

NUMERATOR X QUIRKS

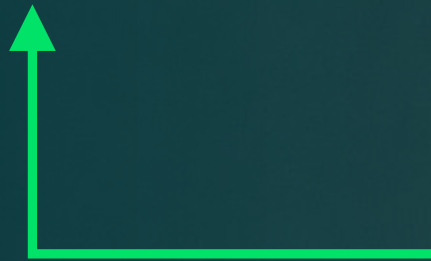
The Fragile Truth Beneath Our Trusted Methods Title

Michelle Pichman, Sr. Director, Survey Innovation & Enablement
Dave Aronson, Vice President of Sales, Verified Voices

“

When GenAI is moving toward conducting the surveys, acting as respondents, and interpreting the surveys, will we be able to tell the difference between it and real people?

In survey research, “we can no longer simply assume that a ‘coherent response is a human response.’”



12-30-2025 | TECH

Digital surveys may have hit the AI point of no return

A new study shows bots can be indistinguishable from humans in survey responses.



While all eyes are
on the elephant in
the room....



The Sleeping Tiger

Quantitative surveys have traditionally been the cornerstone of understanding consumer sentiment and behavior — but they depend on one thing: **recall**.

The risks of relying on recall are harder to detect, yet potentially more harmful if ignored.

How Shopping has Evolved

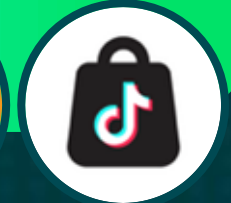
My Grandma



My Mom



Me



Modern shopping...our memories weren't built for it.

The retail landscape is undergoing rapid transformation.

DID YOU KNOW?

15+

Consumers shop across 15+ retail banners per month*



Product life cycles are shrinking with more options than ever.

DID YOU KNOW?

400+

Consumers buy from 400+ parent brands per year*

That's
MORE THAN
33
brands per
month!

*Numerator OmniPanel data

Leveraging a Unique Dataset to Find Answers

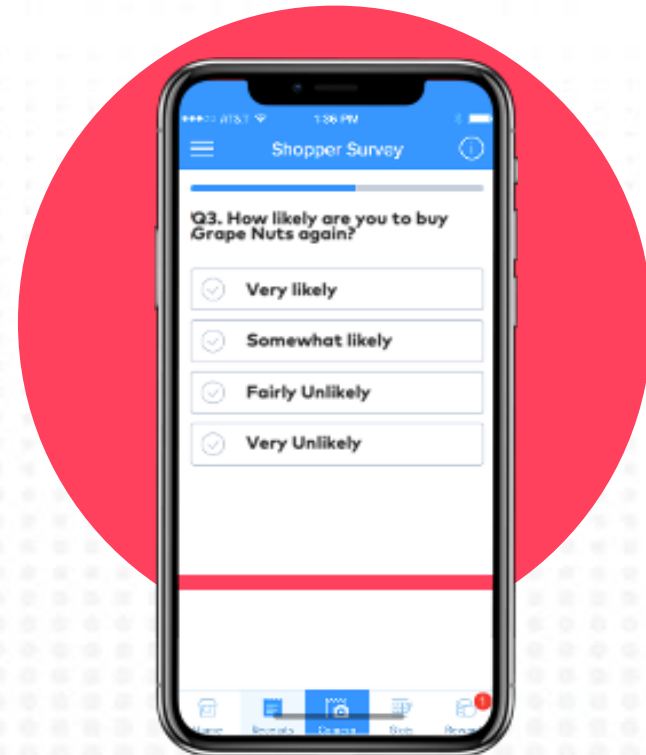
VERIFIED PURCHASE DATA



Paper Receipt Upload &
Passive Digital Receipt Sharing



RECALL-BASED PURCHASE DATA



In-App Surveys

PHASE 1

2024 Research On Research explored risks in screening survey respondents by their ability to recall recent brand and category purchases.

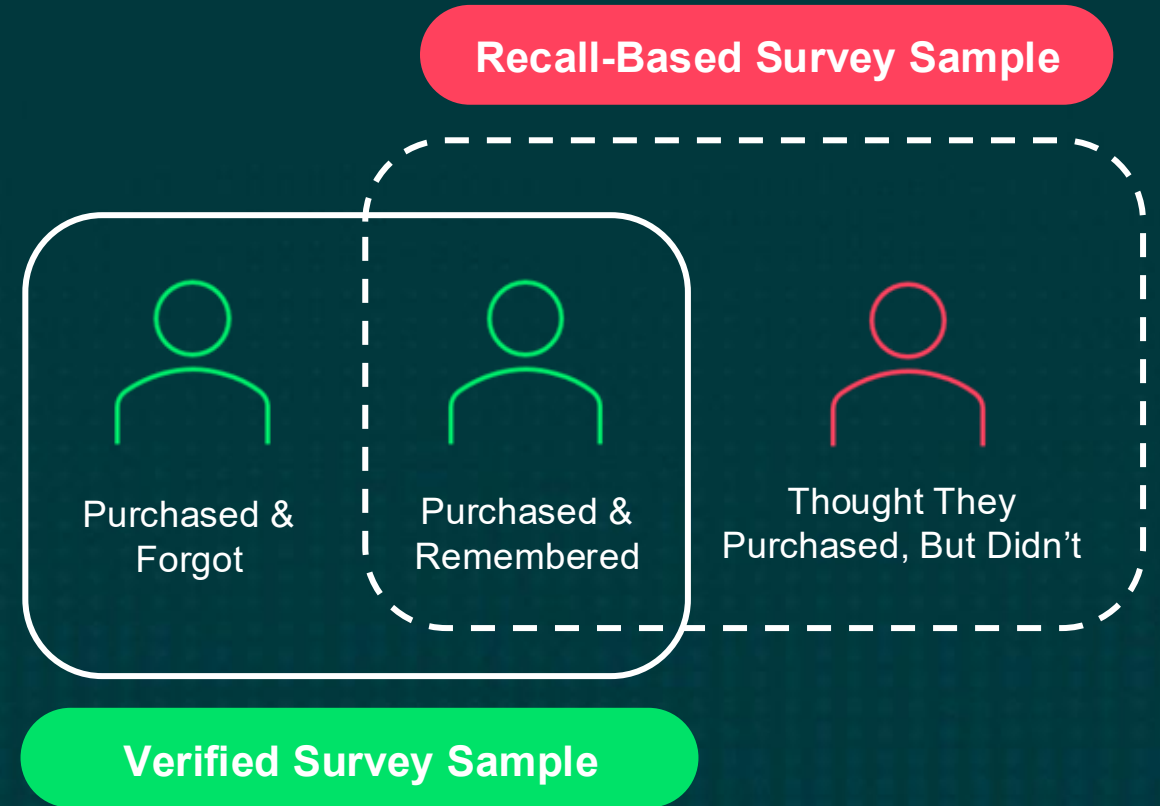
Of 40k verified buyers analyzed...

50%

Less than 50% could recall the brand they had just purchased

1 in 5

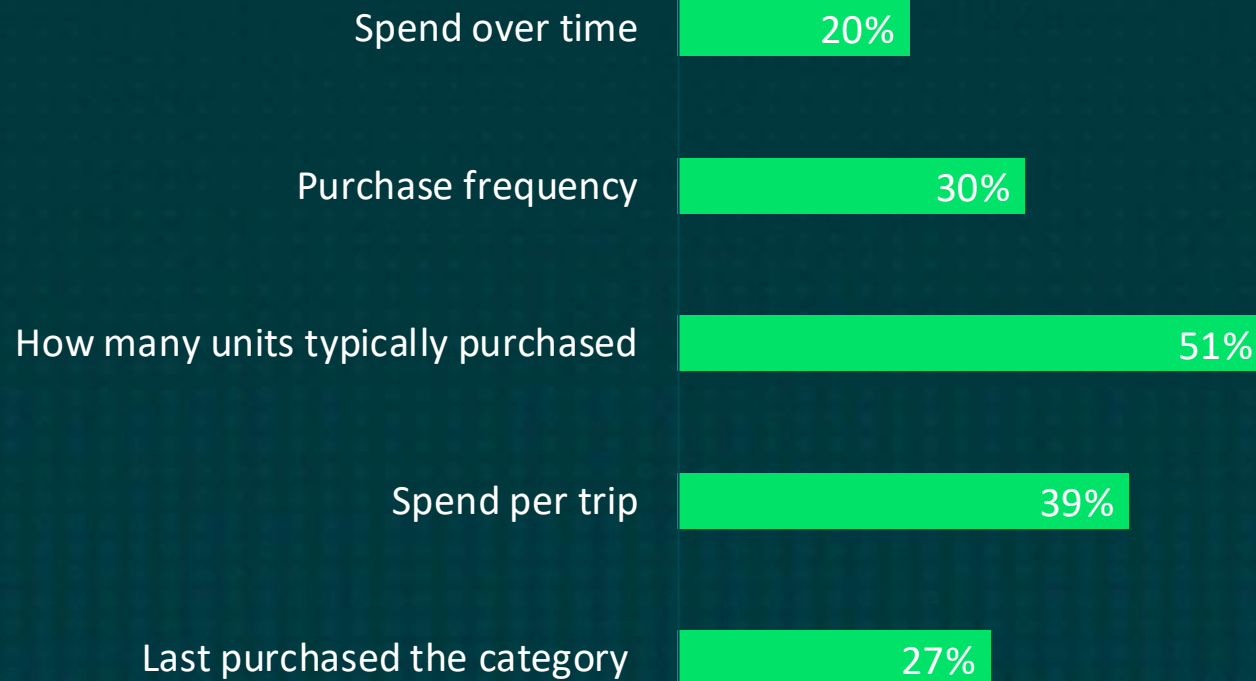
did *not remember buying the category* at all



PHASE 2

2025 Research On Research Dives Deeper — examined how relying on consumer recall for key metrics can skew insights and strategies.

OCCURRENCE OF ACCURATE RECALL BY CORE METRIC



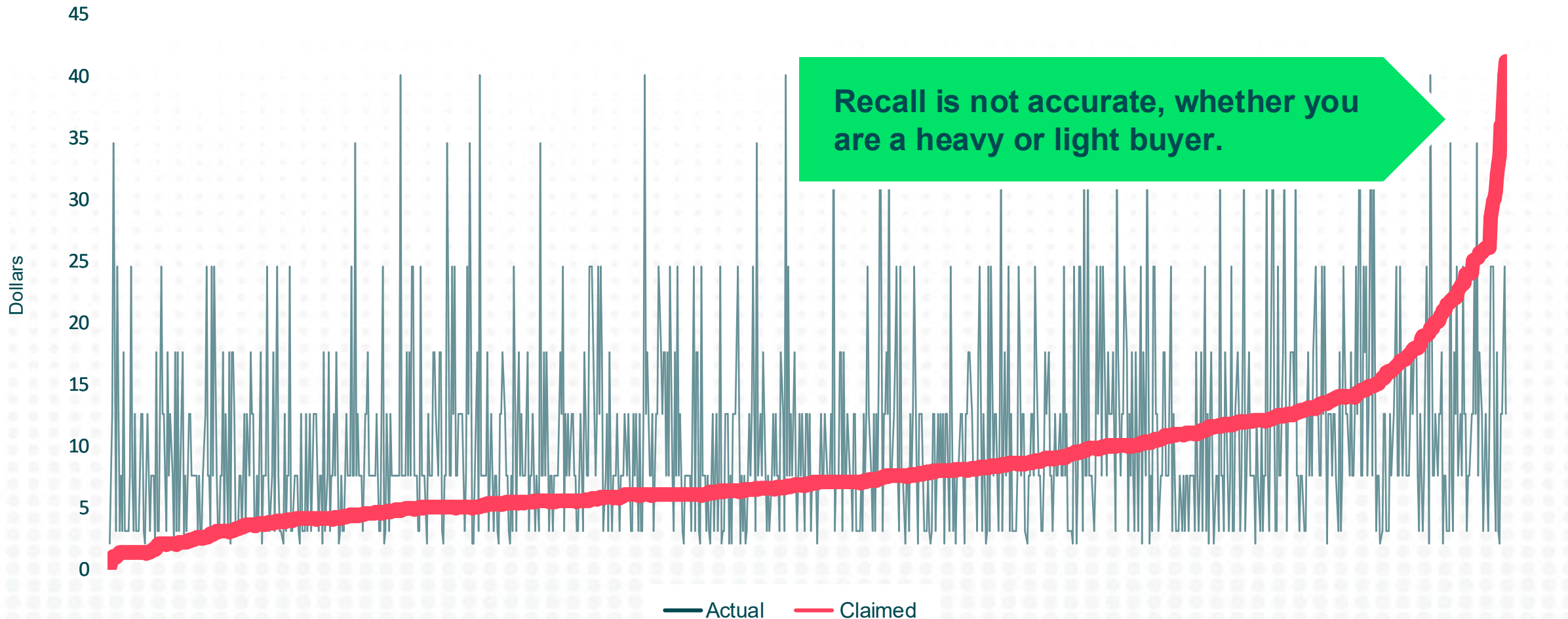
AND HERE'S THE CATCH...

Over half of respondents (56%) said they were highly confident in their answers —but their accuracy wasn't any better.

Confidence \neq Accuracy

What happens when claimed decisions don't reflect actual purchase behaviors?

ELECTROLYTE SOLUTIONS | CLAIMED VS ACTUAL BEHAVIOR





The Future of Research is a Smarter Blend

When behavior is difficult to recall or prone to misreporting, we should rely on verified behavioral data and other methods to understand **what people do** — reserving recall for **why they do it** — motivations, attitudes, needs, and experiences.

Together, they create stronger, more reliable insights.

Because no great meal starts with rotten ingredients —
and **no great insights start with bad data.**

Want to Go Deeper?

Verified buyer research—two white papers to dive deeper.

Risky Recall: Why Verified Buyer Data Is the New Research Imperative

From Claimed to Confirmed: Reshaping Research with Verified Buyers



Scan here to access both!



Numerator

