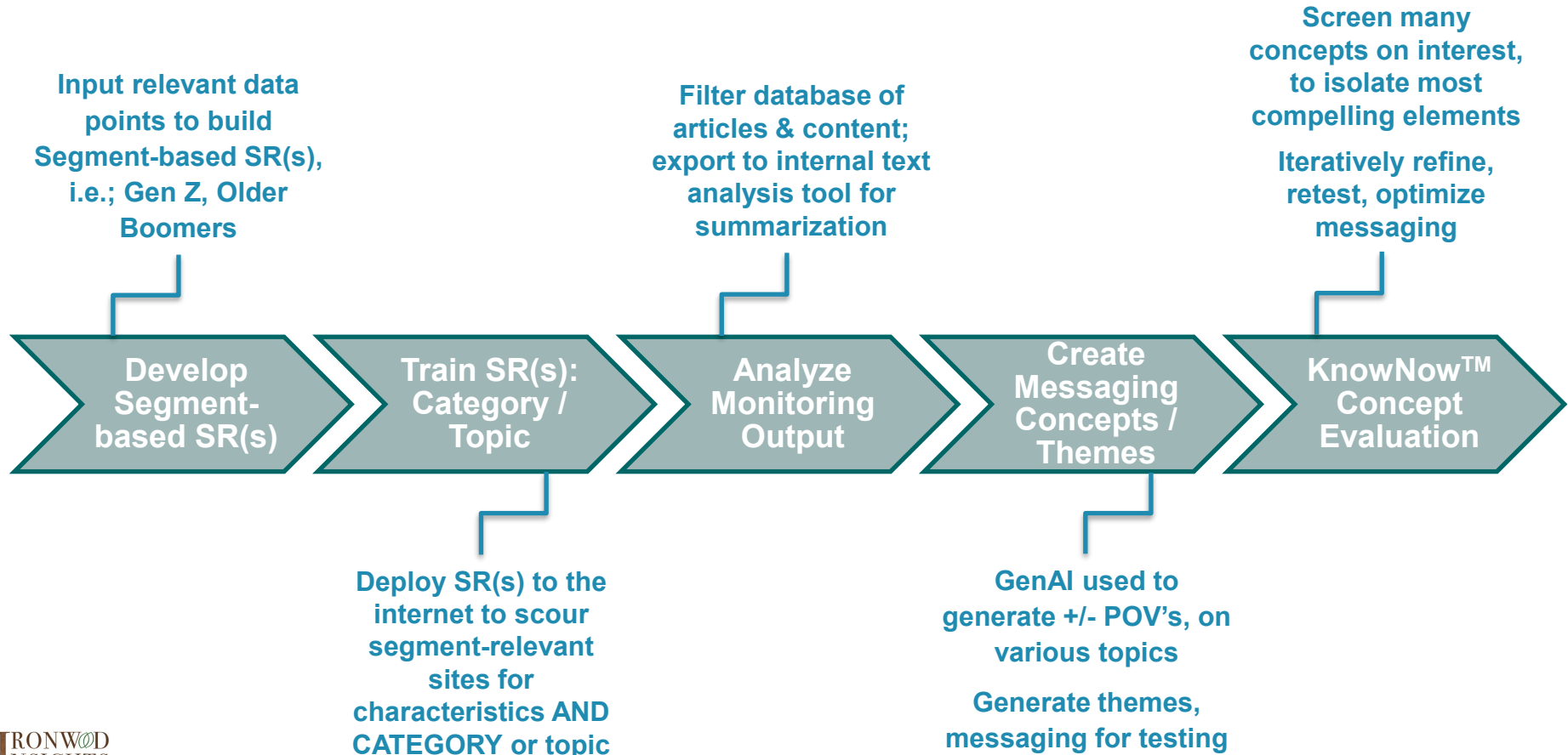
## 4 How do Clients use KnowNow™?

**Outcomes:** Measure interest and importance to develop, test & optimize segment-relevant ideas and concepts.

**Applications:** Improve effectiveness of marketing strategies & tactics across the marketing mix.



# An Illustration of how We've Used the Platform



# ***In Closing***

## **Back to the Future: 3 Integration Strategies to Improve your Online-Mobile Leverage**

- 1. Integrating AI- AND Human-led Quality Control Protocols**
- 2. The “Back:” Leveraging Traditional MR Methods**
- 3. The “Future:” Integrating Segment-Based Synthetic Respondents**

**But remember...**

**Implementing AI is NOT the goal, better data and efficiency is the goal**



# Thank You!



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*Doc Brown*

**For more information contact Brad or Brian  
OR stop by booth #415**

# *Appendix*

# EV Example: Updating Segments with Monitoring Data

Synthetic Segment Respondents collect thousands of articles on Electric Vehicles (EV)...  
key themes reviewed are summarized in minutes



## Summary of Articles Read by Gen Z Synthetic Respondent

1. *Interest in Elon Musk & Tesla*: The articles consumed by Gen Z reflected a strong interest in Elon Musk's activities, including his involvement with Twitter, comments on political issues, and leadership at Tesla.
2. *Emerging EV Markets*: Articles on the growth of the EV market in unexpected regions, like conservative Texas, and abroad (Norway and UK) were of interest.
3. *Climate Change and Clean Energy*: Articles on climate change, clean energy policy, and the role of electric cars in environmental sustainability were also prevalent.

## Summary of Articles Read by Older Boomer Synthetic Respondent

1. *Tesla, Elon Musk & Twitter*: Older Baby Boomers also consumed articles related to Elon Musk, Tesla, and Twitter's CEO selection.
2. *Politics and Public Opinion*: They showed interest in articles on public opinions, political implications, and presidential critiques.
3. *Global Economics and Politics*: Global topics were also a theme, including China's population growth, France's economic recovery, and political issues in Turkey.



# EV Example: Developing Preliminary Coms Strategies

Deploy Claude 3.5 Sonnet to generate copy to identify messaging pathways...

## Gen Z

- Drive the Change, Be the Change: EV Revolution
- Tech-Savvy Driving Meets Climate Action: Upgrade to EV
- Zero Emissions, Infinite Possibilities: Join the EV Revolution
- Quiet Streets, Clean Air, Happy Earth: The EV Solution
- Smart Car for Smart Generation: EV – As Connected as You Are
- Fuel Your Career, Not Your Car: EV Industry
- EV: Your Ticket to a Sustainable Social Circle
- Health Conscious? Drive Electric!
- EV + Smart Home = The Ultimate Tech Ecosystem
- Drive Change: EVs and Social Justice

## Younger Baby Boomers

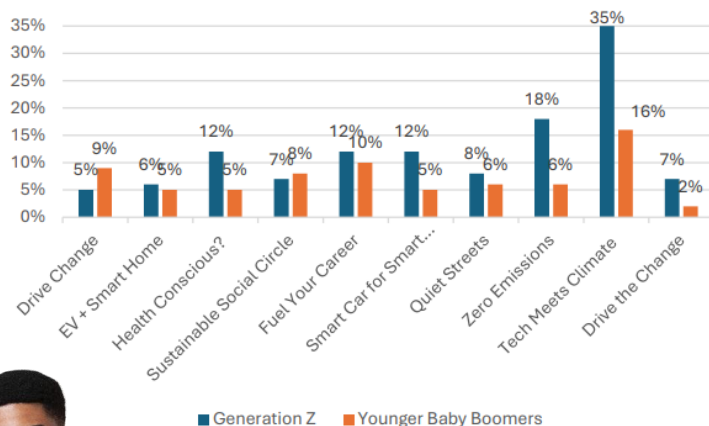
- Redefine Your Drive: The EV Advantage
- Lower Costs, Higher Standards: The EV Advantage
- American Innovation on American Roads: The EV Revolution
- Cutting-Edge Technology Meets Time-Tested Quality: Modern Driving with EV
- Freedom from the Pump: Energy Independence Starts with EV
- Less Maintenance, More Enjoyment: Simplify Your Driving Life with EV
- Rediscover the Joy of Driving with EV
- Retire in Style: EVs for Your Golden Years
- Leave a Legacy: Choose EV for the Next Generation
- EVs: The Smooth, Quiet Ride You Deserve

# EV Example: Evaluating Concepts

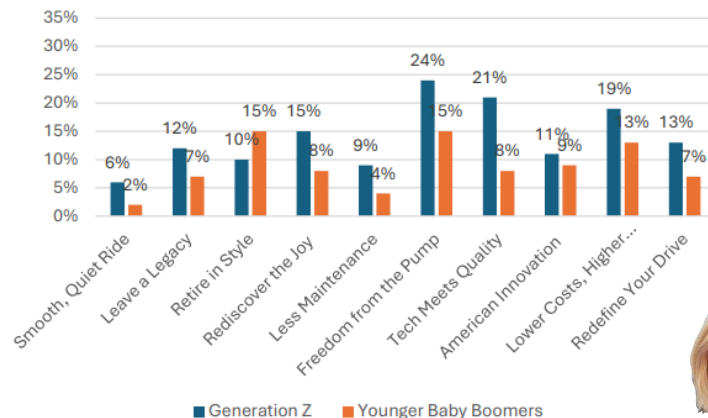
Compare interest in scores of concepts developed & tested for each segment

## Concept Interest Scoring

Ads created by Claude 3.5 for Generation Z, but tested with both generations



Ads created by Claude 3.5 for Younger Baby Boomers, but tested with both generations

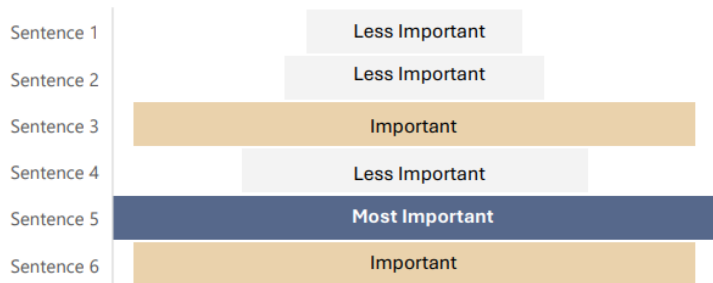




# EV Example: Importance Testing Refines & Optimizes

Deconstruct the concept to isolate its most compelling components... and optimize

## Importance Testing



- Break down the highest-rated messages for each segment into component parts
- Assess the contribution of each component to the overall appeal of the concept (component interest / overall interest)

Message Component*	Importance Score	Importance Level**
Cutting-edge tech	36%	Most Important
Performance beast	32%	Most Important
EV industry booming	23%	Most Important
Tech enthusiasts intro	9%	Important
Cost-effective	9%	Important
Tech-savvy driving	5%	Less Important
Climate hero status	5%	Less Important
Charging network	5%	Less Important
Government incentives	5%	Less Important
Join the revolution	5%	Less Important

**Synthesize components → Refine → Retest → Optimize**

# Best Practices for Select Traditional Methods



Mixed Method

- Preferred state.
- Best, most representative samples and highest quality insights come from designs that marry the sampling & methodological strengths of 2+ approaches



Telephone/CATI

- Strongest quant method when paired with online in terms of representative populations & capturing clean, authentic data
- Deeper level of insight possible (i.e., open ends)
- Best solution for certain demographics, narrow geographies, targeted segments



Text/SMS

- Emerging method that is still being refined, but really only effective when used in a closed population—i.e., a client list—and sponsored.
- More suitable for transaction-based surveys and as a compliment in mixed method studies; i.e., to drive respondents to the web, 800#, etc.



In-Person/F2F

- Limited in terms of sample representativeness (convenience, self-selection) so best applied in qualitative settings
- Best approach for depth of information, stimulus flexibility/presentation/review, observing non-verbal queues, such as facial expressions