

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

A-I
Segmentation

Focus Groups

Qual

Online
Surveys

Quant

Strategy

OL Message
Boards

Surveys

Dashboards

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PersonaPanels

verisoul

VOXCO

TANJO.ai

Relative
INSIGHT

Enhouse
Interactive

FastFocus

indico
LABS

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

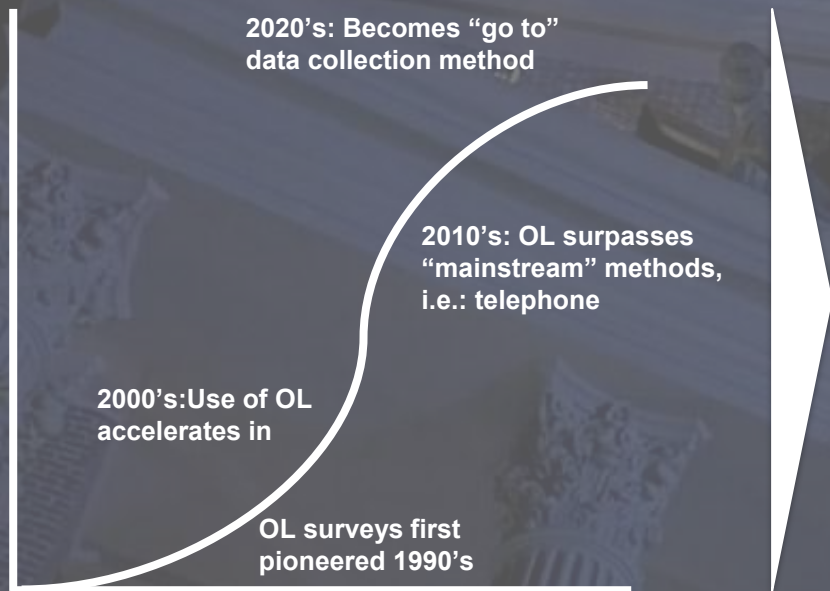
2024
\$75-\$80B!!*

*Categorizations of research activities have become significantly broader over 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

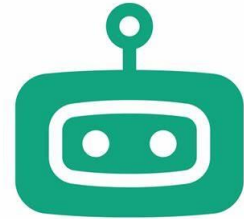
- Mass adoption of digital forms of communication
- Mainstreaming of digital self-expression, i.e., social media videos/pics/posts
- Prevalence of a 24/7, "on demand," mindset
- WFH models that blur work/home/social lines

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

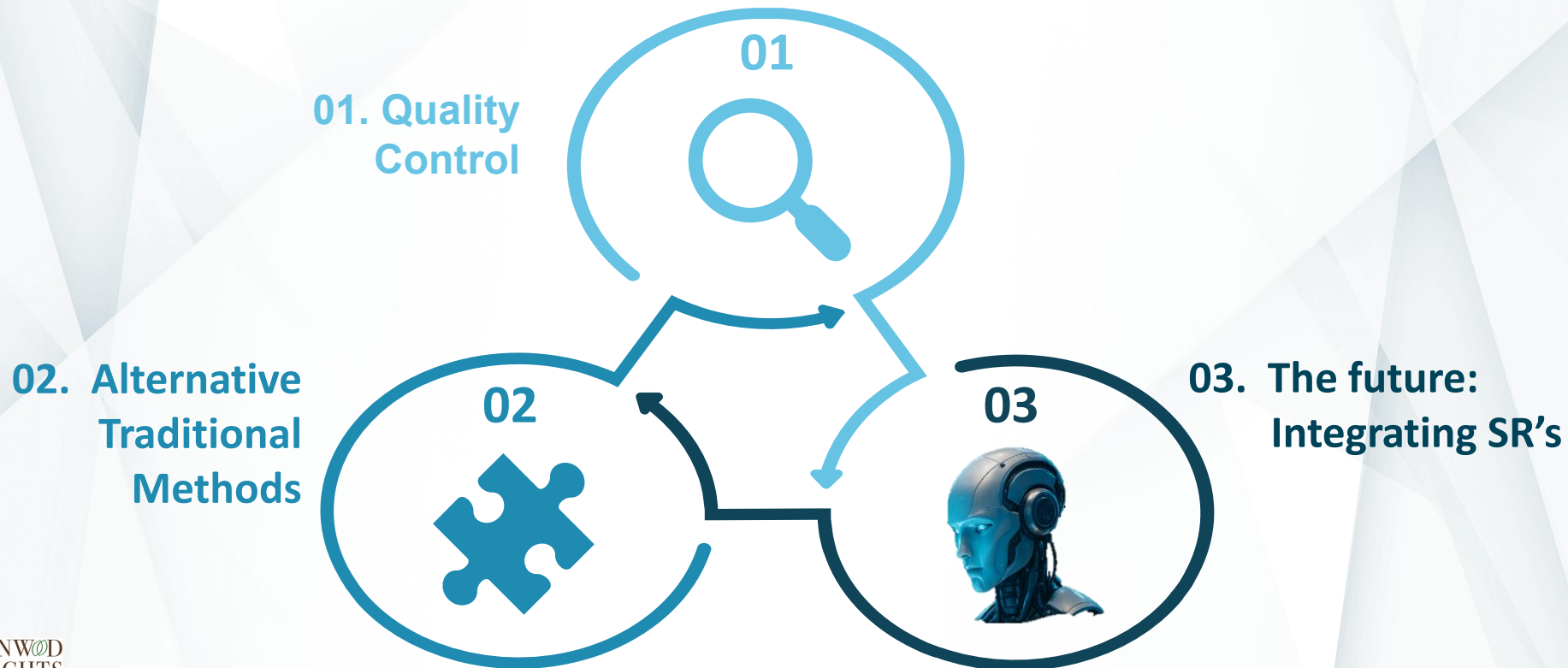
But the pursuit of low-cost, quick turn insights has also led to the overuse and misuse of the online method

- 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

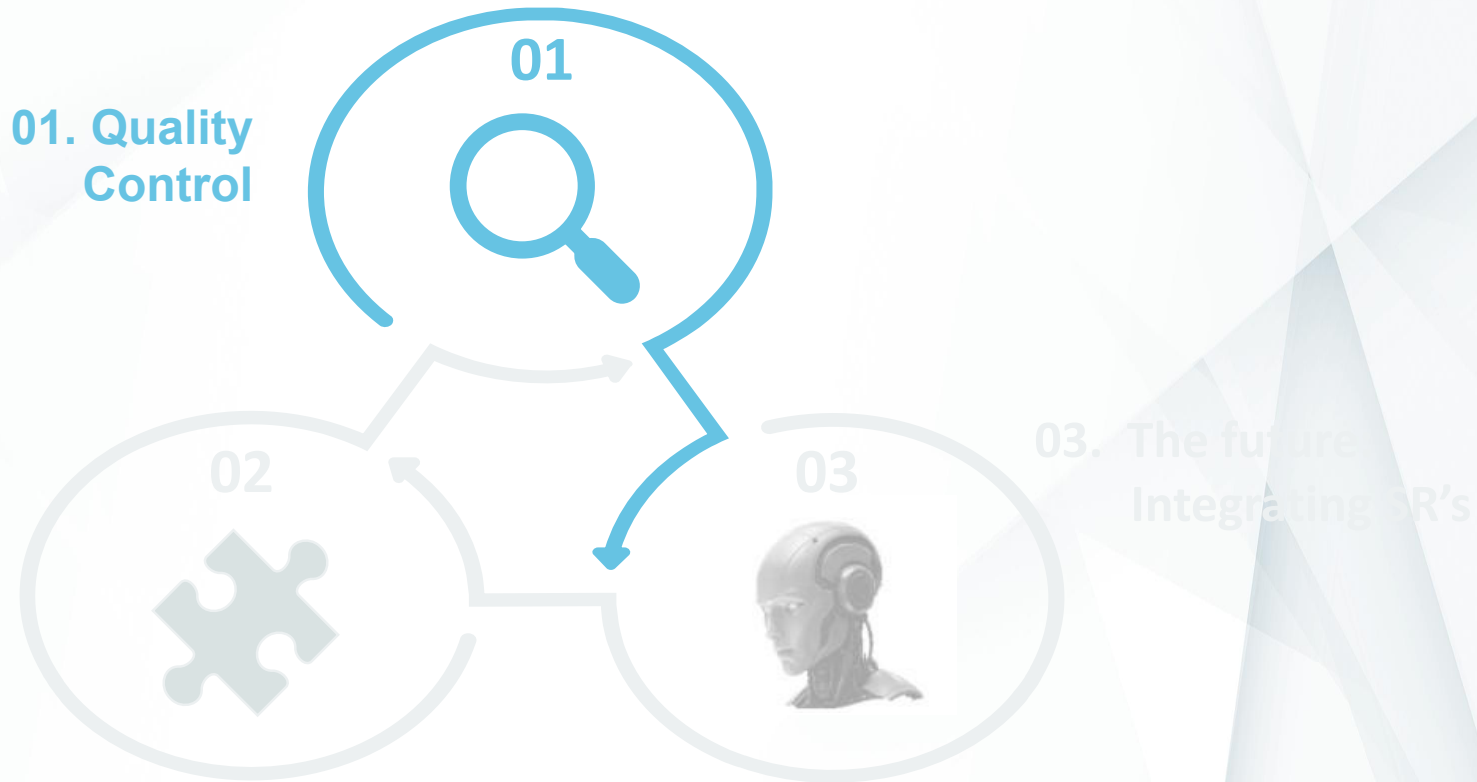


Strategies to Better Leverage Online-Mobile

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!**



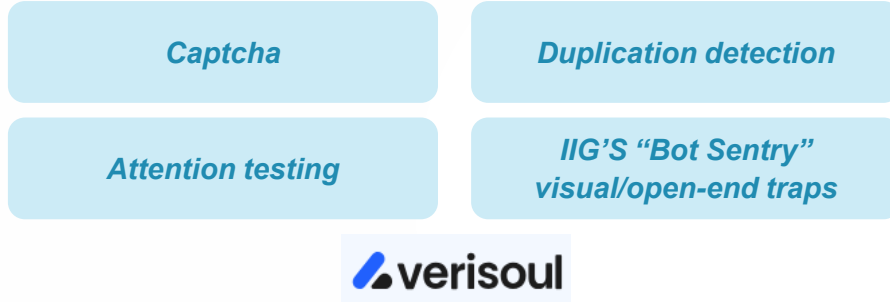
Strategies to Better Leverage Online-Mobile



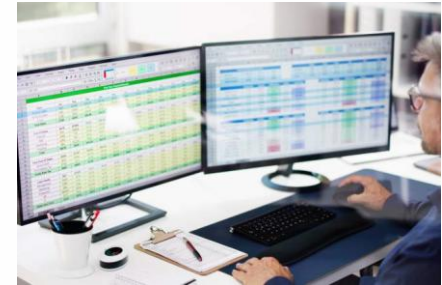
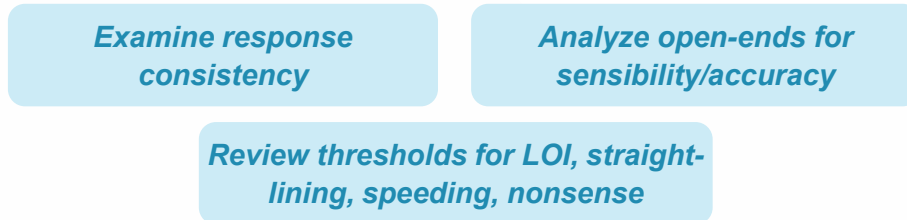
1. Better QC to Improve Online-Mobile Data Quality

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

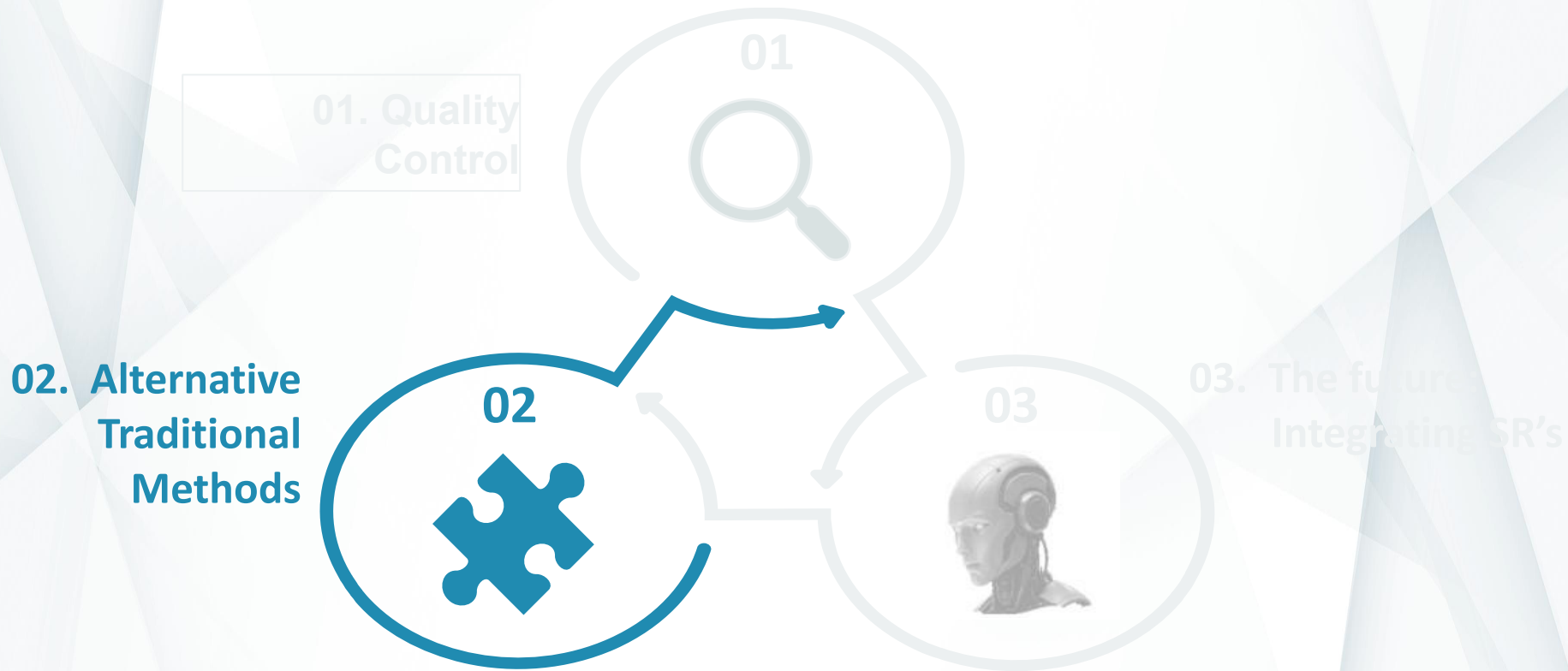
- **Technology-led Countermeasures...** AI-powered technology and complex scoring algorithms *detect, identify and prevent* mal activity:



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



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

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

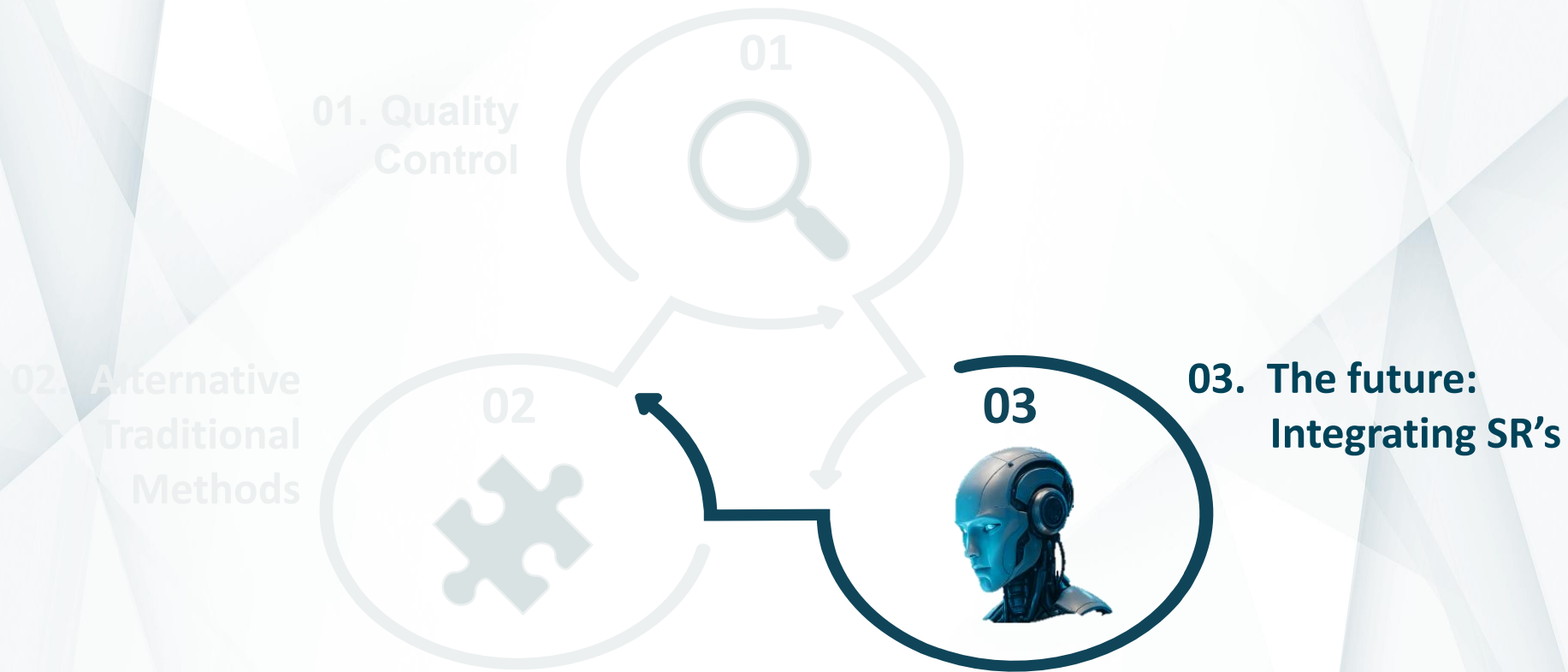
- Emerging method that is still being refined, but really only effective when used in a closed population—i.e., a client list—and sponsored
- More suitable for transaction-based surveys and as a compliment in mixed method studies; i.e., to drive respondents to the web, 800#, etc.



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

Strategies to Better Leverage Online-Mobile



Adoption of Synthetic Respondents (SR's)



Mid 2010's:
Early stages...SR's trialed

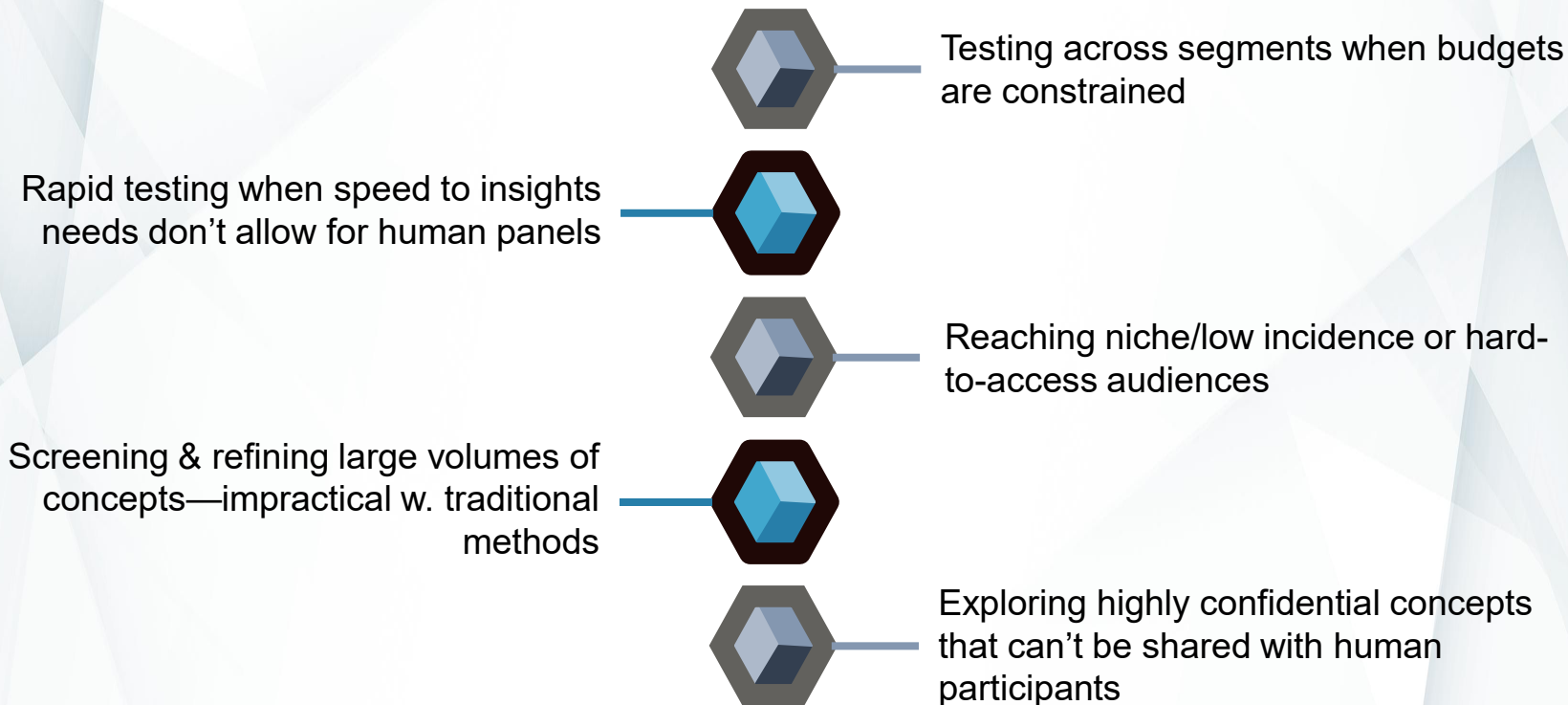
What's driving this rapid adoption?

- 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 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)

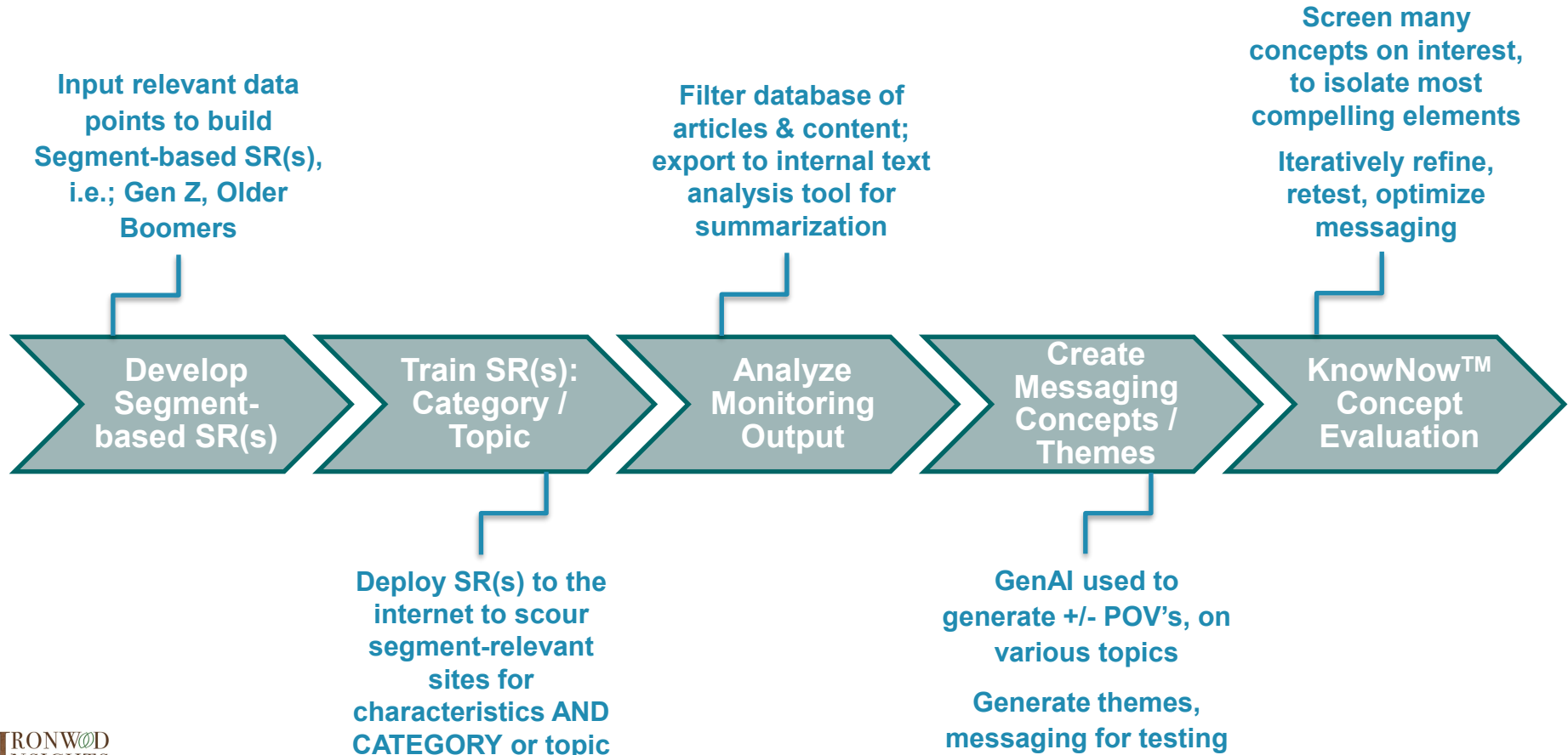
4 How do Clients use KnowNow™?

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.



A Recent Example of how We've Used the Platform



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

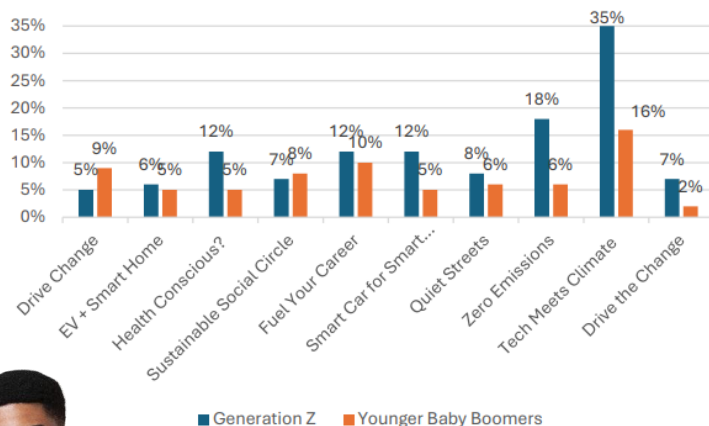
- Redefine Your Drive: The EV Advantage
- Lower Costs, Higher Standards: The EV Advantage
- American Innovation on American Roads: The EV Revolution
- Cutting-Edge Technology Meets Time-Tested Quality: Modern Driving with EV
- Freedom from the Pump: Energy Independence Starts with EV
- Less Maintenance, 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

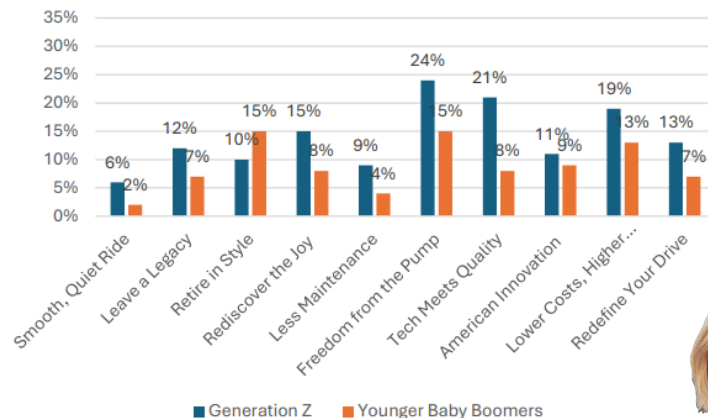
Compare interest in scores of concepts developed & tested for each segment

Concept Interest Scoring

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



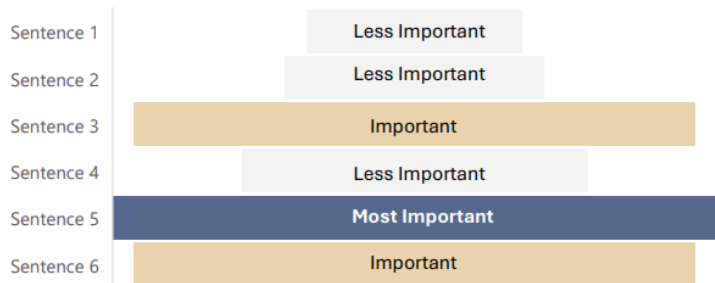
Ads created by Claude 3.5 for Younger Baby Boomers, but tested with both generations



EV Example: Importance Testing to Refine & Optimize

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

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!



McFly



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Doc Brown

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