

# Stay Sharp!

Market Research Data  
Analysis & Reporting  
Cheatsheet





# Wondering what the top minds in the insights industry are doing this year to sharpen their **market research and analysis**?

We've gathered some of the key highlights from our popular **Now That's Significant Podcast** and organized them for you in this handy, quick reference format.

Featuring essential market research tips and trends culled from interviews with over 100 industry leaders, this 2024/2025 Brand Tracking Cheatsheet is designed for market researchers by market researchers to help you get the most value from your data.



# Executive summary

The paradoxical drive for increasing effectiveness and efficiency is very real for market researchers. Shrinking budgets and stagnant headcounts put pressure on insights teams, all taking place in an unfortunate time when pressure to deliver has never been higher. Self-reflection in times like this are well-warranted.

Are you a better market researcher than you were at this time last year? If you are to ask the same thing in a year's time and expect that answer to be an unequivocal yes, you'll need to work with a higher level of intentionality – constantly sharpening your relationships, competencies, and toolsets.

This 60-point checklist offers a strategic roadmap for market research teams to maximize their impact on business outcomes. The checklist emphasizes a proactive and holistic approach to insights generation, urging teams to become drivers of innovation and strategic decision-making. While we haven't ordered them as such, the checklist has three overall themes.

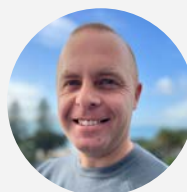
The first of the themes focuses on transforming the role of the insights department. This includes positioning the team as a go-to innovation hub by proactively identifying emerging trends and anticipating future needs. It stresses the importance of data diversity to gain a more comprehensive understanding of target audiences. And from an efficiency perspective, the checklist recommends leveraging AI for automating smaller tasks, freeing up the team for strategic thinking and high-level analysis.

Another key theme highlighted is the need for a holistic and in-depth approach to research. This involves tracking insights over time, investing in the full research lifecycle, and going beyond superficial data points. Market researchers are encouraged to embrace the use of open-ended questions to delve deeper into customer motivations and perceptions, uncovering hidden opportunities – even those on the quant side of the industry. Furthermore, it emphasizes integrating macro-level market trends with micro-level customer insights to drive strategic decision-making.

The other theme worth pulling out is an amalgam of transparency, collaboration, and continuous improvement. Building trust with stakeholders by maintaining clear data practices and providing visibility into methodologies and sources is crucial. Celebrating successes and sharing positive feedback internally helps to showcase the value and impact of the team's work. Lastly, the checklist emphasizes the importance of integrating insights from the outset of any project, ensuring that customer understanding is at the heart of all initiatives, which ticks all three boxes of transparency, collaboration, and continuous improvement.

We trust this will be helpful for you in your endeavors as a market researcher, even you only implement one thing.

All the best,



Michael Howard  
Head of Marketing  
Infotools.



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# #1

## Turn and Face the Strange

### Become a go-to innovation resource.

With the democratization of research tools, and the accelerating pace of innovation, researchers need to stay on the front foot to keep their organizations competitive and informed.

### Action Items



#### Prioritize Respondent Engagement

Make surveys shorter, more engaging, and relevant to combat declining response rates and ensure data quality.



#### Embrace Agile Methodologies

Utilize agile approaches for quick insights and iterative learning, but maintain a clear plan for when to employ more robust, strategic research methods.



#### Leverage AI Strategically

Explore AI tools for automating tasks, enhancing insights, and improving data visualization, but ensure human oversight and focus on delivering clear, actionable findings



#### Focus On The Basics

Ensure data accuracy, thoughtful analysis, and concise, visually appealing reporting to deliver impactful insights that resonate with stakeholders.



#### Close The Loop with Stakeholders

Communicate the impact of research findings and demonstrate the value of insights to foster stronger relationships and encourage continued investment in research.



“Everything is moving faster. If you ask an Exec what keeps them up at night, one of the top three is ‘My competitors are moving faster than me’. If we don’t provide the tools to move quickly, we’ll get left behind.”



#### Todd Horvitz

Head of Insights, Business Computing and Software, HP

Click to see more highlights and listen to our full conversation with Todd about the changing nature of market research.

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# #2

## Broaden Your Perspective

Try to increase your data diversity.

In today's data-rich landscape, market researchers face a golden opportunity—and a critical challenge. The key to unlocking deeper insights lies not in more data, but in smarter data integration. By weaving together diverse data sources, you can paint a more accurate picture of market trends and consumer behavior.

### Action Items



#### Emphasize Brand Purpose and Authenticity

Brands must not only claim a purpose but also demonstrate it through actions. Market researchers should focus on tracking how well a brand's actions align with its claimed purpose and the impact it has on consumer perceptions.



#### Incorporate Co-Creation With Consumers

Engage in a process of co-creating the brand with the audience. This involves listening to consumer feedback and incorporating it into brand strategies.



#### Utilize Multiple Data Sources

Integrate various types of data including social media listening, qualitative research, and academic publications to get a comprehensive view of consumer sentiment and trends.



#### Focus on Emotional and Cultural Relevance

Brands need to be dynamic, evolving with cultural shifts and emotional needs of consumers. Track how well brands resonate with current cultural and emotional landscapes.



#### Track Consumer Loneliness and Social Needs

Understand and measure the loneliness and social needs of consumers. Brands that address these emotional gaps can build stronger connections with their audience.



“All data sets considered in isolation have shortcomings. The ability to collect and combine disparate sources of data into something coherent that drives decisions, that's the Holy Grail.”



#### Emmanuel Probst

Global Lead: Brand Growth & Thought-Leadership, Ipsos North America

Click to see more highlights and listen to our full conversation with Emmanuel about the new era of brand relevance

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# Outsource the Small Stuff

## Buy time for strategic thinking with AI.

With AI automating so many of the more time-consuming tasks traditionally performed by people, a researcher should have more time to focus on higher-level thinking such as understanding the underlying reasons behind consumer behavior and predicting future trends.

### Action Items



#### Embrace Technology

The market research industry is becoming increasingly tech-driven. Researchers should familiarize themselves with new technologies, particularly in areas like data visualization, data collection, and generative AI for tasks like questionnaire creation and data summarization.



#### Focus on Business Impact

Don't get bogged down in the process. Technology should enable researchers to answer business questions and provide actionable guidance. Focus on delivering insights that drive business decisions.



#### Develop Strong Analytical and Consulting Skills

As technology automates more tasks, researchers need to develop higher-level skills. Focus on understanding business problems, synthesizing data from multiple sources, and communicating insights effectively to stakeholders.



#### Prioritize Data Integration

Businesses are increasingly looking to combine data from various sources. Researchers should develop expertise in data integration techniques and tools to provide a holistic view of the market and consumer behavior.



#### Stay Curious and Adaptable

The market research landscape is constantly evolving. Stay curious, embrace new technologies, and be adaptable to thrive in this dynamic environment.



“Generative AI will force people to spend more time doing different things than they normally do. I hope that that is adding value thinking about the ‘why’ and the ‘now what’.”



**Lenny Murphy**  
Chief Advisor for Insights  
and Development, Greenbook

Click to see more highlights and listen to our full conversation with Lenny about the latest findings in the Market Research GRIT Report.

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# Track to the Future

Avoid stale insights by constantly reviewing trackers.

Continuous reviews and modernization of brand tracking programs is essential for staying relevant in a rapidly changing market landscape. This can be done by adapting surveys to reflect evolving consumer demographics and business needs, improving participant experience through shorter and more engaging surveys, and integrating data from various sources beyond traditional surveys.

## Action Items



### Modernize Your Surveys

Update your surveys to reflect changing consumer demographics and business growth. Ensure you are talking to the right people at the right time in the right way.



### Improve Participant Experience

Focus on making surveys shorter and more engaging, regardless of the device used. Leverage passive data collection methods to reduce respondent burden and gather in-the-moment data.



### Integrate Multiple Data Sources

Don't rely solely on surveys. Incorporate social media data, sales data, customer reviews, and other relevant sources to gain a holistic understanding of your brand's performance.



### Embrace New Technologies

Utilize advanced research technology, including generative AI and synthetic data, to enhance data collection, analysis, and decision-making.



### Continuously Review and Adapt

Regularly review your brand tracking program to ensure it remains relevant and actionable. Eliminate redundant questions and adapt to new opportunities and challenges presented by the evolving market research landscape.



“We need to be smarter and think more from a consumer side – how can we collect only data we need, or data in the moment to uncover hidden motivation?”



**Horst Feldhaeuser**  
Group Services Director  
Infotools

Click to see more highlights and listen to our full conversation with Horst about keeping trackers relevant.

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# #5

## Go Beyond the Basics Invest in the full research lifecycle.

Gathering data is just the beginning. To extract maximum value from your efforts, it's crucial to view research as a comprehensive process rather than a single event. By investing in each stage of the research lifecycle, you can elevate your work from informative to truly transformative.

### Action Items



#### Embrace a Holistic Approach

Go beyond just conducting primary research. Invest time in pre-research preparation, such as literature reviews and understanding existing data, and in post-research data visualization to effectively communicate findings.



#### Leverage First-Party Data

For companies with streaming services or other platforms, mine the wealth of first-party data to understand user behavior, preferences, and engagement patterns.



#### Triangulate with Third-Party Data

Combine first-party data with third-party sources like Nielsen ratings and social listening tools to gain a comprehensive understanding of the market and brand perception.



#### Understand Evolving Consumer Behaviors

Stay abreast of changing consumer habits, particularly among younger generations, such as "rationing" content and the rise of vertical video consumption.



#### Experiment with Emerging Technologies

Explore the potential of AR and VR to engage consumers and gather insights, recognizing the challenges of adoption and the need for compelling experiences.



"Conducting a primary research project is important, but it's really only half the battle. Literature reviews and preparation before the research – as well as things like data visualization on the back end of your findings – can be just as vital and really take your research to the next level."



#### Vera Chien

Executive Director, Global Corporate Strategy & Insights, Warner Bros. Discovery

Click to see more highlights and listen to our full conversation with Vera about making consumers the 'superhero' of market research programs.

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# Marry Purpose with Profit

## Integrate macro and micro insights.

There's a growing expectation for brands to address social and environmental issues genuinely. By identifying and integrating macro contexts like climate change with consumer-related micro contexts, you can help guide strategies that are both purposeful and profitable.

### Action Items



#### Embrace a Contextual Approach

Move beyond traditional category-based tracking and focus on understanding brand performance within specific occasions and consumer contexts.



#### Integrate Multiple Data Sources

Connect brand tracking data with other relevant data sources to gain a more comprehensive view of brand health and its impact on business outcomes.



#### Leverage Technology

Utilize advanced platforms like Ipsos' Harmoni to enhance data accessibility and analysis, and explore the potential of Generative AI to improve research processes and insights.



#### Measure New Dimensions

Develop and track new indicators that capture the evolving consumer landscape, including social expectations, ESG factors, and the impact of digital media.



#### Provide Actionable Guidance

Focus on delivering insights that empower brand marketers to make informed decisions and drive brand growth in a challenging market environment.



"80% of consumers think that it's possible for a brand to support a good cause and make money at the same time."



#### Benoit Tranzer

Global Brand Health Tracking Lead  
Ipsos Group

Click to see more highlights and listen to our full conversation with Benoit about the future of brand tracking and bringing order to chaos.

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# Build Trust with Transparency

## Prioritize clarity and oversight of your data.

In an era of data abundance, gathering insights is only as valuable as the trust you build with participants and stakeholders. Prioritizing clarity and oversight enables you to create an environment that yields more honest responses and empowers decision-makers to act with confidence.

### Action Items



#### Prioritize Open-Ended Inquiry

Don't shy away from open-ended questions. Embrace text analytics tools like Fathom to analyze these responses at scale and uncover deeper insights into consumer sentiment and motivations.



#### Focus on Actionable Insights

Ensure your research delivers insights that can be readily translated into action. Utilize text analytics to identify specific areas for improvement and drive strategic decision-making.



#### Embrace Mixed Methodology

Combine qualitative and quantitative data to gain a more holistic understanding of your brand's performance. Leverage text analytics to bridge the gap between these methodologies and uncover richer insights.



#### Leverage AI Responsibly

Embrace the power of AI in text analytics while prioritizing transparency, human review, and data ethics to ensure accuracy, minimize bias, and maintain trust.



#### Invest in Continuous Learning

Stay abreast of the latest advancements in text analytics and AI. Experiment with new tools and techniques to enhance your research capabilities and adapt to the evolving market research landscape.



"We need to have a ton of transparency so that humans can continue to look at their data, understand what is going on with it, and know what and when to take action."



**Tovah Paglaro**

Co-founder & Chief Operations Officer  
Fathom

Click to see more highlights and listen to our full conversation with Tovah about the text analytics that transform market research.

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# Share the Love

## Incorporate CX learnings into brand trackers.

There's untapped potential in positive feedback that goes beyond customer satisfaction. You may be able to make proactive changes just as they start showing up as trends in your brand tracking program (and, vice versa, changes to your CX program from what you're hearing with your brand trackers).

### Action Items



#### Prioritize Real-Time Feedback

Implement systems that allow for immediate customer feedback, enabling quick responses and service recovery.



#### Respect Customer Time

Keep feedback requests concise and relevant to the customer's experience. Avoid lengthy surveys that may deter participation.



#### Acknowledge and Act on Feedback

Show customers that their feedback is valued by acknowledging it and taking action based on their input.



#### Balance Positive and Negative Feedback

While addressing negative feedback is important, don't neglect the valuable insights from satisfied customers.



#### Integrate Feedback into the Customer Journey

Consider feedback mechanisms as part of the overall customer experience, ensuring they are seamless and enhance, rather than detract from, the customer journey.



"Print them out, put them on the staff noticeboard, email them to the team or read them out at team meetings. It makes them feel good and encourages them to continue to do a great job."



**Mat Wylie**

Founder & CEO, Customer Radar

Click to see more highlights and listen to our full conversation with Mat about improving customer experience in feedback and surveys to generate measurable insights.

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# Fight Fire with Fire

Use smarter tech for better data quality.

The rise of sophisticated bots and automated responses threatens the integrity of surveys and reliability of our insights. By employing innovative solutions against digital interference, you can ensure the authenticity of your data and the validity of your findings.

## Action Items



### Anticipate Data Shifts

Recognize that data shifts are inevitable in longitudinal studies. Proactively plan for potential shifts by understanding the category, monitoring industry trends, and maintaining open communication with clients.



### Investigate Thoroughly

When a data shift occurs, conduct a comprehensive investigation to determine the root cause. Check internal processes for errors, review external factors, and consult with clients for insights into market dynamics.



### Leverage Technology

Utilize technology to enhance data quality and identify potential fraud. Employ tools that detect inattentive respondents, bots, and inconsistencies in responses.



### Employ Smart Survey Design

Design surveys that minimize the risk of data shifts. Use clear and concise question wording, avoid order bias, and carefully consider panel composition.



### Communicate Transparently

Keep clients informed about data shifts and the steps taken to address them. Explain the potential impact on the study's findings and collaborate on solutions to mitigate any disruptions.



"We get people who will program factories of mobile phones trying to qualify for surveys to earn incentives. So we started embedding honeypot technology in their surveys. If a bot answers a honeypot question, which a human can't see, they just get removed."



**Kim Short**

Senior Vice President,  
Ipsos North America

Click to see more highlights and listen to our full conversation with Kim about what to do with your longitudinal studies when there's a monumental data shift.

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# #10

## Open Things Up

Use open-ended questions to gauge brand density.

Open-ended questions reveal genuine and nuanced perceptions. Analyzing these responses helps identify core strengths and understand how associations relate, informing marketing strategies and strengthening market position.

### Action Items



#### Explore Brand Density

Consider incorporating brand density as a measure of brand strength in your tracking programs. It provides a richer understanding of brand associations and their interrelationships compared to traditional attribute batteries.



#### Leverage Open-Ended Questions

Utilize open-ended questions to capture consumer language and uncover the nuances of brand associations. This data can provide valuable insights that go beyond pre-defined attributes.



#### Embrace Technology

Experiment with AI-powered tools like chatbots to gather and analyze open-ended data at scale. This can help you identify category associations and understand their relationship to your brand.



#### Combine with Traditional Trackers

Integrate insights from brand density analysis with data from your existing brand tracking programs to gain a holistic view of brand performance and identify opportunities for growth.



#### Iterate and Collaborate

Continuously refine your approach to brand density measurement through iteration and collaboration with internal teams and external partners.



“Brand density, when you’re deriving it from actual open-ended questions, correlates very highly with market share.”



**Kendra Speed**

Director of Consumer Market Research  
LinkedIn

Click to see more highlights and listen to our full conversation with Kendra about brand density, its use at LinkedIn, and how you can leverage it.

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# Get Real-Time

Use mobile ethnography to capture everyday moments.

Marry what you're seeing in your trackers with mobile ethnography, gathering rich data from participants in their natural environments via mobile devices. These real-time insights can be used to validate trends in your trackers, reveal unexpected patterns and attitudes, and then inform targeted strategies.

## Action Items



### Prioritize Trust

Recognize that trust is a crucial driver of brand success. Incorporate measures of trust into your brand tracking programs to understand how customers perceive your brand's trustworthiness.



### Go Qualitative

Utilize qualitative research methods, such as focus groups and in-depth interviews, to delve deeper into customer perceptions of trust. Explore the nuances of customer experiences and understand the emotional drivers behind trust.



### Focus on Authenticity, Capability, and Empathy

Assess your brand's performance in these three key areas. Understand how customers perceive your brand's honesty, credibility, ability to meet their needs, and genuine care for their well-being.



### Listen Actively

Encourage open and honest feedback from customers. Create channels for customers to share their experiences and concerns, and demonstrate that you value their input.



### Act on Insights

Translate research findings into actionable strategies. Use insights about customer trust to inform brand messaging, product development, customer service, and overall brand strategy.



"In the same study you can get really white space, exploratory thinking. You can get usage, you can get behaviors, you can get attitudes."



**Jodi McGee**

Chief Insights Officer and Co-Founder  
Inquisitive Insights

Click to see more highlights and listen to our full conversation with Jodi about market research's role in creating successful and trusted brands.

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# Get In Early

## Lead with insights at project launch.

To maximize impact and drive truly informed decision-making, secure a seat at the table from the very beginning of projects. That way research insights can guide the direction of initiatives and ensure that customer perspectives are woven into the strategy – not just brought in as an afterthought to validate predetermined outcomes.

### Action Items



#### Become Data Detectives

Don't just rely on surveys. Dig deeper into behavioral data from platforms like streaming services to understand actual usage patterns. Combine this with qualitative insights from focus groups and social listening to get a holistic view of consumer behavior. This will help you identify trends and understand the "why" behind the "what" in your brand tracking data.



#### Craft Compelling Narratives

Transform dry data into engaging stories. Use data visualization tools to create compelling reports and presentations that highlight key trends and insights. This will make your brand tracking findings more impactful and persuasive for stakeholders, leading to better decision-making.



#### Be a Strategic Advisor

Align your brand tracking program with the overall business goals of your organization. Understand the challenges faced by different departments, such as marketing and sales, and tailor your insights to address those needs. This will position you as a valuable strategic partner who contributes to business success, not just a data provider.



#### Stay Agile and Embrace New Trends

The entertainment landscape is constantly evolving, especially with the rise of new platforms and formats like TikTok and vertical video. Continuously monitor these trends and adapt your brand tracking program to capture relevant data and insights. This will ensure your program stays relevant and provides valuable information for navigating the changing market.



#### Leverage AI for Efficiency and impact

Explore how AI and machine learning can automate tasks, analyze data faster, and uncover hidden patterns in your brand tracking data. This will free up your time to focus on strategic thinking and delivering more impactful insights to your organization.



"The order in which insights have a seat at the table is really, really important. Otherwise you risk insights in data just adding confirmation."



**AiCi Li**

Director, Center of Expertise for Shopper Insights & In-store, Mars

Click to see more highlights and listen to our full conversation with AiCi about the journey toward achieving meaningful customer centricity in retail.

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About Harmoni

# When it comes to market research, sharp insights are the whole point.

**Harmoni Survey Data Analysis & Reporting** unlocks the true value of your data with an intuitive, flexible platform designed FOR researchers BY researchers.



Trusted by market researchers from the world's biggest brands, Harmoni helps organizations generate insights through time-tested algorithms, automation, visualizations, and reporting functionality. **Give Harmoni a try for free** and see what it's like to be able to truly shape your data, generate insights and maximize the return from your research investment.

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