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Brett Watkins: Here we go. Welcome, everyone. Welcome to L&E Research's sixth annual webinar on the future of market research. My returning champions, as always, we have Lenny Murphy of GreenBook, Charlie Rader of Procter & Gamble, Barry Jennings of Microsoft, and our very own Kelli Hammock here with L&E Research, our research design engineer we have. A couple little side notes for all of you as always. We are recording this webinar. Our thanks to Focus Forward, our transcription partner, who will be providing transcripts of this for anybody who is unable to make it today but you wish to share this content. Kelli will also as always be doing a summary wrap-up and sending that out post email survey, so for those of you who are short on time and can't catch up the whole hour, we'll look to try to provide you a summary of that as quickly as possible. And a new wrinkle into today's webinar, for those of you who've been with us before, we will be hosting out a few polling questions. First of which, which our ever present Josh Bradley there in the background, our technical wizard who keeps us all on track and rolling forward. Thank you, Josh, for all your help. He's going to start us off with what did you want to hear about today as we start our conversation. It's going to be a little different than past ones as we focus more perhaps on technology and qualitative, but today we're going to get started in a little bit of a different direction, which is specifically the state of the industry and some data that's been coming back. Lenny, I know you and I have been talking recently about some of our latest great findings analysis and I know why you were fully tabulating that. We had some interesting things that came up that I know has been a hot topic in the industry: data quality. So tell me a little bit more about what you're starting to see in your initial cuts from the data that you're looking at.

Lenny Murphy: All right. Well, thanks Brett, and hi everybody. This is always, I look forward to this every year, so it's great to, feels like the band's back together, and appreciate that. So yeah, we just wrapped up GRIT and it's taken us longer to get to tabulation this round than normal because of one really interesting

finding related to data quality that I can talk to you right now. This is one with the GRIT 50, and so we always, we're aware that people sometimes play games in responses because they think that they can get by somehow with gaming the system so they can go up and down, or go up in the GRIT 50 listings. And so we pay an awful lot of attention on this one to data quality. That was far more challenging this year than normal because there were well over 600 completely generative AI generated completes. And they were really hard to find. The real tell was that the open ends were too good. So when we got to looking at verbatims and verbatim responses, they were very thoughtful, they were contextually accurate, they were very deep, they were very long, they were perfect punctuation-

Charlie Rader: They answered the question?

Lenny Murphy: They answered the question. They absolutely. And they didn't say- Well, there actually were a couple that said, "As an AI system." Those were easy. People weren't really trying. But the vast majority of them, only because they were so good, made them stand out and then go back and look. So again, I want to be clear. One, for anybody who thinks, oh, people try and B. S. their way through GRIT, yes, they do. And yes, we catch them. This year was different because it wasn't people that weren't qualified. Someone took the time to set up a-multiple someone's, actually-to set up artificial respondents. And they answered consistently. They were, there was no length of interview difference. So they were paced. They were contextually relevant and accurate. These were synthetic respondents, right? It's a misnomer to say they were bots. We're familiar with bots and we know that type of stuff that exists within surveys. These were synthetic respondents. And that brings up a whole host of interesting questions that we can get into. But here is the real takeaway, I think. If somebody sets that up to take GRIT, what the hell do we think is happening in real surveys, where there is actually money? Now, Charlie, you had a nice point.

Charlie Rader: Yeah, I would say Lenny, getting higher up on the GRIT 50 is a big influencer of corporate budgets and where and who the technology providers that we as clients look to. So I wouldn't say that there's no money in the GRIT 50. I'd say it's a very different class of money that's in the GRIT 50, to be honest with you.

Lenny Murphy: Thank you. Appreciate hearing that, and yeah, we recognize that's part of the thing. But this couldn't have been an incredibly difficult thing to do, so somebody had a data set that they modeled and said, "Here's a profile of GRIT respondents. Hell, let me even use the past version of the survey to train it

on. Or even a past version of the report." And there were a ton of them. To put it in perspective, this was a sample size, before cleaning, we were at 2,700. Over 600 were fake, so were AI generated responses. Now, we'll share more about this. Obviously it's a big deal. And not necessarily just on this webinar; we have a plan how we're going to talk about all of this as we get ready to release the report next month, because it's just very telling. But for this conversation, I would say that from what I am hearing from other folks within the industry, I'm hearing numbers as high as 70% of sample being thrown away because it is, we'll use the term fraudulent, for lack of a better word. That they're not authentic, real people responses. And I would argue that is a crisis. It's been a crisis that's been brewing for a long time. It is a major crisis now. And we may, I am advising some clients to go back to face to face in some things, or to embed non-conscious measurement into their standard survey kits, so things that can't be faked so easily. So I think we're at a critical juncture as an industry and we need a handle on this and we need to figure it out and we need to figure it out fast.

Brett Watkins: Yeah, Charlie and Barry, let's talk about that a little bit. Charlie as an example, starting with you, I know Procter & Gamble has been very active. I know one of your colleagues has even flown across the [INAUDIBLE] to look at actual like mobile phone cell bot farms and automated responses to their surveys. Can you talk a little bit about P&G's perspective and stance on this? I know this is definitely one of the big disconnects between suppliers and brands as you all look at it and try to do a better job in the industry. Tell us a little bit about what's going on in your world.

Charlie Rader: Yeah, absolutely. Well, I just see the poll that came through and it's good to hear everyone's opinion on this. We probably won't follow any of it. It's our conversation.

Brett Watkins: I will try, Charlie. I will try.

Charlie Rader: No worries. Data quality of course is a huge thing at P&G. As you mentioned, I have had colleagues that we are investigating lots of provider technologies. One of the things that we are doing with our vendors, especially in the quantitative realm but certainly in the qualitative realm as well, is that we are, even at the bidding and procurement level, we are determining: What are our metrics for data quality going in? And what are the assurances that as a researcher designs their research, especially quant using online sample, that we have metrics in place to detect as best as we can, but as opposed to just, let's just throw a survey out there and see what percentages come back in. There is definitely a much more thorough and aware take on recognizing that fraud is

becoming really, really rampant in this space and we're taking steps to make sure that we have built in quality measures before we even field the survey. And then going through and doing those data cleaning bits on the back end of the survey. And then talking to our vendors and suppliers in that space to say, "Here's where the real numbers are, so this is what we'll pay for and this is what we won't pay for."

Barry Jennings: Exactly the same. And we strive at Microsoft to partner with our research partners and sample providers because it's a common problem, right? It doesn't benefit anybody. And you're right, we build it into the statement of work. And my world is particularly focused on B2B. And so that means much less supply. And in many cases, as my economics teacher would say, that means that's why our incentives are quite high. And we deploy methodological things like red herring questions or different techniques that can sort of suss out the bots. We validate. We do everything that you're supposed to do. And yeah, we're throwing out 30% of the samples sometimes. But we believe that that partner ecosystem both with our research suppliers as well as the sample providers and us, we all have skin in the game and so we all have to be part of the solution. And with generative AI, we're starting to see those and toss those out as well. We've got to figure out what a strategy is in this brave new world. Because the motivations for the people who drive these things, they don't go away. They just find a new way to deploy the new thing, and after gen AI, it will be something else. I don't know what it is. But it only can be addressed if we do this collectively. And again, I can afford a little bit of my work being premium sample, but that's not sustainable. We got to have a good fix. And Lenny, there are times and places to do face to face. Absolutely. And again, also, very difficult to sustain. And so we've got to find what's that middle, half solution and how do we protect that for the long run.

Lenny Murphy: Are you guys concerned about deep fakes?

Charlie Rader: Sure. I don't know if we're quite there for qualitative yet that we're deep faking it, but no, it seems to be quite a little bit of work to get something worthwhile and useful in that space. But the low hanging fruit is clearly the quant sample. The fact that gen AI can give us really good responses in those open ends is certainly concerning. You know, are we going to put somebody else's face on a bot and have deep fake video? It certainly, we know that it happens. That's frankly what part of the actors' strike in Hollywood is all about, that they're worried about their images being used and reused with gen AI and not getting paid for it. So the technology is certainly there. I'm not ready for it just yet. I think people who want to talk about dishwashing soap and

whatnot may be a little harder to make that gen AI work. But yeah, certainly is coming, Lenny.

Barry Jennings: Yeah, I agree. And I would argue, and I'm not a- I know some things. I know things are going on. I don't know exactly what they are, but in full transparency. But I read the newspaper and I know that there's tons of concerns about upcoming elections, right? And so a myriad of technology providers out there and other folks are looking into this and how to figure it out, how to identify it, how to thwart it. And I would guess, again, like you, I don't know if my developer satisfaction study is going to be that huge of a thing for deep fakes. However, I think many things are, and I would guess that there's going to be a collective force focused on how to really understand what that is, how to address it, how to mitigate it. And I would probably figure we'd be drafting off of solutions like that at some point.

Charlie Rader: You know, if I can share an anecdote, I've actually used some deep fake technology. So as many people know that I'm involved in community theater and performing arts and whatnot and we just finished a run of the show *The Wedding Singer*, and I played the Ronald Reagan impersonator. And so I went to a deep fake site, typed in my lines, and got the recording back of a passable Ronald Reagan impersonator so that I could then mimic it on stage. So I found it, it was, for the amount that I was using it, it was even at the free stage. I didn't have to pay any premium to get that working. So video may be the next generation on that one, but people can use this stuff right now.

Brett Watkins: Yeah, I think there's a piece to this that is interesting to what you're talking about, and I want to get into a little bit of the generative AI for good. We're talking about how it's being used negatively; I think there's a lot of discussion how we can use it positively as well and that certainly seems like an interest to our audience. But one question before we get there, I'm curious for Charlie and Barry, is to kind of put a capsule for a moment on this data quality issue, are you concerned about the long run of this and are you even looking at how maybe we're going to have to structure research differently, right? As Barry mentioned, qual is not something that's just sustainable. We just can't make all of our research qual, right? We can't do all the validation pieces and go with that. So the ques then becomes if we have a data quality issue over here, well, how are we going to have to alter this in order to get to where you all's brands need to get to? What are your thoughts there?

Barry Jennings: I would say we work with some of the best research suppliers out there who have a very vested interest in the viability of this function and

business. We have a deeply vested interest in the viability of our function because we provide impact and value to our company that improves the bottom line. And so in my opinion, this is just like QAing your questionnaire. You got to do it. You got to figure that sh- You got to figure that stuff out. I'm trying to work on my cursing this year. And we will. And Brett, I don't know. I don't know if there's a confidence interval change that I think about because I have to account for the potential for a fake slipping in. I don't know. But I do know we will work the problem. And I don't know what the answers are. And my gut tells me there will be something else right after this, and then something else right after that. Because again, there is money, and if there is money for somebody to get it in a dodgy way they'll figure it out. But our job is to be vigilant, leverage the tools that are in front of us, the techniques that can help us, and again, work really closely with the industry, with our suppliers, with our peer companies to really figure out what's the right solution and how do we sustain that and stay ahead of it.

Charlie Rader: For us, some of the basics is, one, bringing awareness to folks. Because sometimes at larger companies like ourselves, we have the access to lots of great thinking and lots of great researchers. In smaller companies, the problem just isn't as top of mind, because they're just trying to get to the next project. Even sometimes our own researchers, we have to review it and you're like, "Oh, I forgot to put at least a red herring question in there," you know? "What two colors makes up a penguin or a panda," or something like that. Those kinds of basic pieces of just to make sure that you have some awareness that there's a human on the other end. And this is becoming an arms race, definitely, with layering of technologies. I just saw the webinar with Bimeda and Forsta on how they're looking to get the ghost, getting, and combating ghost completes, which was something that I was like, "What's a ghost complete? Oh, that's a ghost complete? Then just skip right to the end of the survey and take your incentive." So yeah, there is much to be done in this space. You know, I'll say that we're having to recognize, and I've said this in other industry meetings as well, that we're going to have to recognize that the race to the bottom on pricing, it's quite the diminishing return these days. We are probably going to need to look to figure out where the premium and quality providers are in the first place and really work our way there. Even when it comes to our recruiting with folks such as L&E, we are doing work where we're asking folks to provide pictures of products that they use in their homes to make sure that that in fact is the right version and the right skew. That's who we want to talk to. Those kinds of quality measures aren't going away. I think we're just going to keep increasing those.

Brett Watkins: Yes, that's a really good question because I see one of our webinar attendees. Hi, Sean Wolf out there. Hopefully, I'll see you sometime soon at a conference. He asked, "Hey, what are some of the ways that we're vetting suppliers to make sure we get quality samples?" Charlie touched a little bit on actual things that we've been doing as well. What are you working with on clients and how is that process going to try to ensure that we get people a good sample?

Kelli Hammock: Well, I can only speak to qual. I don't have the experience with quant panels so what I'm saying is qual relevant. And it naturally has less fraud as we've discussed here, due to the real-life touchpoint such as in-person research and synchronous virtual online interviews. That also doesn't mean we're immune from the bad actors. AI's going to bring some new challenges that all panel suppliers are going to need to resolve. One of the things that I've started thinking about is open-ended articulation questions. They're generally asked over the phone but they can be administered in online pre-screening. For example, a high-incidence gen pop study is going to produce a lot of leads, so gauging an articulation question in written form can be pretty helpful in narrowing that pool. But as generative AI gains popularity with the general public, we're likely going to see an increase of use in AI when answering these questions, articulations, and how we gauge the level of responsiveness and engagement. If their articulation response is generated by AI, the candidate's going to look good on paper, but to Lenny's point, these are perfect answers but it's likely the articulation is false and may not be truly indicative of a quality participant. I think we're going to have to, as a supplier, start investing in technology that might be able to pick up on those things. Another challenge we're likely to see or that we're on the precipice of with AI is asynchronous research fraud. As a supplier, L&E won't necessarily be able to account for this as we're not reviewing the data collection part so safeguards on the tech side have to be implemented, such as fraud detection tools, so that researchers are alerted to the suspicious responses that it may be AI-generated. And it does increase the need for honest and transparent communication between brands and their suppliers. When situations such as these arise clients should be extra diligent in sharing these details back with their project manager. L&E does not want to provide clients with panelists who are only interested in shortcuts to a quick incentive, and our clients aren't interested in those candidates either. To Barry's point, this has to be a really collaborative effort of what I'm calling tattletale to make sure that the bad actors aren't used for other research. As far as what safeguards can we implement to maintain a qualitative sample, I think the key is understanding what motivates participants. Taking steps to work better to increase a good participant experience. All parties need to collaborate and

embrace best practices as it relates to the participant experience. And of course, this needs buy-in from everybody. We're all in this game together. Responsibilities on panel providers are going to be a little more manual, not so much technology solutions, but first of all, a strong provider is going to have a powerful system designed to account for a multitude of variables such as the ratio of screeners completed versus screeners qualified, or when someone last qualified for a study. And of course, the ability to track static data points. Accounting for all these variables together, the project manager will always target the ideal candidates first, therefore, minimizing the overall outreach needed to fulfill recruitment, ergo, reducing overall screener fatigue. I think there's also a disconnect between the audience a brand wants to engage for their research and what could be viable for panel suppliers. I'm not really going to go into detail about the incidence rate funnel that starts broadly and narrows as you add different qualification points. But the most successful projects in my specific experience have been with a really broad and balanced audience, not necessarily successful in that we can secure the audience, which is a definite measure, but also post-project feedback received on projects that have a wide distribution. There are tons of examples where the researcher had to adapt and pivot and maybe change the target- change the goal, and then all of a sudden they've got these new insights that they didn't even have a discussion guide written for. You'll be surprised what that adaptability and flexibility have. And then, of course, writing a good screener. This is probably one of those hills that I'm going to die on. I am a huge fan of a well-written screener. It is a passion of mine to make sure that screeners are concise. Screeners should have one objective, to qualify or disqualify or recruit. It's not an opportunity to do quant. It's not the time for additional information. That should be done in other places. The pushback I've seen is, "Oh, my client wants to know before the interview." "Great. Let's do a homework assignment," or, "How about you do a 10-minute pre-call to do a getting-to-know-you?" There are other ways to do that rather than a lengthy screener, which just leads to fatigue. And to Barry's point, if we're looking to increase the health of the ecosystem, we collaboratively have to talk together about all these issues that make respondents tick and how we can cater better to those. Those are just a couple of thoughts off the top of my head.

Lenny Murphy: I'll chime in for a minute, Brett.

Kelli Hammock: Please.

Brett Watkins: That's a couple of thoughts. Right, Kelly?

Lenny Murphy: Yes. And they were all great.

Kelli Hammock: I didn't even finish my list, so I can keep going.

Brett Watkins: Yes, Lenny. Go ahead.

Lenny Murphy: Yes. I mentioned earlier talking to brands, outside of Barry and Charlie, on how to adapt to this. and a few things have come up that I think were really interesting. One is the incorporation of non-conscious measures into the study design because those don't seem to be spoofable yet. That's interesting. And it even broadened it out. There's a big CPG company that is looking at really leaning into behavioral data versus attitudinal data, period. And looking at their supplier mix, even for panel companies that are behavioral first and that validate identity, folks, and that are capturing purchase behavior, capturing their web journey, et cetera, all of those things as the tip of the spear in identifying good human respondents. I think that's really interesting as well. Those are useful data sources, always have been, but now we're seeing them maybe become more useful in a different way to mitigate against fraudulent respondents. Now, that has real implications for river samples and routers. That's a big bulk of the industry. I feel for the companies that play in that arena. It's been the dominant model for a very long time, and rightfully so from an efficiency perspective, it was the right answer. Now, we have to do something different.

Charlie Rader: It's vulnerable.

Lenny Murphy: Yes. It's just like ad fraud, Barry. The other side of Microsoft's business is Bing, right? You guys see this all the time. Those are all really interesting. But I want to pivot back around to - you hit it, at the good stuff. Again, even my first point, these were synthetic respondents so this was a synthetic sample. I just didn't ask for it. I didn't want a synthetic sample in my sample. But it does create a really interesting idea. If we're moving into a world of verified identity with respondents with large behavioral data sets and also large attitudinal data sets, then that creates a path where we maybe as buyers can start creating synthetic respondents ourselves. And what is the role of that within insights? When is it OK for us to model versus ask or quantify? I think it's intriguing and interesting, and here we are. Just curious what everybody's take is on that.

Barry Jennings: Yes, on that learning journey. Sorry, Charlie. I hope I didn't cut you off. Yes, there are lots of papers out there and there are lots of ideas out there. There are things that my team is trying to do to really figure out what's the right fit. There's lots of potential. I think it's probably fairly narrow and definably

useful. And I don't know what it is yet. Again, no shortage of ideas- and they could all be crap, but I think there could be some there that could make things efficient or effective or may enhance a technique in some way, shape, or form. I think we have to learn it and understand it. I think some of those learnings will also help us improve our defenses if you will. I think there's a place for it. And I think there are probably some companies who have a wealth of data and can project based off of some personas something more real-time that gives you a directional point of view today.

Charlie Murphy: Like agent-based models, Barry? Sorry, I didn't mean to interrupt.

Barry Jennings: Potentially, absolutely. And those are the things where they may improve your starting point on a thing. It may get you to an answer quickly. As a client brand, I dream of the day when I can actually do a survey with just five questions. If I could do that because I'm starting off in a better place, my hypotheses are a bit stronger and testable in some way, shape, or form, I think there's something there. And I think we've got to learn what that is. There are PhD types who know this stuff and they're trying to figure it out. Great. We need to figure it out from our perspective because I do think there's some viability there. And I like big data.

Charlie Rader: And you cannot lie.

Barry Jennings: Everything that is going to destroy the research industry that's come up over time, well, nothing has succeeded. The industry has adapted. And that might be the adaptation, right? I have a significant behavioral practice that's really meaningful and super impactful, and I would argue a significant part of the value happens when we get some of the target audience on a call and we have a conversation to put that data in context. I think things like that, we'll find ways to get all of these things to work together. I think that's the learning journey, at least that I know that I'm on and I suspect others are as well.

Kelli Hammock: I wanted to chime in on what you were saying about the persona recruitment because I feel like that could be a really good bridge between the quant and qual world if maybe some qual panel providers could build panels around category usage. If you need those quick analyses or something to base your research on, you might be able to get that faster, cheaper, and better from a qual provider, and then you actually have a better gauge on the way to mitigate fraud just because qual panels are really built better to exclude that. I think that could be really nice. If we could figure out how to do

persona recruiting as that hybrid in the middle stage, that could be a good future of where things could go.

Charlie Murphy: Brett, you're paying attention?

Brett Watkins: Well, we actually do that very much. We do a lot of that today in custom models. Clients that come to us that want to build. As opposed to a walled garden, we build the garden for them and then they decide how they want to continue down that metaphorical road and how they grow their garden best. What questions they want to ask. What methodologies do they want to implement? We've basically just put the qualitative threshold in by ensuring, "Hey, these are people." We know they're real people. We know that they've answered the questions. And then proceed forward. I'm personally interested when we look at qual. And this is just me stating my opinion. Quant was always a crude measurement tool because to ask you in your own words was meant to be a method of how do I go back and try to do quick measures for these things? And it seems that as these generative AI tools get better in taking all this unstructured data and being able to put thematic around it, there are some new generative AI companies - Yahoo comes to mind as an example, that is taking data analytics and then, "OK, how do I take all of that and push this out?" I really think that's a big way because we get back to quality. I think a simple easy one is video. The downside is we still don't have a large percentage. It basically reminds me back to the days 20 years ago when you were like, "Well, we want to do this but what percentage of households have computers in their homes?" Well, now that percentage is pretty much now evaporated to a very small number. Now we move on to the next one. It's like, "Well, how many of them have a webcam?" But of course, so many people on their mobile phones, the answer is a lot. Video becomes a very, I think, sustainable way. And the question is, is the technology able to validate that that's real? It's not fake. It's not synthetic. From there, you really can go to communicate more in the consumer language as opposed to trying to force them through this exercise. Lenny, I can remember you talking about this for years, gamification of the serving process. How do we make it more interesting for people? I think there are some elements to that. But the technology that I think is hopeful is that we might be able to come right back around and really allow the consumer to speak in their own words and process it in their own ways. It becomes more anthropological really in just observing what people do. You just have to get them to enable you to let them into their lives. The question is, how do we best do that? The younger generations don't seem to have any problems, especially in the mobile phone status, of letting you in their lives. Our generations and older, yes, not so much.

Charlie Rader: Well, Brett, this actually harkens back to a lot of the conversations we've had in previous years, which is the growth of video analytics work in qualitative research to do more human person-to-person face-to-face research. But the challenge has been- in the past, which is, OK, you have all this rich data of video, how do you start to deal with that? Well, frankly, AI is on everyone's tongue today, but AI or machine learning, or algorithms, or whatever you want to call it, have been around for a long time. The machine speech-to-text or however you want to call those things, that has evolved very, very nicely and now we have basically instant captioning. That even happens if I'm doing a Teams presentation, while I'm giving a PowerPoint the live captioning is going along there. Now the next step here is, how do you get beyond some of the human research biases? Humans live in a time stream. We see the first one, we remember the last one, and we remember the weird one. The boss came to the weird one. But the body of data that the human researcher has to search and sort through now can be aided, I think, in this area of generative AI. When we present it with a tight body of data, something that's been a bit of a holy grail in that video analytics space - once we get beyond the, "Oh, you can easily get the transcription there," so you never have to worry about do I have the verbatim correctly? It's never been about the verbatim exactly. It's been about creating the story of what the body of the learning has been in that piece of research. To that space of where GenAI is going to help us, I think it's definitely in the space of summarization and creating themes of things that, one, you were expecting and then the things you weren't expecting. I think there's some promise definitely in that space for what GenAI can do for us in these large language models.

Lenny Murphy: Yes. And doing it right now. That was out of the gate. We've started going there. I think that it's also interesting just to build on that while we're waiting on Barry to come back. What does it mean when the guy at the Microsoft headquarters loses connection? I don't know, is it another sign of the apocalypse, the-

Brett Watkins: [INAUDIBLE] on the plate, Lenny [CROSSTALK].

Charlie Rader: If there's no internet at work, everything stops. It's- you might as well just turn the power off.

Lenny Murphy: Good lord, it's the aliens. I'm telling you, it's the aliens.

Charlie Rader: Indeed.

Lenny Murphy: The-. But so we're seeing a lot of folks utilizing everything you said, but also the synthesis power of kind of merging in secondary research. Really what we were thinking of is kind of desk research in the past. Now is so much easier and incorporating that in as well because it's now just, it's easy to do. And also data visualization. There's a platform out there called Decktopus that it will create your PowerPoint deck just like that. So as you would use generative AI for anything else, I'd like to see a deck that is- has a business look and feel, and this color and this tone, and on this topic, and boom, there it is.

Brett Watkins: Lenny, sorry to interrupt, but one thought I know you shared with me is just everybody in the audience might be interested out there was, I believe the company was Colop that actually built for quality the ability to read transcripts in and to do thematics. So similar I haven't had the opportunity to test the tool yet, but my understanding is it was available to- it was all available to all researchers. Yes.

Lenny Murphy: With that beta last week. So I think, and those things, so I'm glad you- we went there of, look, there's these big, thorny societal questions we have to deal with regarding this topic. There's obviously dark side elements we have to deal with as well- fraud. But the efficiency gains from a, just a process perspective, those are just no-brainers. Absolutely. I'll tell you though, my concern even on that is that we don't lose the human component. So I have been, I'll be the first one to admit, I have been very hesitant to utilize generative AI tools personally, because the nature of my work, of how I pay my bills is my brain. And I could see getting really lazy, really easy with those tools. So for myself personally, I've been still just doing things old school because I just, for me, I just feel like I need to keep my brain sharp and keep that human element in things.

Kelli Hammock: Sorry, wanted to chime in because you mentioned something about, I actually heard this about a week or two ago on AI, and it's that we've gotten to the point where as humans, we're working harder than ever. We're working longer hours, we're killing ourselves out there in the workforce, and yet we have trained AI to do our art. It writes poetry, it creates paintings. What are we doing. Why are we using AI to do the fun stuff. And I'll sort of take a step back and say, when I say fun stuff, I love building PowerPoint decks, so I'm like, why would I want to have AI take that away. This is great fun for me, so I'm not delegating the fun things. We have to be careful of what we're delegating to AI so that we're not keeping all the grunt work and giving them the fun stuff.

Charlie Rader: I'd say, let's flip this around, recognizing that let's call generative AI our assistant. Our assistant, and let's just say they're- generative AI is your new hire. You can get your new hire to do some things, but you better check their work because they're a new hire. And I think this is probably the right place to place this technology at its current level right now, which is that, let's go ahead and summarize this stuff. I'm going to read through it. Does this jive with what I heard in the research, is this pointing to stuff that I can go back and verify, did that person actually say that. Because we know that there is a hallucination problem in AI. So what, probably what I was saying earlier about making sure they have a nice tight set of data is that you can spot the extrapolations easier rather than giant sets. Where if you had 400 interviews to look through versus 20. But I think recognizing that these AI assistants should be doing that, assisting us. But absolutely the researcher is the one responsible for creating the value to the business and the productivity gains that we can get from it is certainly useful. The question is, is that if however you find out that there's junk in your data, even on the qual side, you are doubly responsible for it.

Brett Watkins: So as we get a little closer here, I know, keep it in the hour as always, the time flies. So we're down getting here close to the last few minutes. Hopefully Brad- Barry's able to make his way back. But just looking at some of the questions from our audience-

Charlie Rader: Blockchain, what-

Brett Watkins: I saw- did see a blockchain question.

Charlie Rader: Lenny might have something to say about that.

Brett Watkins: Lenny, I'm sure you've got something to say about that, buddy. Absolutely. What do you got to say? But the question was, will blockchain, can blockchain play a role in validating participants to be who they are, they say they are in quant. I saw a presentation five years ago, not a since then. Say ye.

Lenny Murphy: Yes. The- so there's a- you may have heard a couple- just a few weeks ago, a big initiative launch called Worldcoin. And I had to grin and shake my head briefly, because it was- it's another variation of that concept of creating a centralized identity for the individual. And of course, their thing is scanning your retina. So it's very, very minority report. And they've literally set these things up all around for people to go and scan their retina, create their identity. You have a digital wallet and they are paying a \$2,000 a month stipend for storing all of your personal data on that system. I can only assume that they're

monetizing that in a variety of ways. So [INAUDIBLE] evolve, we see Worldcoin sample popping up at some point soon. So yes, the- and what- I think blockchain is just one example. The point is validated identity that has some level of encryption or protection so that bots can't go in and create those accounts. Having some way to confirm that it's real people that are doing that. And there are companies Measure Protocol, they lost at the same time that Verg Lift did. Measure has succeeded, Verg Lift did not, at least not yet. And they have a panel that is blockchain, that's foundational element of that. And people are sharing both behavioral and attitudinal data, et cetera, et cetera. It's high quality. So I think that's absolutely a part of it. And if we move into kind of this, the central bank digital currencies, which seems to be everyone's playing with right now. It's coming down the pike, that'll be another dimension of that. So there- everybody's identity will have to be secured on the blockchain. That is what they are doing. This- central bank digital currencies are basically cryptocurrencies. They won't be crypto because they'll be backed by central banks, but you'll create a wallet linked to your identity. There'll be some way to confirm that that is your identity. And that'll probably go pretty far in helping to solve some of these issues. Now, that may be some dystopian hellscape components in other ways that we'll have to get to when we get to it, but it will solve that problem.

Kelli Hammock: So webinar content, like three years from now?

Lenny Murphy: Can we do a dystopian hellscape webinar, that's the topic. Hell yeah, I'm in [CROSSTALK].

Charlie Rader: That'd be great.

Lenny Murphy: With the aliens.

Charlie Rader: Maybe just I'll chime in with this idea of blockchain verified and for us, I've started to rely more on getting to those behavioral things, as I've scanned through some of the questions. What are some of the behavioral things that we're talking about. We're looking for sample providers that can verify that somebody's actually bought this thing. Whether that is all the way back to Nielsen and a variety of other providers that we use to say, I've seen that you've done this thing. Or even to online clicks, you have visited this website and you've had this search. That's something that I'm interested in. And let's go look at the behavior. Now, the- often the way I feel about this is that there's kind of an increasing time and effort and money. So the more certain you want to be of your data, the more expensive and slow it's going to take. So if you want someone's top line opinion and I'll throw this even back to the idea of synthetic sample.

The- your uncertainty level can be pretty high, and you could maybe use synthetic sample in that space to say, what do people generally think about, top attributes that we need in a baby diaper. That was something that I did with the folks at Yabla at the last IEIEX. And then you go into recorded diary type behavior, and then you get towards these longer term behavioral panels where, you're tracking someone and their consumption and recognizing that in order to get those ethnography type level insights takes time, it takes money, it takes quality. So it's kind of depending on where's your project really need to be. Of course, the foundation of even what you want on the more uncertainty side, you still want to know that there's a human behind it, or at least you know that it is synthetic sample is what you're buying.

Brett Watkins: Just typing up a response for someone, which perhaps maybe we put this out in the field since we have a few more minutes. I know the data quality, of course, since we talked about this initially, was so important. A lot has come back and what are you all doing and I've heard Charlie, you mentioned obviously red herring questions within the data sets. I mentioned video and I think Kelli mentioned imagery. I think both of you did as far as, you're talking about you buy this product, take me a- take a picture of it. Most- the growing percentage of people that actually have mobile phones, that have cameras in them, it's an easy thing to do. There's- are there any other little tips and tricks Kelli, Charlie, you got out there that you are often helping to improve data quality and eliminate the bad behavior?

Kelli Hammock: I think- go ahead, Charlie.

Charlie Rader: Just real quick, the- when even working with folks like you at L&E. When we're looking at the gigantic brand lists, we could at least provide an- the technology on the web to provide an image of what brand that we're talking about. Is this the green one or is this the blue one. While it isn't necessarily fraud, it is certainly inattention or unawareness by our panels of what they actually use. So by providing at least a picture of the brand in the list that they're scanning, we're improving their experience, and therefore the quality that we get back there. So these kinds of things, all the way up to take a picture of the Dawn dish washing liquid on your kitchen counter. And then, hey, maybe we're using other kinds of image analysis to say, is this actually Dawn, is this actually a kitchen counter, is- all these other things to say it's real. And that can help us in the screening process even get that good quality. So Kelli.

Kelli Hammock: And I think another thing that we've been doing, because we don't always have a concrete product. There's not always the Dawn dish soap on

the counter. It could be something else. So what some of our clients have started leveraging is audition videos. So they will have us go through the recruitment screener. Once we have found really good candidates, they then take that pool and have calls with them. Just a 10 minute conversation might help them to gauge if-. Again, it could, it- if it's not a physical product, then they can't really prove it. So I think an audition video has been-. I've seen an uptick in that over the past couple of years, because once you get into the session, the last thing you want is a recruit who may be qualified on paper, but didn't quite meet the expectations that you had for your research. And of course, well-written screeners are going to mitigate that, but the concept of doing some sort of video submission in advance of the research or even just a homework assignment has been wildly successful.

Lenny Murphy: And we should point out on the quant side, that the- everybody is either building proprietary technology to deal with this. No one has take- no one is ignoring this issue. So I don't- I want to be super clear on that. The-.

Brett Watkins: Which company's dedicated specifically to it, like Research Defender and others.

Lenny Murphy: Absolutely. That's where I was going to go as well. That there are platforms out there that just like your antivirus software, that's- they are staying abreast. They're trying to- it's an arms race as Barry said. So there's a lot of trying to play catch up and leapfrogging to do this. But everyone is extending significant effort to try and resolve this. And Brett, particularly the companies like Research Defender, big shout out to them. I think that they have- they're doing an awful lot now with the AI piece, and I just am familiar with what they are doing. And we'll get it, we'll fix it. It'll help the cause, but then something else is going to pop up. We'll have to plug another hole in the dyke, but there's certainly progress being made.

Brett Watkins: One last question before we go. And by the way, Josh if you would just go ahead and put the final satisfaction poll out there. So before everybody logs out, we get that feedback. But our last question was from Kristen Coleman, thoughts on stricter privacy regulations and how that would affect the access to the richer behavioral data sets. Obviously a huge issue, so I'm curious to see what you both have to say about that.

Charlie Rader: I function as our privacy spock for two of my categories within P&G on the R&D side. So we want to protect people's privacy and access to it. So we understand, first of all, that let's obey the law. My wish for however, is that

the lobbyists for the research space had not been as so thoroughly mixed in with the advertising space, because in the research side, we are definitely getting penalized for the bad behavior of the marketing side of our lives. And so being able to recognize that the research question is different from the marketing question. And so as we do internal governance, helping folks to recognize the difference between the two. But absolutely, the amounts of regulation that is coming through from- at the state level here in the U. S as well as other governments are starting to implement stricter and stricter privacy regulations. Lots to keep on track of and lots to do in that space. But I think ultimately in the research space, we generally should feel good because we are doing stuff via informed consent. We're asking people, please talk with us, and not just scooping up info to be able to market to them.

Brett Watkins: Lenny, final thoughts?

Lenny Murphy: I agree with Charlie, although we're on Zoom. A week or so ago there was a big to-do where they kind of slid into their terms of service that, we're going to use everybody's data for all of our users for our own AI purposes, and people said, the hell you are. And the interest piece of that was that, my understanding is that when we're using third party software we need to be cognizant of their terms of services, and we shouldn't take anything for granted. The- because hypothetically, if Zoom had said, we're going to make this opt in, and the default is you're opted in. And Brett, if you didn't go back and change that, then every time you use Zoom, what happens to your users. I didn't opt in. So there's just, there's interesting questions that we just have to keep an eye on. The data is the new oil. When this whole thing's been about generative AI, it is driven by data, it is driven by data, by training sets. So the hunger for more and more data is only going to increase.

Charlie Rader: And real human data.

Lenny Murphy: Yes. Real human data it. So it is- companies want to get access to that, and we're going to have to keep pushing them to do that ethically. And to the core of that question, people that are part of behavioral panels, they are compensated for being part of that behavioral panel. And if the people are not being compensated for their participation, in my opinion, that's unethical. And we're going to have to just stay on top of it. So we can't take it for granted that everything is permissioned. So we need to trust but verify.

Brett Watkins: I agree. And I think this too will be Charlie, you mentioned as well, to kind of wrap this up on our end. As somebody who works with panel,

that's our business. And we deal, Kelli and I deal with daily as a business on the balancing of what clients want. Meanwhile, with over 1.5 million users who have access to Google and everything else that want to tell us, I'm unhappy with process. And we are the Switzerland of the balance of the process to try to keep them happy while we're trying to deliver obviously quality solutions to brands. And it's, to me, going to be more and more about the opt-in process. It was- as opposed to- and to give some shout out to Insights Association and Melanie Courtright's work with Howard Feinberg and their lobbyist group that's working on our industry's behalf is to really, to Charlie's point, to do more. And trying to create firewalls between marketing and market research to get Congress to understand that these are opt-in processes and the bad behaviors when their researchers should be probably even doubly penalized. But when we're doing the right things and people are agreeing to the right ways, and we do this, it's how we can be more connected to consumer without a question.

Lenny Murphy: Did we hear from Barry, just by the way? No.

Brett Watkins: I will certainly reach out to Barry and make sure that all is well there. I'm sure like everybody else, whether it's something that's going on in the world that's just created a minor blip in the broadband's ecosystem. So remind us all that this can all be fragile. But I do want to take just a quick moment to thank all of you again, as always, Charlie, Lenny, Kelli. We'll let Barry know as well. Thank you so much again. For those of you who ask questions, we will or I will, and Kelly and I will, we'll certainly get back to you with answers to those questions as best we can to address those for you. Or if there's others that you want us to follow through with Charlie and Barry, we will certainly be happy to try to do that on your behalf. So again this recording will be sent out. Thank you to Focus Forward for doing our transcription work for this, which will also be sent out as- along with Kelli's summary for those who had to miss it. This recording also will be provided to you as part of the link. So for your colleagues out there who didn't get a chance to see you live, can always catch it, obviously once it is published here in the very near future. So thanks to all of you. Thank you everyone for attending today's webinar, and we look forward to seeing you again soon.

Lenny Murphy: Thanks everybody. See you next year.

Charlie Rader: Bye now.

Brett Watkins: Absolutely. See you.

Lenny Murphy: Bye-bye.