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# EMI Research Solutions Sample Landscape Report 2024 Edition

The Sixth Annual Report  
on the Online Sample Industry



# Foreword

Launching the 6th edition of The Sample Landscape feels surreal. This report has evolved into a labor of love for everyone at EMI, encapsulating the very essence of our mission: to do what is right for research. I take immense pride in our relentless industry analysis and adeptness in confronting our sector's ever-evolving challenges.

Sharing the findings within The Sample Landscape is always a proud moment for me and the EMI team. It's a privilege to be able to give back to our industry, and it is something we relish and are deeply invested in.

In this 6th edition, you'll hear about our research-on-research, including an in-depth dive into respondent survey attempts (activity levels) and how they impact data, our findings on the public sentiment of the ongoing conflicts, perceptions of the economy and how they have changed over the last three years, an examination of mental health, and more. In addition to learning more about our extensive research, you'll also read new editorials from several expert team members.

We're excited to celebrate a remarkable 6th year of sharing The Sample Landscape with you. There really is nothing else like this unique report. I hope you gain something from it and that it can act as your guidebook to this ever-evolving industry.



Michael Holmes  
CEO & Founder  
EMI Research Solutions

Sharing the findings within The Sample Landscape is always a proud moment for me and the EMI team.



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# Executive Summary

2023 was yet another year of changes, challenges, and innovation for the market research industry. A combination of a volatile economy and rapid ascent and adoption of breakthrough technology led to a year that can only be described as complicated. Here at EMI, we're lucky to have a bird's-eye view of the industry and feel compelled to share this knowledge of the sample landscape with you. This 6th edition of our annual report will cover the current state of the industry, our findings on the panel differences, survey attempts and thier impact on data, editorials from industry experts, and our own specialty research.

In this year's report, we put a larger focus on data quality, specifically how the the number of surveys a respondents attempts can impact data, whether it is how their attitudes and behaviors differ, to how often they trigger various data quality measures. With all the discussions on data quality, this aspect is one that is not readily talked about.

In this report, you'll also hear about the current state of the sample landscape. We'll discuss the rise of artificial intelligence and its impact on the landscape, how the economy has impacted budgets, the decline of investment capital and more.

Additionally, we'll touch on the reduction of mergers and acquisitions, the launch of a new global data quality initiative, and how the increase of data privacy legislation has influenced the landscape.

Throughout this report, you'll discover editorials penned by various esteemed team members. These pieces delve into a spectrum of topics, from the advantages and challenges of AI to discussions on mental health and beyond. These essays provide a valuable platform to gain insights from industry specialists on pressing issues within our field.

The final section of The Sample Landscape includes our specialty research. Every year, our research-on-research allows us to share findings on a variety of subjects. In 2023, we looked at the public sentiment around the ongoing regional conflicts, perceptions of the US economy, people's mental health, ability in the workplace, and current views on patriotism and the political landscape.

This distinctive report stands out from any other resource in the market research industry. We're thrilled to unveil another year of invaluable insights with you.

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Part 1

# Traversing the landscape



# Background

Over the past 15 years, we've delved deep into the world of panels and panelists, aiming to unravel the complexity of the landscape. Our focus extends beyond knowing each sample provider; we take pride in understanding how they relate to one another and contribute to the bigger picture.

We have completed numerous consumer waves, as panels can change quickly over time. Last year, we fielded three waves.

Wave 1: Jan 25 to Feb 6

Wave 2: Jun 8 to Jun 16

Wave 3: Oct 30 to Nov 13

In 2023, we fielded several waves to specifically examine differences in results when compared, as well as data quality in the sample industry, specifically around the survey activity of panelists.

In addition, we included several unique topics, including:

- Regional Conflicts and Public Sentiment: How They are Viewed
- Perceptions of the US Economy from 2021 to Now
- An Examination of Mental Health
- Ability in the Workplace
- Patriotism and Politics

# Methodology

## Consumer

### Specifications

For our research into the sample industry, we focused on consumers. The three waves of the study were conducted using a number of panel sources.

The sample providers tested differed depending on the wave, so the number of providers and base sizes may vary.

All findings of our research are presented blinded.

## Objective

The objective of our research-on-research study is to evaluate, understand, and analyze the consumer portion of the sample industry for:

- Consistency
- Quality
- Device Usage
- Industry Trends
- And more

## Evaluation Metrics

- Consistency
- Concept Ratings
- Brand Ratings
- Device Usage
- Behavioral Questions
- Traps/Open-End Quality
- Activity Data

## Consumer Sample Provider Types

- Double Opt-In Panels
- Mobile Panels
- API/Programmatic Sample Sources
- Dynamic/Real-Time Sample Sources
- Client Supplied Sample

# State of the Landscape

In 2022, we saw a bit of a return to normalcy after a few wild years driven by the pandemic and the recovery, even in a volatile economic environment. The economic climate in 2023 wasn't any less volatile. Combined with the rapid disruption brought on by the meteoric adoption of generative AI, all that can be said is that 2023 was challenging.

## Artificial Intelligence

If you thought you could get away from artificial intelligence in a report about the sample industry, you thought wrong. Artificial intelligence was the trend of 2023. Since the launch of ChatGPT in December 2022, the adoption of AI in the market research industry has been unprecedented. Over the year, it seemed like a new tool that leveraged generative AI was launched daily, AI was the talk of all the conferences, and improvements to large language models seemed to be rolled out every few weeks.

Innovations driven by artificial intelligence didn't skip the sample industry. Custom GPTs and generative AI models were leveraged to launch synthetic respondents. These

respondents could be custom-built based on target profiles of different consumers and could then be used within online quantitative research to garner feedback. Along similar lines, larger corporations started to develop their own custom large language models (LLMs) based on their unique customer profiles and audience data and have started to compare results to the data from their market research programs.

The use of artificial intelligence wasn't just in the launch of new tools or products; many people across the market research industry began to leverage generative AI tools to help them become more efficient. Whether it was to automate mundane tasks or to help increase efficiencies and speed, researchers were able to increase their bandwidth and put additional focus on more strategic tasks.

## The Economy

We all thought the economy in 2022 was volatile, but it was nothing compared to 2023. The stock market continued to be a rollercoaster, while many economists

predicted a coming recession that never materialized. Inflation continued to impact nearly every industry as prices and interest rates rose.

These factors combined led many corporations to go into cost-cutting mode, which impacted budgets. The budgetary impacts of end-clients were felt by many as the number of studies decreased and competition for what remained increased.

## Investment Capital Dries Up

In previous years, investment capital poured into the market research industry. It drove mergers and acquisitions, as well as growth. That was not the case in 2023. With the volatile economy continuing and the high-interest rates making borrowing money more expensive, we saw much venture capital investment dry up. Instead, investors looked to ensure that their investments continued to provide a positive return, even if it meant cost-cutting and downsizing.

## Reduction in Mergers & Acquisitions

Unlike in previous years, where it seemed like there were new mergers and acquisitions weekly that caused shifts in the industry, 2023 saw limited action in this area. While there were still some activities, the amount was severely reduced. The combination of a volatile economy, high-interest rates, and limited investment capital made a perfect storm that reduced M&A activity. As the economy becomes less volatile and interest rates come down, we expect M&A activity to return to previous levels.

# In 2023, several major industry organizations launched a strategic collaboration to tackle data quality.

## The Industry Comes Together on Data Quality

Data quality has been a significant talking point for the market research industry for years. In 2023, several major industry organizations, including Market Research Society (MRS), The Canadian Research Insights Council (CRIC), ESOMAR, Insights Association, SRCA, The Research Society, SampleCon, and The Market Research Austria (VMO), to launch a strategic collaboration called the Global Data Quality Initiative to address ongoing and emerging risks to data quality in the market and social research, consumer insights and analytics industry.

The new collaborative focuses on:

- The language of quality - how we refer to the different aspects of fraud, duplicates, and survey cleaning in ways that inform with accuracy and transparency
- Fraud detection – tracking the prevalence of fraudulent survey completions by humans or bots and outlining best fraud detection and mitigation practices
- Identification and mitigation of bias from sample frame and representativeness
- Data quality in research surveys, and the resulting impact on overall quality of the data
- Improvement in the research participant experience

## Privacy Legislation Ramps Up

The insights industry is no stranger to privacy and legislative updates, but 2022 seemed to have opened the floodgates for new data privacy legislation. The tide didn't stem any in 2023 either. New and supplemental privacy legislation was passed in Connecticut, Delaware, Florida, Indiana, Iowa, Montana, Nevada, Oregon, Tennessee, Texas, and Washington, all of which were fairly unique to the state that passed it.

The meteoric growth of generative AI didn't do anything to help slow down legislation either. We saw Congress start to debate different forms of AI legislation. State legislatures didn't sit idly by on this either, as many started the initial process of developing legislation for artificial intelligence.

The sample landscape undergoes continual transformation, with new elements shaping its dynamics alongside persistent factors. Whether it's advancements in AI, economic fluctuations, or regulatory shifts, change remains the only constant within the sample industry.

Part 2

# Panel and their differences

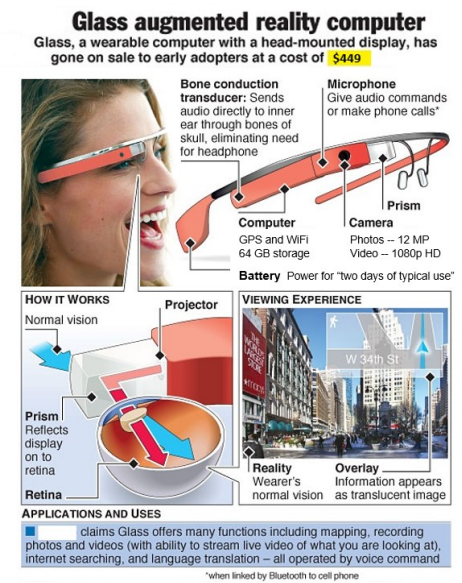
# Consumer Research

Panels and their differences

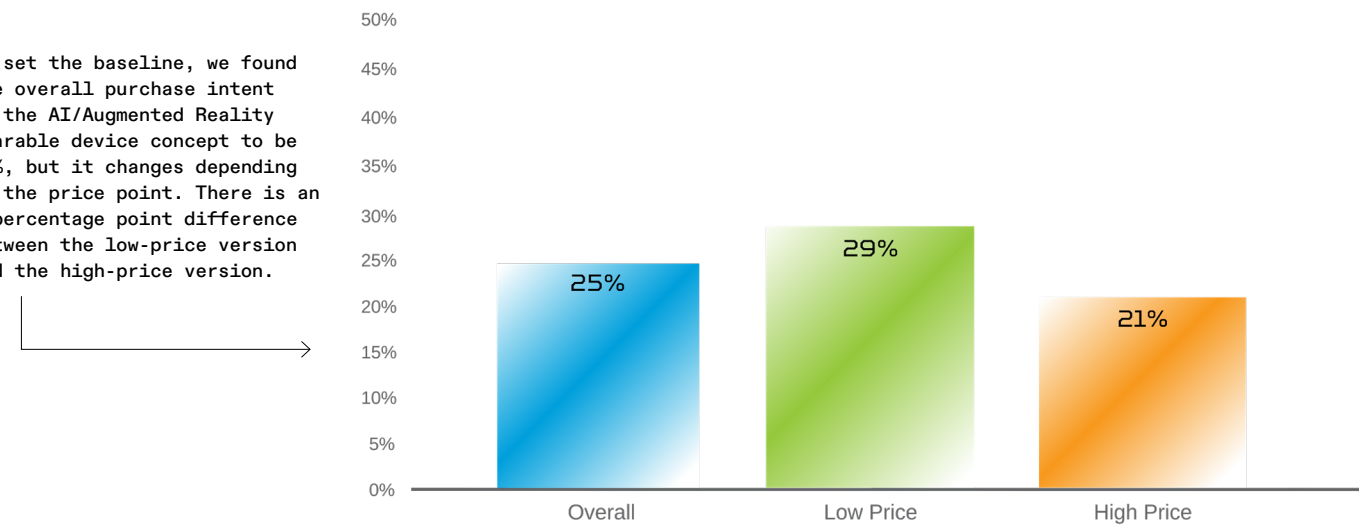
## Introduction

Throughout the years we have produced this report, a component of measuring the differences between panels has been their purchase intent of various concepts. We have tested multiple concepts throughout the years, including a fictional high-priced technology product, a low-cost consumer product, a technology product from a well-known brand, an entertainment theme park, and a high-end retail store.

This year, we added a new wrinkle to our analysis. We added a new AI/Augmented Reality wearable device concept and tested purchase intent at two different price points, \$449 and \$699.



To set the baseline, we found the overall purchase intent of the AI/Augmented Reality wearable device concept to be 25%, but it changes depending on the price point. There is an 8-percentage point difference between the low-price version and the high-price version.



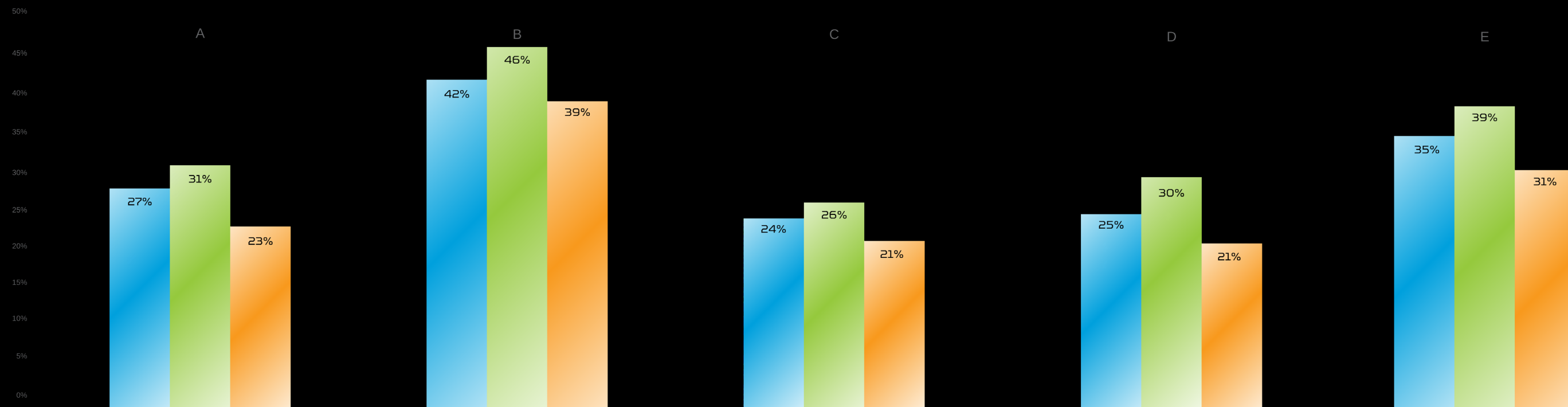
# Purchase Intent by Panel

● Overall
 ● Low Price
 ● High Price

The overall purchase intent of our new AI/ Augmented Reality wearable device concept has an 18-point difference when comparing panels. The most significant difference was between Panels B and C.

points. With the high-priced version, the difference between panels gets as high as 19 points, with the largest difference being between Panels B and D. This really highlights how panels differ from one another because of their attitudes and behaviors.

The point differential actually goes up between Panels B and C with the low-priced version of the concept to 20 percentage



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## Part 3

# Exploring quality in the landscape



# Part 3

## Survey Attempts and Their Impact on Data

Exploring quality in the landscape



### Introduction

Data quality is always at the top of mind when discussing online quantitative research. Everyone talks about bots, fraudulent respondents, open-end quality, and more. What is never talked about is the sample itself, particularly the number of surveys a respondent attempts in a day and how that might impact the data.

Here at EMI, we incorporated the study of respondent activity level and its impact on results into our research-on-research. Over 2023, we monitored the activity level of respondents who completed our study. We have compiled our results and insights into this rarely talked about aspect of online survey research for the first time.

For our activity analysis, we used the definition adopted by both CASE (Coalition for Advancing Sampling Excellence) and Research Defender. An activity is a survey attempt, with the respondent clicking on a link to access a survey.

One note about our research into respondents' survey attempts (or activity level) – we utilize Research Defender's platform to track a respondent's activity. To accurately track a respondent's activity across different surveys, the panel the respondent is part of must be part of the Research Defender ecosystem. If the panel the respondent belongs to is not part of the ecosystem, their activity data cannot be accurately tracked.

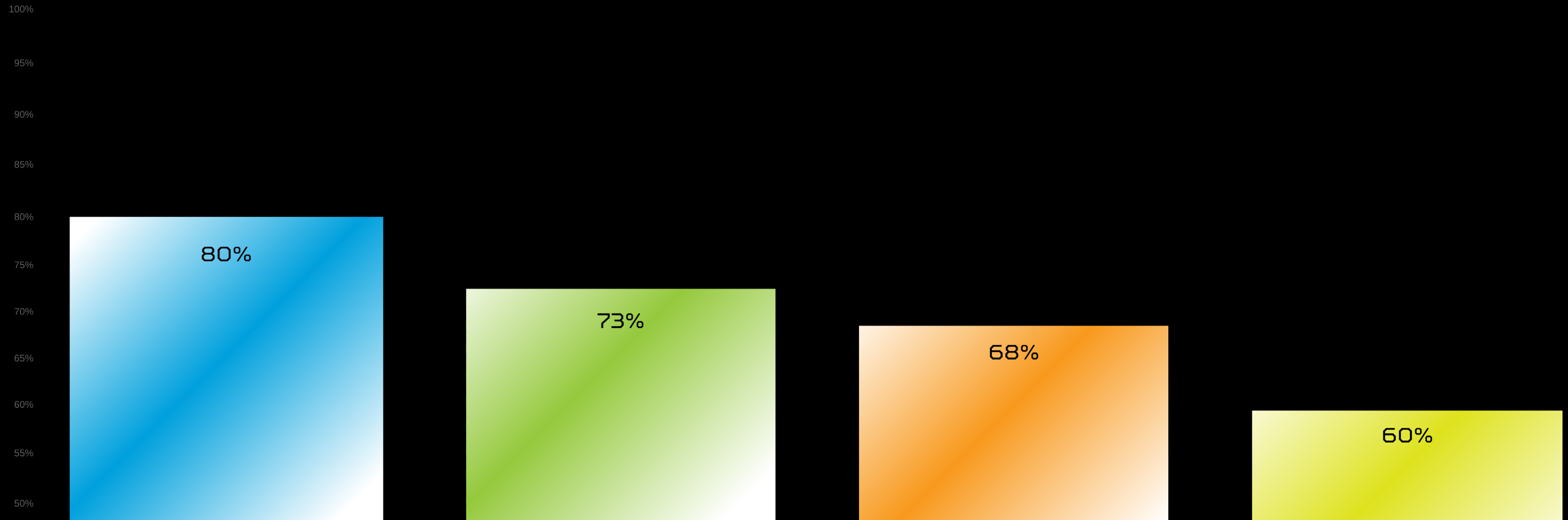
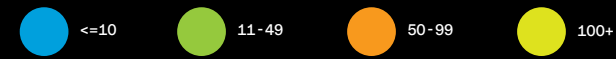
We categorized respondents into the following activity level groups:

- <=10** – Attempted ten or less surveys in a 24-hour period.
- 11-49** – Attempted between 11 and 49 surveys in a 24-hour period.
- 50-99** – Attempted between 50-99 surveys in a 24-hour period.
- 100+** – Attempted 100 or more surveys in a 24-hour period.

*\*EMI automatically blocks respondents with 200 or more survey attempts in a 24-hour period. This may have impacted the number of high-activity respondents we included in the survey.*

# Brand Awareness

Overall Brand Awareness



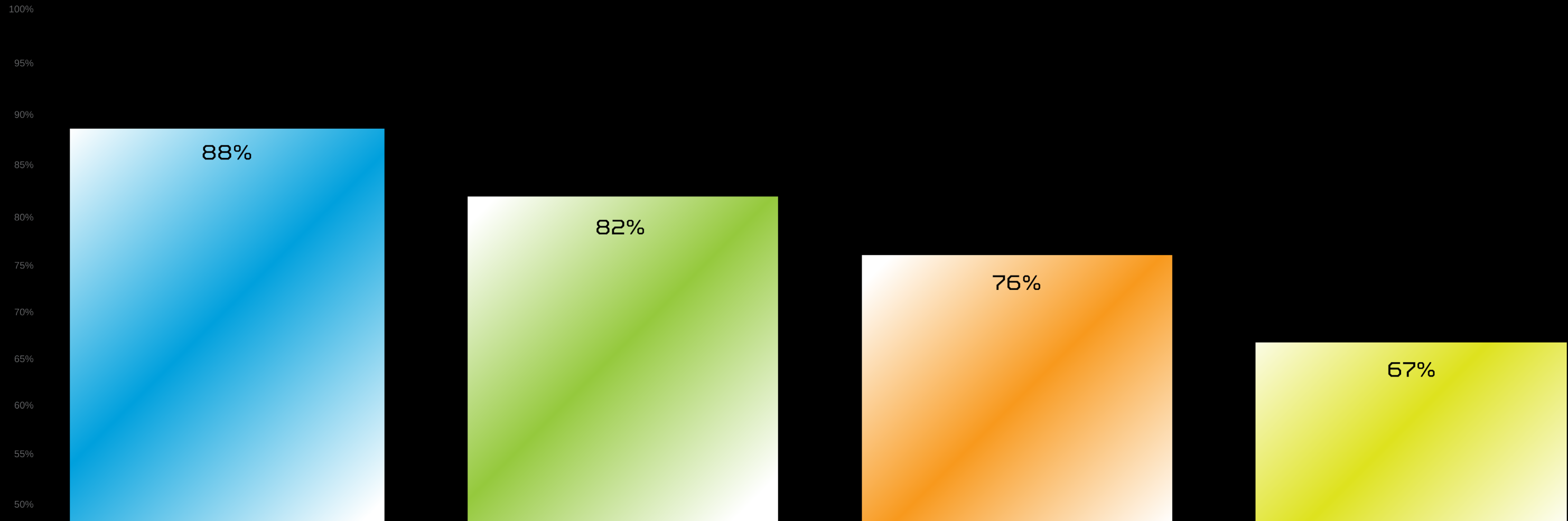
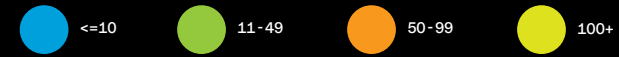
We looked at the average aided brand awareness of 22 different brands and broke down the results based on the four activity level groups we outlined above. We found that the higher the number of surveys attempted, the lower the brand awareness. We also found that there was a 20-point difference in average brand awareness

between the low-activity and the high-activity groups.

This large difference could be due to respondents who attempt more surveys understanding that the more brands selected for awareness, the more questions they will have to answer.

# Brand Awareness

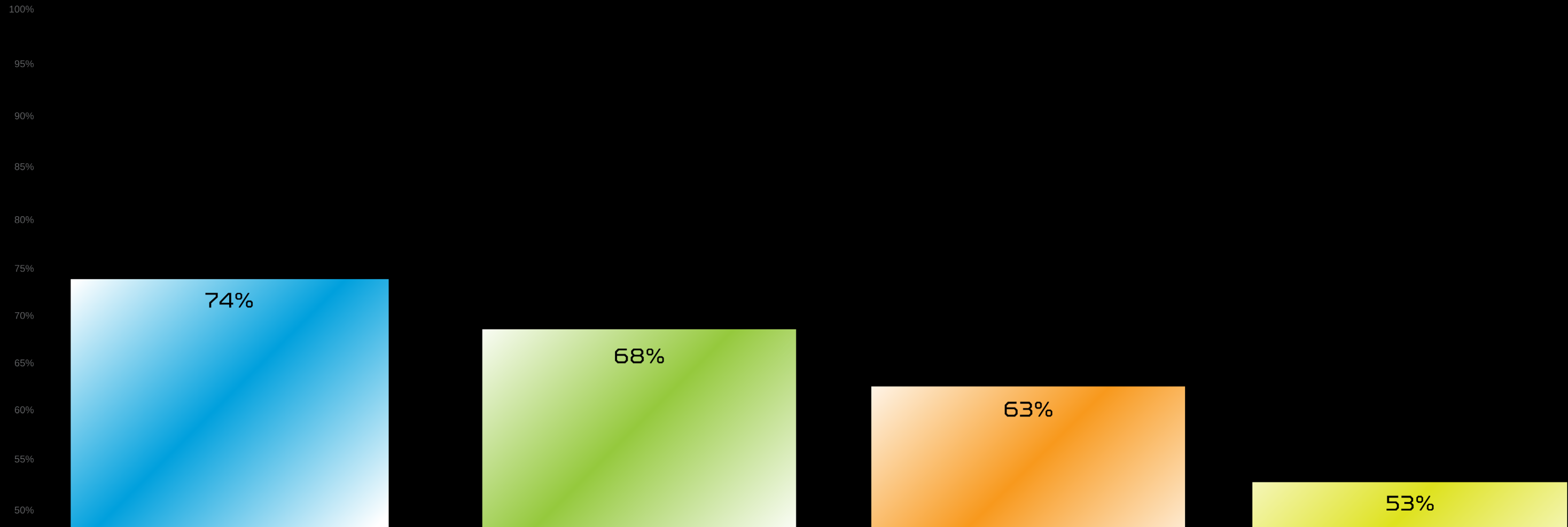
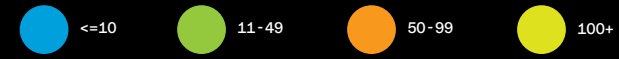
Individual Brand Awareness - Coca-Cola



Next, we took a deeper dive into a couple of the included brands. We observed that Coca-Cola's brand awareness followed the same trend of declining brand awareness as the number of survey attempts increased. There is a 21-point difference between the low and high-activity groups.

# Brand Awareness

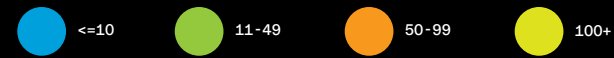
Individual Brand Awareness - Bose



Similar to the overall trends and the trend we observed with Coca-Cola when looking at Bose, we found that as survey attempts increased, brand awareness declined. There was a 21-point difference between the high and low activity groups, the same differential we found in Coca-Cola's brand awareness.

# Brand Awareness

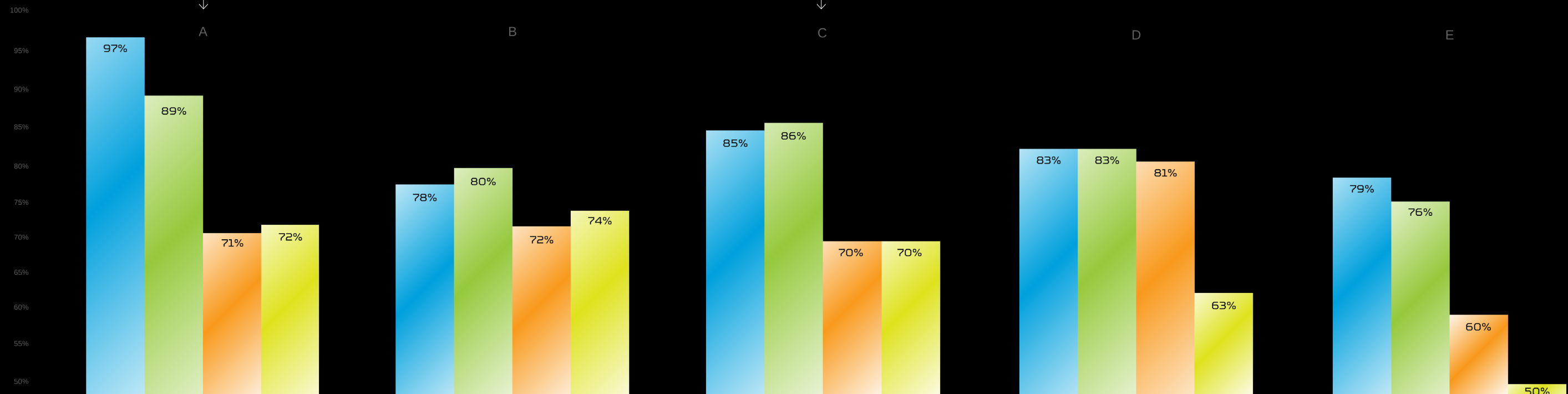
Brand Awareness by Panel - Coca-Cola



When we add the additional segmentation by panel, we see most panels follow the same brand awareness trend we have observed with the overall average. Panel B was the exception, whether due to their panel makeup, attitudes and behaviors, or other factors.

There is a 26-point difference between low activity and respondents who attempted 50+ surveys.

There is a distinct difference between respondents who have attempted less than 50 surveys in a day compared to those who have attempted over 50 in a day.

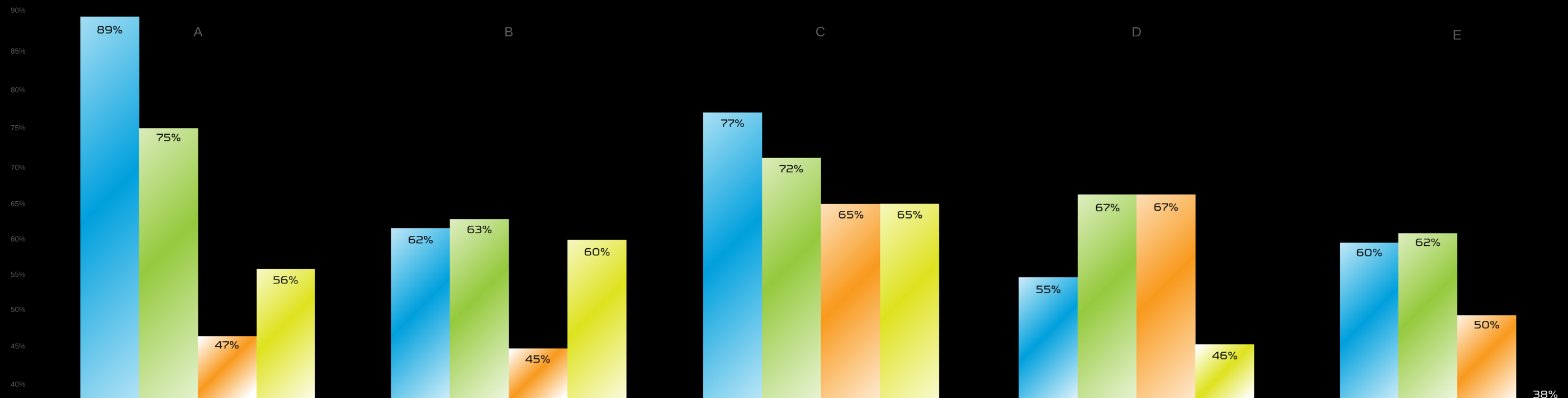


# Brand Awareness

Brand Awareness by Panel - Bose

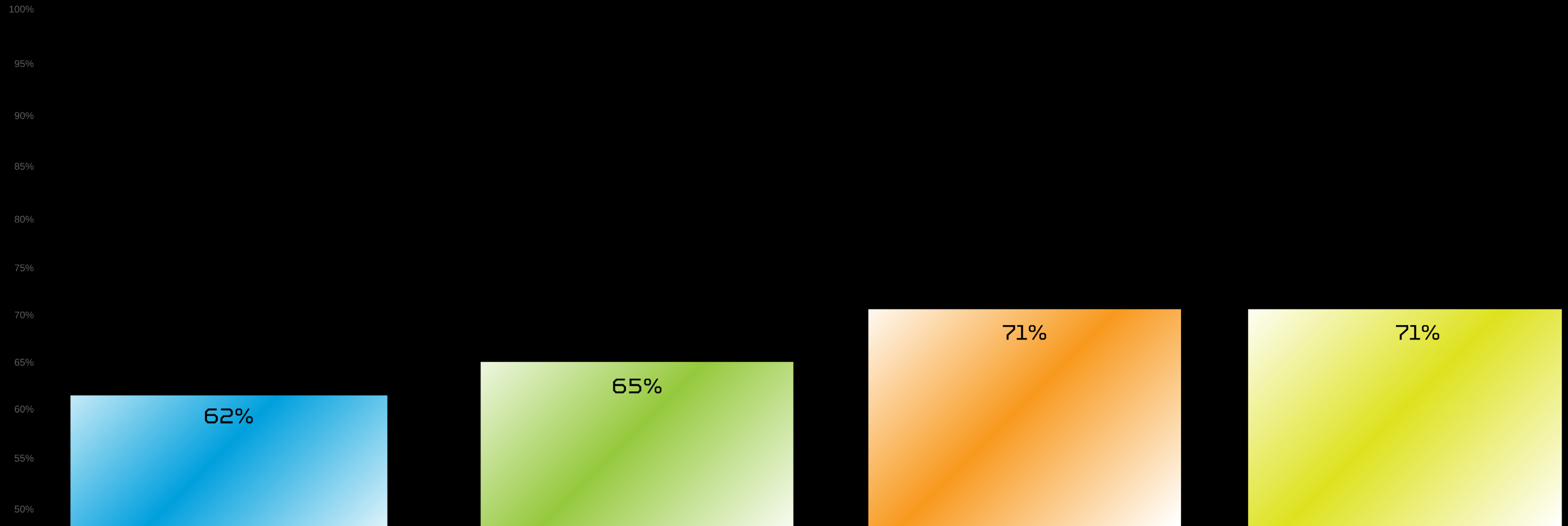
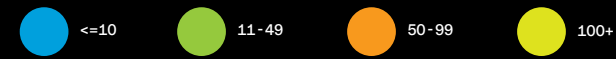


When we add the additional segmentation by panel, we see most panels follow the same brand awareness trend we have observed with the overall average. Panel B was the exception, whether due to their panel makeup, attitudes and behaviors, or other factors.



# Brand Rating

Overall Brand Rating

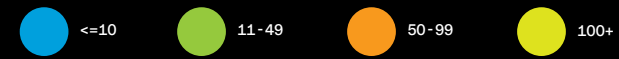


We asked respondents to rate brands they indicated they were aware of on a 4-point scale and looked at the top 2-box scores. We found that it was the opposite of what we observed with brand awareness. The positive brand rating increased as the activity level or survey attempts increased. We found the largest increase occurred specifically when

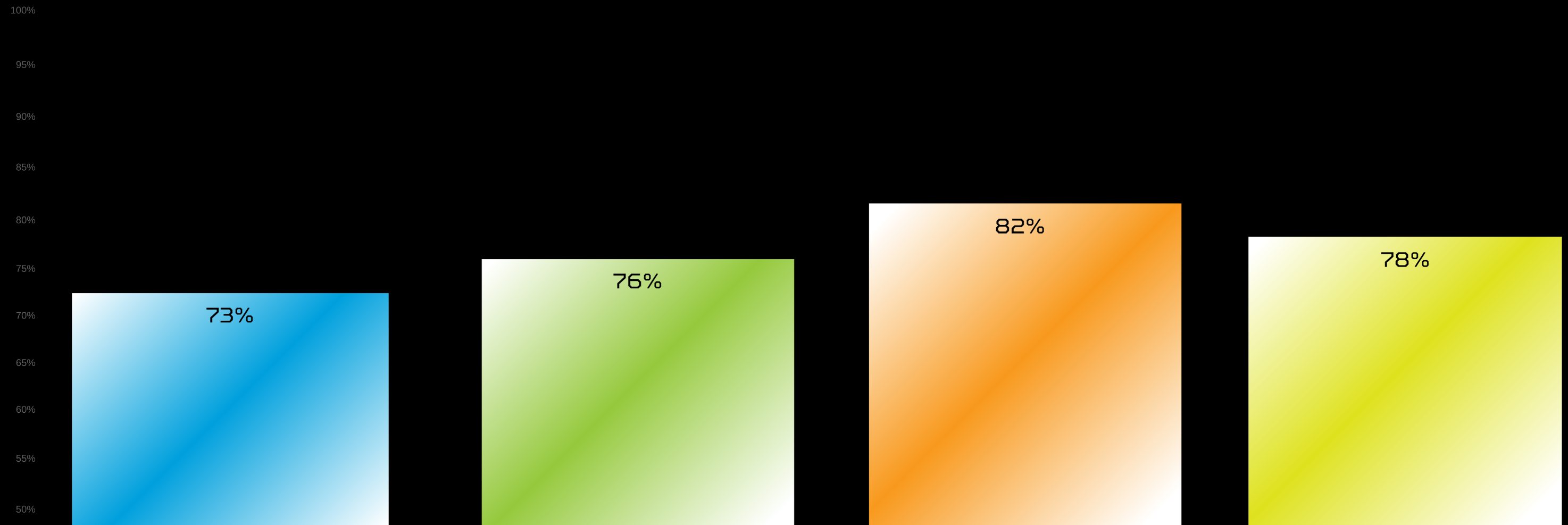
the survey attempts were 50 or more in 24 hours. Overall, we found that there was a 9-point difference between the low-activity and the high-activity groups. While the point differential we observed with brand ratings was lower than brand awareness, it was still substantial.

# Brand Rating

Individual Brand Rating - Coca-Cola

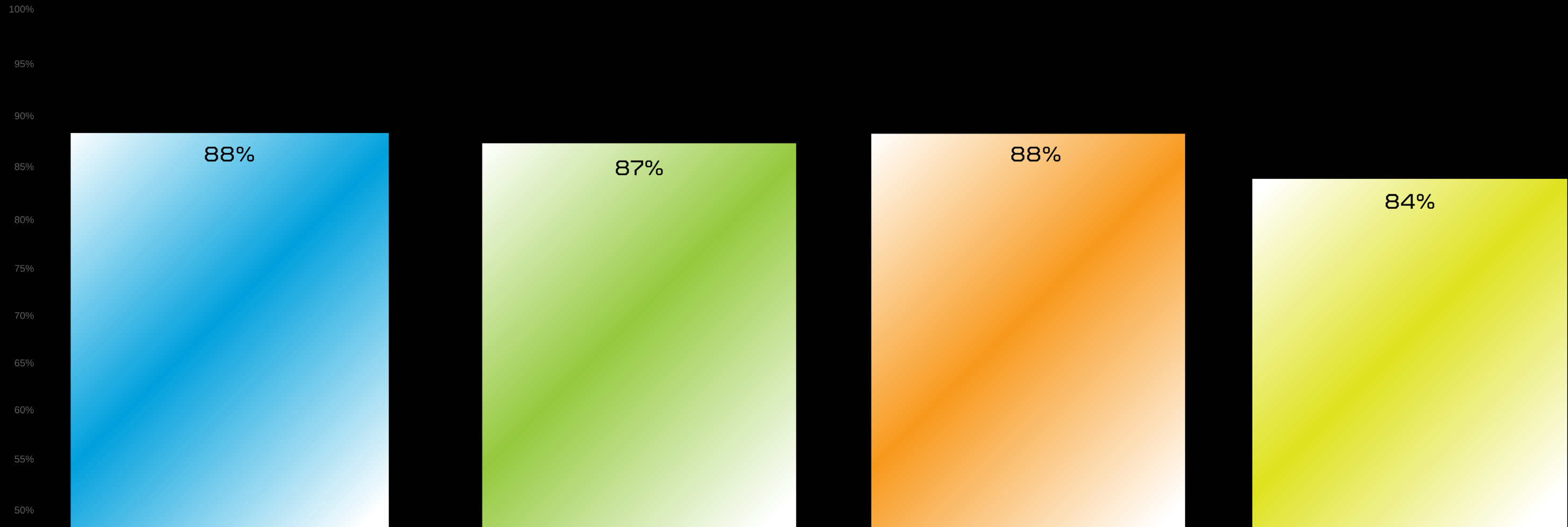
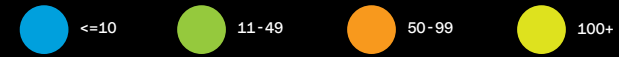


Coca-Cola's brand rating followed the overall trend, where the brand rating was higher in the higher activity groups. What we found different was that the brand rating increased as survey attempts increased but dropped slightly with the highest activity group.



# Brand Rating

Individual Brand Rating - Bose



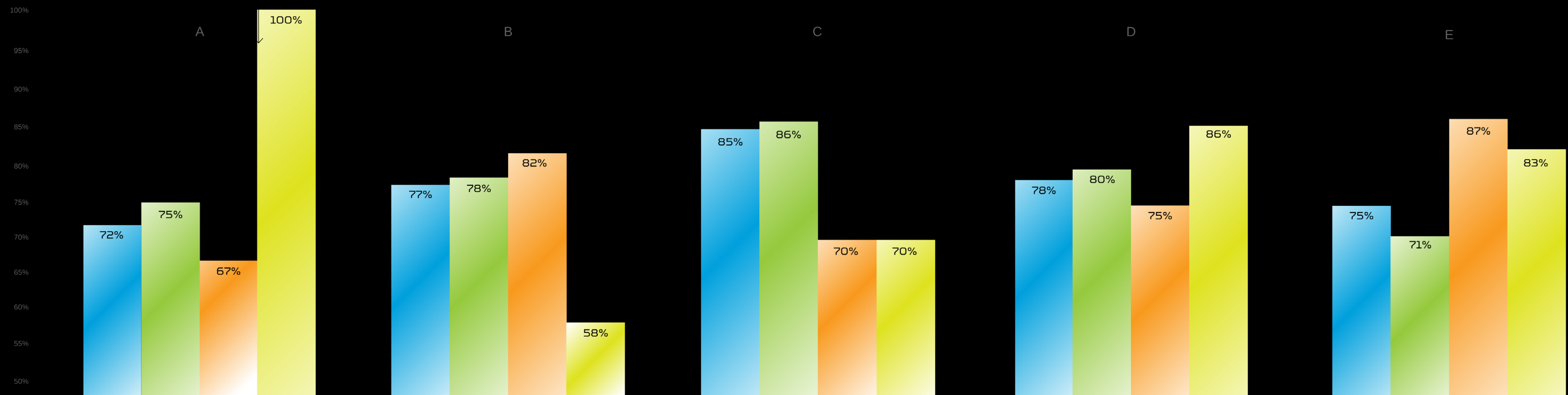
The findings with Bose, a premium brand, were different than we observed with Coca-Cola. Instead of brand rating increasing as survey attempts increase, we found that they remained consistent until you reached the highest activity group, where we observed a drop similar to what we saw with Coca-Cola. In other premium brands we tested, we saw a similar trend to what we saw with Bose.

# Brand Rating

Brand Rating by Panel - Coca-Cola



The results by panel differ from the overall trend of increasing brand rating as the activity level increases. Activity level does play a part in the impact of the data, but so does the attitude and behavioral makeup of the panels.

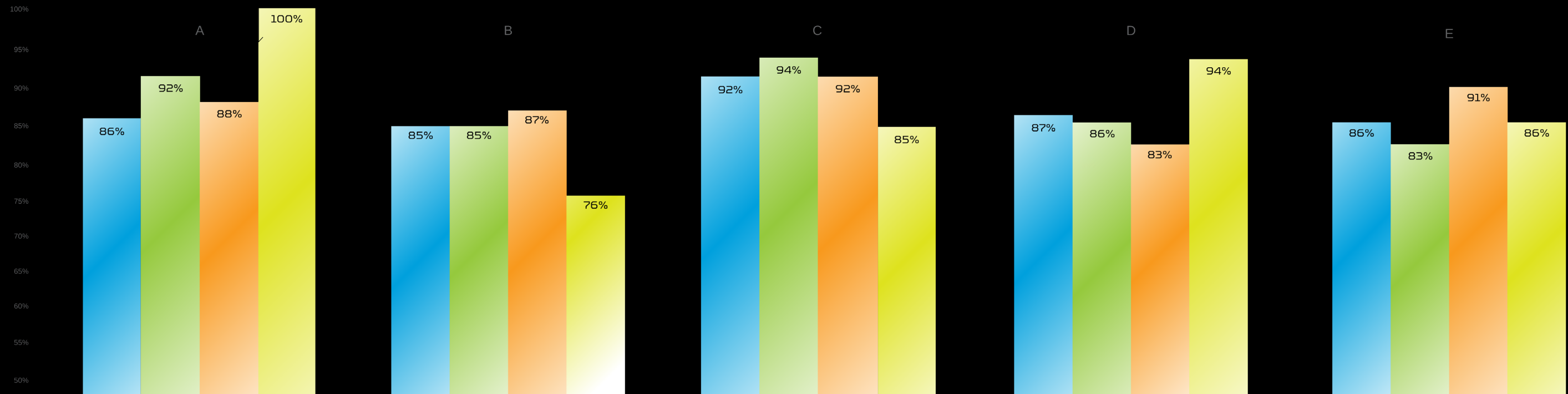


# Brand Rating

Brand Rating by Panel - Bose



With a premium brand like Bose, we found that within the same activity level group, the percentage point difference increases as the activity level increases. With the respondents who attempted ten or fewer surveys in 24 hours, there is only a 6-point difference across panels, whereas respondents who attempted 100+ have up to a 24-point difference.



# Concept Ratings

Comparing panels through the measurement and tracking of brand awareness and brand rating are just a couple of the methods we utilize. We also measure the purchase intent of various concepts.

We asked about purchase intent on five concepts: a fictional high-priced technology product, a low-cost consumer product, a technology product from a well-known brand, an entertainment theme park, and a high-end retail store.

We averaged the top 2 box scores of all 5 concept ratings.

## Smartbeam Wireless Charger



**Same taste, but now you can customize!**

Introducing Share-a-Coke! The completely customizable option great for weddings, parties, birthdays, gifts and just for sitting around the house. It's the same great taste as always only completely designed for you!

Also available for Diet Coke, Coke Zero, Coke, Sprite, Diet Sprite, and Sprite Zero



## Ark Encounter Theme Park

You probably seen pictures of Noah's Ark in children's books, complete with giraffe heads sticking out the top. But the real Noah's Ark the one described in the Bible, was huge. It was amazingly seaworthy — a ship that kept the occupants safe during a year-long worldwide flood. Prepare to be blown away as you explore the life-sized reconstruction of Noah's ark.

ARK TICKETS	
Adult	\$40
Senior (age 60+)	\$31
Children (ages 5-12)	\$28
Children (under age 5)	Free



Ark Encounter, opening phase one next month, is a one-of-a-kind, historically themed attraction. In an entertaining, and immersive way, it presents a number of historical events centered on Noah's Ark as recorded in the Bible. The largest timber-frame structure in the US, the 510-foot-long full-size Ark is designed to be family-oriented, historically accurate, and environmentally friendly. Additional phases will be added over the years.

- Tired of ugly and annoying cords to charge all of your wireless devices?
- Smartbeam has developed a device that will charge all of your devices!
- You can charge all of your devices completely wirelessly!
- Hide it in your ceiling, place it in your living room or in your cubicle at work and turn it on to make everything charge at once

**\$150**  
Found only at  
[SmartbeamWireless.com](http://SmartbeamWireless.com)

## Bose Sound Refresh Headphones



- On ear headphones connect wirelessly to your smartphone, iPad, or any Bluetooth device
- Best-in-class sound with wireless convenience
- Simultaneously connect to two devices; switch easily between music and calls
- Rechargeable lithium-ion battery provides up to 15 hours of listening time

**\$249.95**

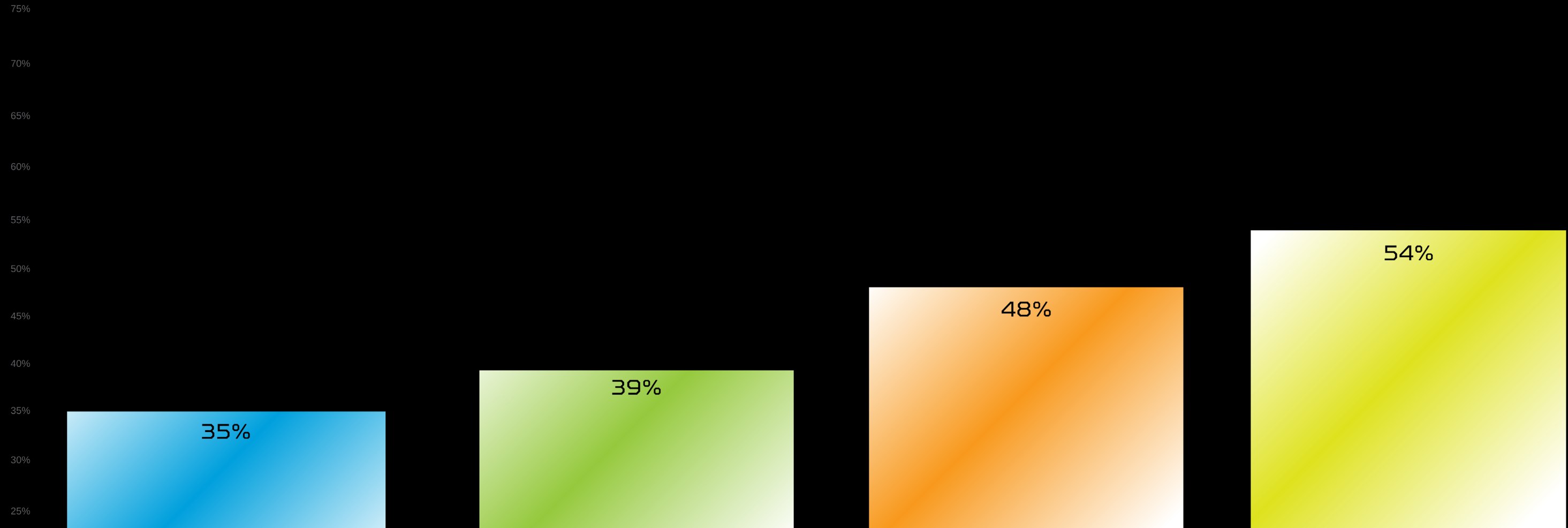
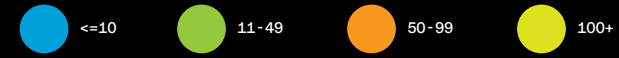
## Eco-Mart Zero-Waste Grocery Store



- Eco-Mart, opening next month in major cities across the US, is a zero-waste grocery store that offers products with no packaging.
- Bring your own shopping bags as well as containers such as jars or boxes, or if you don't have them you can buy reusable bags and containers in the store.
- The environmentally friendly store will offer all-local produce to reduce carbon footprints, and it will immensely cut down on paper and plastic waste.

# Concept Rating

## Overall Concept Rating

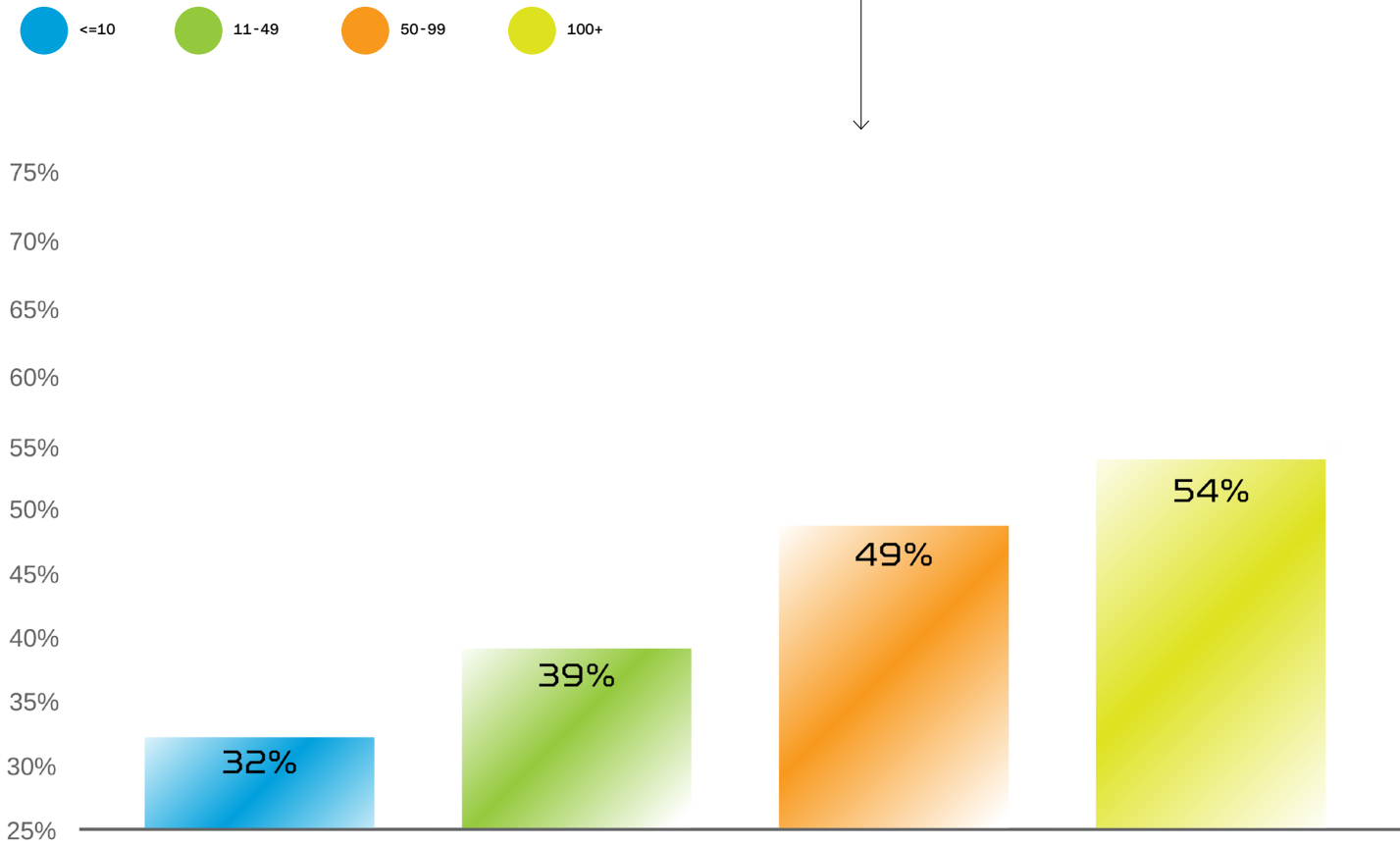


When looking at the overall average purchase intent of all five concepts, we found that it follows a similar trend to brand ratings - purchase intent increased as the activity level increased. We found a 19-point difference between respondents who attempted ten or less surveys in a 24-hour period and respondents who attempted 100 or more.

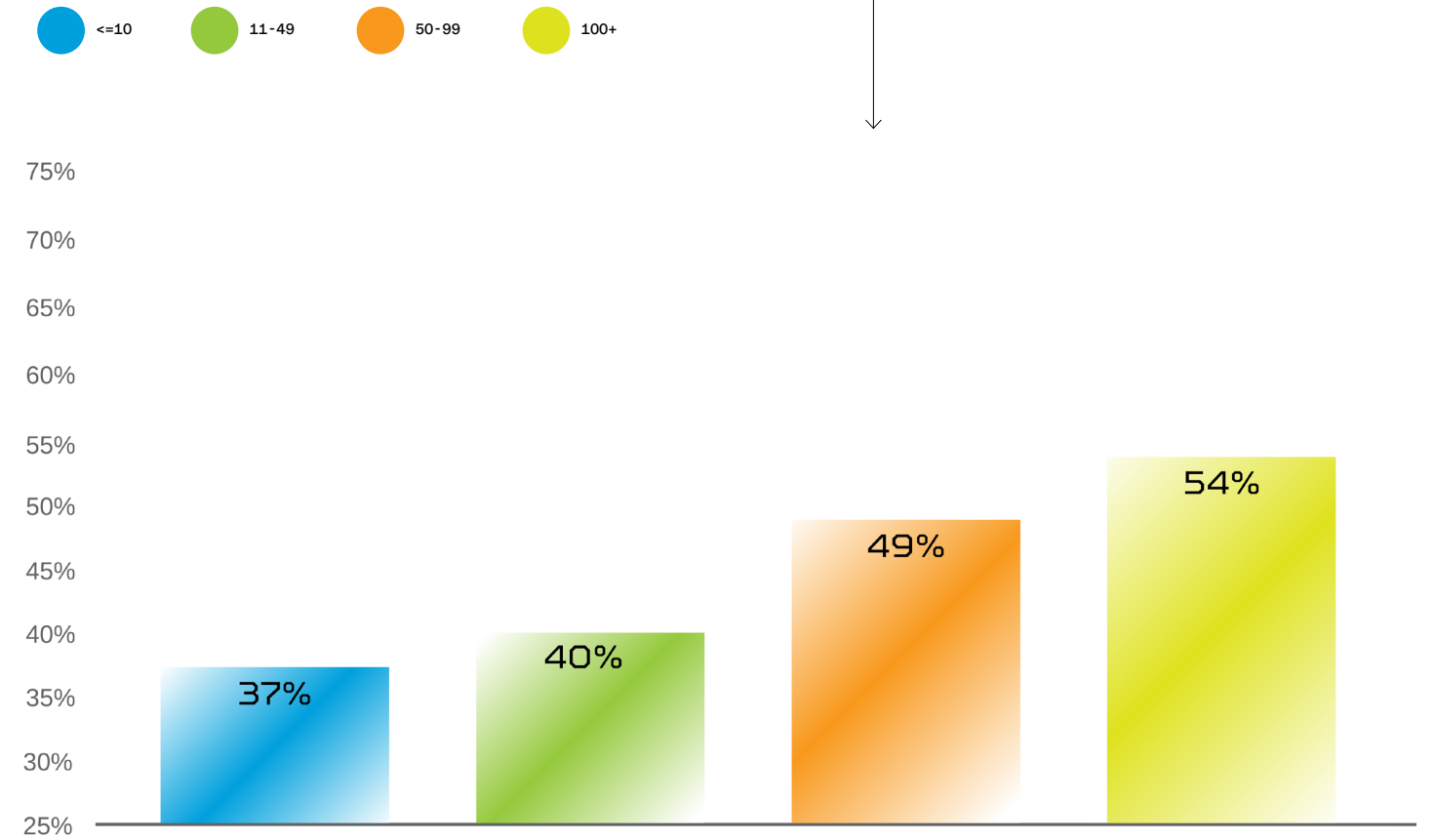
We also found that this trend holds across all concept types, whether low-cost grocery items, high-priced technology items, or experience-based concepts.

Across all five concepts, no matter the concept type, we found that purchase intent was higher the higher the activity level. The amount of difference between the low activity group and the highest activity group fluctuated depending on the concept. The high-activity groups across all the concepts had a 50%+ purchase intent, which was 15 to 23 points lower than the low-activity group.

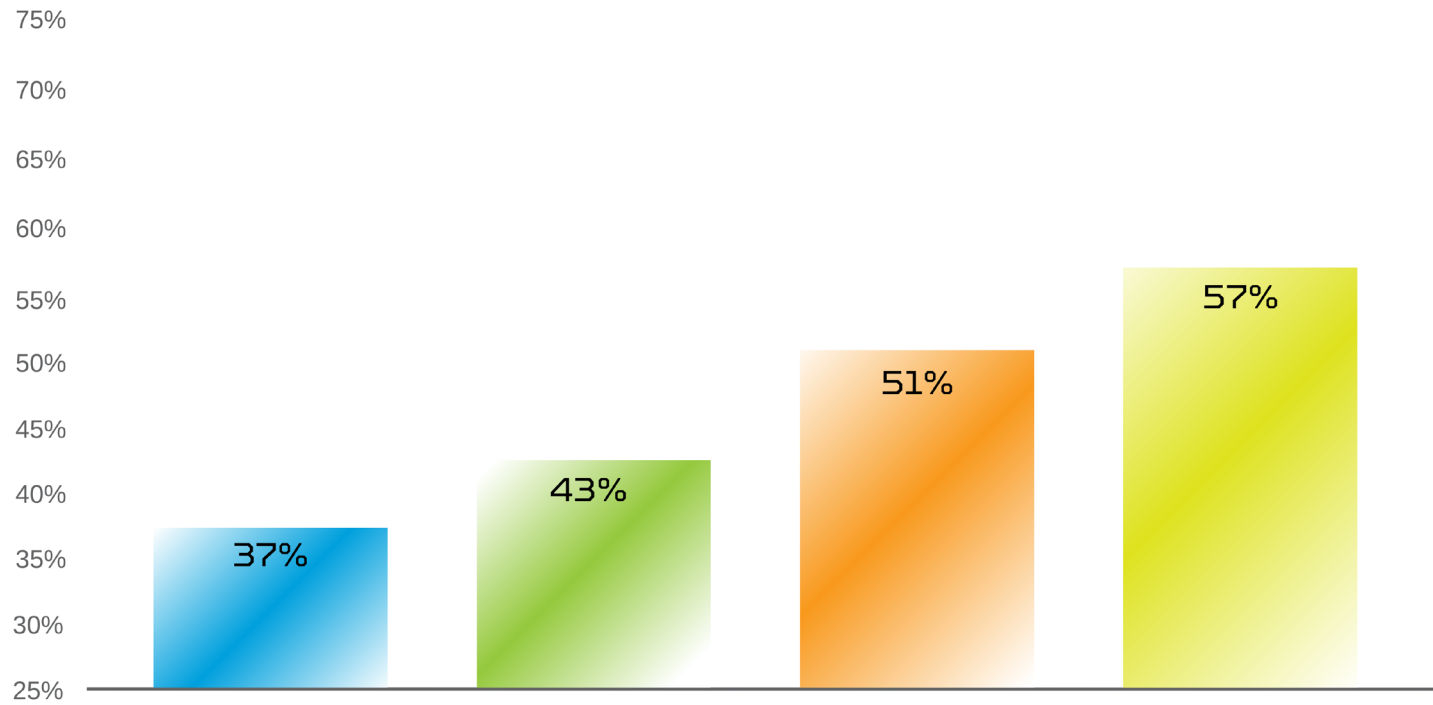
With our fictional high-priced technology concept, the purchase intent increased as survey attempts did, with a 22-point difference between the high and low-activity groups



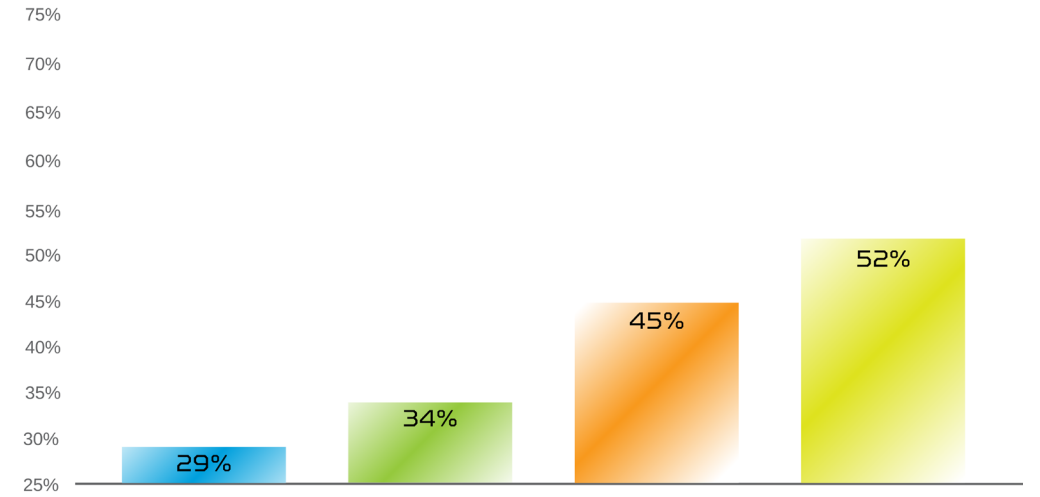
We saw the same trend in our theme park concept, where purchase intent increased as survey attempts did. With this concept, the difference between the high and low-activity groups was 17 points.



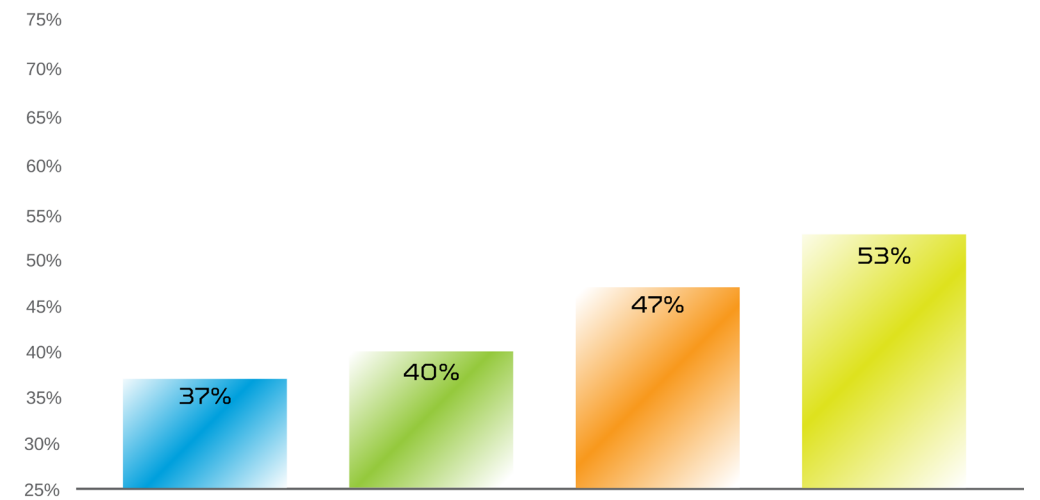
As with the previous two concepts, with our low-priced consumer good concept, we found that purchase intent increases as survey attempts increase, with a 20-point difference between the low and high-activity groups.



With the high-priced concept from a premium brand, we found that as activity levels increase, so does purchase intent. With this concept, there was a 23-point difference between the high and low-activity groups.



The purchase intent of the final concept, the high-end retail store concept, followed the overall trend but with the lowest point differential (15 points) between the high and low-activity groups.



# Concept Rating

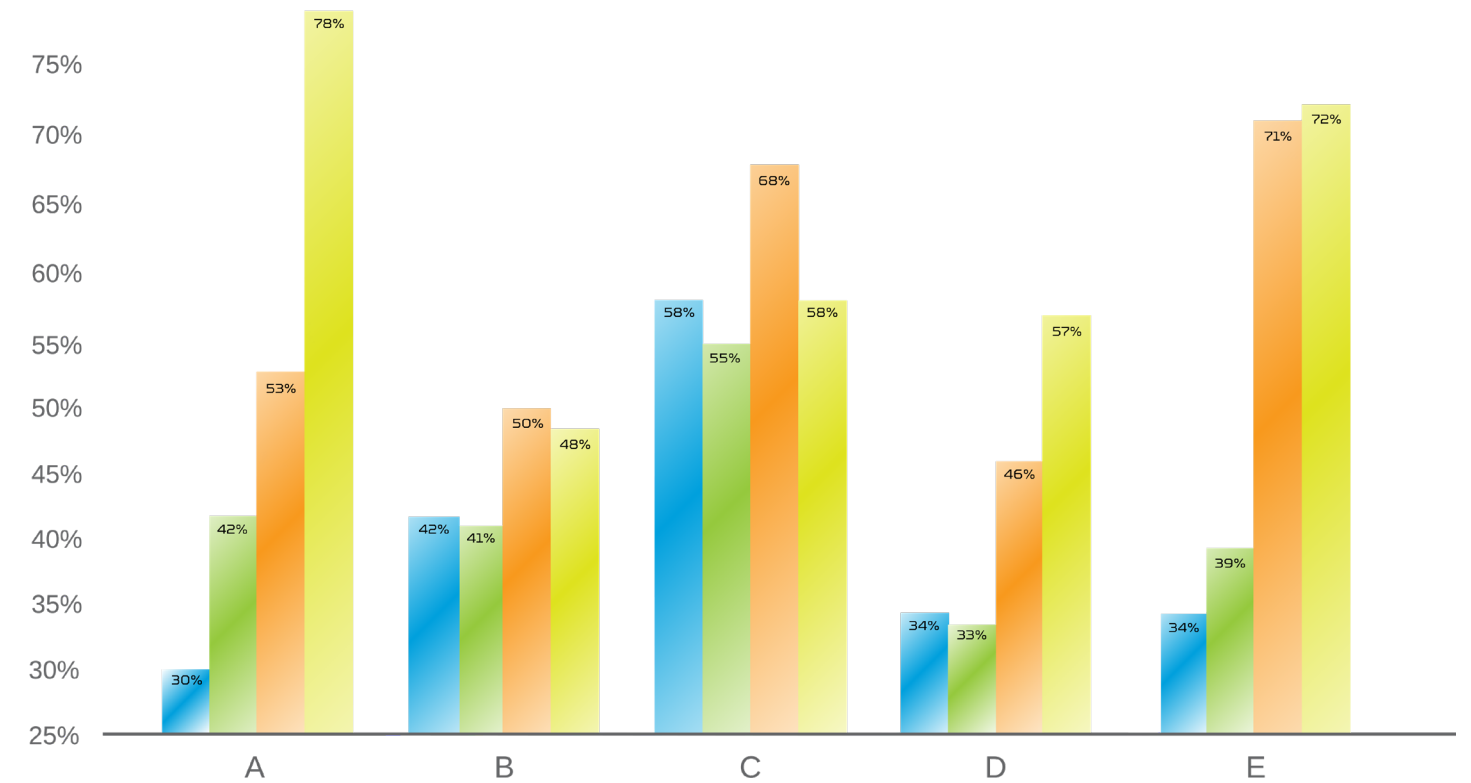
## Concept Rating By Panel

Across all of the concepts and the different panels we tested, we found that higher activity levels correlated with a higher purchase intent. For instance, Panel A's high-activity respondents have a top 2 box score of 76%, significantly higher than those in the low survey attempts.

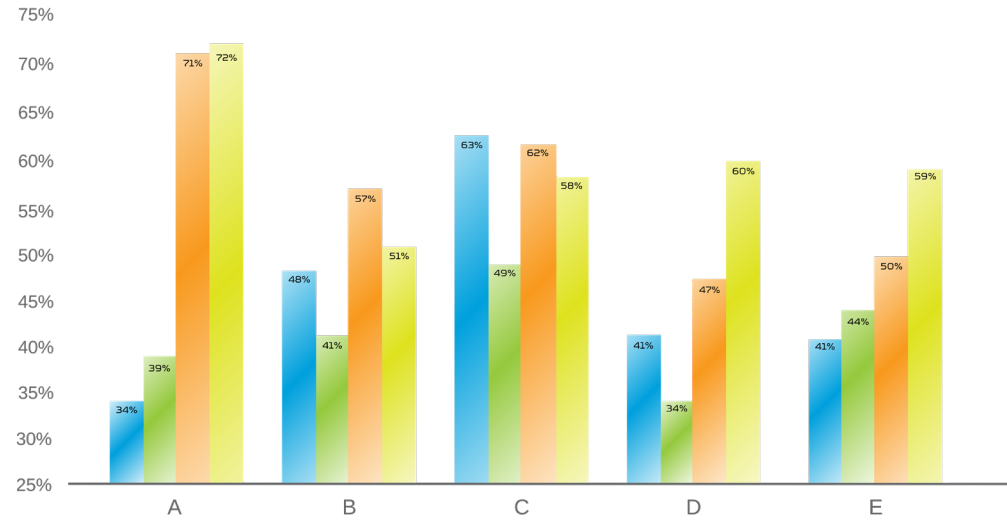
We also found that respondents with the highest survey attempts tend to have more consistent top 2 box purchase intent scores compared to respondents with lower survey attempts.

While activity level can impact data, a panel's behaviors and attitudes have a more considerable impact. This is highlighted when looking at the results of concept 5, where purchase intent widely varies by panel.

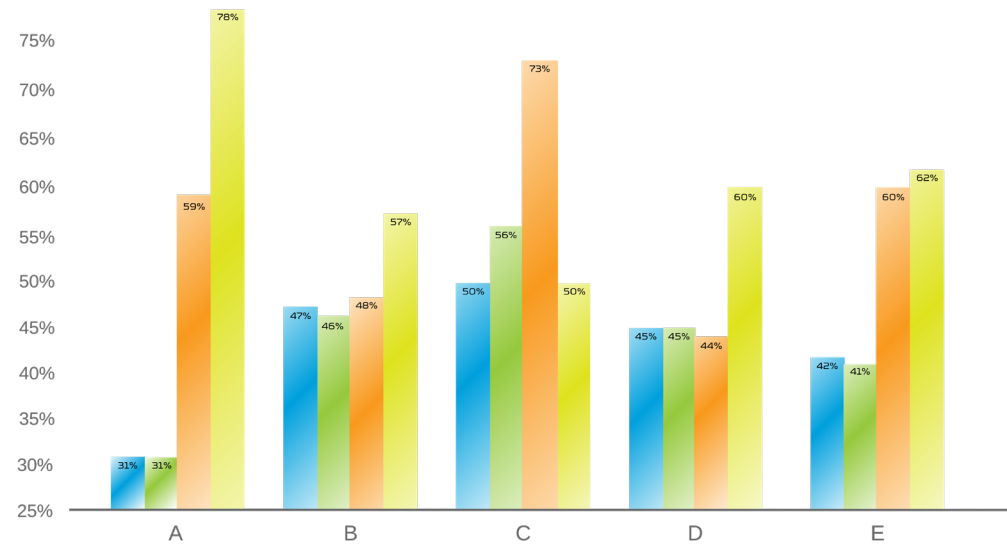
With our fictitious technology concept, the purchase intent increased as activity levels increased with most panels. Panel C, which has the lowest number of high-attempt respondents, had a drop once the high-attempt group was reached.



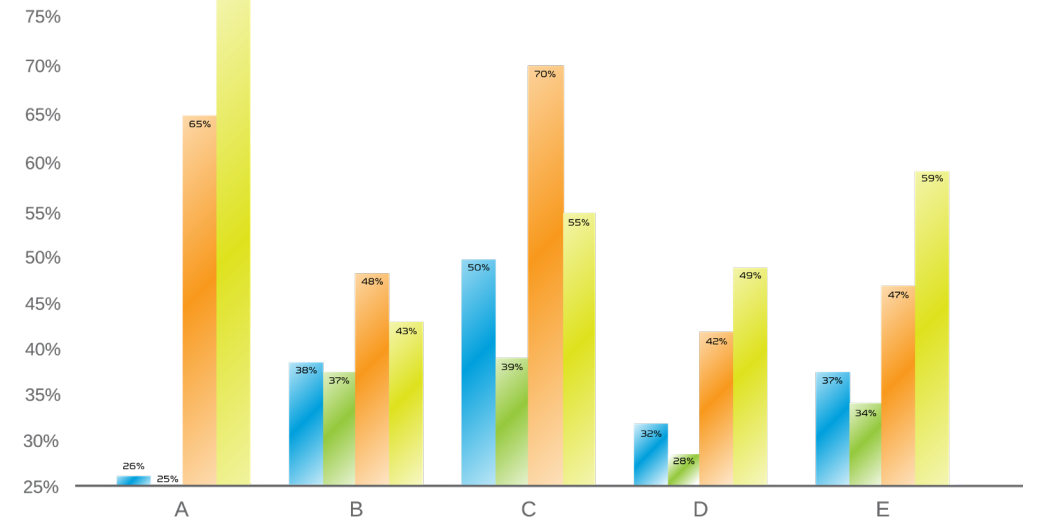
With our experience-based theme park concept, there is a 6-to-32-point difference in purchase intent between respondents who attempted less than 50 surveys and over 50 surveys in a 24-hour period across the panels.



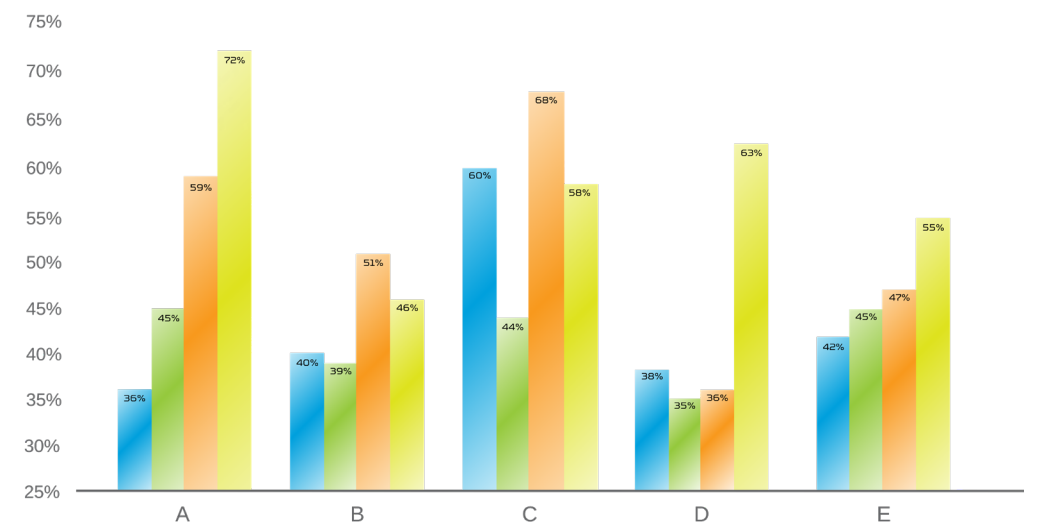
For the low-priced consumer good concept, the lower activity groups (those who attempted 10 or less and 11-49 surveys in a 24-hour period) across each panel have less variance in their results than the higher activity groups (50-99 and 100+ survey attempts). The average variance of the low activity groups is 1.6 points when comparing the 10 or less survey attempts group to the 11-49 survey attempts group. On the other hand, the high-activity groups had an average variance of 14 points when comparing the 50-99 to the 100+ survey attempt group.



The purchase intent of our premium brand, high-dollar technology concept increases an average of 22 points when survey attempts get above 50 in a 24-hour period.



The purchase intent of our high-end retail store concept is higher in the higher activity groups (50-99 and 100+) than it is in the lower activity groups.



# What is the Impact of High-Frequency Survey Takers?

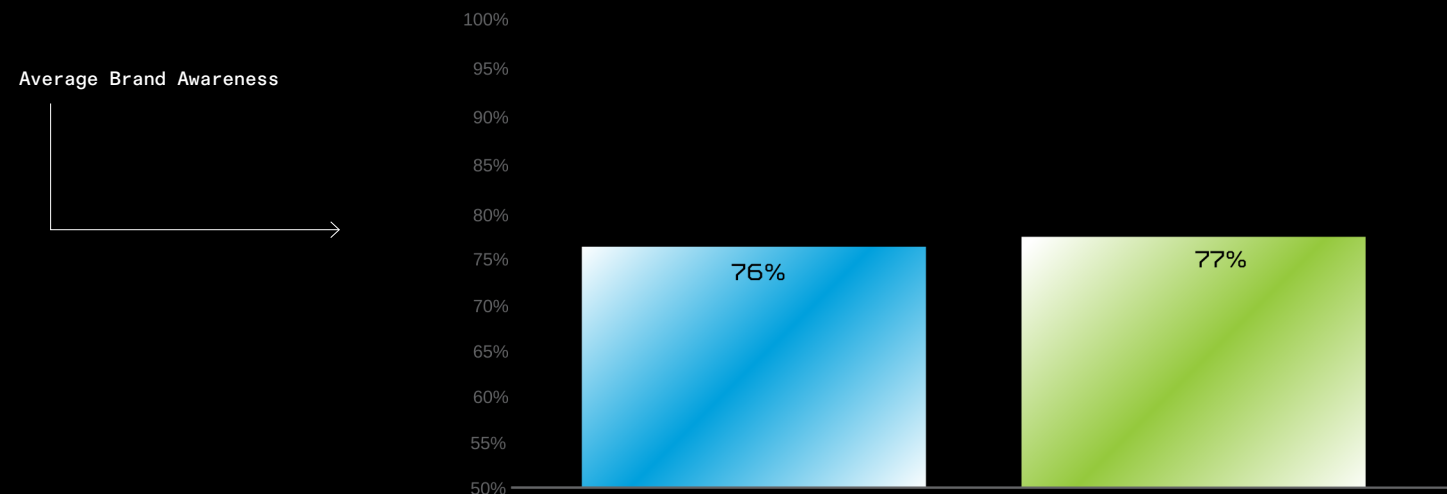
Regarding the overall respondent population for the study, respondents who attempted 100 or more surveys in a 24-hour period made up a relatively small percentage of the overall audience. We found that while the data this group provides does impact the results, the impact is minimal given that they are the smallest percentage of the overall audience. We suspect that as the percentage of high-activity respondents increases, the effect on the data will also increase.

## Average Brand Awareness & Brand Rating

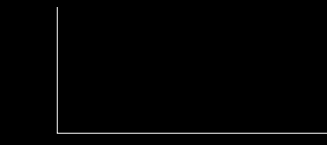
There was a 1% difference when the high-activity respondent group was excluded from the overall. This trend was observed across average brand awareness, average brand rating, as well as all five concepts we tested.

*One item of note is that EMI internally sets its activity-based blocks at 200, which impacted the number of respondents who fell into the 100+ activity level.*

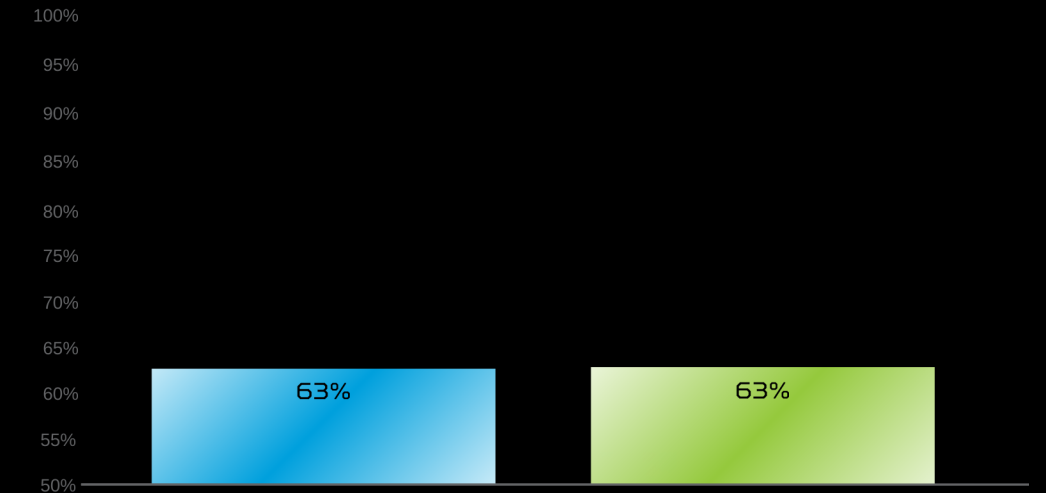
● Overall ● 100+ Excluded



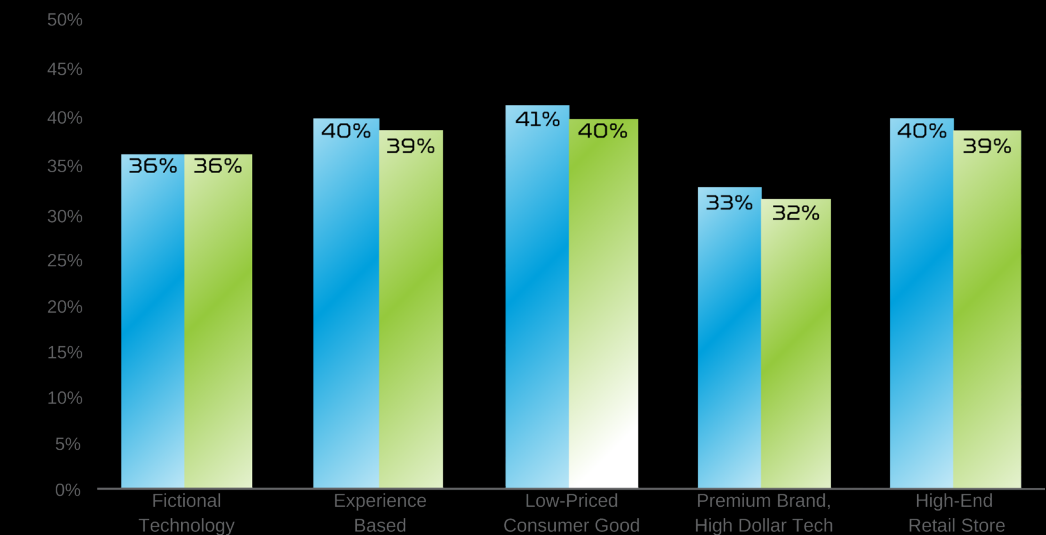
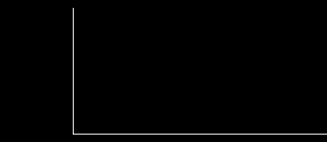
Average Brand Rating



● Overall ● 100+ Excluded



Average Concept Ratings



# Survey Attempts and Their Impact on Data Quality Measures

In addition to looking at the impact survey attempts have on data, we also examined whether activity level impacted data quality measures' triggering. We examined five different data quality measures to see what percentage of respondents in each activity level group triggered which measure.

The five data quality measures we looked at were:

## Red Herring:

- Fictitious Brand
- Activity That Had Not Occurred in the Timeframe Provided

## Open-End Response Analysis:

- Character Count of Open-End Response
- Word Count of Open-End Response

## Straight-line Responses

- Straight-line Responses to Brand Rating: Qualified by indicated awareness of any brand.
- Straight-line Responses to Brand Rating: Qualified by indicated awareness of at least four brands.

## Speeders

- A respondent is determined to be a speeder if they complete the survey in one-third of the median length of interview time.

## Attention Check

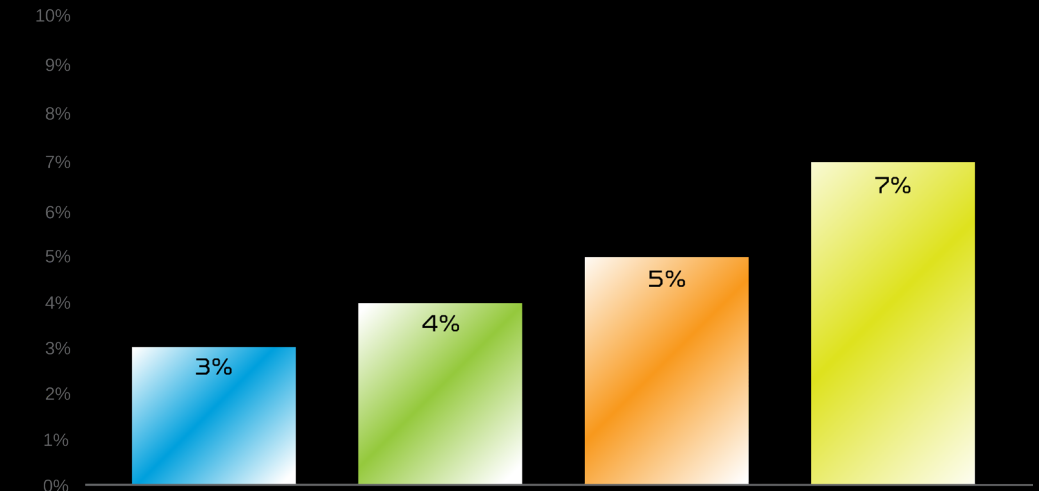
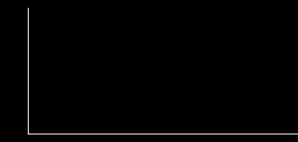
- We asked two questions, one asking respondents to select "5" for Twitter and the other to select "5" for Tesla. If "5" was not selected in either question, they were flagged for inattentiveness.

Overall, we observed an increase in the percentage of data quality failures as the number of survey attempts increased. This trend was observed across all five data quality checks we measured.

Also, while high-activity respondents may have a limited impact on the data (depending on the percentage of the overall population), they do increase the number of blocked respondents in your survey.

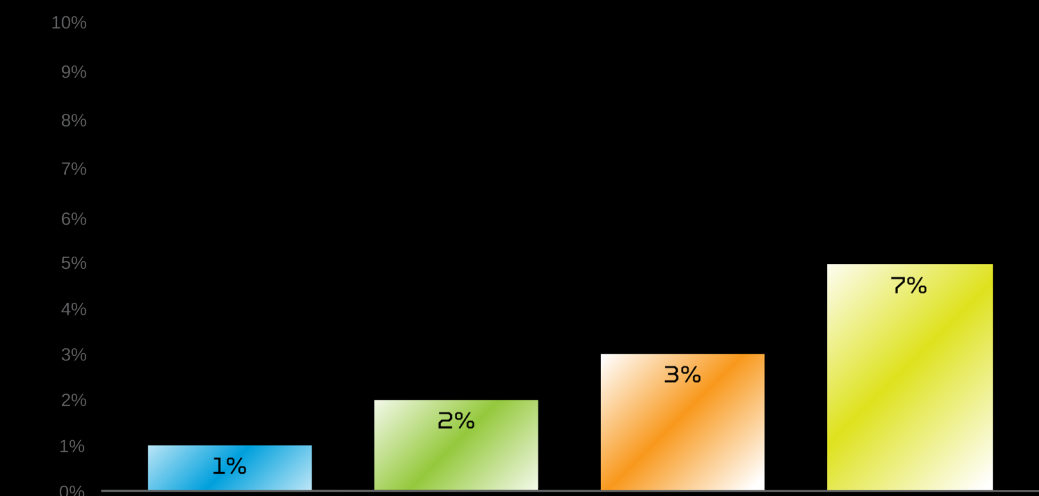
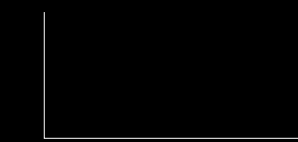
Red Herrings: Fictitious Brands

As survey attempts increased, there was a 4-percentage point increase in respondents who failed our fictitious brand red herring.



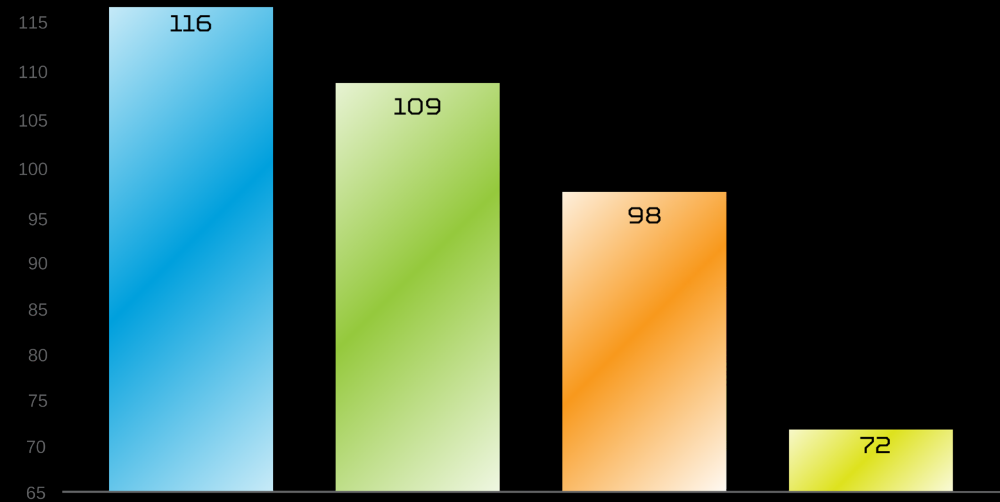
Red Herrings: Activity that Had Not Occurred In Timeframe Provided

As with our fictitious brand red herring, there was a 4-percentage point increase in the number of respondents who failed our other red herring that asked about an activity that had not occurred in the timeframe provided.



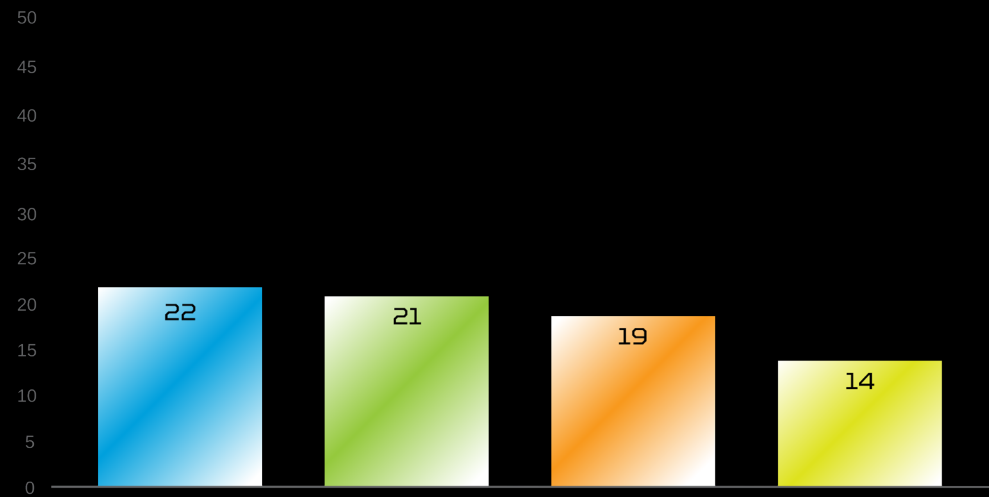
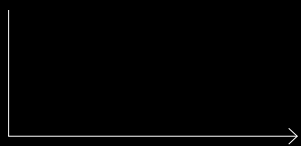
Open-Ends: Character Counts

The average number of characters in open-end responses declined by 38% as the activity level increased.



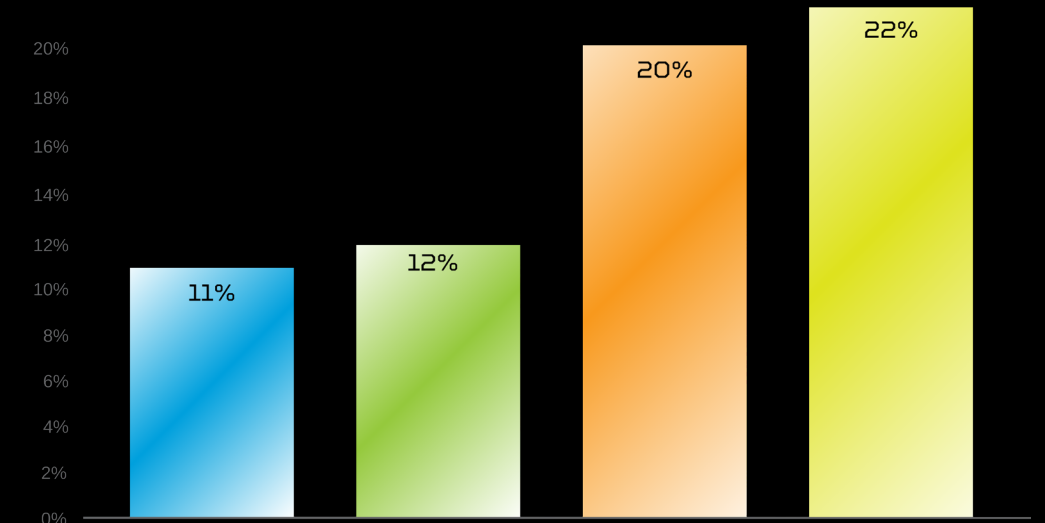
Open-Ends: Word Counts

As observed with the open-end character counts, the average number of words used in open-end responses declined by 37% as the activity level increased.



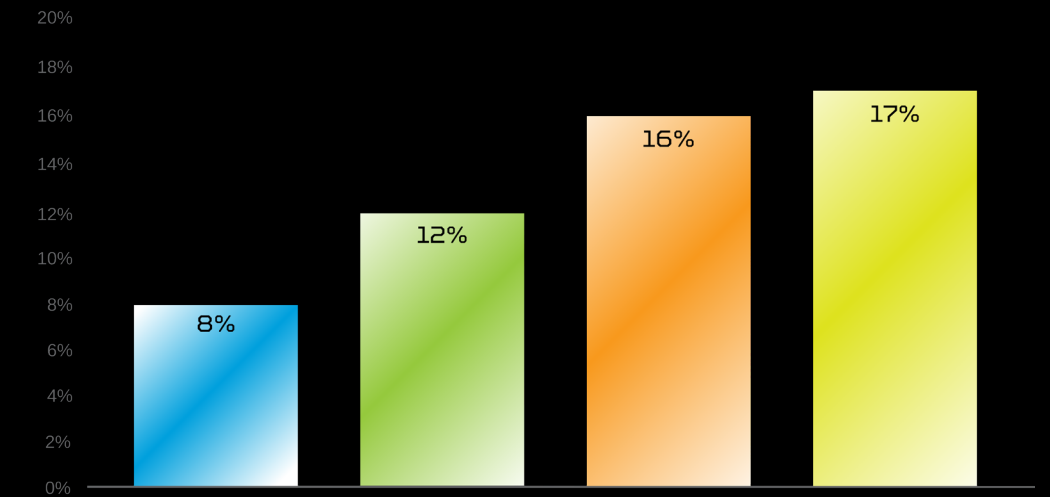
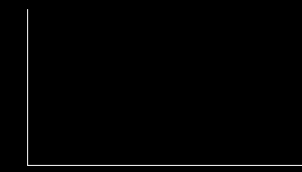
Straight-line: Any Brands Selected as Aware

When looking for straight-lining in brand rating among respondents who selected that they were aware of any of the brands we asked about, we found that the number of respondents who failed this data quality check doubled as the activity level increased.



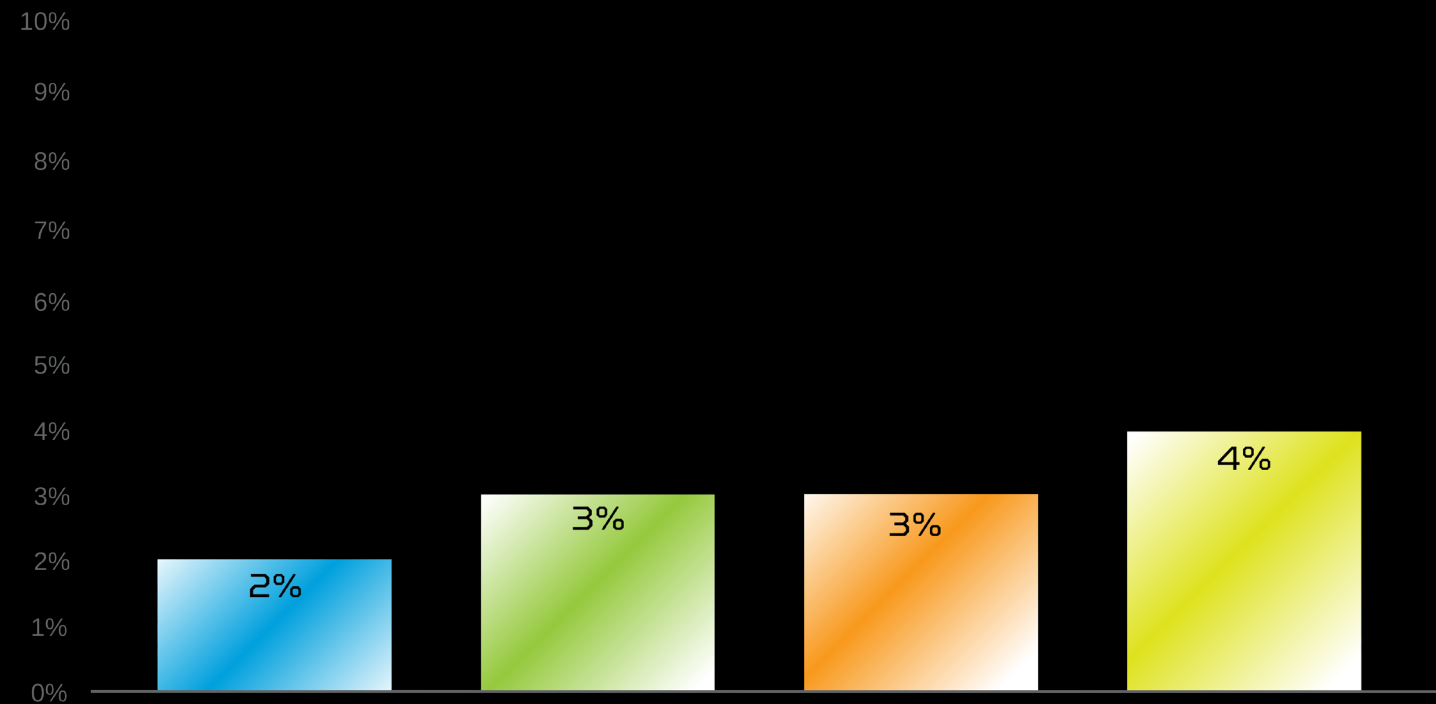
Straight-line: Min. 4 Brands Selected Aware

The trend of the percentage of respondents who failed a straight-line check doubling is also observed when we look at respondents who selected they were aware of at least four brands we asked about.



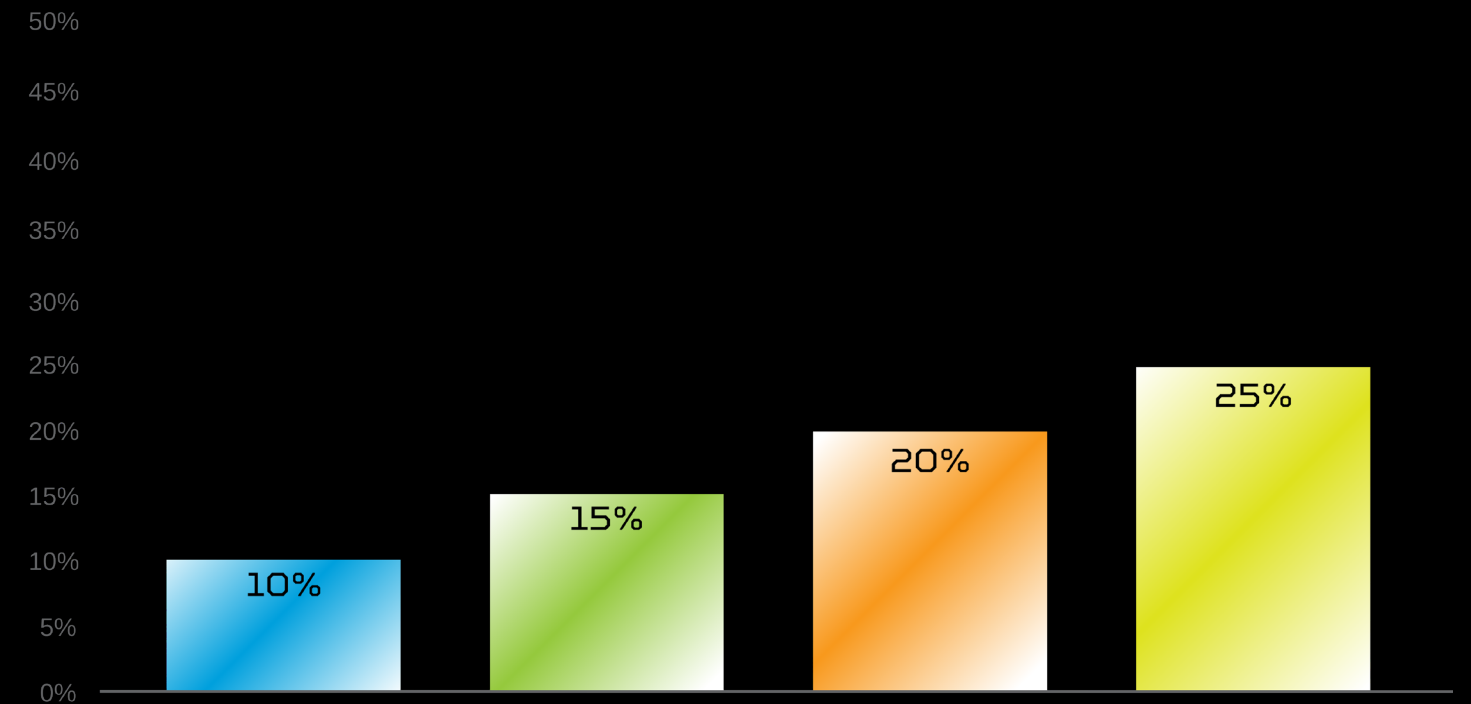
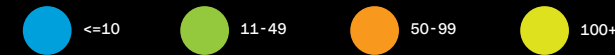
### Speeders

As the number of survey attempts increases, there is a slight increase in the number of respondents who fail a speeder data quality check. There is a possibility that respondents who attempt 100+ surveys in 24 hours may be aware enough to take their time so as not to trip this check.



### Attention Check

Failure of the attention check measure highlights how the number of respondents who fail the check increases as the survey attempts increase. The high-activity respondents failed this quality check 15 percentage points higher than the low-activity respondents. The data quality failure rate increased by 5% each activity level you go up.



Part 4

# AI's impact on the landscape



## Part 3

# Real Vs. Synthetic Respondents

AI's impact on the landscape

### Introduction

The launch of ChatGPT in December of 2022 opened the artificial intelligence Pandora's Box. Since then, AI has taken market research and many other industries by storm. Artificial intelligence was at the forefront whether you were at a conference, attending an industry webinar, or staying updated on industry news.

One aspect of AI in 2023 was the concept of synthetic respondents. Synthetic respondents are respondents whose profiles, opinions, and survey responses are created using generative AI. Synthetic respondents are not just ChatGPT answers survey questions; they are custom-trained GPTs that can mimic target audiences or customer profiles and answer similarly to real respondents.

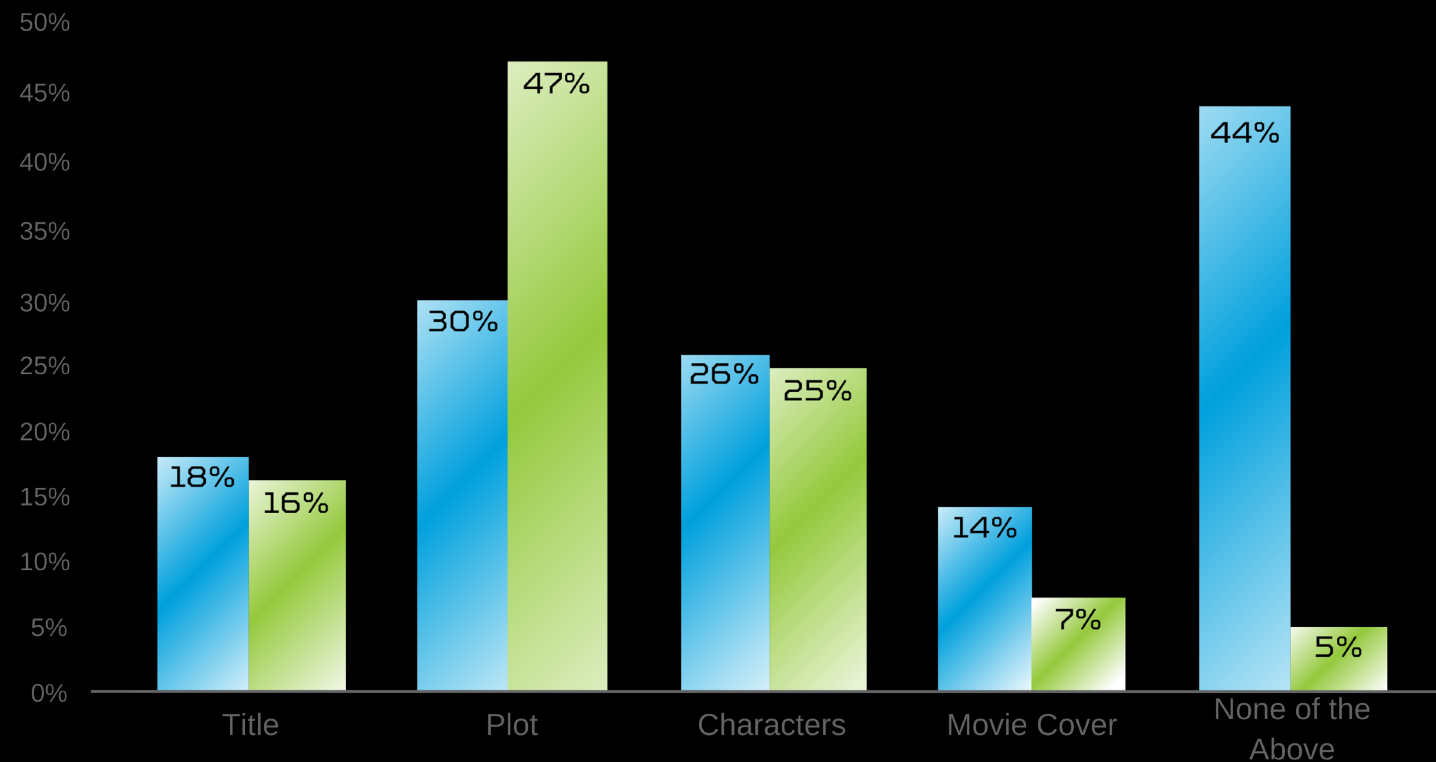
Throughout 2023, we saw the launch of synthetic panels, companies offering to create custom GPTs to use as synthetic respondents, and many brands starting to test and incorporate synthetic data into their market research approaches. As Mark Ritson wrote in his Marketing Week article, "The era of synthetic data is clearly upon us."<sup>1</sup>

Just as we study online sample panels to understand their differences, we started testing synthetic respondents and comparing them to actual respondents to understand best the difference in the data that can occur. We built a custom GPT to mimic 18+ US consumers to compare the results generative AI provided against what real respondents provided. In one of our tests, the GPT and real respondents provided feedback on a fictitious movie concept called *Apology Olympics*.

### Overall

When looking at the different aspects of the movie concept overall, synthetic respondents were on target with their predictions about the movie's title and characters, with a mere 2% difference from the real respondent responses. However, the synthetic respondents' data didn't match real respondents across the board. They overestimated the appeal of the plot by 17 points compared to real respondents, assuming it would be the standout aspect of the movie concept.

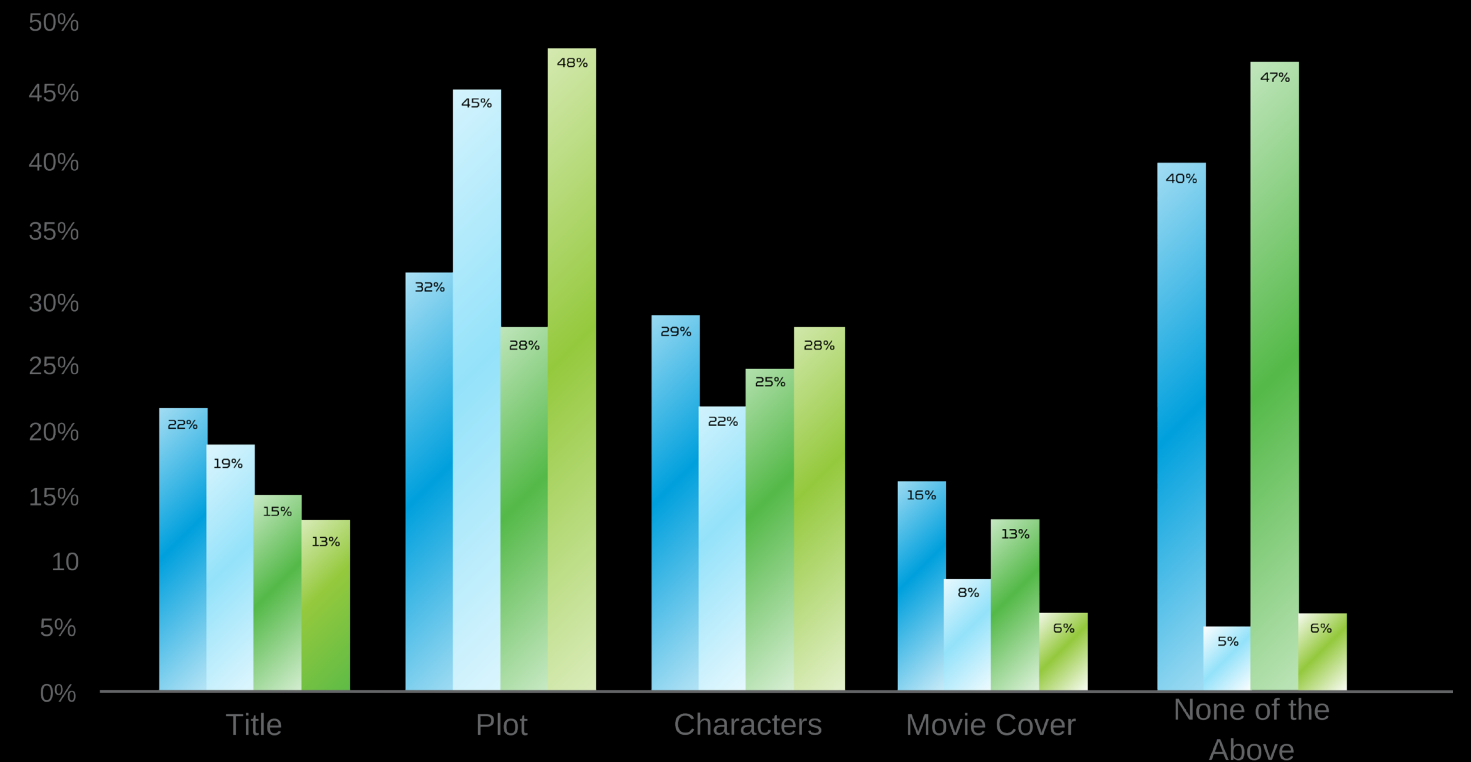
The most significant discrepancy lay in the "None of the above" category, which unexpectedly 44% of real respondents selected. This 39-point gap between synthetic and actual respondents highlights a crucial point: audience interests are diverse and often unpredictable, and their reasons for not being intrigued by certain movie elements can be just as telling as their excitement for others.



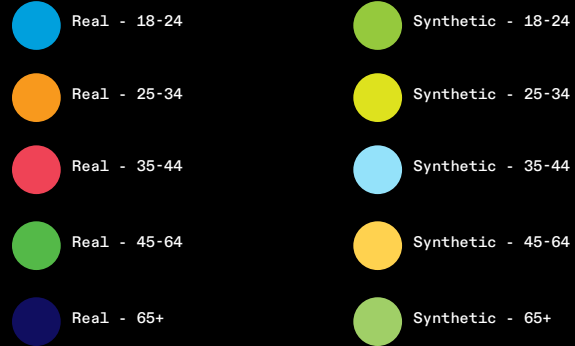
### Gender

We next separated the results by gender, where synthetic respondents' foresight shone through in certain areas. They anticipated that males would have a stronger preference for the movie's title than females, the same result we saw with real respondents.

Synthetic respondents thought the movie's story and characters would be more popular with women, but the numbers told a different story. The data from real respondents showed that 32% of men were into the plot compared to 28% of women, and men liked the characters four points more than women.



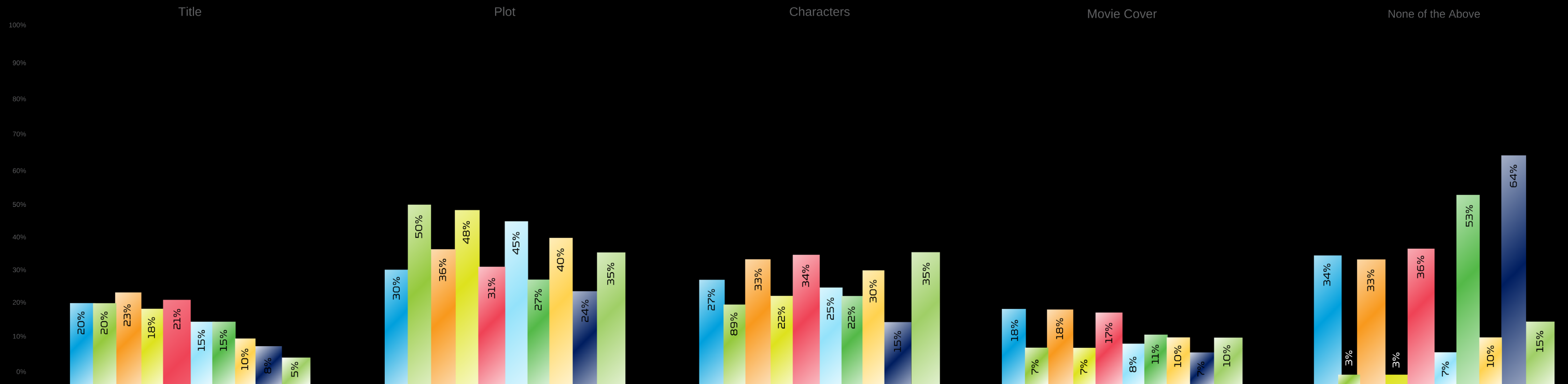
Age



When we broke down the movie concepts by age, synthetic respondents' predictions revealed some intriguing trends. They anticipated clear patterns for the title and plot that we also observed in the results from real respondents. The trend was straightforward: the younger you are, the more likely you are to like the title and plot.

However, synthetic respondents' results of increasing preference with age weren't entirely accurate regarding the characters. While there was an upward trend until age 35-44, the preference dipped for older age groups in the results from actual respondents.

Interestingly, synthetic respondents' movie cover prediction had a twist. They foresaw that older age groups would be likelier to like it. Still, the data from real respondents revealed the opposite trend, with older age groups showing less interest than their younger counterparts.



Income

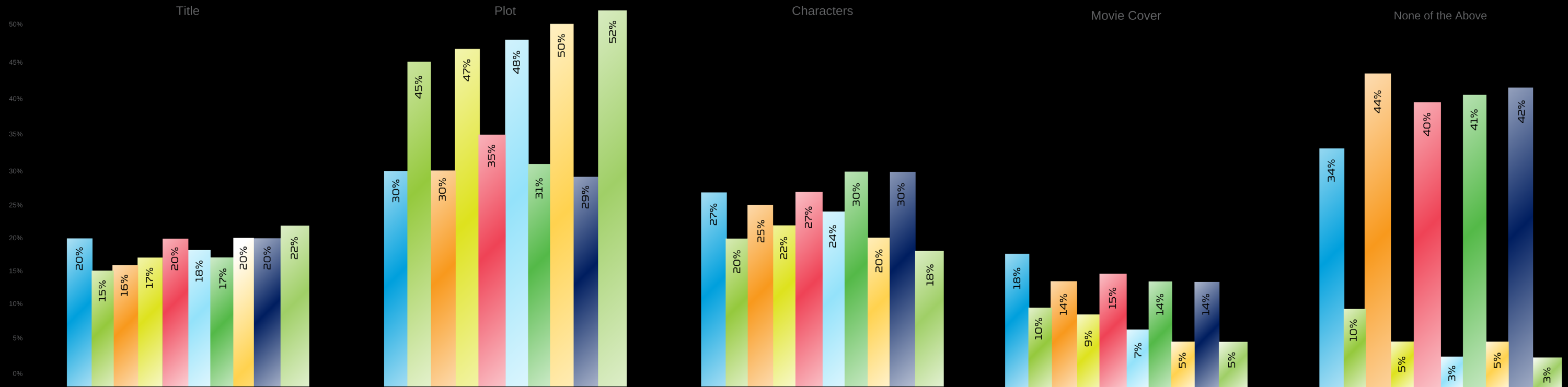


The results from synthetic respondents were interesting when we looked at them by income.

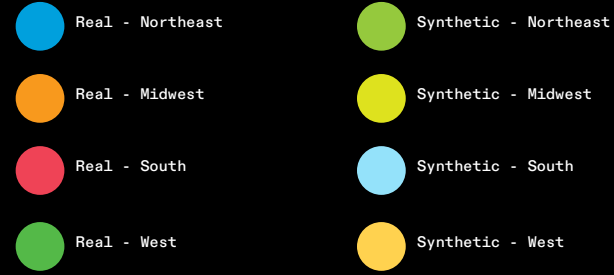
They foresaw clear trends for the title and plot, suggesting that the higher the income bracket, the more likely people would like these elements. However, the results from real respondents painted a different picture, showing no discernible trend in preferences

for the title. As for the plot, the data showed an increase in likelihood with each income bracket until it peaked at \$40,000 - \$59,999 and decreased in likelihood.

Synthetic respondents hit the mark when predicting that the movie cover would be most popular among the under \$20,000 income group.

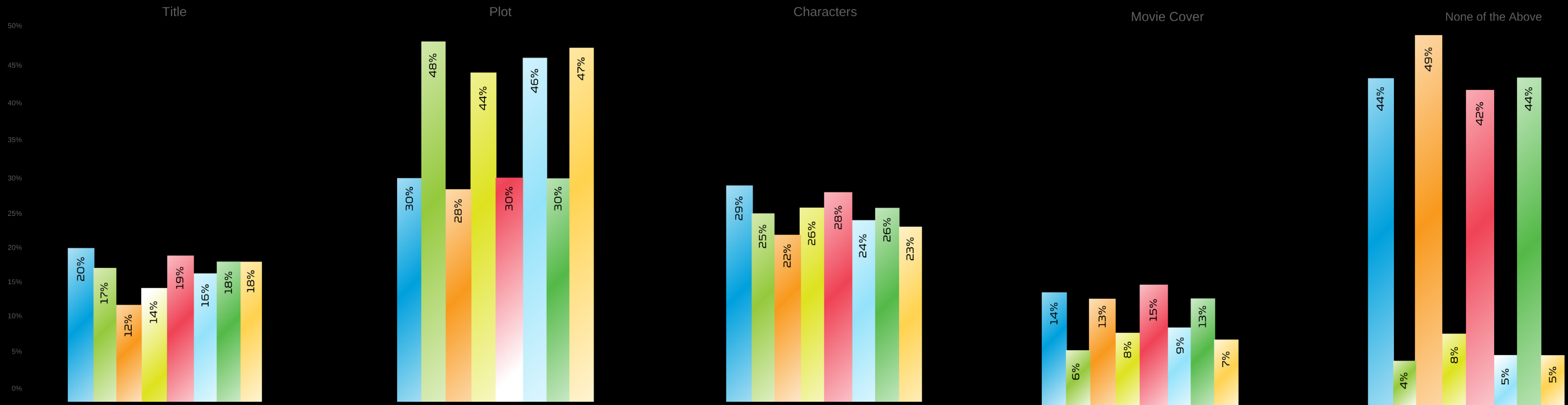


Region



When looking across regions, there was a mix of accuracy between the data from synthetic and real respondents. The data from synthetic respondents anticipated that the Midwest would exhibit the highest affinity for the characters. Still, the data from actual respondents indicated that they were, in fact, the least likely to favor them.

Conversely, the South validated the trend predicted by the synthetic respondents by confirming it is the region most likely to appreciate the movie cover, with 15% of respondents expressing interest.



## *The Final Result*

We can break down the final results into two buckets: the good and the bad.

**The Good:** Synthetic respondents showcased their prowess with spot-on accuracy in anticipating the audience's response to the "Title." Its predictions for this element had an average difference of just 3% from the real respondents' results. What's even more impressive is that the synthetic respondents were within a mere 1% of the responses from real respondents in four instances. Although slightly higher at 6%, its maximum difference still demonstrated remarkable precision.

The second-best area was where synthetic data matched actual respondents in predicting the audience's sentiment toward the "Characters." Here, its predictions had an average difference of 7%, mirroring the same accuracy achieved with the "Movie Cover." Notably, its best prediction was off by a mere 1%. It's worth mentioning that the synthetic data would have had an even better average for "Characters" if not for one outlier - a 20% deviation from real respondent data for people over 65.

**The Bad:** On the flip side, the custom GPT's predictions were not as great when assessing the audience's affinity for "None of the above." Here, the difference between the real and synthetic respondents missed the mark by an average difference of 38%.

The bottom line is that synthetic respondents can provide some directional insights depending on the concept, but research should still be conducted with actual respondents for actionable insights.

# Advantages and Challenges of AI: A Researcher's Perspective

ChatGPT was released in November 2022, marking a pivotal moment in the evolution of language models and the first of many new changes in my work processes. Although it was not the first language model to launch, it was the most significant and helped bring my attention to the AI industry. It provided me with a wealth of benefits, allowing me to automate repetitive tasks and unlock new insights. However, these newfound benefits were accompanied by several drawbacks. As we navigate these new technologies, it's essential to recognize both the opportunities and challenges AI presents in marketing research.

From my perspective, one of the most prominent advantages that AI has brought to me involves data analysis. Data analysis has seen an enormous transformation with the application of AI, resulting in several key benefits:

- **Efficiency:** AI algorithms can process and analyze massive datasets significantly faster than I and other human researchers can. This rapid analysis accelerates insights and allows me to view data through a myriad of lenses. For one or two urgent queries about a dataset, the responses can be obtained much more rapidly. These automations have also allowed me to allocate my time to other critical areas of market research. With

the ability to create custom GPTs, I can now have an AI "assistant" for all areas of my job.

- **Open-end analysis:** Before using AI models, I would spend an abundant amount of time processing open ends and sentiments. Although much progress still needs to be made, AI has made great strides in processing sentiments, deciphering emotions, and identifying trends from open-ended responses. However, this comes with limitations. AI may not be as good as humans with understanding sentiments and feelings, but it can be a great start.

Despite the efficiency of AI processing data, it is not a panacea. People may be caught up by newfound automation and efficiencies, but there is still reason to be wary. AI still presents some challenges:

- **Data quality:** As the saying goes, "Garbage in, garbage out" is still true for AI-driven research. The insights you can generate from AI are as good as the dataset you're working with. It doesn't matter how fast you can analyze data or discover new insights if you are not working with a reliable dataset. Ensuring high-quality data remains a paramount concern. Fortunately, at EMI, we pride ourselves on data quality and providing reliable datasets.

- **"Survey sleuths":** While AI has been a difference maker for me as a researcher, it also presents a unique paradox in survey taking. ChatGPT and other language models are a wealth of information. They can write extensive papers, pass MBA exams, and much more. So, who is to say that it cannot help a respondent qualify for a survey? Whether it's helping with an open-ended response or answering difficult red herrings to help qualify, these language models can become valuable tools for respondents. Having open-ended questions asking for feelings and emotions can help prevent some of these language models from giving a humanistic answer. However, this alone is not enough.



Jared Frank  
Insights Associate  
EMI Research Solutions

*Jared Frank*

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Part 5

# Examining current events

# Part 5

## Specialty Research

Examining current events

### Introduction

The main focus of research-on-research every year is to better understand the sample landscape and its trends. But, we also devote a portion every year to specialty research that explores additional “hot” current events and other topics of interest.

2023 was no different. We covered various topics, from the ongoing regional conflicts, the economy to an exploration of mental health and more.

The full list of topics we covered include:

- **Regional Conflicts and Public Sentiment: How They Are Viewed**
- **In This Economy!? A Closer Look at Perceptions of the US Economy from 2021 to Now**
- **An Examination of Mental Health**
- **Don't Overlook this Aspect of Diversity: Ability in the Workplace**
- **Patriotism and Politics**

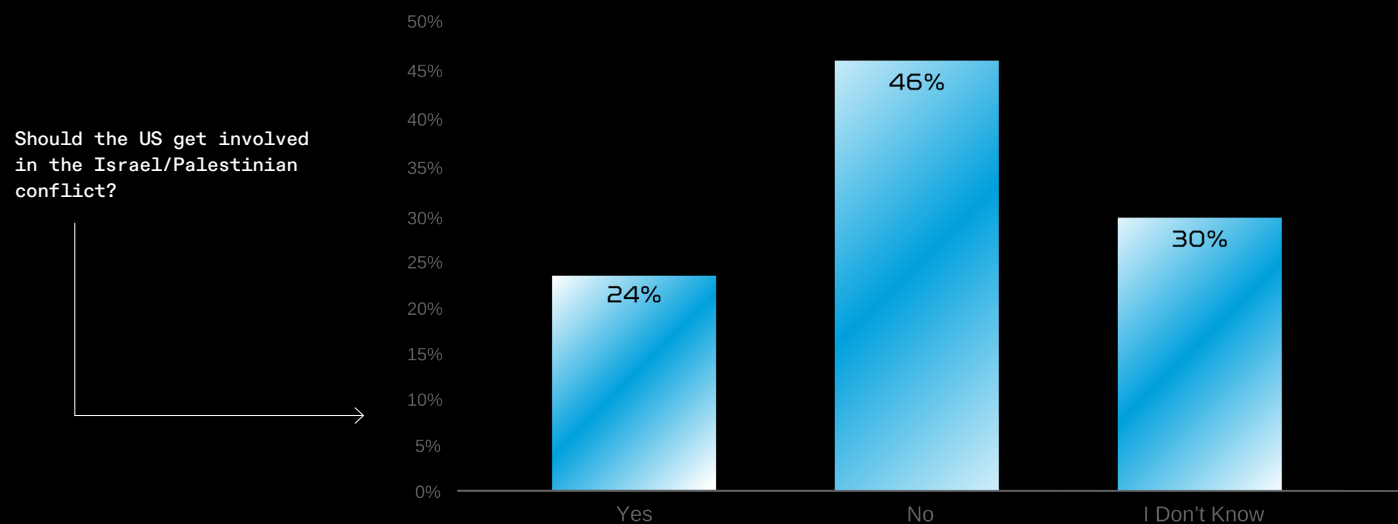
# Regional Conflicts and Public Sentiment: How They are Viewed

## Stay on the Sidelines or Take an Active Role: Views on US Involvement in the Israel/Palestine Conflict

Since October of 2023, much of the world's focus has shifted from the Ukraine / Russia conflict to the Middle East, as Israel and Hamas have been at war with each other. The conflict between the Israelis and the Palestinian militant group could be considered a new conflict. Still, many historians believe it is just the latest chapter in the ongoing Israel/Palestine conflict that can be traced back to the mid-nineteenth century.

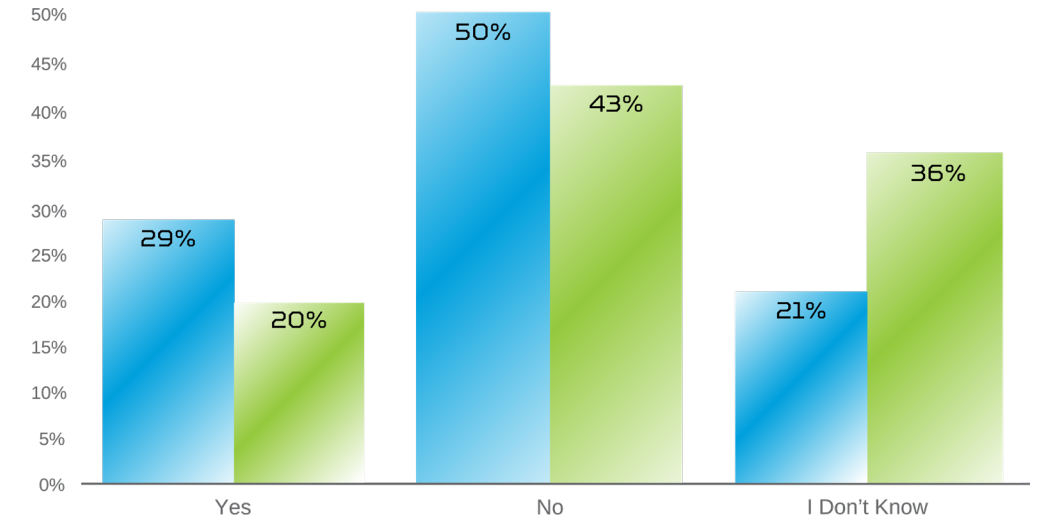
This latest chapter has increased support for both Israel and Palestine since October. In our research-on-research, we wanted to better understand people's perspectives of the conflict and whether the United States should get involved.

Overall, there is a predominant belief that the US should not get involved in the Israel-Palestine conflict, with nearly half of the respondents (46%) expressing this view. In contrast, only about one in every four people (24%) believe the US should be involved.



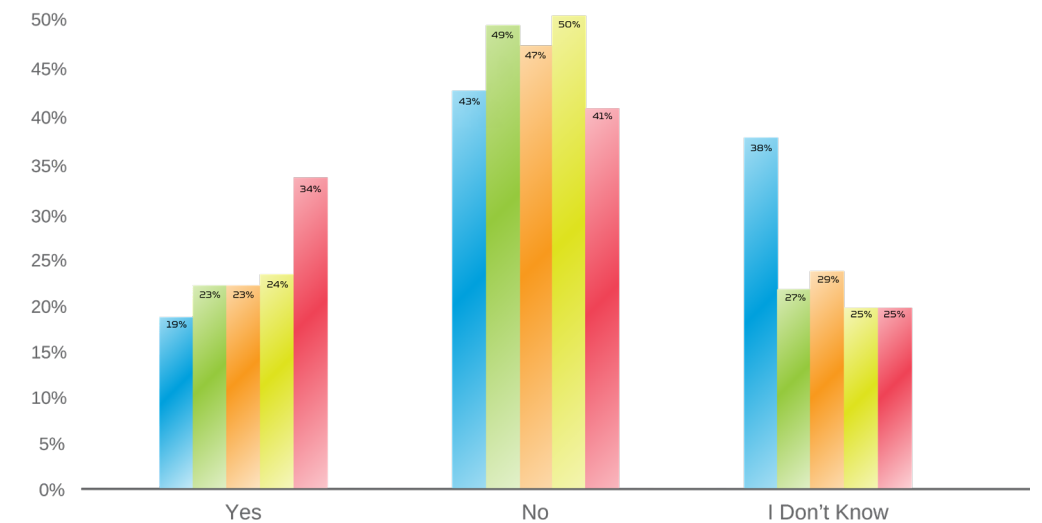
Male Female

Males are 9% more likely than females to think the US should get involved in the conflict between Israel and Hamas. Conversely, females exhibit a higher level of uncertainty or neutrality, being 15% more likely than males to be undecided or not have an opinion.



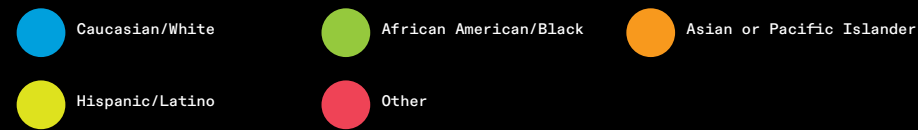
Should the US get involved in the Israel/Palestinian conflict?

Income levels play a significant role in shaping opinions on US involvement, where the higher the income group, the more likely they are to believe the US should get involved. Conversely, individuals earning under \$20,000 are the least likely to support US involvement, with only 19% in favor, and those earning between \$60,000 and \$99,999 are most likely to be against it, with nearly half (50%) holding this view.

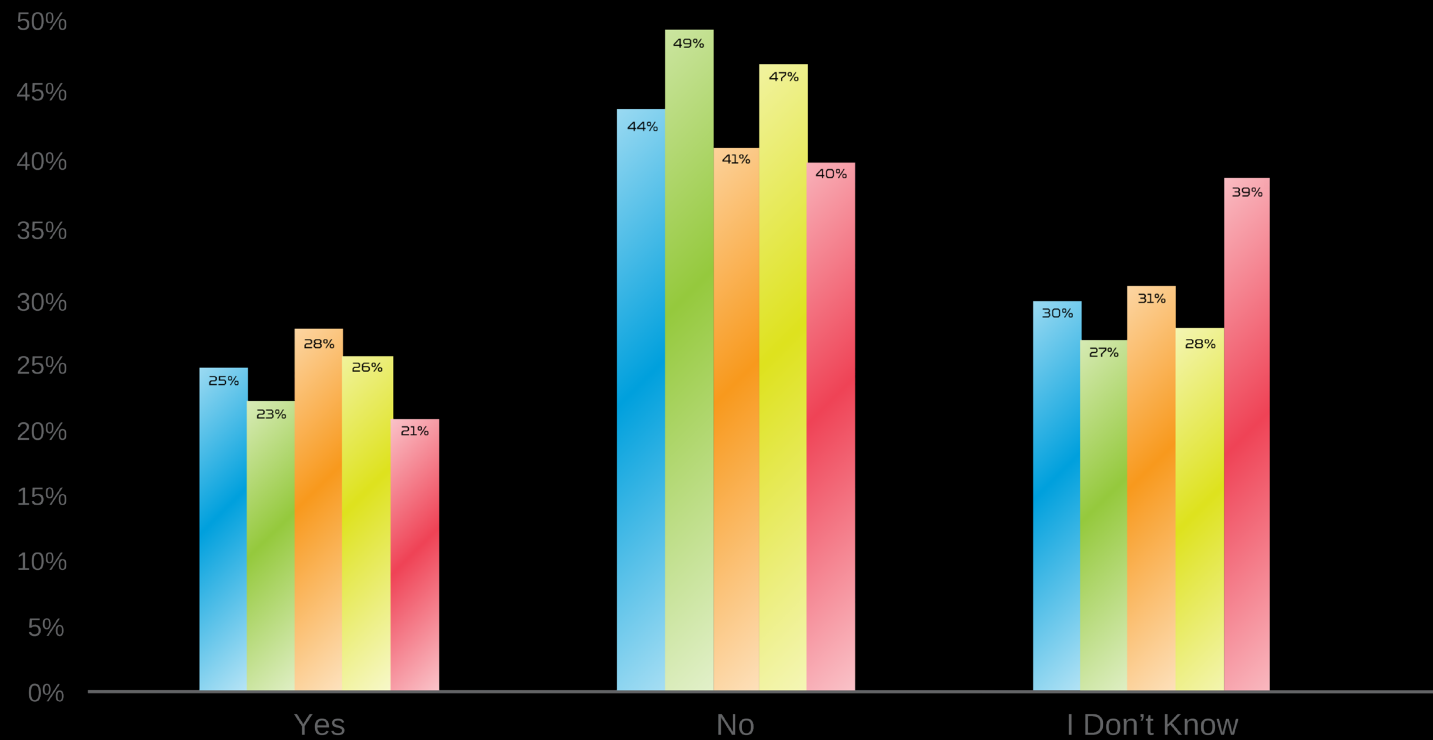


Under \$20K \$20,000-\$39,999 \$40,000-\$59,999 \$60,000-\$99,999 \$100,000+

Ethnic background also shapes viewpoints on US involvement in the Israel-Palestine conflict. Asians or South Asians are most likely to support US involvement, with 28% favoring this stance. African Americans are most inclined to oppose US involvement, with a notable 49% against it, closely followed by Hispanic/Latino respondents at 47%.



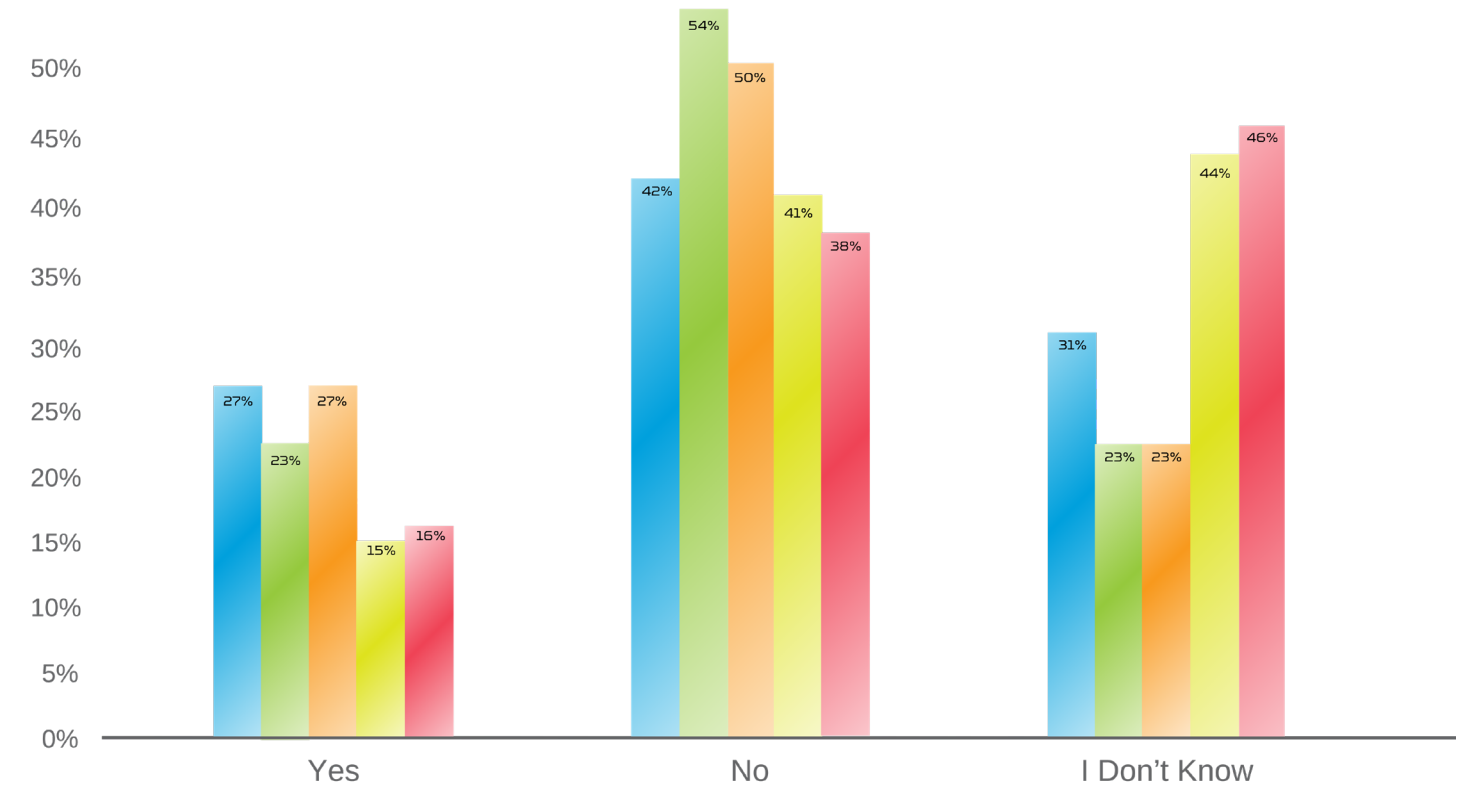
Should the US get involved in the Israel/Palestinian conflict?



Across panels, opinions varied regarding US involvement in the Israel-Palestine conflict. Panels A and C show the strongest support for US involvement, each with 27% of respondents in favor. In stark contrast, Panel B exhibits the highest opposition, with 54% believing the US should not get involved.



Should the US get involved in the Israel/Palestinian conflict?

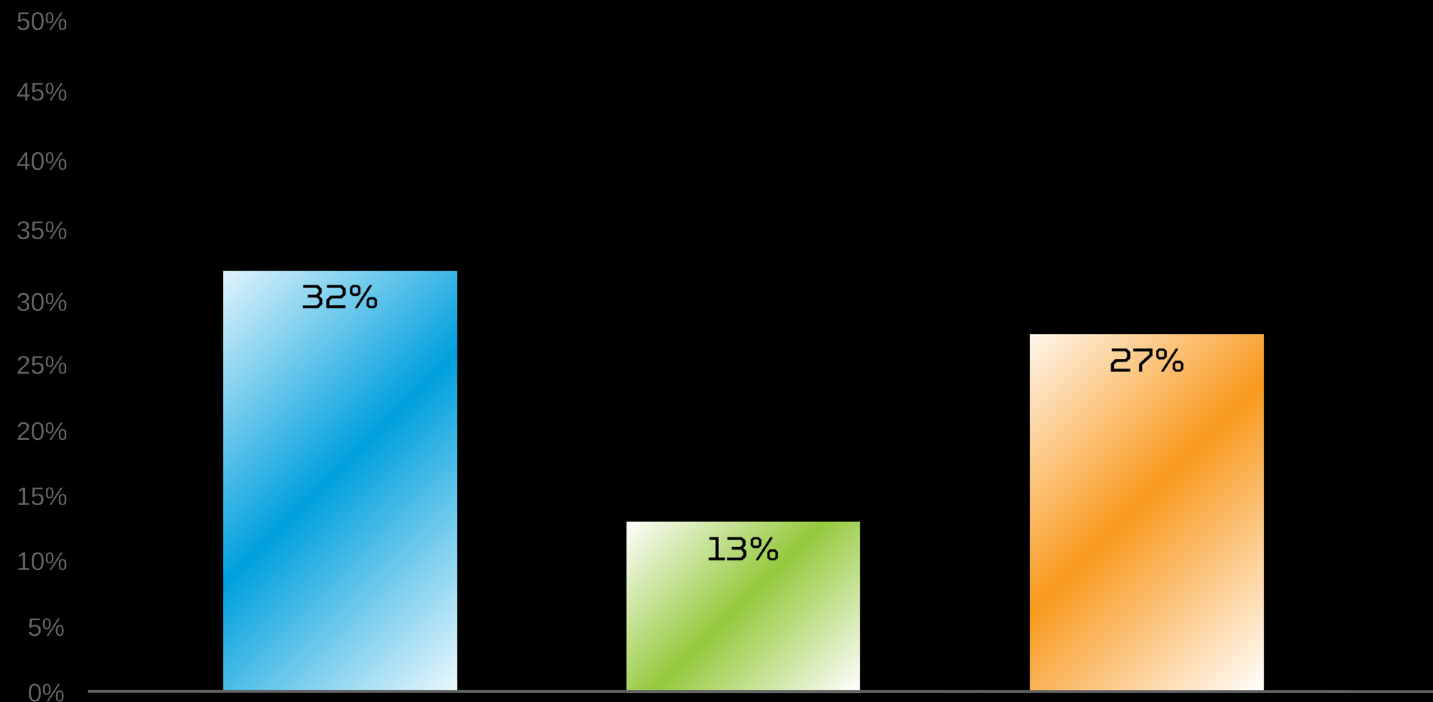


Whether or not the US should get involved was only one angle we explored when trying to gauge public sentiment around the Israel / Hamas conflict. The current polarized climate of today's world makes this conflict a contentious one, with people voicing their support for Israel and Palestine. We delved deeper to understand better people's empathy around the current conflict and who they are empathizing with the most.

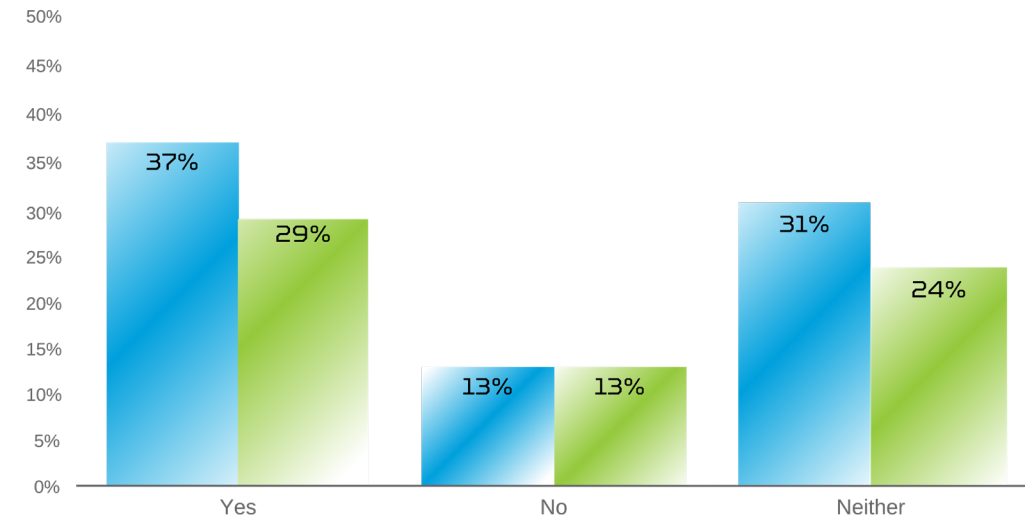
Overall, there is greater empathy towards Israel over Palestine, with one-third of respondents showing this preference. Interestingly, there's a 14% higher likelihood of people empathizing with neither side compared to those empathizing with Palestine, and 28% are unsure of who to empathize with.



Who do you tend to most empathize with in the Israel/Palestinian conflict?

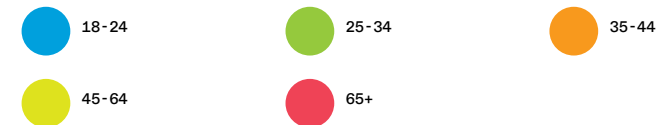
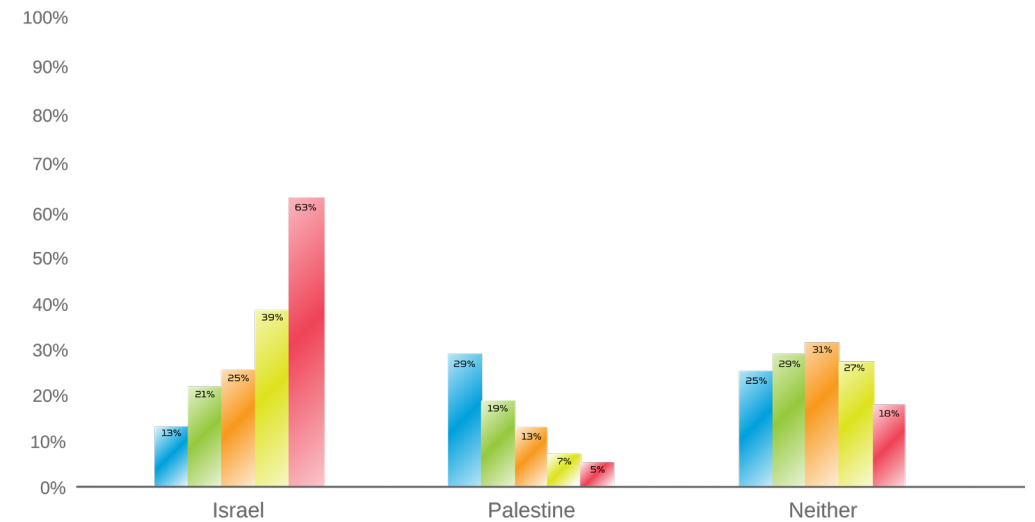


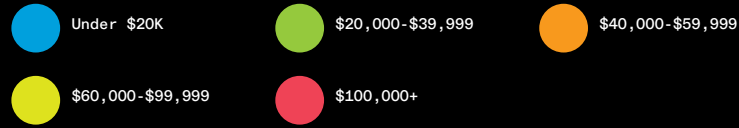
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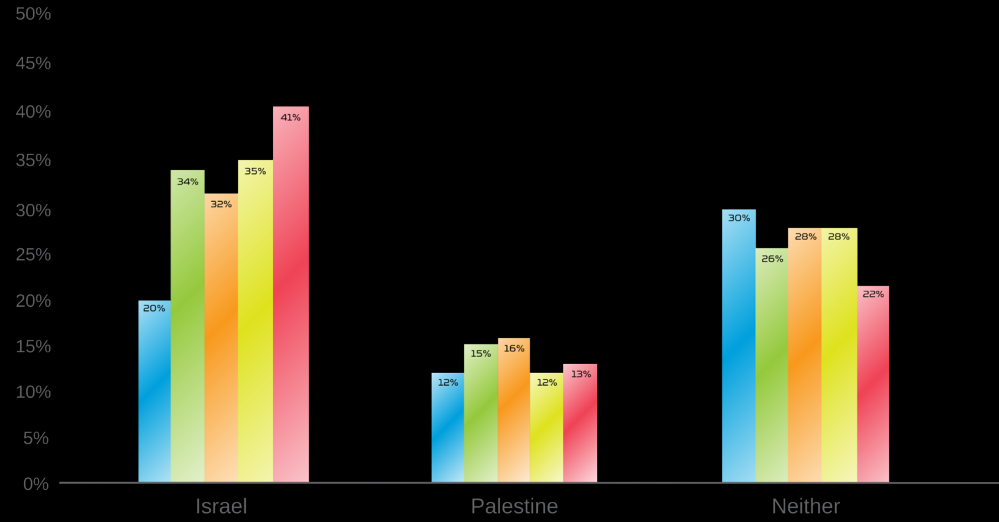
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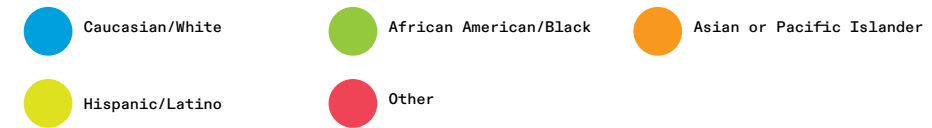
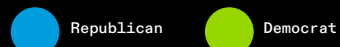
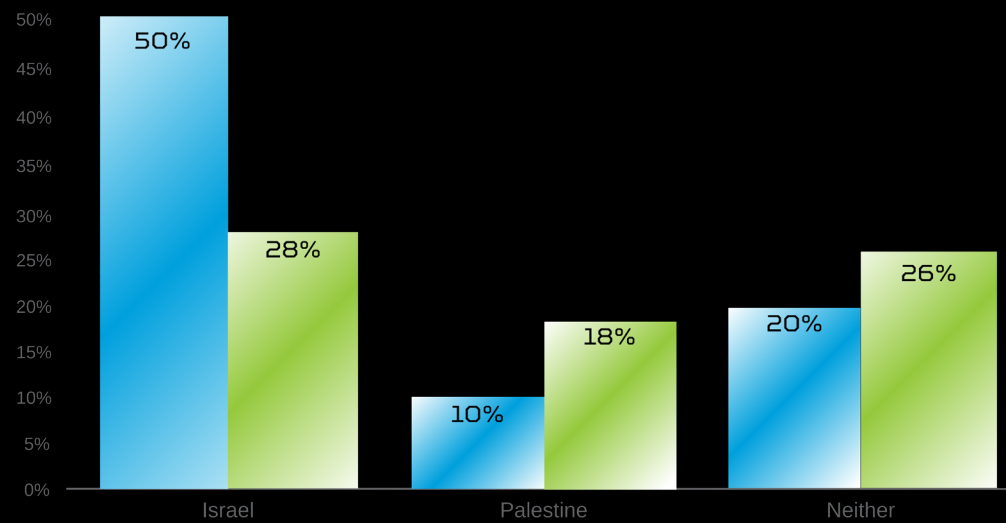


Those with incomes above \$100,000 empathize with Israel 21% more than individuals earning below \$20,000.

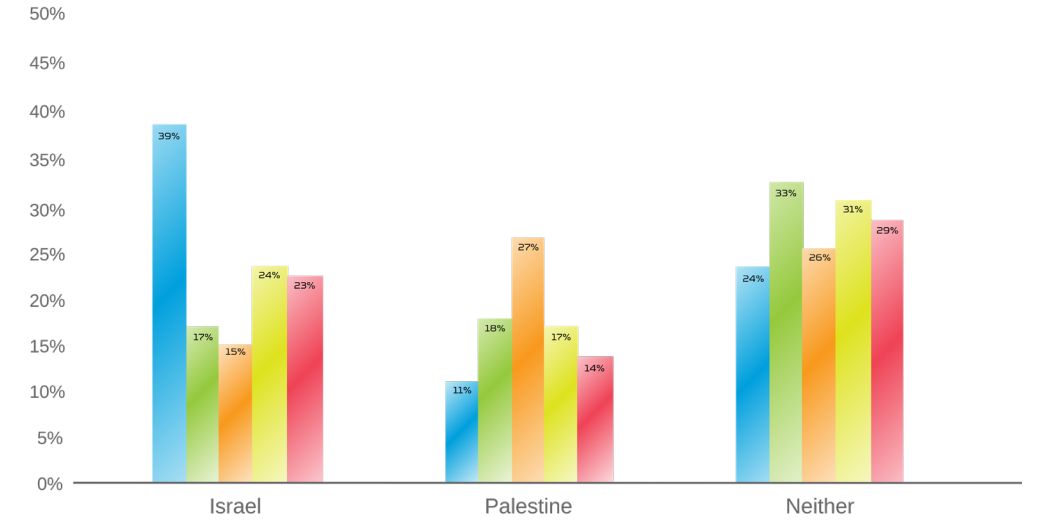


Who do you tend to most empathize with in the Israel/Palestinian conflict?

Political affiliation significantly influences empathy. Half of Republicans empathize with Israel, which is 22% more than Democrats. Meanwhile, Democrats are 5% more likely to empathize with Palestine.

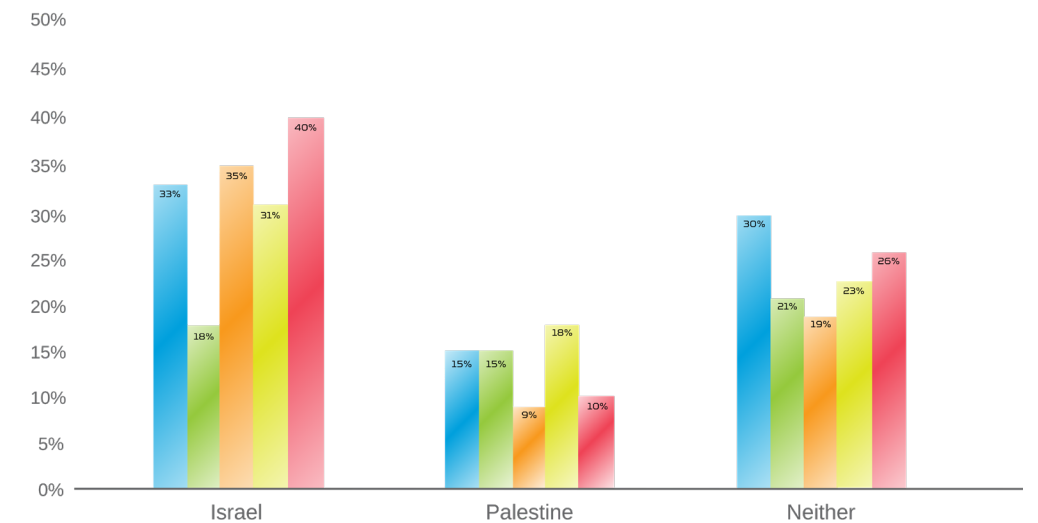


Caucasians are the most likely to empathize with Israel at 39%, 15% more than any other ethnicity. Conversely, Asians or South Asians demonstrate the strongest empathy towards Palestine, at 27%.



Who do you tend to most empathize with in the Israel/Palestinian conflict?

Analyzing results by panels found Panel B stands out with the lowest empathy towards Israel, at just 18%, compared to the 30%+ across the other four panels. Meanwhile, Panels A, C, and E display a stronger inclination towards empathizing with Israel, while Panel D has the highest empathy rate for Palestine.



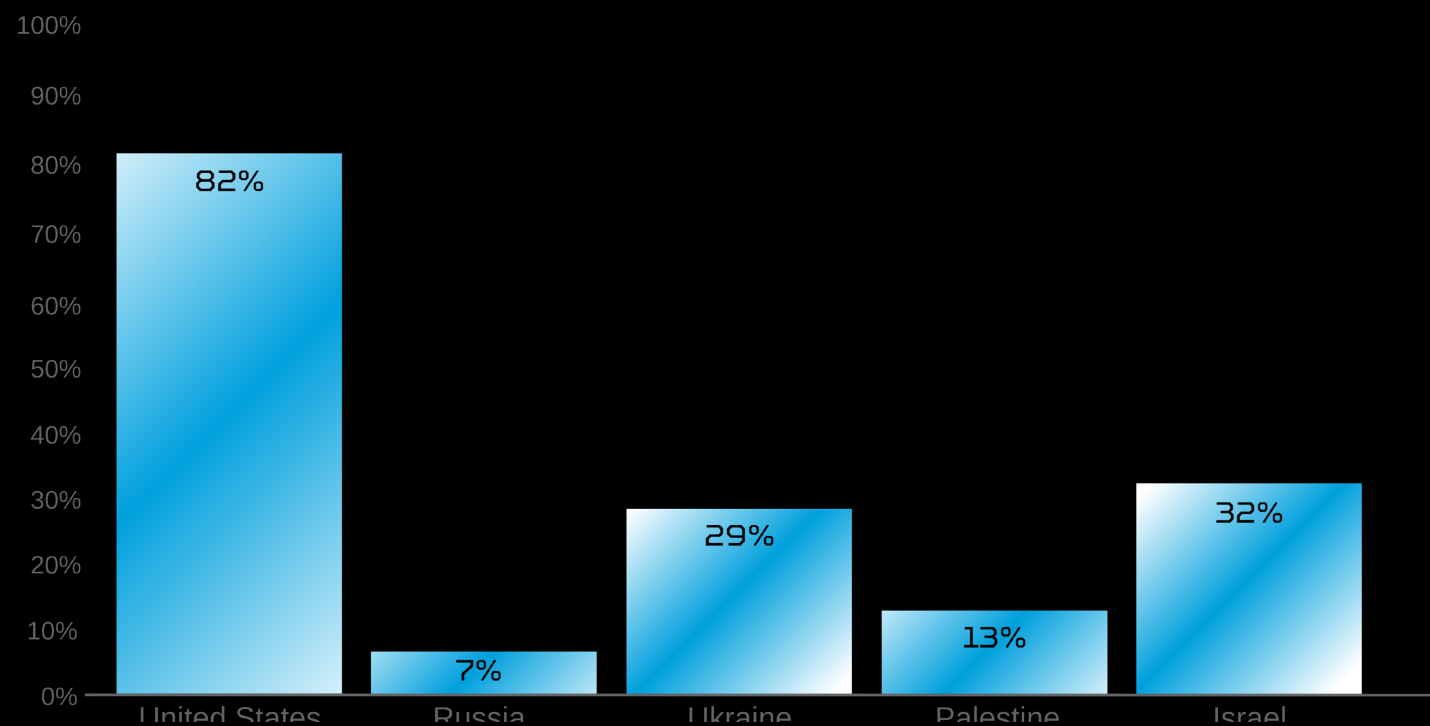
### Perceptions of Countries Currently Involved in a Conflict: Good Vs. Bad

2023 saw one conflict enter its second year and another one start. As both conflicts look to remain in the public eye for the foreseeable future, we wanted to understand the public perception around how the various countries involved in these conflicts are viewed, whether they are considered “Good” or “Bad.”

#### The Good

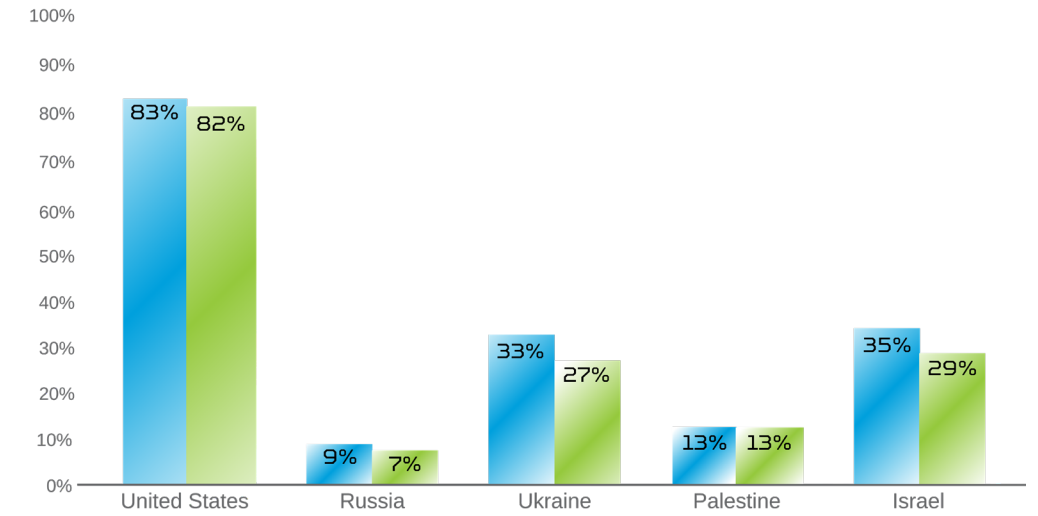
Overall, the United States stands out at the top with an 82% positive rating, significantly higher than any other country we asked about. Russia and Palestine were on the other end of the spectrum, with a positive perception of only 7% and 13%, respectively.

Which of the following countries are good?



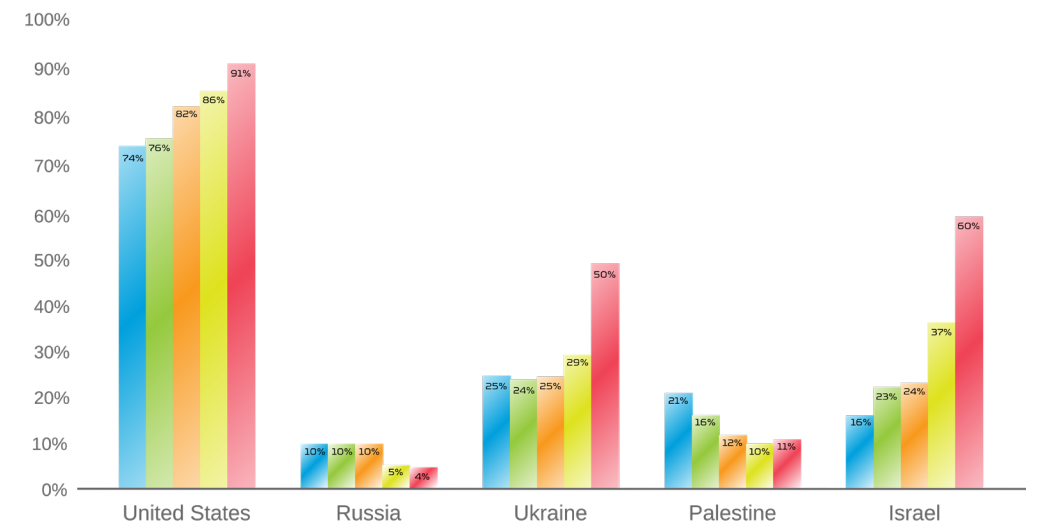
● Male ● Female

The positive perception of the United States is nearly identical when the results are broken down by gender. Differences come into play when looking at Russia, Ukraine, and Israel. For Russia, males show a slightly higher positive perception (9%) than females (7%). In Ukraine's case, males have a noticeably higher positive view at 33%, while females are at 27%. Similarly, Israel is viewed more positively by males (35%) than females (29%).



Which of the following countries are good?

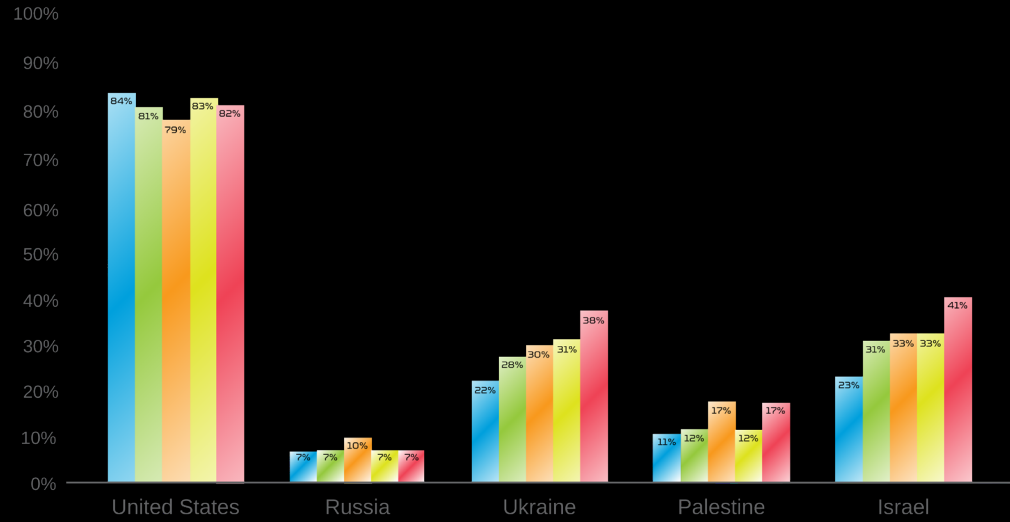
The breakdown by age reveals a notable trend where positive views of the countries generally increase with age. The United States is viewed more favorably by older age groups, starting from 74% in the 18-24 category and climbing to 91% in the 65+ group. Ukraine and Israel both exhibit a significant rise in positive perception among older respondents. For Ukraine, the positivity rate increases from 25% among younger groups to 50% in those 65 and older.



● 18-24 ● 25-34 ● 35-44  
● 45-64 ● 65+

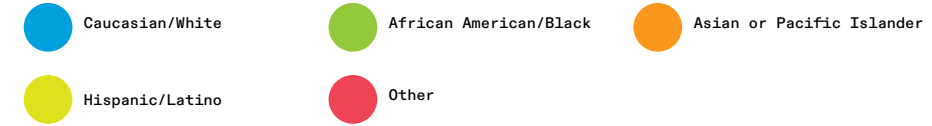
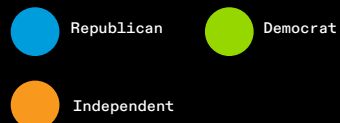
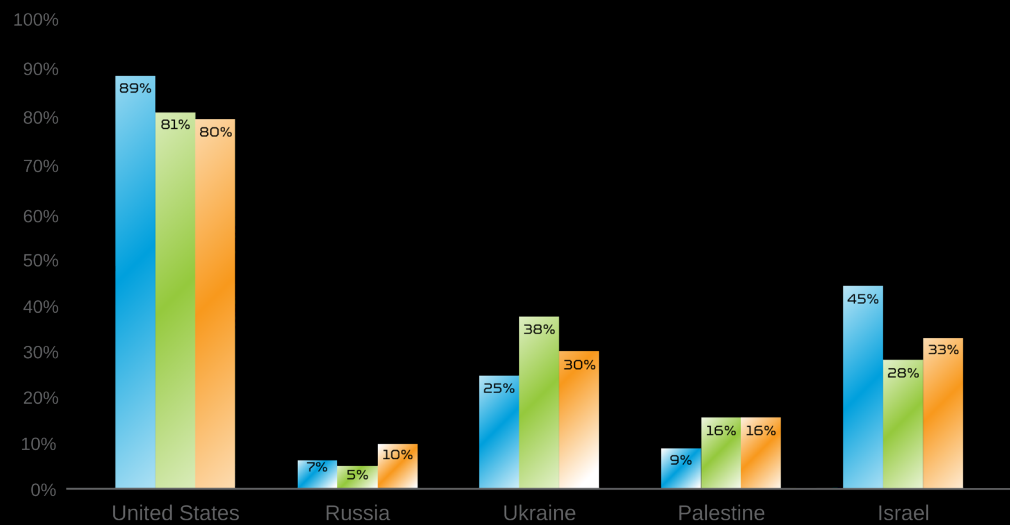


There's a generally high positive perceptions of the United States across all income brackets. Ukraine and Israel both show an upward trend in positive perception as income increases. Ukraine starts at 22% in the under \$20,000 category and rises to 38% in the \$100,000+ bracket. Similarly, Israel's positive perception increases from 23% in the lowest income group to 41% in the highest income category.



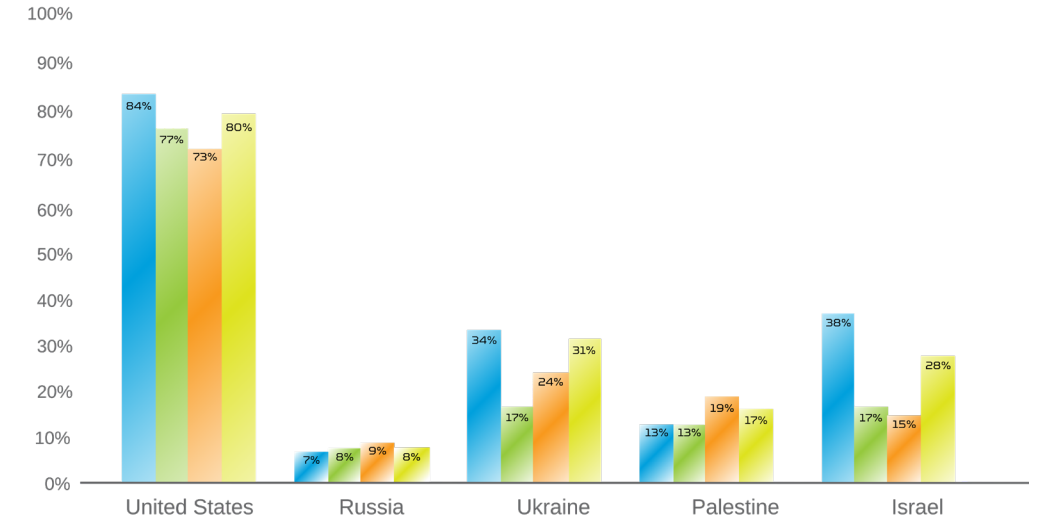
Which of the following countries are good?

While the United States and Russia see similar results to what we have seen in other demographic breakdowns, notable differences emerge with Ukraine and Israel. Ukraine is viewed more positively by Democrats (38%) than by Republicans (25%) and Independents (30%). Israel, on the other hand, shows a stark contrast: Republicans exhibit the highest positive perception (45%), significantly more than Democrats (28%) and Independents (33%).



When looking at the results by ethnicity, the United States has a high positive perception across all, with the most favorable view by Caucasians. Russia has a uniformly low positive perception across all ethnicities.

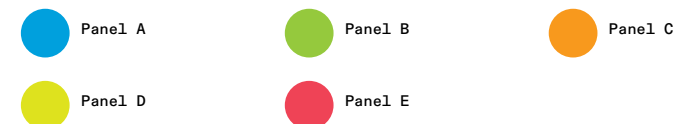
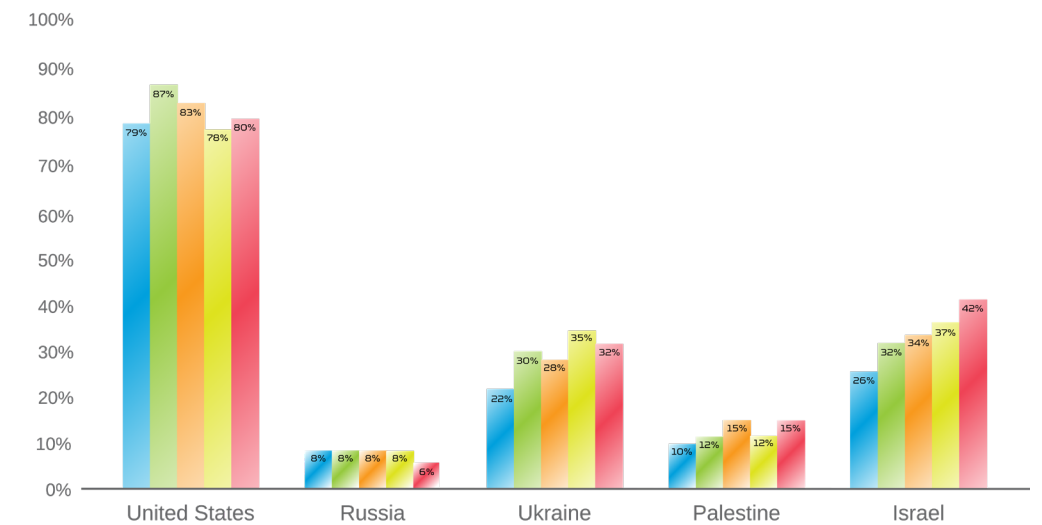
For Ukraine and Israel, the highest positive perception is observed among Caucasian individuals, while African-Americans and Asians or South Asians have a significantly lower positive view of both countries.



Which of the following countries are good?

Examining the results by Panel shows some differences in perceptions, specifically of Ukraine and Israel. Ukraine shows a notable 13% difference between Panel A and Panel D.

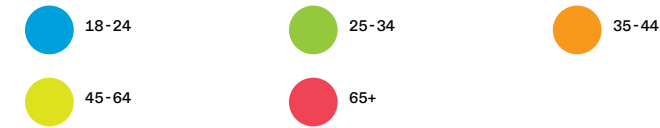
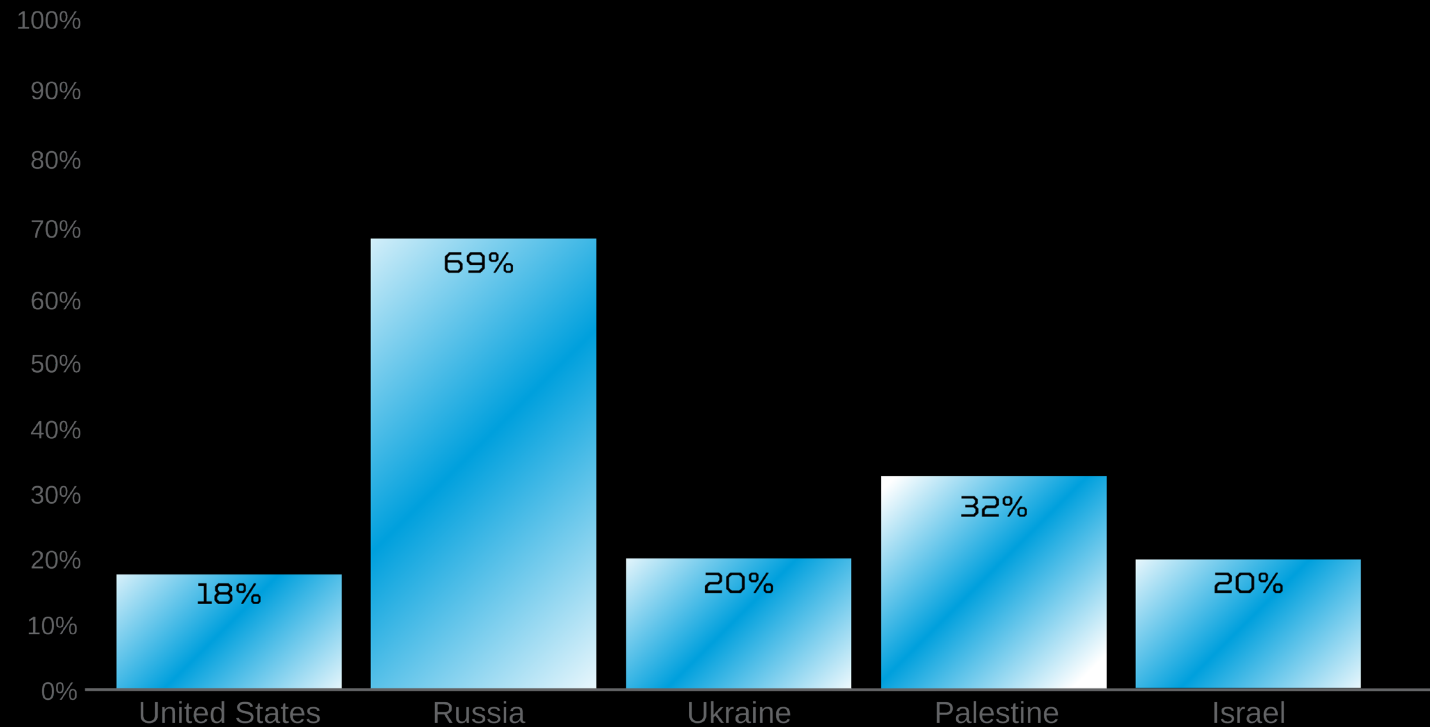
Israel's perception also varies considerably, with a 16% difference between Panel A and E.



### The Bad

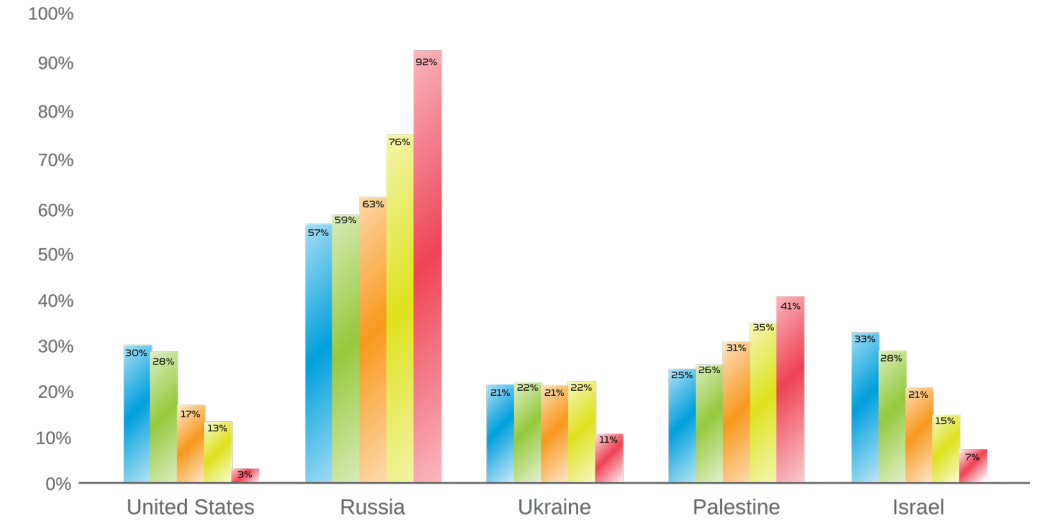
As a counterbalance, we also wanted to understand people's perception of which country is considered bad. Overall, Russia has the highest perception of being bad at 69%, while the results are the opposite of what we saw when asked about which countries were good.

Which of the following countries are bad?



The age breakdown reveals several distinct trends in which countries are viewed as bad. There's a clear decrease in negative perceptions as age increases. We see the opposite for Russia as the negative perception increases with age.

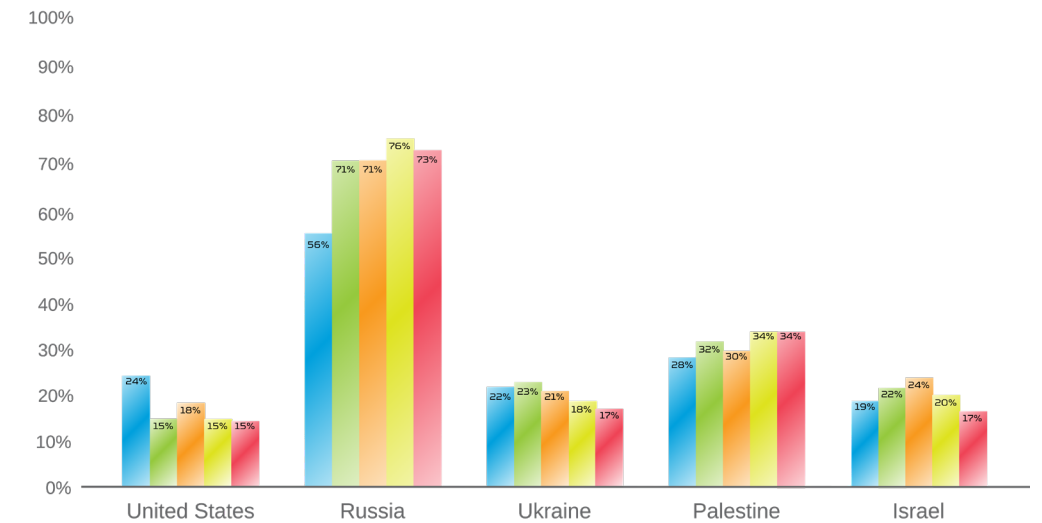
For Palestine and Israel, we see a similar trend to the United States and Russia. Israel's negative perception decreases with age while Palestine's goes up.

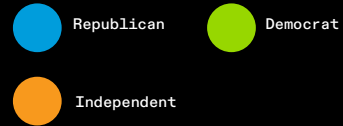


Which of the following countries are bad?

When looking at the results by income, we found that those in the lowest income bracket have the highest negative perception of the United States and the lowest for Russia.

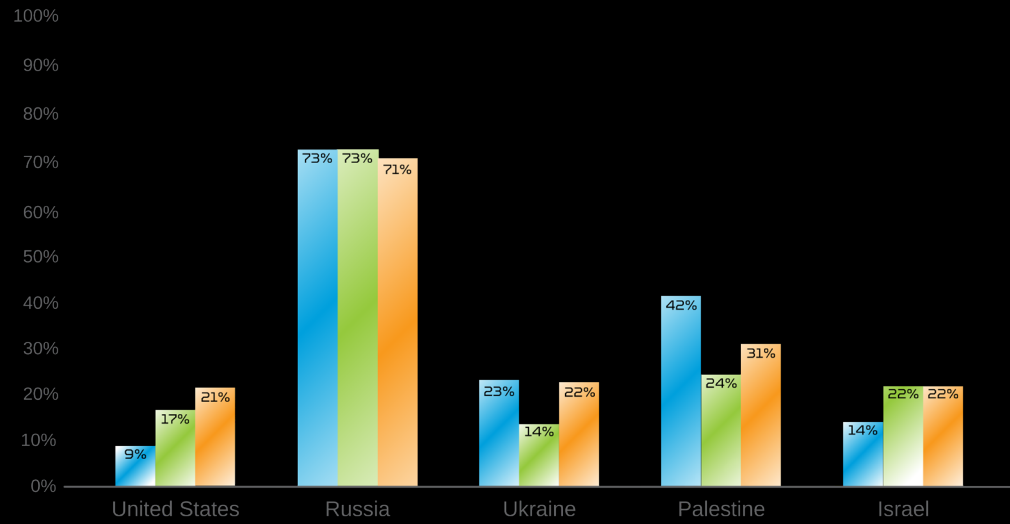
We also uncovered that the negative perception of Palestine increases as income increases. Unlike other demographic breakdowns, we do not see the reverse with Israel—instead, their negative perception peaks in the middle-income bracket.





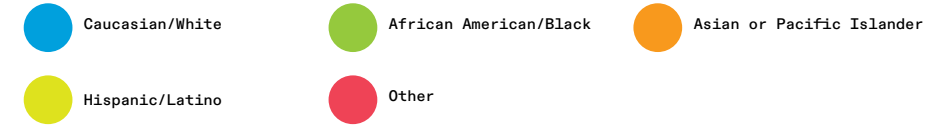
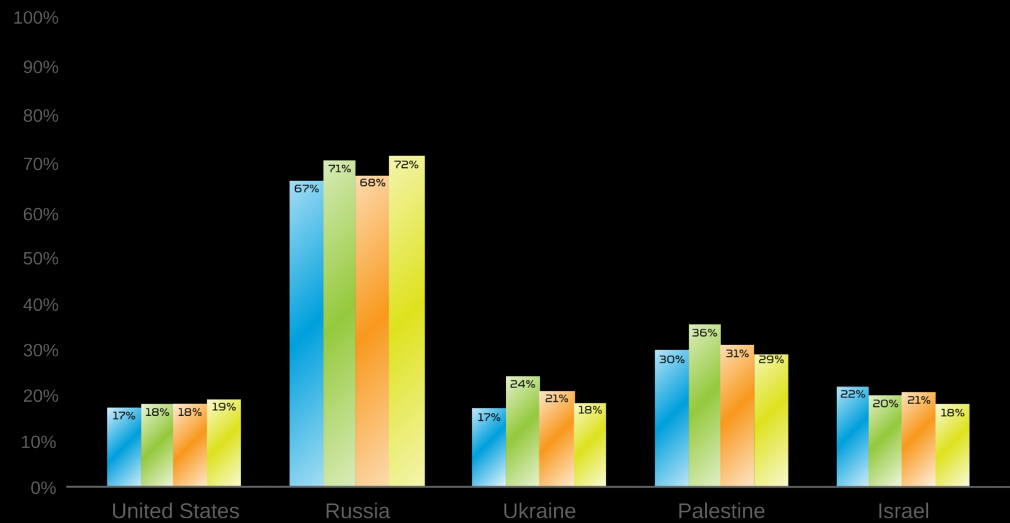
The perception that the United States is bad has a 12-point difference depending on a respondent's political affiliation. Russia is perceived negatively across the board, with little variation between Republicans, Democrats, and Independents.

In the case of Ukraine, there's a higher negative perception among Republicans (23%) compared to Democrats (14%). For Palestine, the negative perception peaks among Republicans at 42%, which is 18 points higher than among Democrats. Israel's negative perception is 8 points higher among Democrats and Independents compared to Republicans.

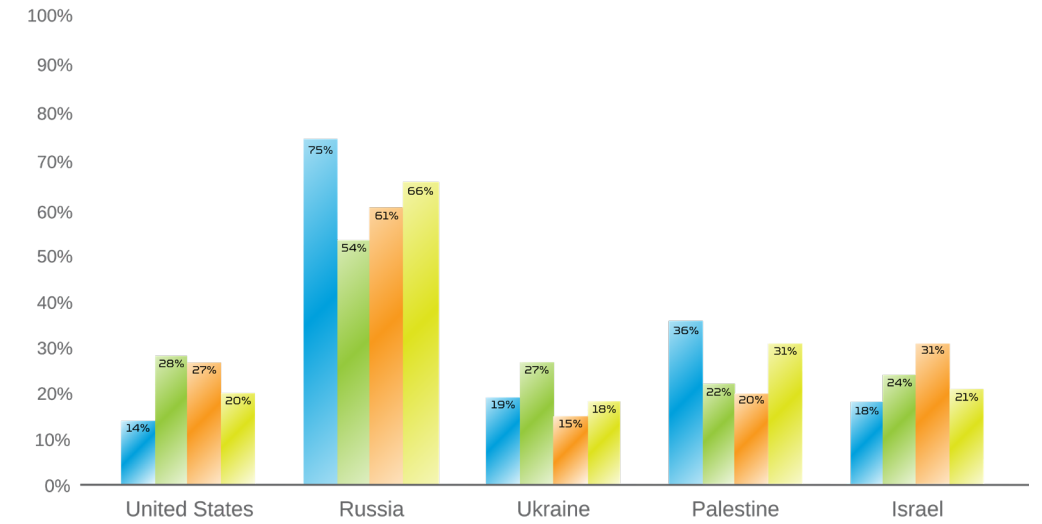


Which of the following countries are bad?

When looking at the results by region, we see that while the negative perceptions of the United States and Russia are relatively consistent, we see some variances in the perceptions of Palestine and Ukraine. The Midwest has the highest perception that Palestine and Ukraine are bad, 7 points higher than the Northeast and West.

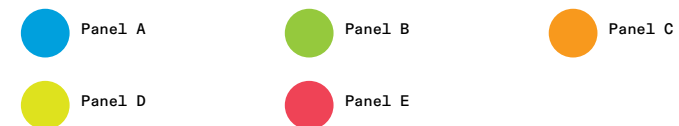
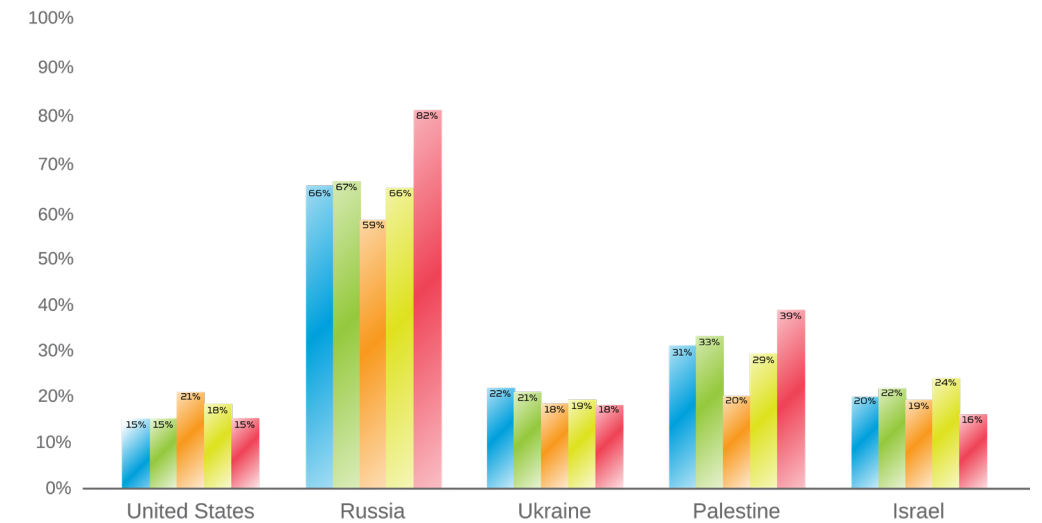


In the breakdown of results by ethnicity, we see that Caucasians have the lowest negative perceptions of the United States and Israel and the highest for Russia and Palestine. African Americans have the highest negative perceptions of the United States and the lowest of Palestine.



Which of the following countries are bad?

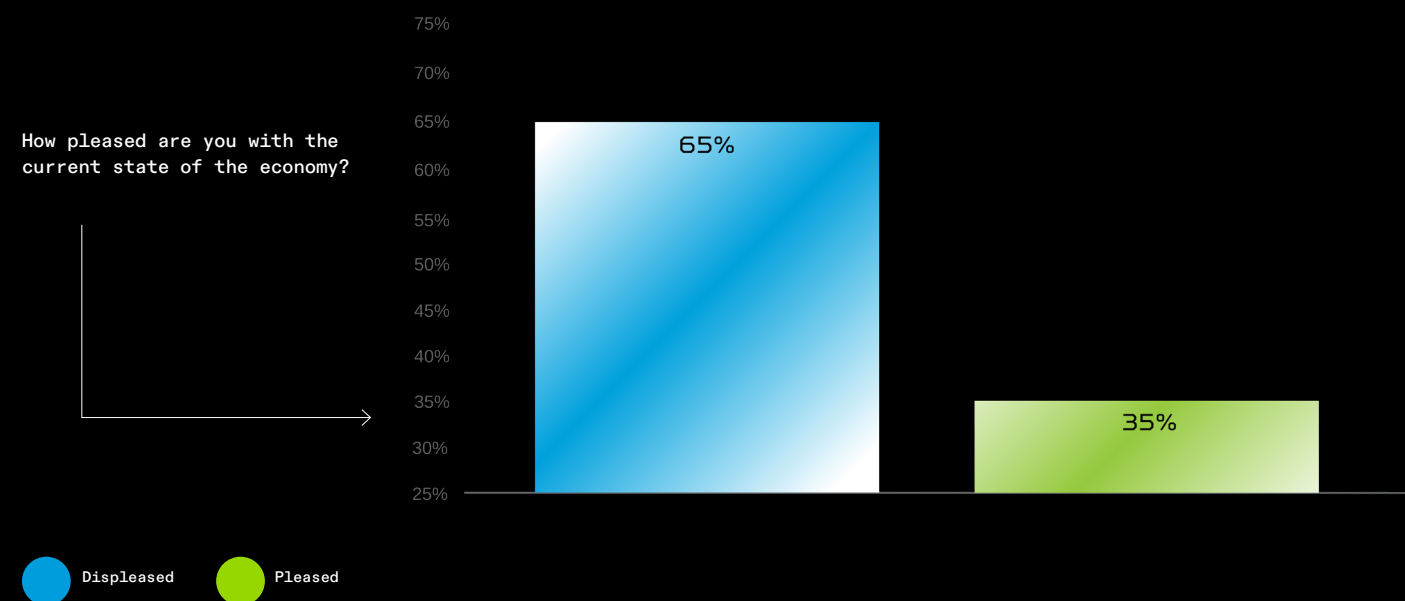
The perceptions of which country is bad vary greatly by Panel. There is a 23-point difference in the negative perception of Russia between Panel E and C. There was also a 19-point difference in negative perceptions of Palestine between these same panels.



# In This Economy!?! A Closer Look at Perceptions of the US Economy from 2021 to Now

We're quick to say the US economy in 2023 was the worst we've seen in a while. However, looking back just a few years, we'll see that this sentiment is not exactly true. In our research-on-research, we asked respondents about their feelings on the current state of the US economy. The good news is that we've asked respondents this question for the past three years of research-on-research to compare attitudes over several years.

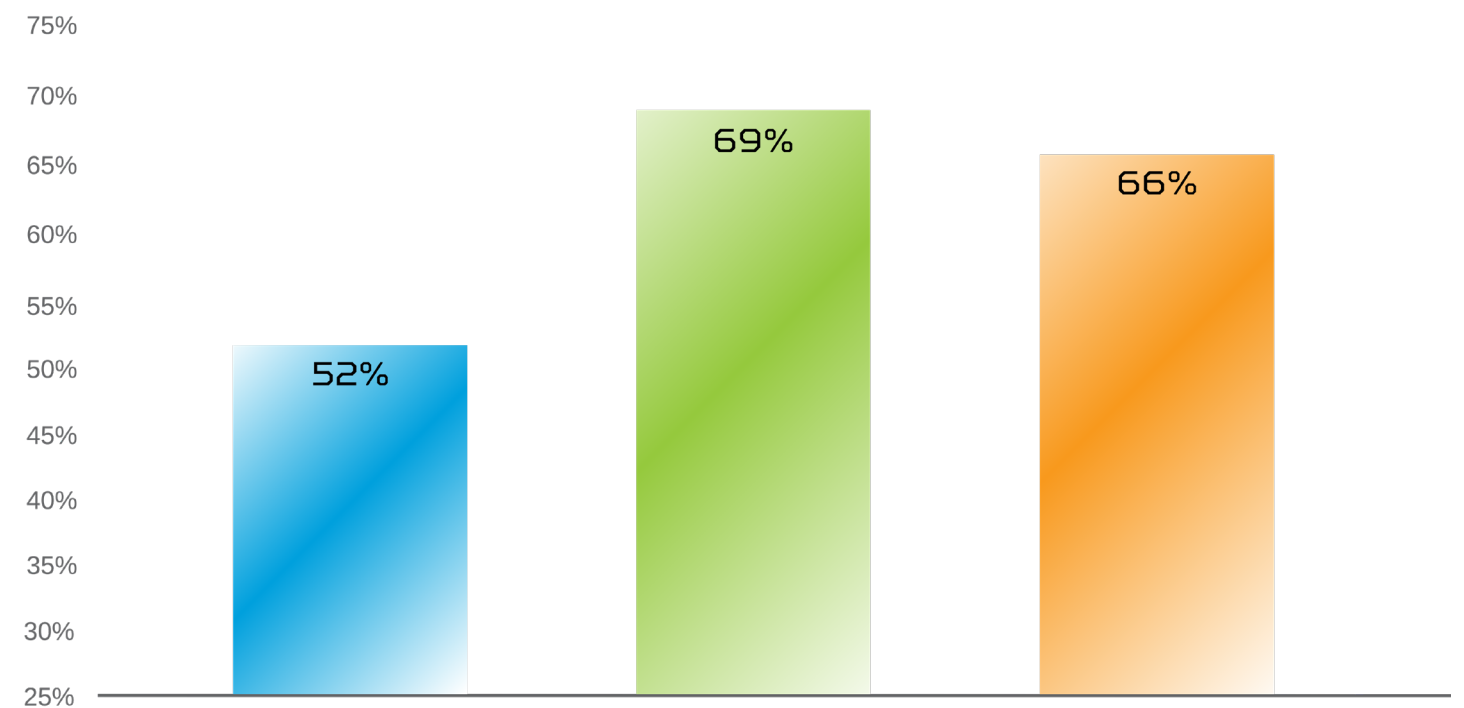
Overall, we found that 65% of respondents are displeased with the current state of the US economy. This is unsurprising as high inflation, layoffs, and other negative things impact the economy.



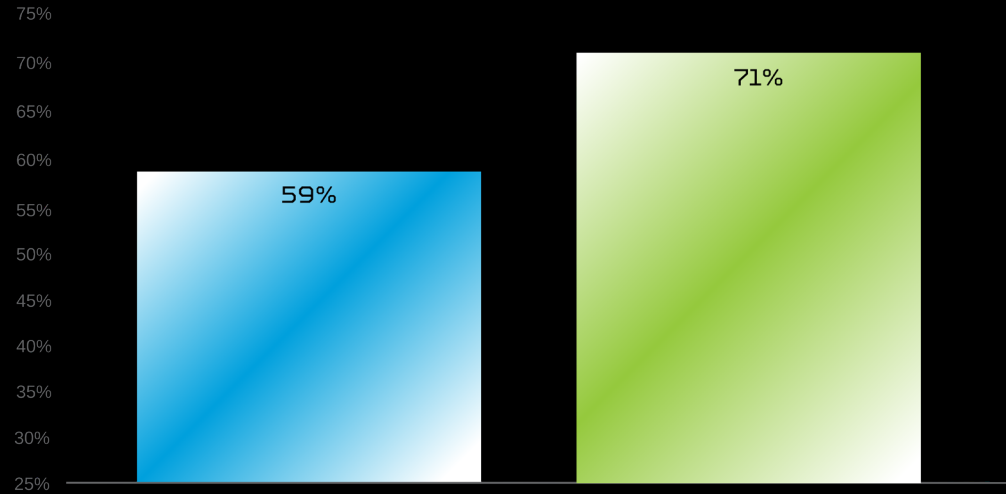
Across panels, opinions varied regarding US involvement in the Israel-Palestine conflict. Panels A and C show the strongest support for US involvement, each with 27% of respondents in favor. In stark contrast, Panel B exhibits the highest opposition, with 54% believing the US should not get involved.



How pleased are you with the current state of the US economy? (Bottom 3 Box)



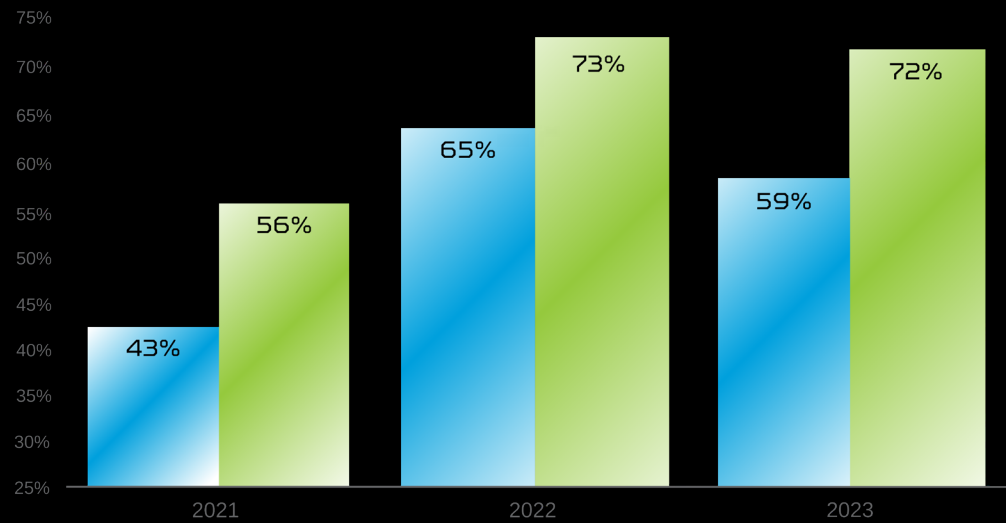
When looking at perspectives by gender, we see that females are 12% more likely than males to feel displeased with the current state of the US economy.



● Male ● Female

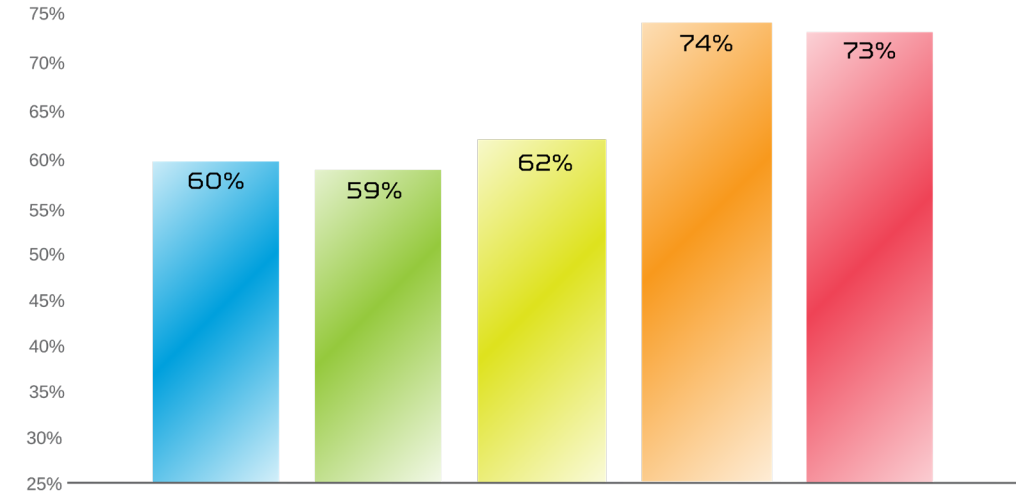
How pleased are you with the current state of the US economy? (Bottom 3 Box)

Looking at perspectives by gender year-over-year, we see that males were 20% more likely to be displeased with the state of the US economy in 2022 than in 2021. Females are the most likely to be displeased with the state of the US economy in 2023. Both men and women hit peaks of displeasure with the state of the economy in 2022.



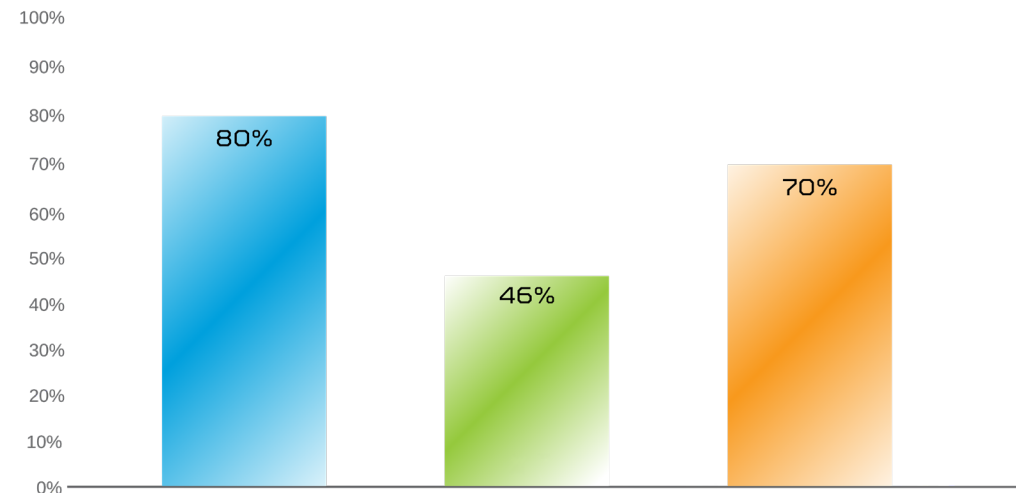
● 18-24 ● 30-39 ● 40-49  
● 50-62 ● 63+

When it comes to age, we see a slight trend where the older a person is, the more likely they are to be displeased with the current state of the US economy. 30-39-year-olds are the least likely to be displeased with the current state of the US economy (15% less likely than 50-62-year-olds who are the most likely to be displeased.)



How pleased are you with the current state of the US economy? (Bottom 3 Box)

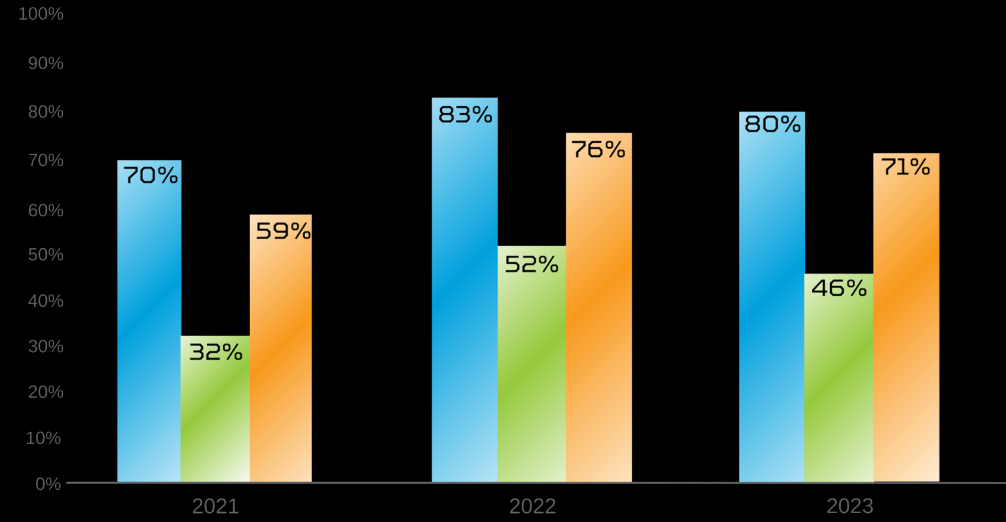
Let's look at perspectives by political affiliation. We see that the results are split among party lines, with Republicans being the most likely to be displeased with the current state of the US economy, 34% more likely than Democrats.



● Republican ● Democrat ● Independent

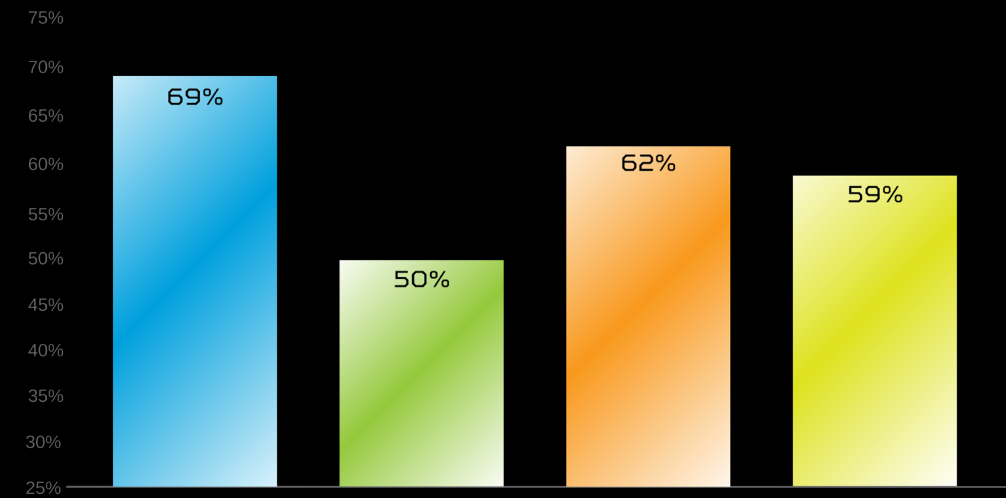
● Republican   
 ● Democrat   
 ● Independent

Looking at perspectives by political affiliation year-over-year, we see that Republicans are most likely to be displeased with the state of the US economy each year, with significant differences from Democrats. Republicans were 38%, 31%, and 34% more likely to be displeased with the state of the US economy than Democrats in 2021, 2022, and 2023, respectively.



How pleased are you with the current state of the US economy? (Bottom 3 Box)

Regarding ethnicity, we see that Caucasians are the most likely to be displeased with the US economy. African Americans are the least likely to be displeased with the current state of the US economy (19% less likely than Caucasians).

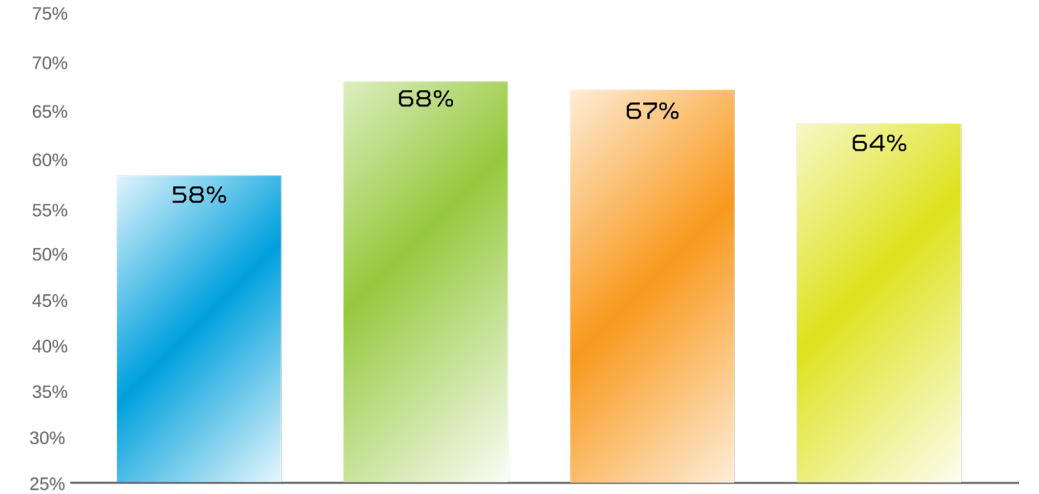


● Caucasian/White   
 ● African American/Black  
● Asian or Pacific Islander   
 ● Hispanic/Latino

By region, we see that people in the Northeast are the least likely to be displeased with the current state of the US economy - 10% less likely than those in the Midwest.

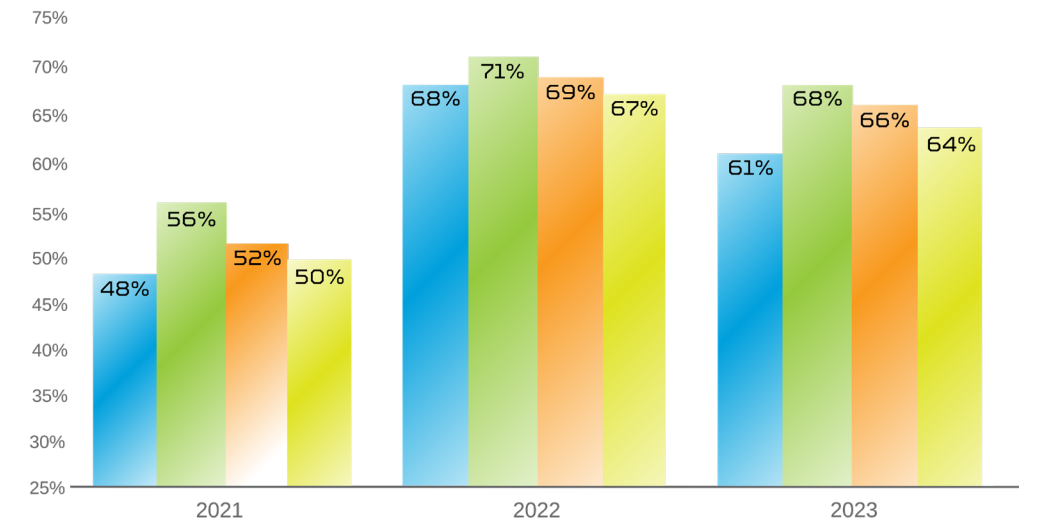


● Northeast   
 ● Midwest  
● South   
 ● West



How pleased are you with the current state of the US economy? (Bottom 3 Box)

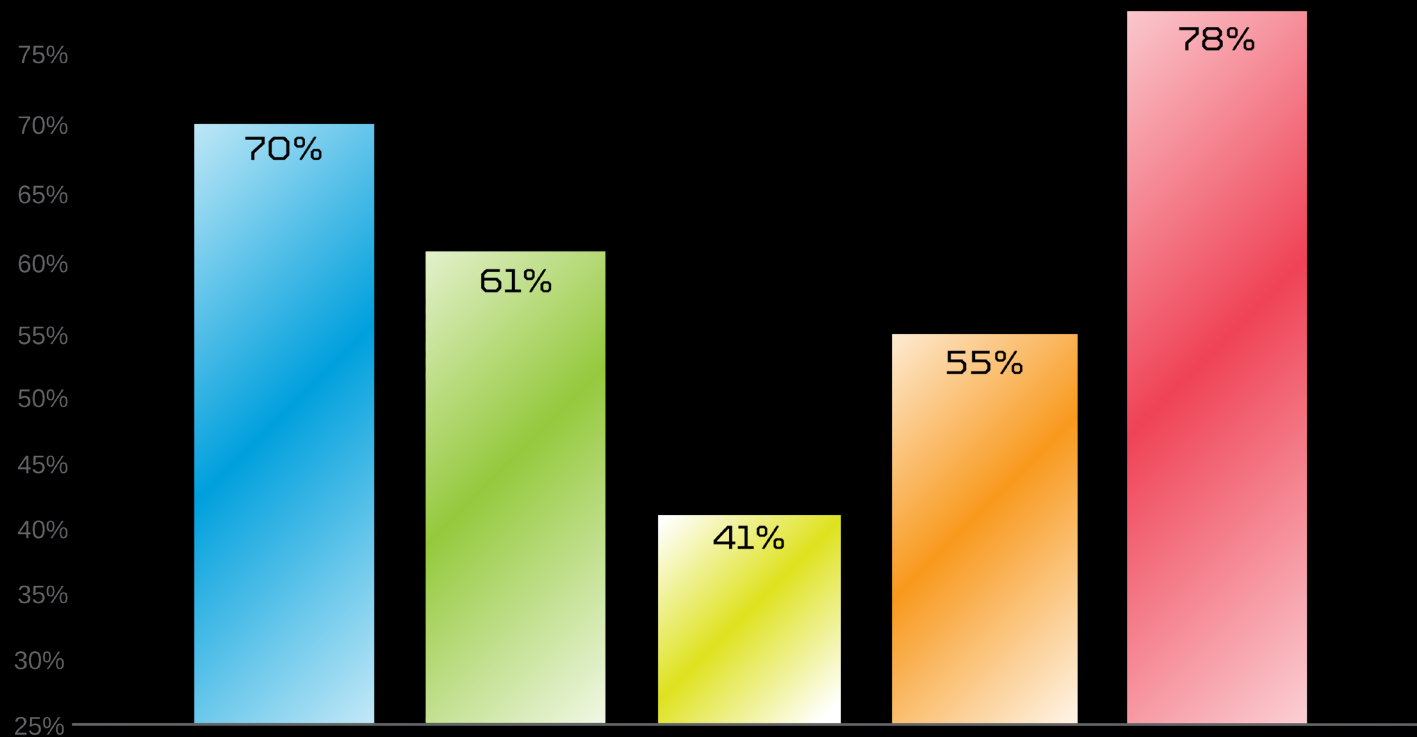
Looking at perspectives by region from 2021 to 2023, we see that 2022 continued to be the year where people were most likely to feel displeased about the state of the US economy. In fact, every region saw a 15%+ increase in people feeling displeased from 2021 to 2022.



Finally, we look at responses by Panel. Here, we see differences in perspectives of the US economy up to 37%, as seen between Panels C and E.



How pleased are you with the current state of the US economy?  
(Bottom 3 Box)



# An Examination of Mental Health

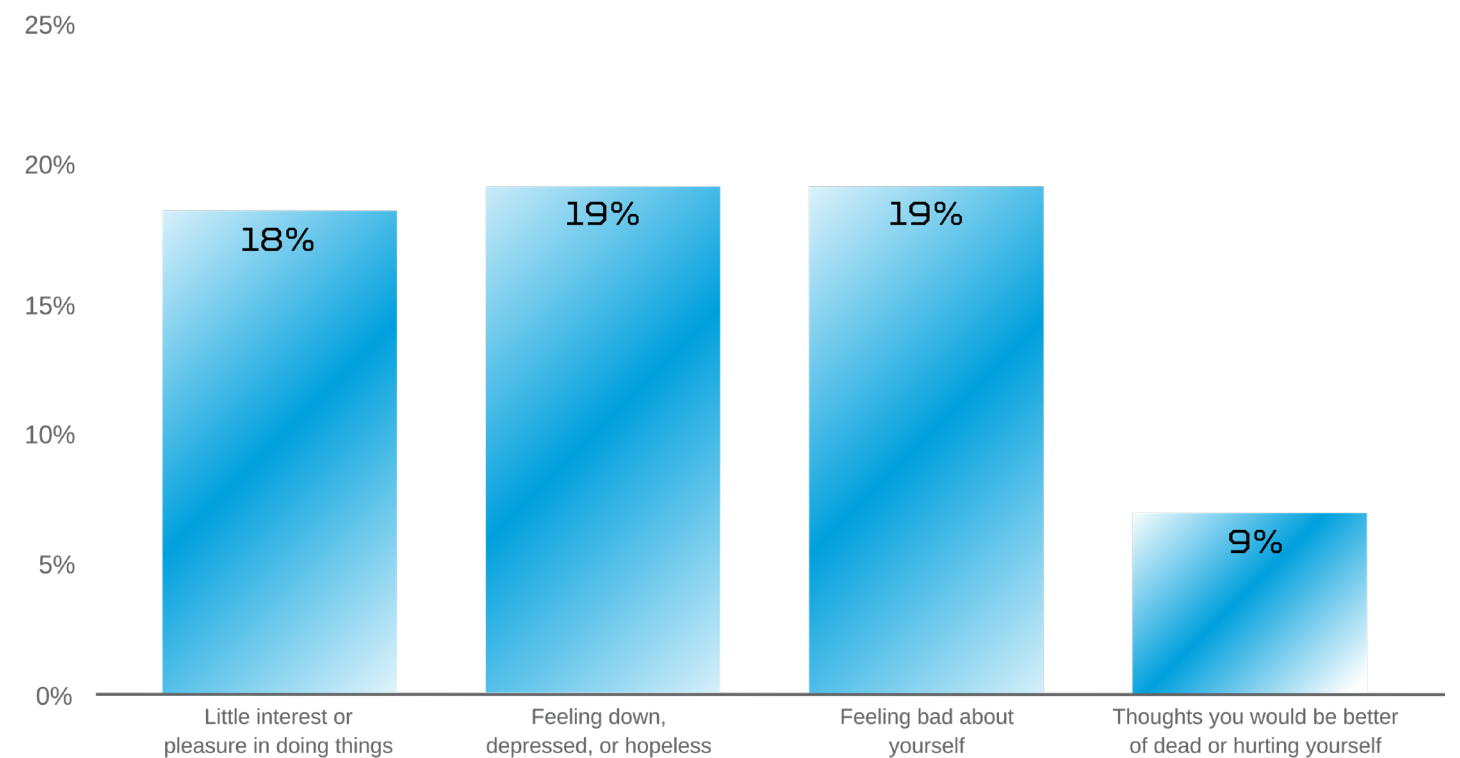
## Current Mental Health

May was Mental Health Awareness Month! During this month, many people and brands recognize efforts being made to stop the stigma regarding mental health. In our research-on-research, we asked respondents about their current mental health and experience of several mental health issues.

Each graph in this section represents the percentage of respondents bothered by these problems, saying they experienced these problems “more than half the days” or “nearly every day” in the last two weeks.

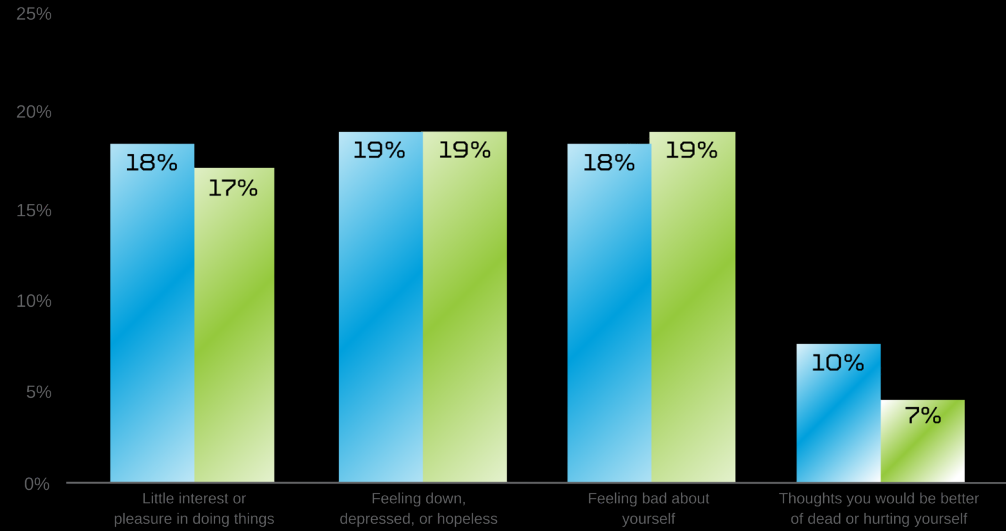
Overall, just under 20% of respondents have experienced mild to moderate symptoms of depression, and just under 10% struggled with severe symptoms of depression. According to the World Health Organization, an estimated 3.8% of the population experience depression, including 5% of adults and 5.7% of adults over the age of 60.

Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)



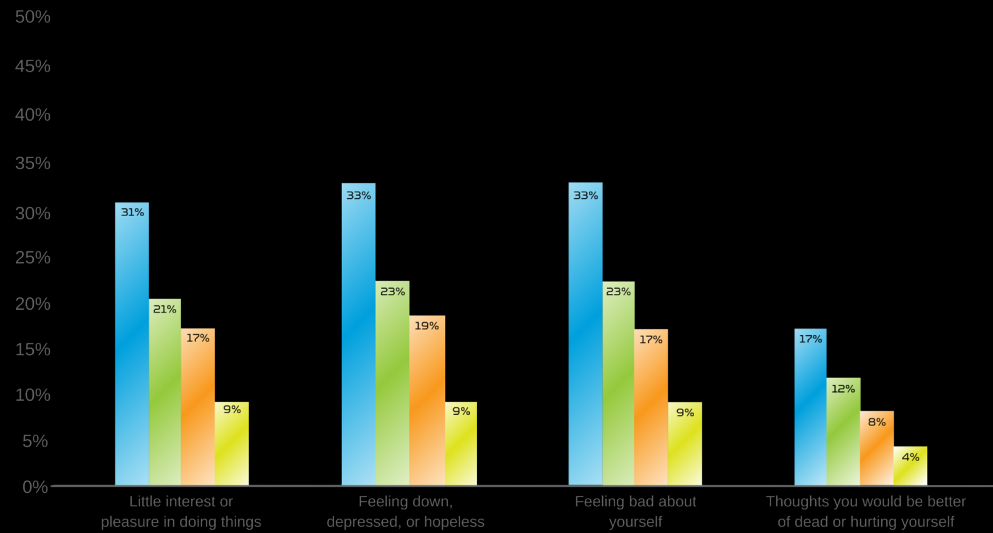
Male Female

When looking at responses by gender, we found that the results for both males and females were almost equal in terms of experiencing the mental health issues we asked about. However, males are 3% more likely to say they experience thoughts that they would be better off dead or hurting themselves. This finding seems to dispel the stigma that men do not experience mental health issues as often as women.



We also looked at experience of mental health issues by age. Here, we found a correlation between age and mental health. The older a person is, the less likely they are to say they have been bothered by these problems. Gen Z are the most likely to have been bothered by these problems (13%, 14%, 14%, and 8% higher than the overall average, respectively.) Some of these findings may be due to the recent decline in stigma surrounding conversations about mental health among younger generations. Older respondents could be less likely to discuss issues in their mental health due to the ingrained stigma around it.

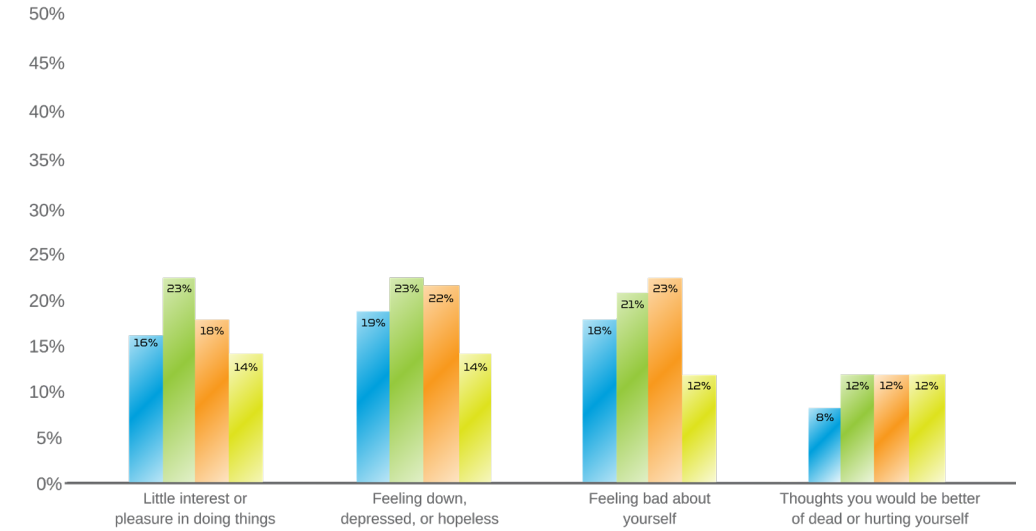
Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)



Gen Z Millennials  
Gen X Boomers

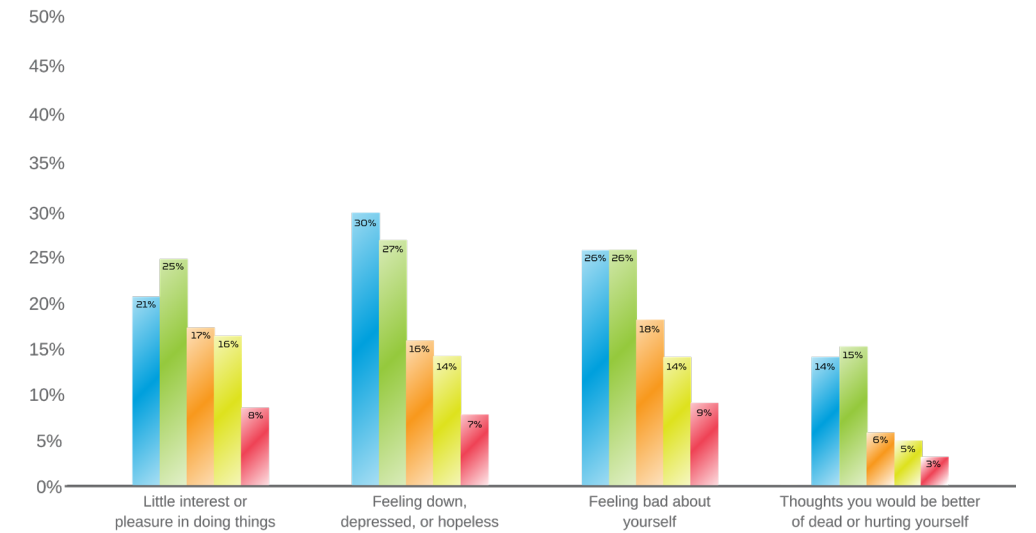
Caucasian African American  
Hispanic Asian

When it comes to ethnicity, African American respondents are the most likely to experience little interest or pleasure in things and most likely to feel down, depressed, or hopeless. Hispanic respondents are the most likely to feel bad about themselves. Here, we see differences up to 5% higher and 7% lower than the overall average by ethnicity.

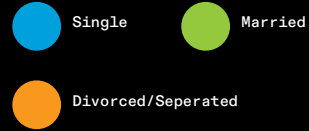


Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)

Our findings based on income are interesting - can money actually buy happiness? We found that the higher a person's income, the less likely they are to have been bothered by the following problems. In fact, less than 10% of people with incomes above \$100,000 have experienced these mental health issues. Those with incomes below \$50,000 are all above the overall average for experiencing these mental health struggles, while all respondents with incomes above \$50,000 are below the overall average.

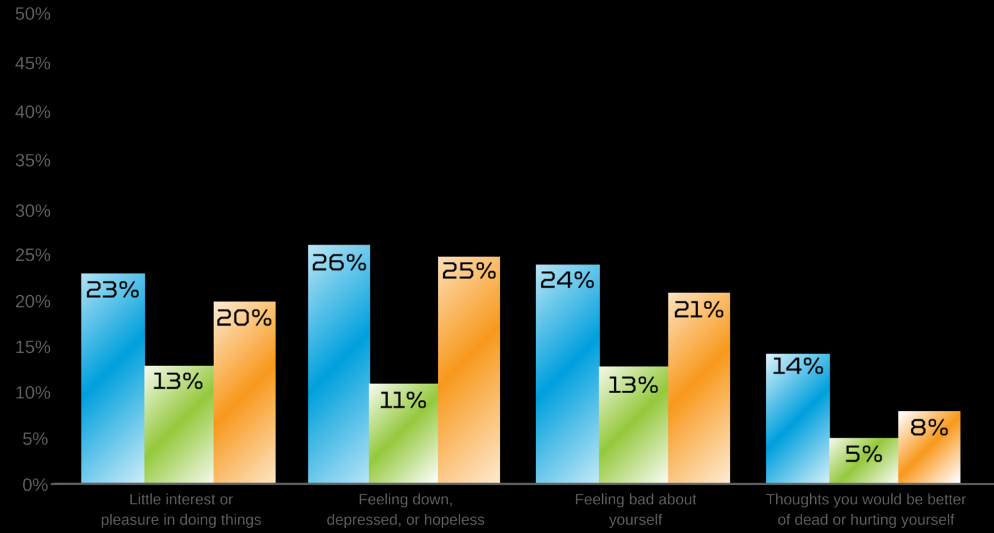


Under \$25K \$25,000-\$49,999 \$50,000-\$74,999  
\$75,000-\$99,999 \$100,000+

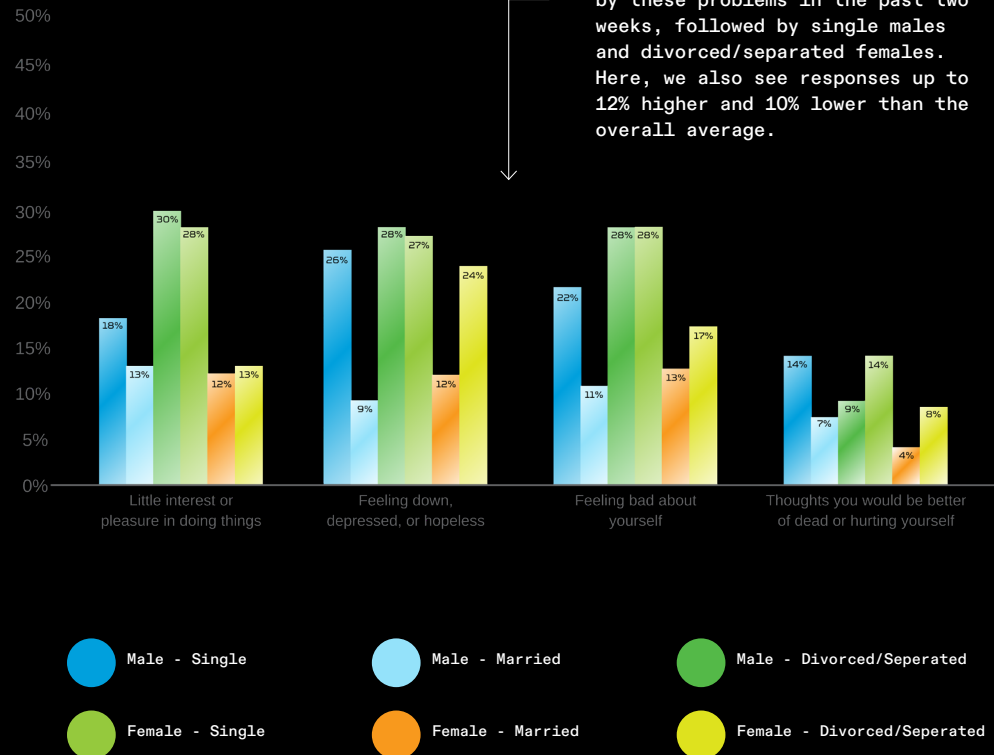


Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)

We also looked at the data by marital status. We found that married people are the least likely to experience these mental health issues. Single people are the most likely to experience these issues, though just slightly higher than those who are divorced or separated. Here, we see differences up to 7% higher and 8% lower than the overall average.



We dove a little deeper and broke down the data by marital status and gender. We first note that we had smaller sample sizes for males and females who are divorced/seperated. Divorced/seperated males and single females are the most likely to have been bothered by these problems in the last two weeks. Single males and single females are the most likely to have had thoughts that they would be better off dead or hurting themselves.

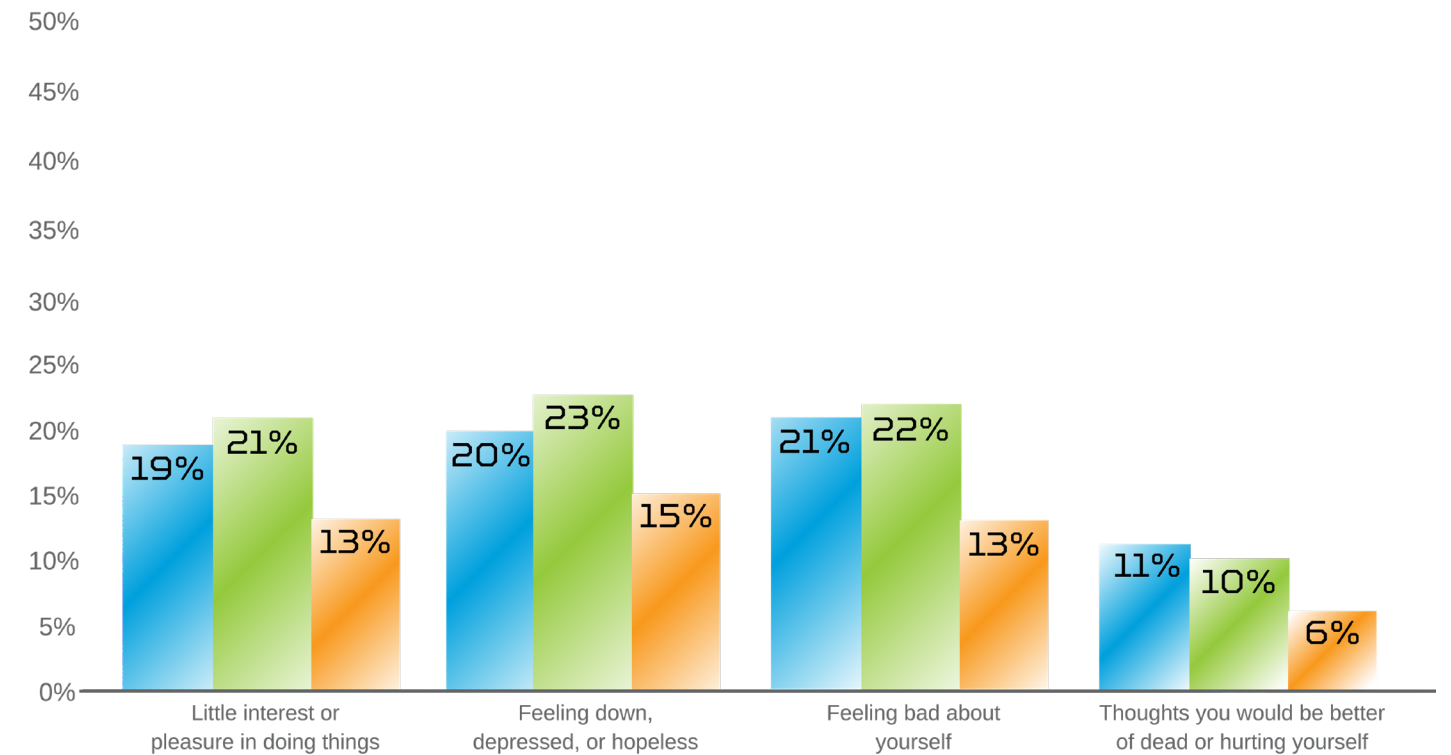


Again, we see that married people, regardless of gender, are the least likely to have been bothered by these problems in the past two weeks, followed by single males and divorced/seperated females. Here, we also see responses up to 12% higher and 10% lower than the overall average.

When looking at responses by Panel, we see that Panel B is the most likely to have been bothered by these mental health problems, with both Panels A and B having responses above the overall average. Panel C has the lowest percentage of respondents who have struggled with these issues in the last two weeks, up to 6% lower than the overall average.



Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)

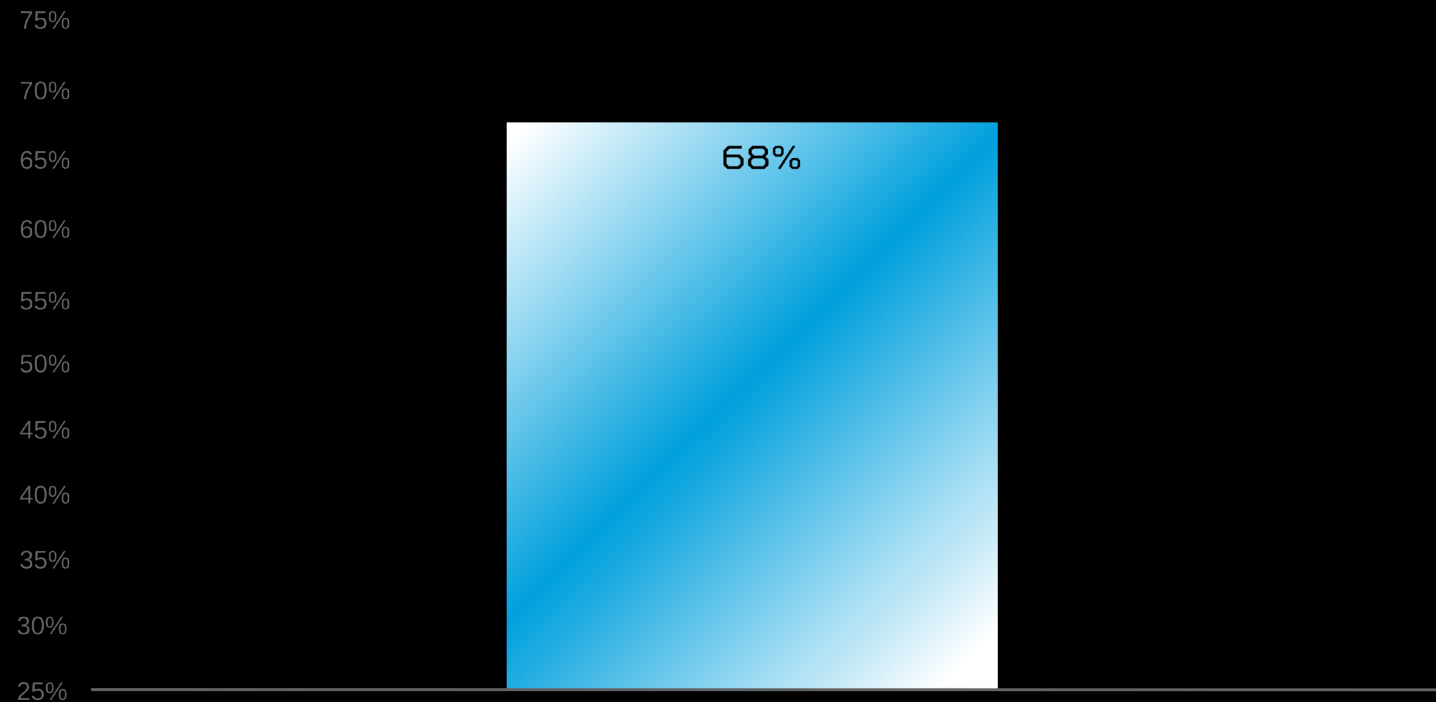


### Stressed and Overwhelmed

We continued our mental health exploration by asking people if they experience stress and feel overwhelmed in their daily lives.

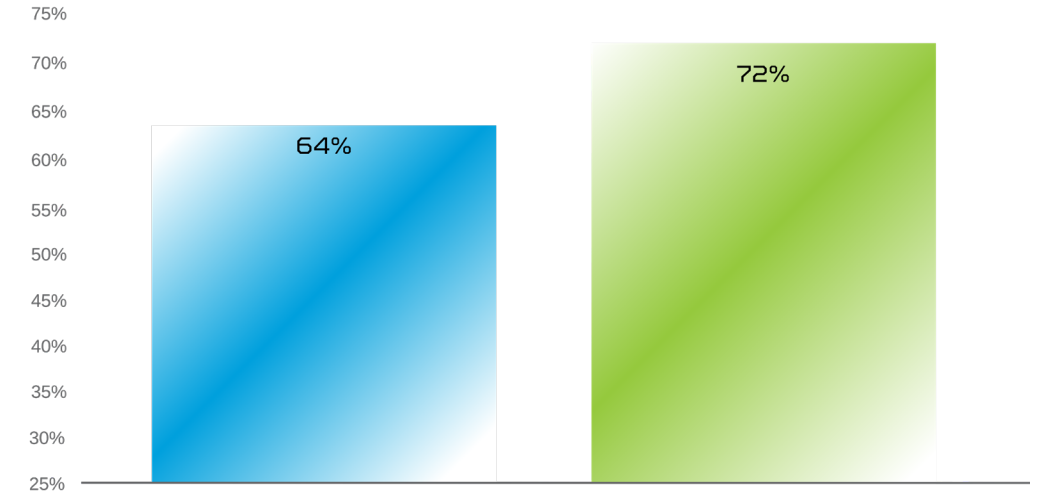
If you're feeling stressed or overwhelmed, you're not alone. Overall, 68% of people occasionally or very often feel stressed or overwhelmed in their daily lives.

How often do you feel stressed or overwhelmed in your daily life? (Top 2 Box)



● Male ● Female

Looking at the data by gender, we see that females are 8% more likely than males to feel stressed or overwhelmed occasionally or very often in their daily lives.

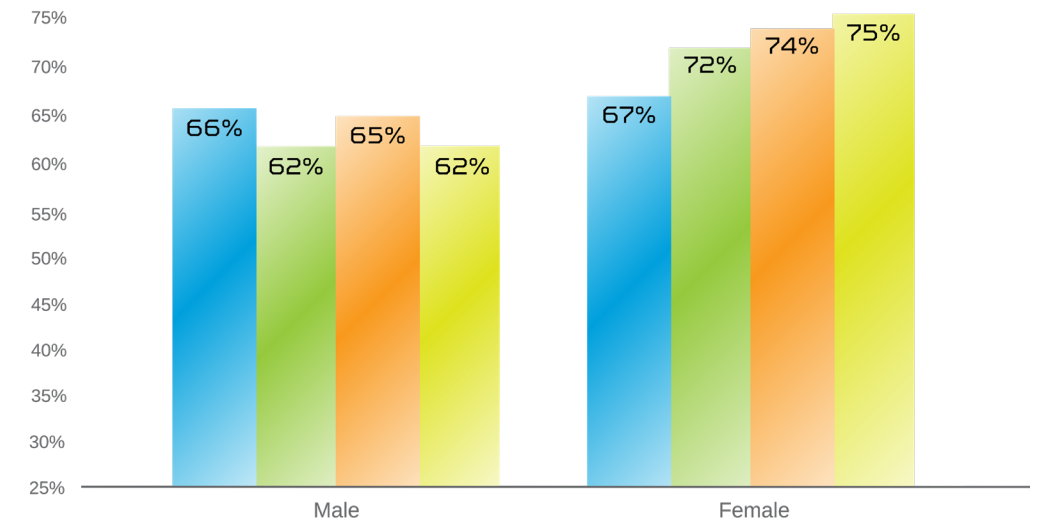


How often do you feel stressed or overwhelmed in your daily life? (Top 2 Box)

When we take a deeper look at the data by gender and region, here we see that females have more significant differences across regions than males. Females in the West are more likely than any other region (and males) to feel stressed or overwhelmed daily, while Males in the West are less likely to feel stressed or overwhelmed than anyone else.

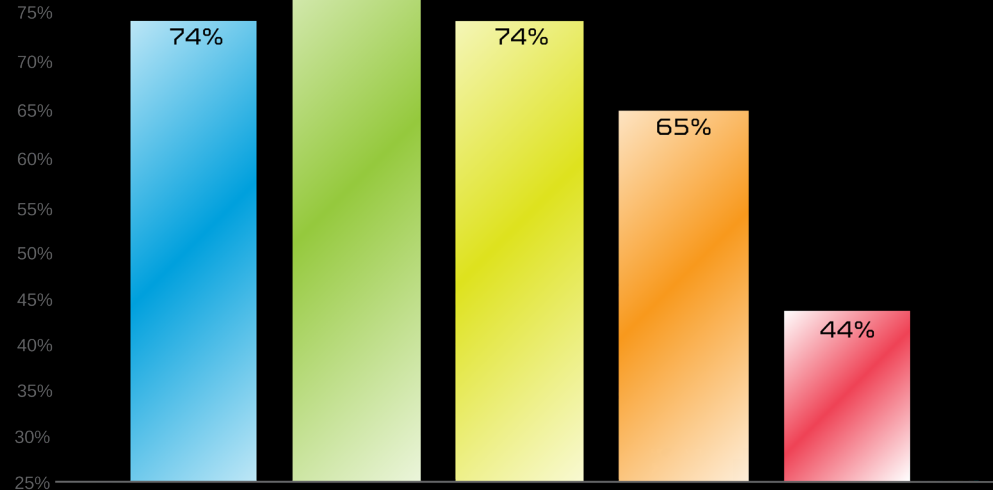


● Northeast ● Midwest  
● South ● West



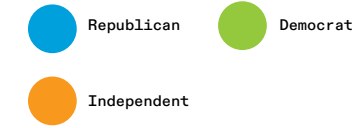
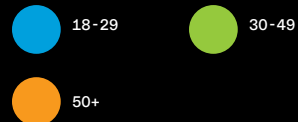
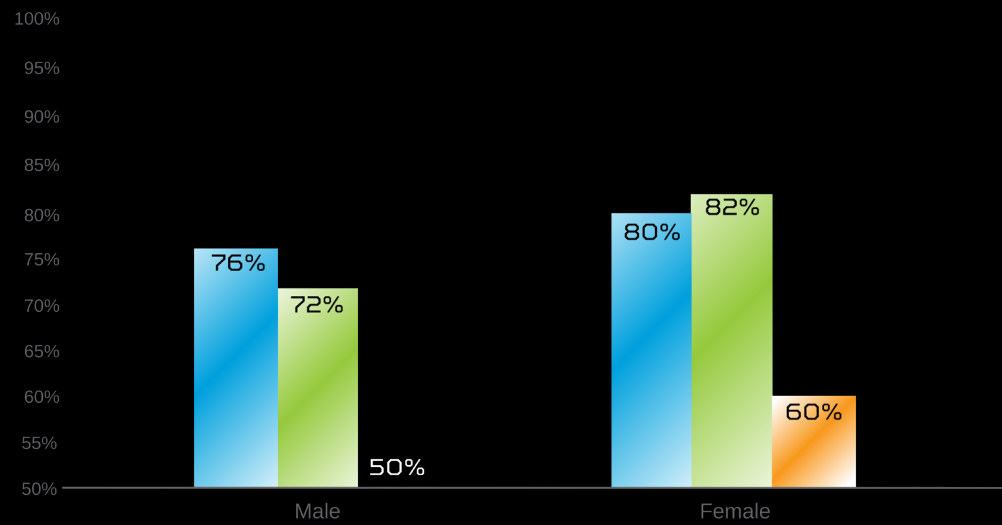


Breaking down the results by age, we see that feelings of stress and being overwhelmed in daily life peak with those aged 30-39 (6% more likely than any other age group) and then gradually decrease as a person gets older. People aged 63+ are less likely than any other age group to feel stressed or overwhelmed daily (36% less likely than those aged 30-39.)

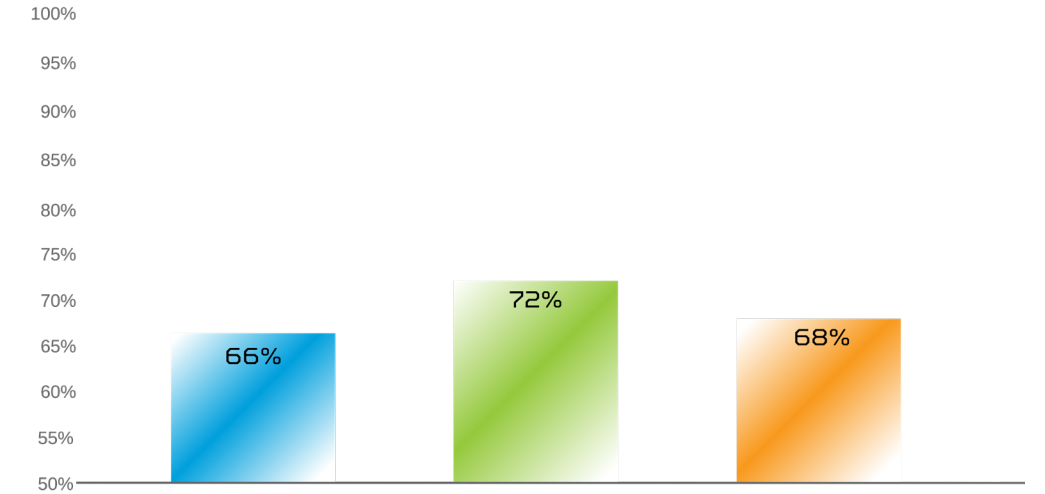


How often do you feel stressed or overwhelmed in your daily life? (Top 2 Box)

If we take a closer look at feelings of stress by age and gender, we see that males experience less stress the older they get, whereas females see an increase in stress from ages 30-49, then decrease. We see up to a 26% difference among age groups for males and up to a 22% difference among age groups for females.

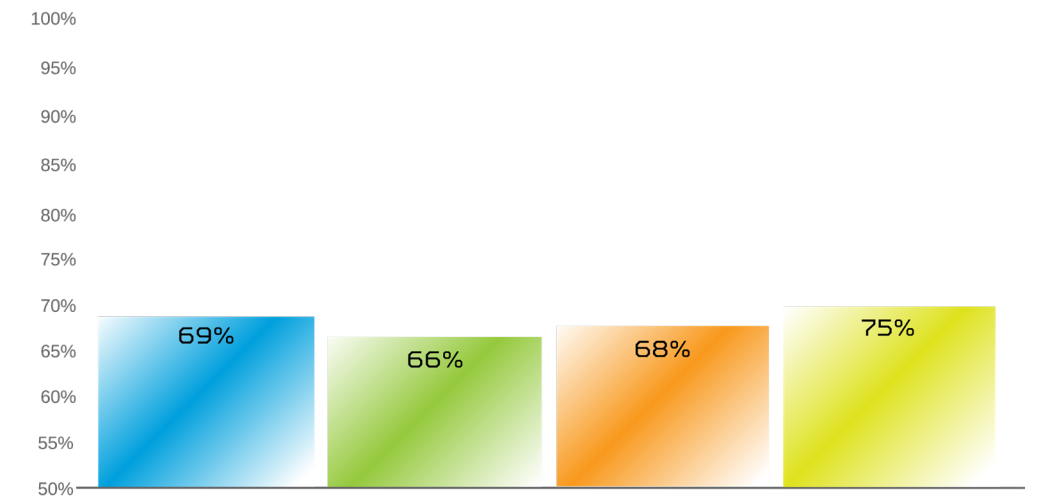


When looking at the data by political affiliation, we see that Democrats are the most likely to feel stressed or overwhelmed daily. Republicans are the least likely to feel stressed or overwhelmed (6% and 11% less than Democrats, respectively.)



How pleased are you with the current state of the US economy? (Bottom 3 Box)

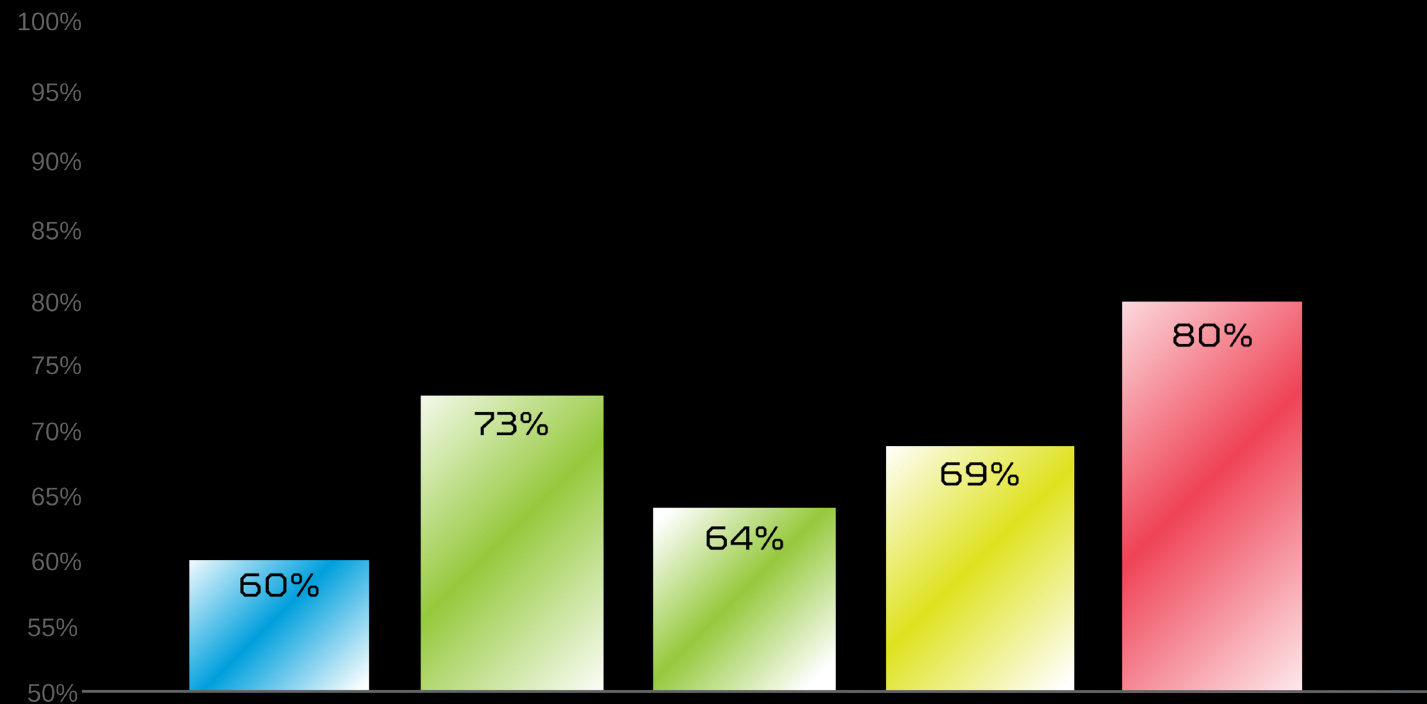
We see that Hispanics are the most likely to feel stressed and overwhelmed occasionally or very often in their daily lives, 4% more likely than any other group. African Americans are the least likely to feel stressed and overwhelmed daily.



Finally, we look at the data by Panel. Here, we see differences in experiences of stress and feelings of being overwhelmed up to 20%, as seen between Panels E and A.



How often do you feel stressed or overwhelmed in your daily life? (Top 2 Box)



## Mothers and Mental Health

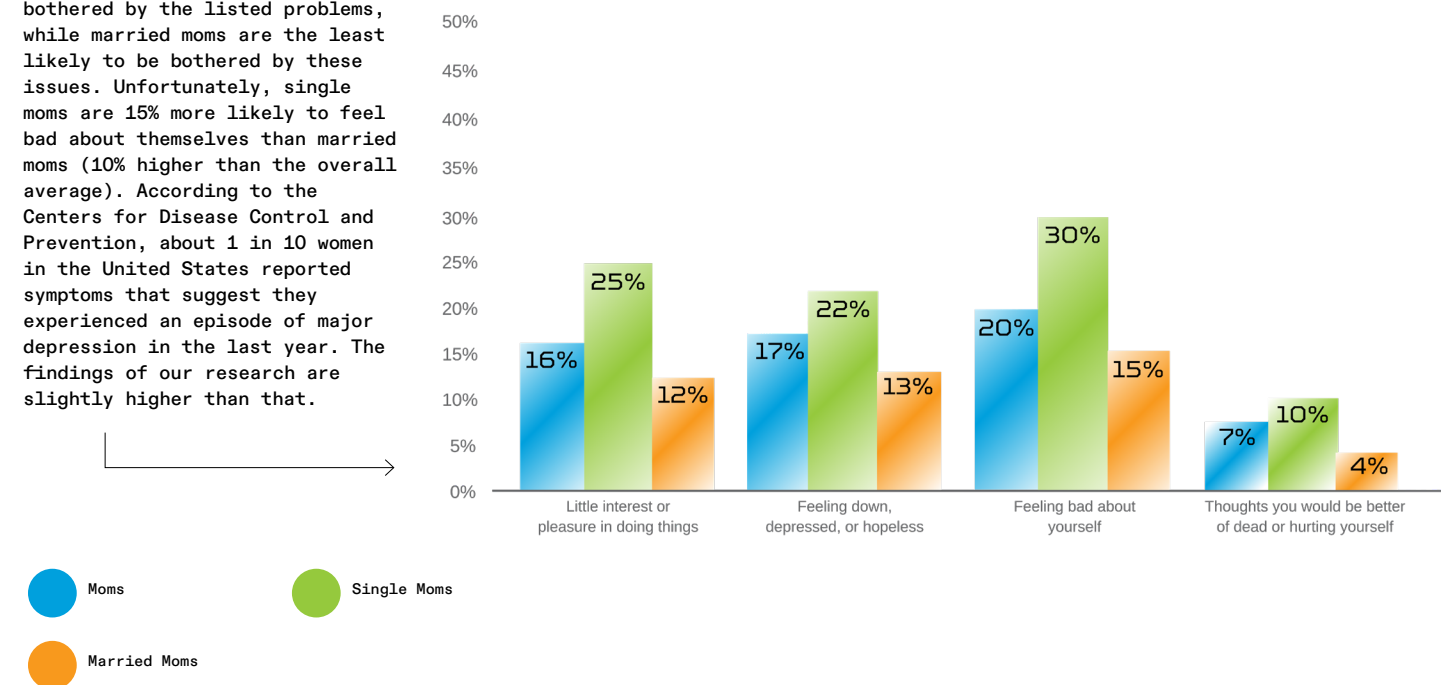
In May, we celebrated both Mental Health Awareness Month and Mother's Day! These two holidays gave cause to examine how moms cared for their mental health. We asked respondents about their experience with several mental health issues. In this blog, we will be looking at responses specifically from mothers. Overall, just under 20% of respondents have experienced mild to moderate symptoms of depression, and just under 10% struggled with severe symptoms of depression. According to the World Health Organization, an estimated 3.8% of the population experience depression, including 5% of adults and 5.7% of adults over the age of 60.

We are classifying moms as the average and then taking a closer look at single moms and married moms:

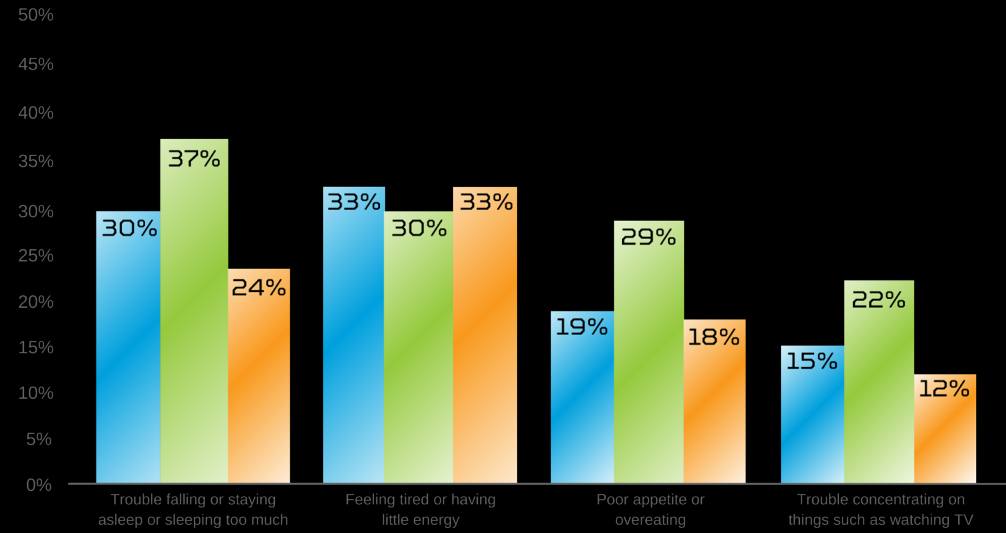
	Moms	Single Moms	Married Moms
Children	1+ Child or Adult children	1+ Child or Adult children	1+ Child or Adult children
Household		Single parent, Live alone, or Live with roommates	Live with spouse or partner and children
Relationship		Widowed, Dating, Single, or Divorced/Separated	Married

Overall, we found that single moms are the most likely to be bothered by the listed problems, while married moms are the least likely to be bothered by these issues. Unfortunately, single moms are 15% more likely to feel bad about themselves than married moms (10% higher than the overall average). According to the Centers for Disease Control and Prevention, about 1 in 10 women in the United States reported symptoms that suggest they experienced an episode of major depression in the last year. The findings of our research are slightly higher than that.

Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)



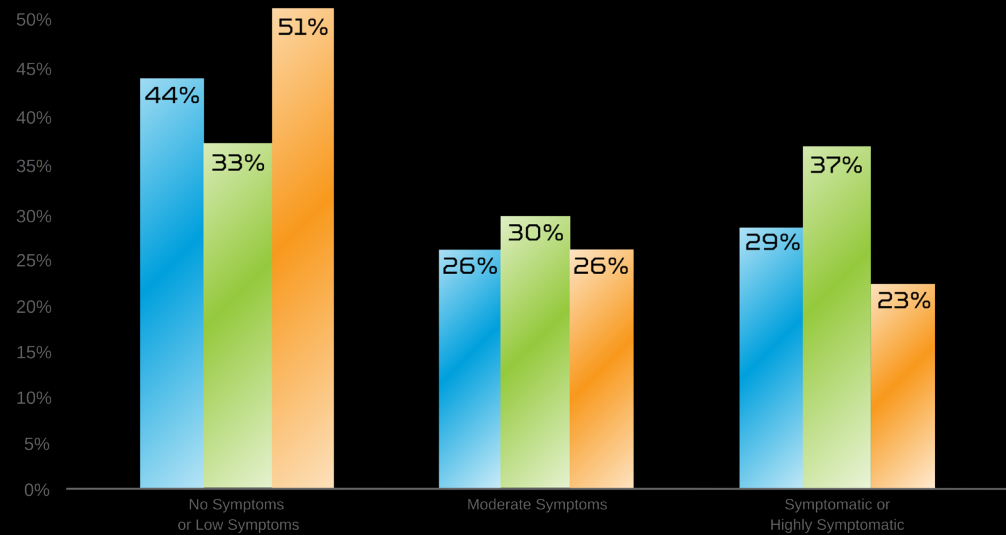
We also found that single moms are 11% more likely than married moms to have a poor appetite or overeat and 13% more likely than married moms to have trouble falling asleep or sleeping too much. Married moms are 3% more likely to feel tired or have little energy.



Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)

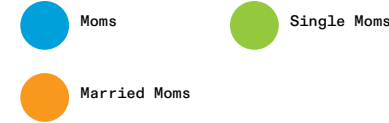
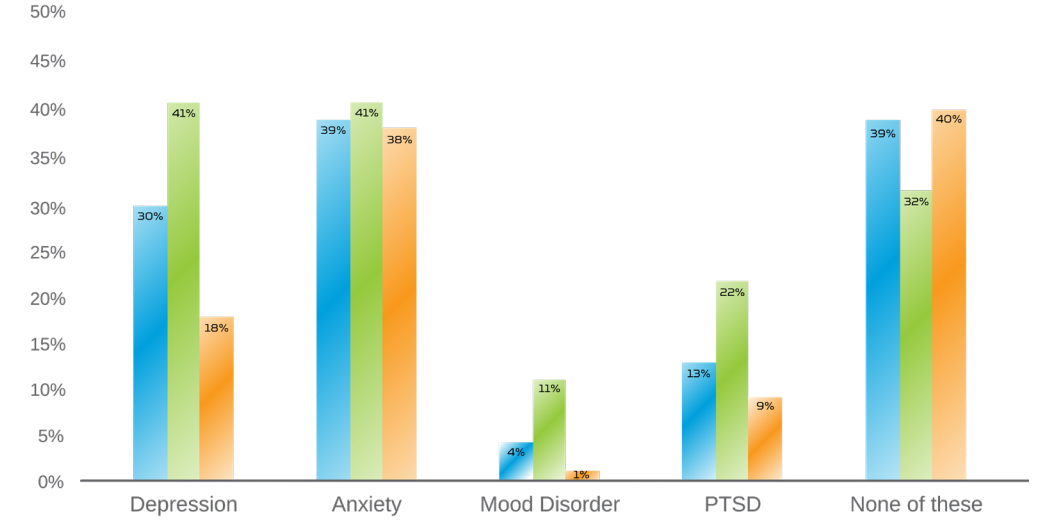
### Symptoms of Mental Health

When looking at symptoms of mental health, we see that single moms are 14% more likely than married moms to be highly symptomatic (8% more likely than the overall average.) They are also 18% less likely than married moms to say they have no symptoms, for females.



### Diagnoses

In this same series of questions, we asked moms if a physician had ever given them a mental health diagnosis. Single moms are 16% more likely than married moms to have been diagnosed with depression and 13% more likely than married moms to have been diagnosed with PTSD.

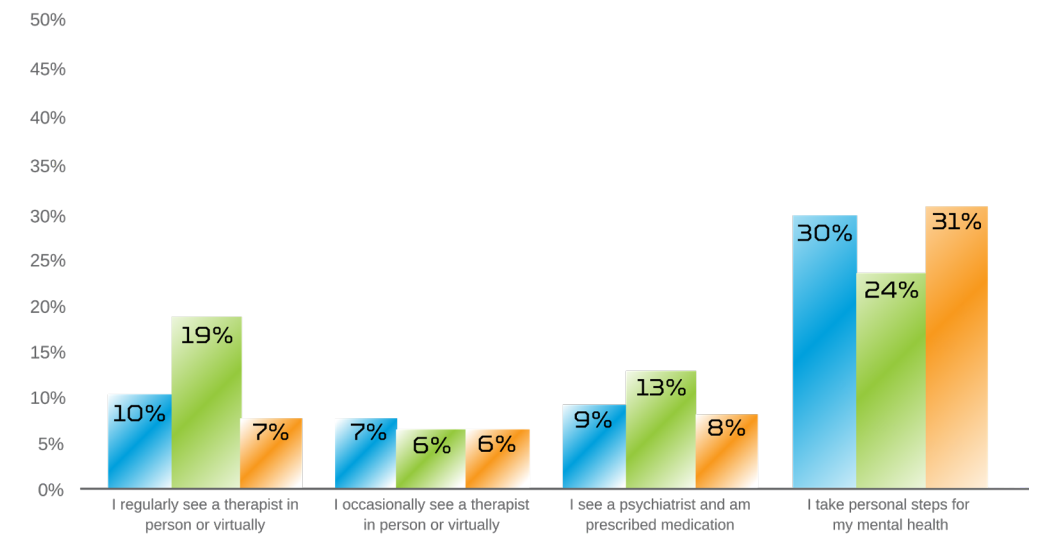


Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)

### Steps for Bettering Mental Health

We also wanted to know if moms were taking steps to better their mental health. Here, we are considering taking steps to better mental health as participating in activities such as reading, exercise, yoga, etc. Single moms are more likely than married moms to see a professional to better their mental health, whether it is a therapist or a psychiatrist.

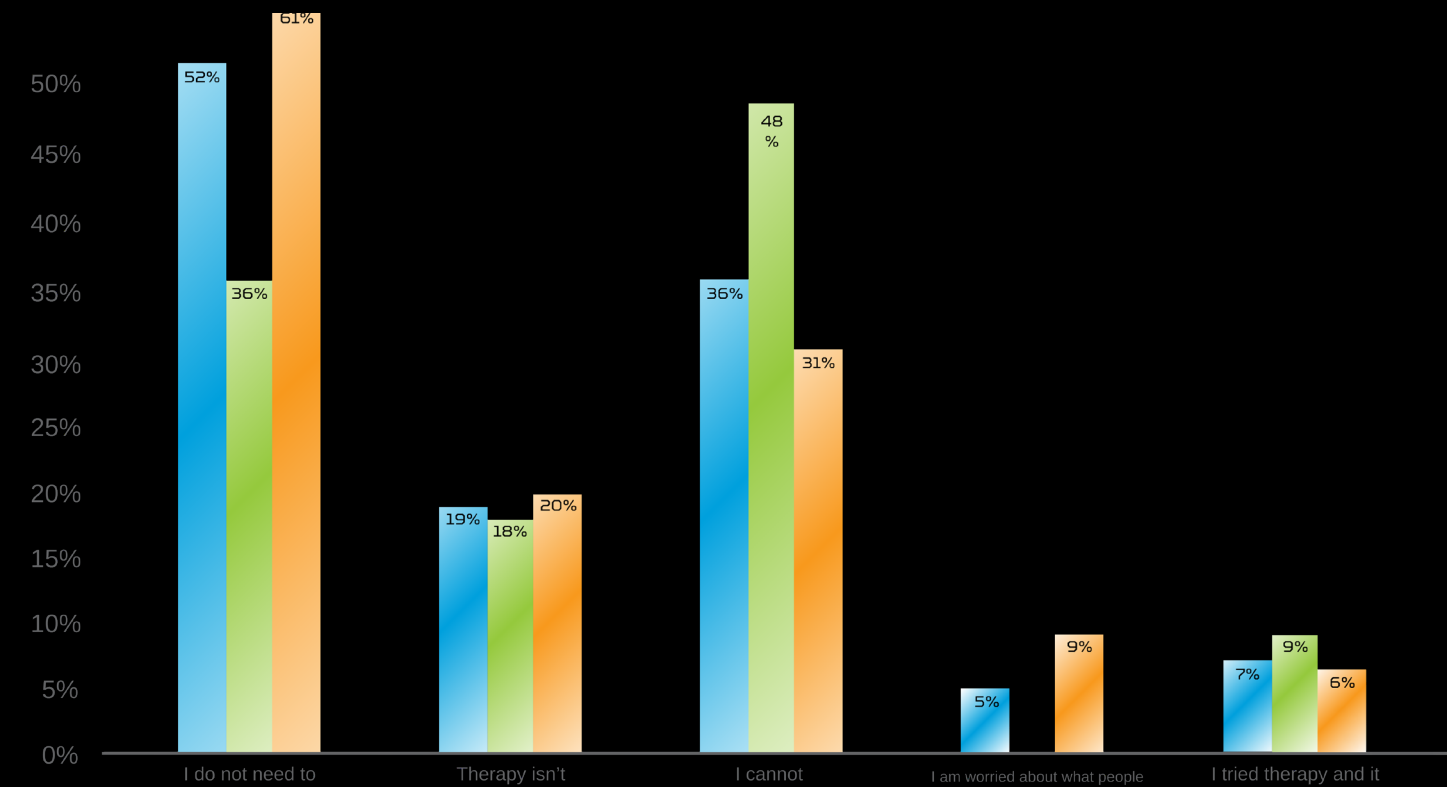
Essentially, single moms are more likely to find ways to better their health through outside sources. Married moms are more likely to take personal steps to better their mental health.



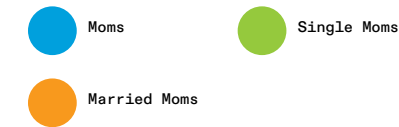
Continuing on these findings, we found that more single moms would like to go to therapy, but nearly half can't afford it. Married moms are more likely than the overall average to say they do not need to see a therapist, 25% more than single moms. The cost of mental health resources seems to be a barrier as both single and married moms are above average to say they are not able to afford therapy.



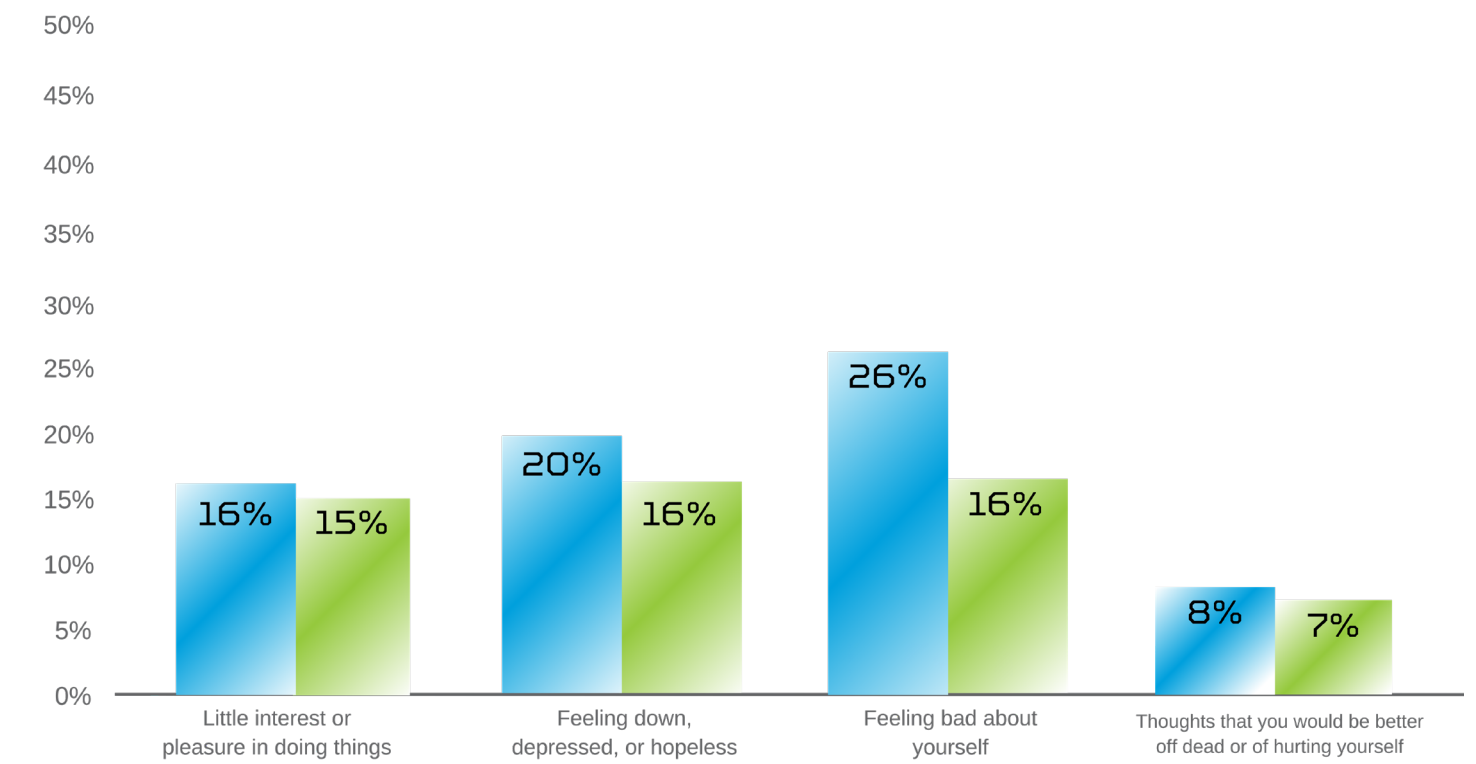
Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)



Looking at the data by Panel, we see that Panel A is likely to have moms who have struggled with the listed problems. Respondents in Panel A are 4% more likely to feel down, depressed, or hopeless and 10% more likely to feel bad about themselves.



Over the last two weeks, how often have you been bothered by any of the following problems? (Top 2 Box)



# A Deep Dive into Mental Health

In recent years, mental health has unequivocally emerged as a central and crucial topic of conversation across the United States. The events since 2020 have compelled each of us to confront our own mental health experiences in unforeseen ways. The global pandemic, with its profound disruption to daily life, brought mental health concerns to the forefront, transcending age, gender, and background. It became an issue that resonated universally, uniting us in our shared vulnerability and need for support.

In light of this, we partnered with Brandtrust to explore mental health beyond the investigation we conducted through our research-on-research. We aimed to examine the intricate layers of mental health, exposing the stories, emotions, and factors that shape our collective well-being. We did this by combining Brandtrust's Narrative Inquiry and our Strategic Sample Blending approach to deliver more detailed responses and higher respondent quality when compared to traditional survey methods.

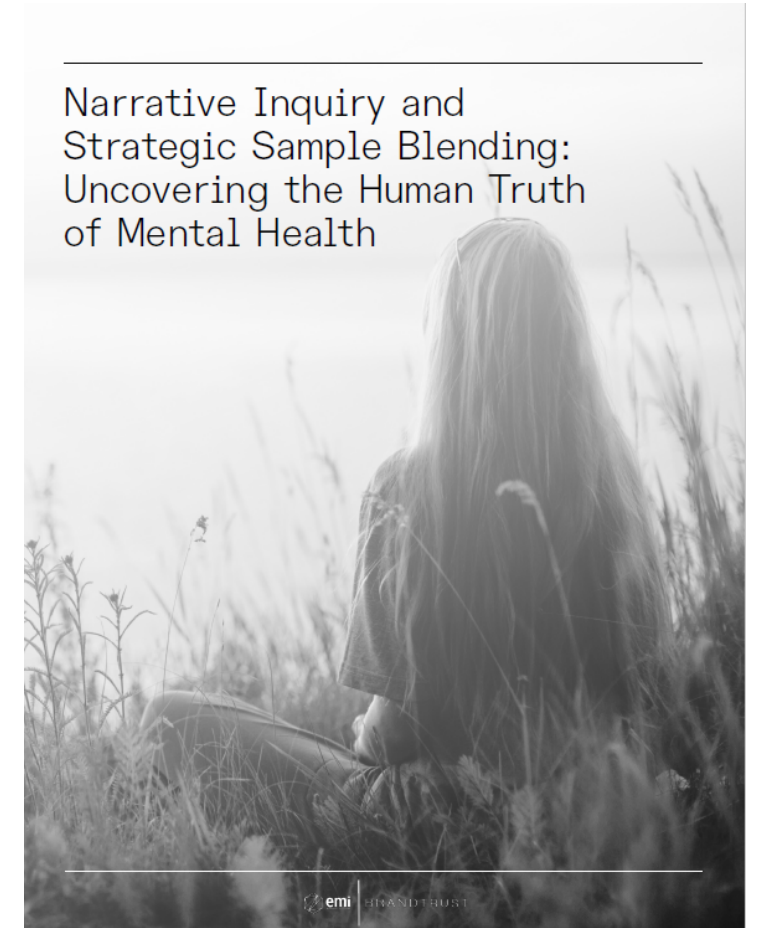
In the eBook, [Narrative Inquiry and Strategic Sample Blending: Uncovering the Human Truth of Mental Health](#), you will:

- Gain deep insights into the multifaceted nature of mental health, exploring emotional, physical, relational, and contextual dimensions.
- Understand the diverse and deeply personal perspectives that shape our understanding of mental well-being.
- Discover the motivations that drive individuals on their journey to improve their mental health.
- Explore the internal and external factors facilitating the transformation towards better mental well-being.
- Learn about the resilience and determination that characterize the human spirit in the face of adversity.
- Find out how Brandtrust's Narrative Inquiry and EMI's Strategic Sample Blending provide deeper insights and higher respondent quality than traditional methods.

You can get all the insights by downloading your free copy of the eBook [Narrative Inquiry and Strategic Sample Blending: Uncovering the Human Truth of Mental Health](#).

[Download Now](#)

Narrative Inquiry and Strategic Sample Blending: Uncovering the Human Truth of Mental Health



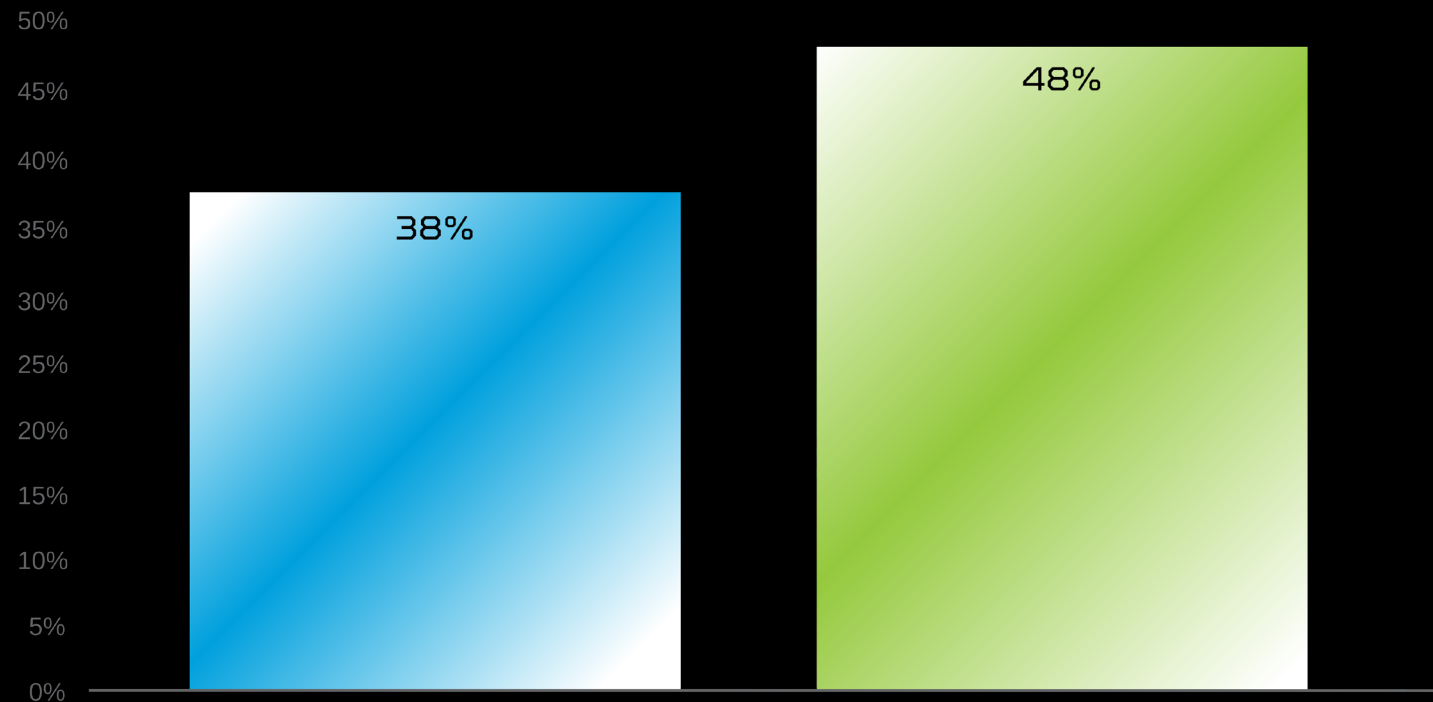
# Don't Overlook This Aspect of Diversity: Ability in the Workplace

Diversity in research has been a trending topic for a few years now. Companies and organizations have done an excellent job of including more practices to promote diversity and inclusion in the industry. However, we feel there is one area of diversity where research needs to dive a little deeper: differential abilities. While researchers like Timothy Cornelius lead the way in this topic, we wanted to explore it in our research-on-research.

Overall, we found that persons with disabilities are 10% more likely to be employed full-time than those without disabilities.

● Persons with Disabilities ● Persons without Disabilities

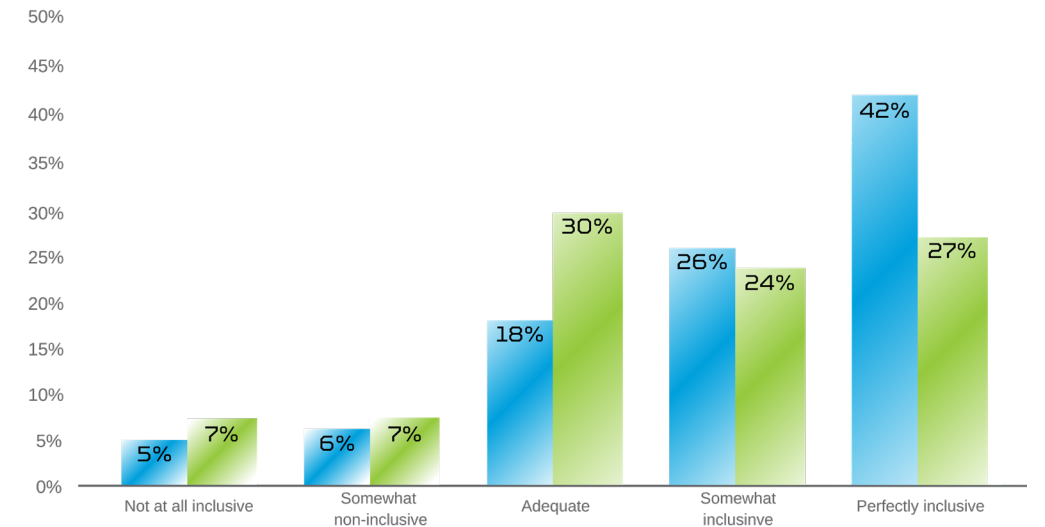
Which of the following best describes your employment status?  
(Employed Full-Time)



How inclusive do you feel about your workplace is towards people with different abilities?

## Workplace Ability Inclusion

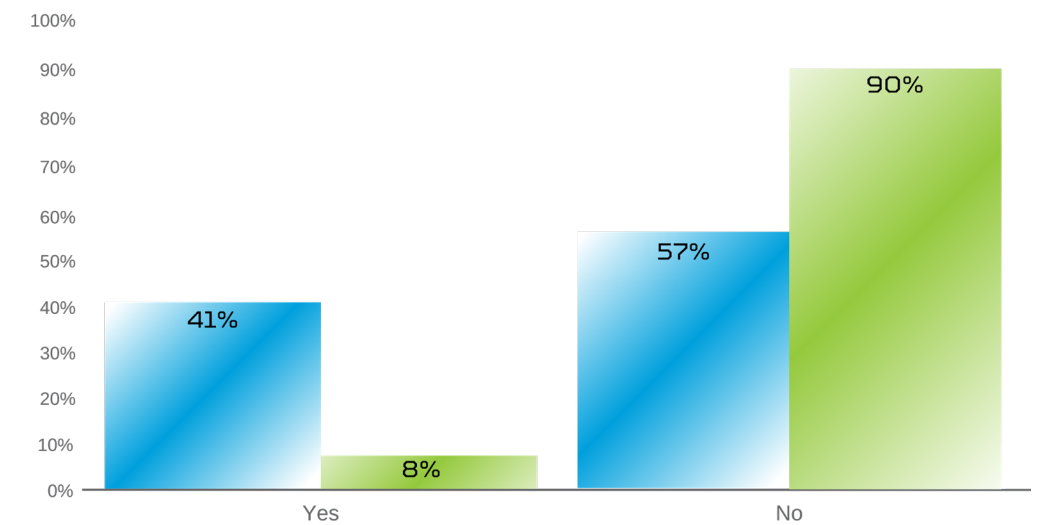
When it comes to how inclusive people feel their workplace is towards those with disabilities, we see that persons with disabilities are 15% more likely to say their workplace is perfectly inclusive than those without disabilities at 42%.



● Persons with Disabilities ● Persons without Disabilities

## Workplace Ability Discrimination

We also asked respondents if they have felt discriminated against in the workplace because of their ability. 41% of respondents with disabilities say they have felt discriminated against in the workplace, 33% more than those without disabilities.

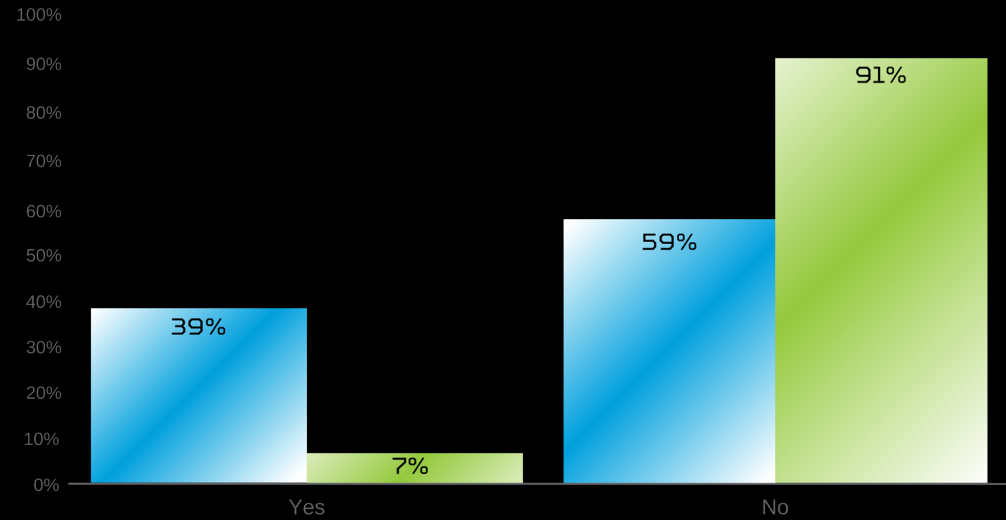


Have you ever felt discriminated against in the workplace due to your ability?

Have you ever requested accommodations in the workplace because of your ability?

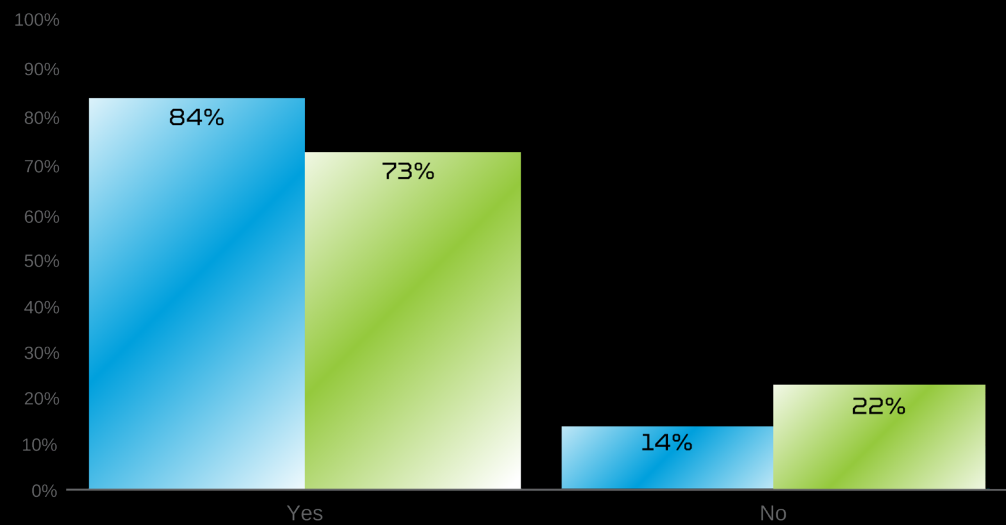
**Workplace Ability Accommodation**

When looking at accommodation requests in the workplace, we see that 39% of persons with disabilities have requested accommodations at work, 32% more than those without disabilities.



- Persons with Disabilities
- Persons without Disabilities

Of those who requested accommodations, 84% of those with disabilities had accommodations provided.

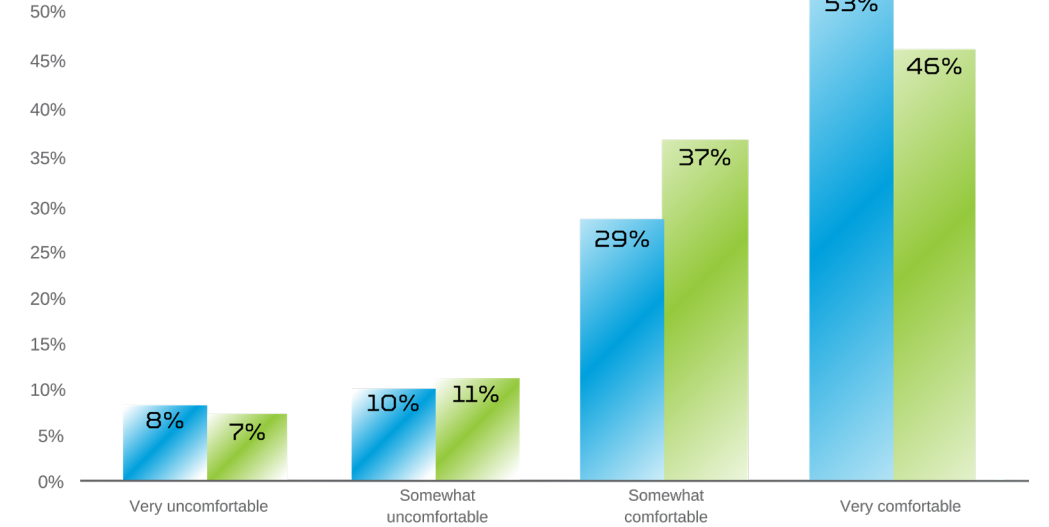


If you did request accommodations, were they provided to you?

How comfortable do you feel discussing your ability with your colleagues and supervisor?

**Discuss Ability at Work**

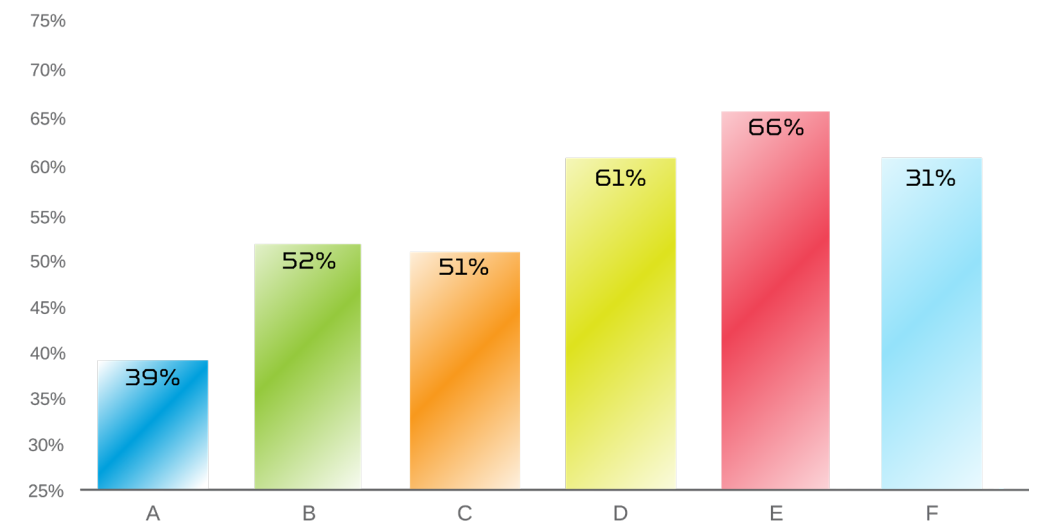
When asked how comfortable people were discussing their ability with colleagues and supervisors, 53% of respondents with disabilities were very comfortable discussing their ability with colleagues and supervisors. However, those without disabilities are 8% more likely to feel somewhat comfortable discussing their ability with their colleagues or supervisors.



- Persons with Disabilities
- Persons without Disabilities

**Workplace Inclusivity By Panel**

Regarding results by Panel, we see up to a 27% difference between Panels A and P.



How inclusive do you feel your workplace is towards persons with disabilities? (Top 2 Box)

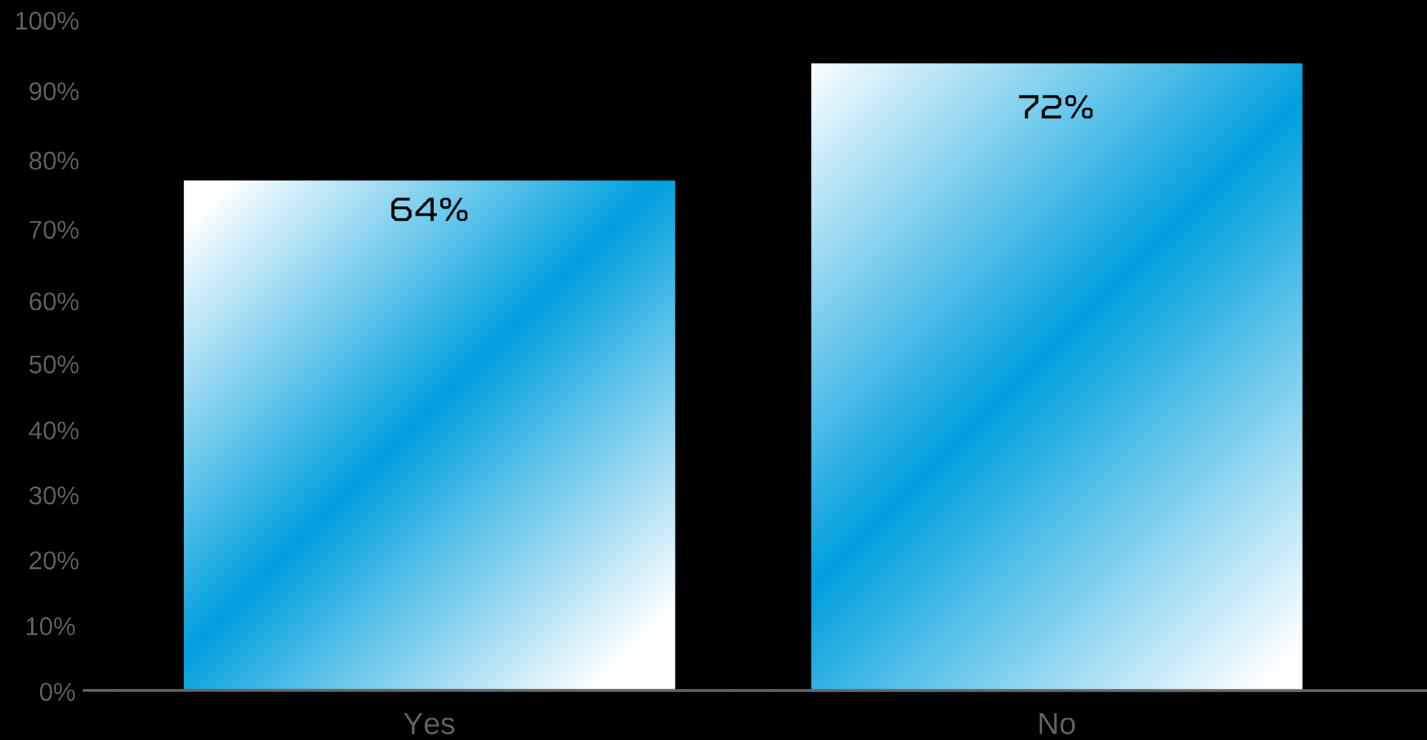
# Patriotism and Politics

## Is it a Party in the USA or Not?

If you've read previous editions of The Sample Landscape, you know that we enjoy analyzing the perceived patriotism of different brands, political parties, and more. But what about individual patriotism? In our research-on-research, we explored this by asking respondents if they think the United States is the greatest country in the world.

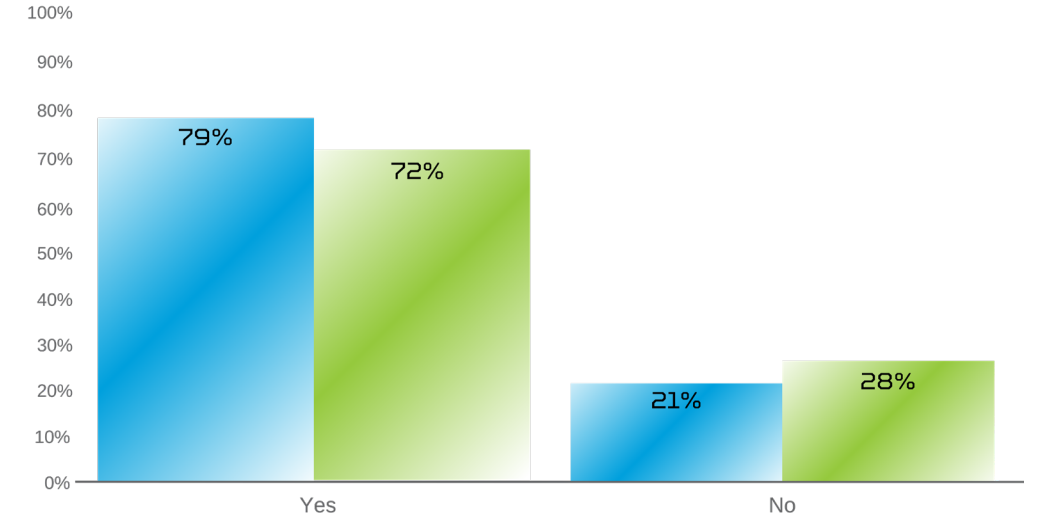
Overall, we found that 75% of people believe the US is the greatest country in the world.

Is the US the greatest country in the world?



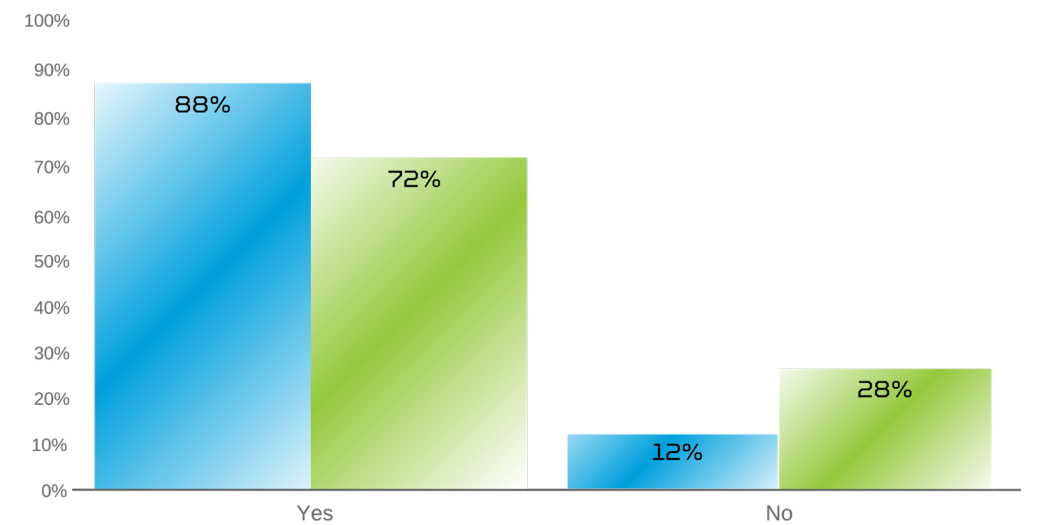
Male Female

Regarding gender, males are 7% more likely than females to believe that the US is the greatest country in the world.



Is the US the greatest country in the world?

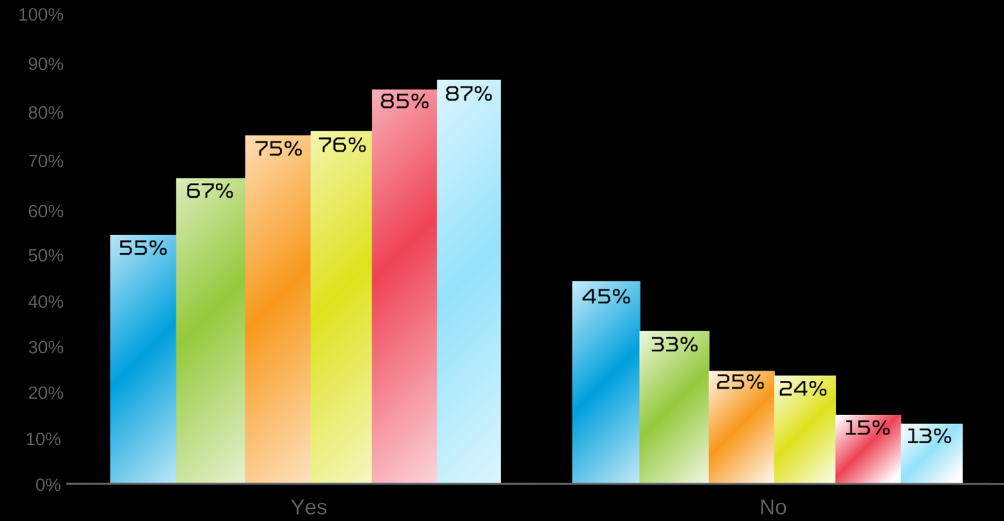
We also looked at responses by political affiliation. Republicans are 16% more likely than Democrats to believe that the US is the greatest country in the world.



Republican Democrat

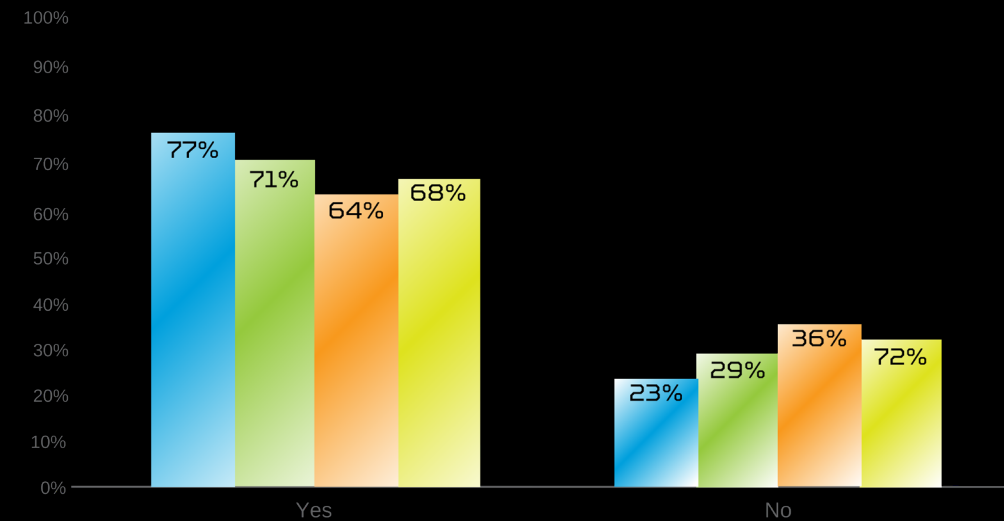


When comparing responses by age, we found the older a person is, the more likely they are to believe that the US is the greatest country in the world. Those over 65 are 32% more likely than 18-24-year-olds to think that the US is the greatest country in the world.



Is the US the greatest country in the world?

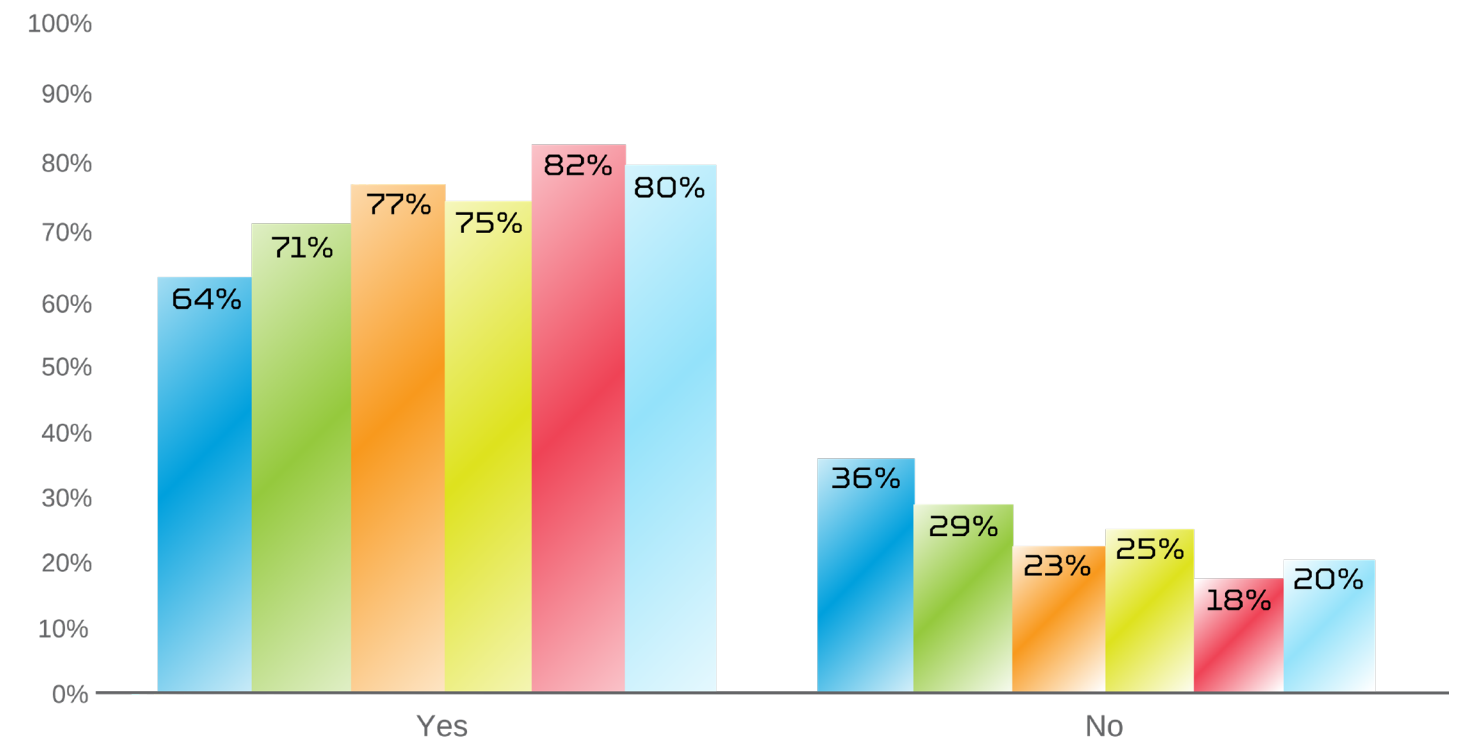
When it comes to ethnicity, Caucasians are the most likely to believe that the US is the greatest country in the world, 6% more likely than any other ethnicity. Asians or South Asians are the least likely to believe the US is the greatest country in the world, 4-5% less than any other ethnicity.



Finally, we compared results by Panel. Here, we see that Panel M is the most likely to think the US is the greatest country in the world, and Panel A is the least likely, with an 18-percentage point difference between them.



Is the US the greatest country in the world?

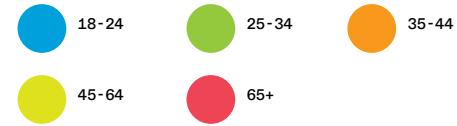
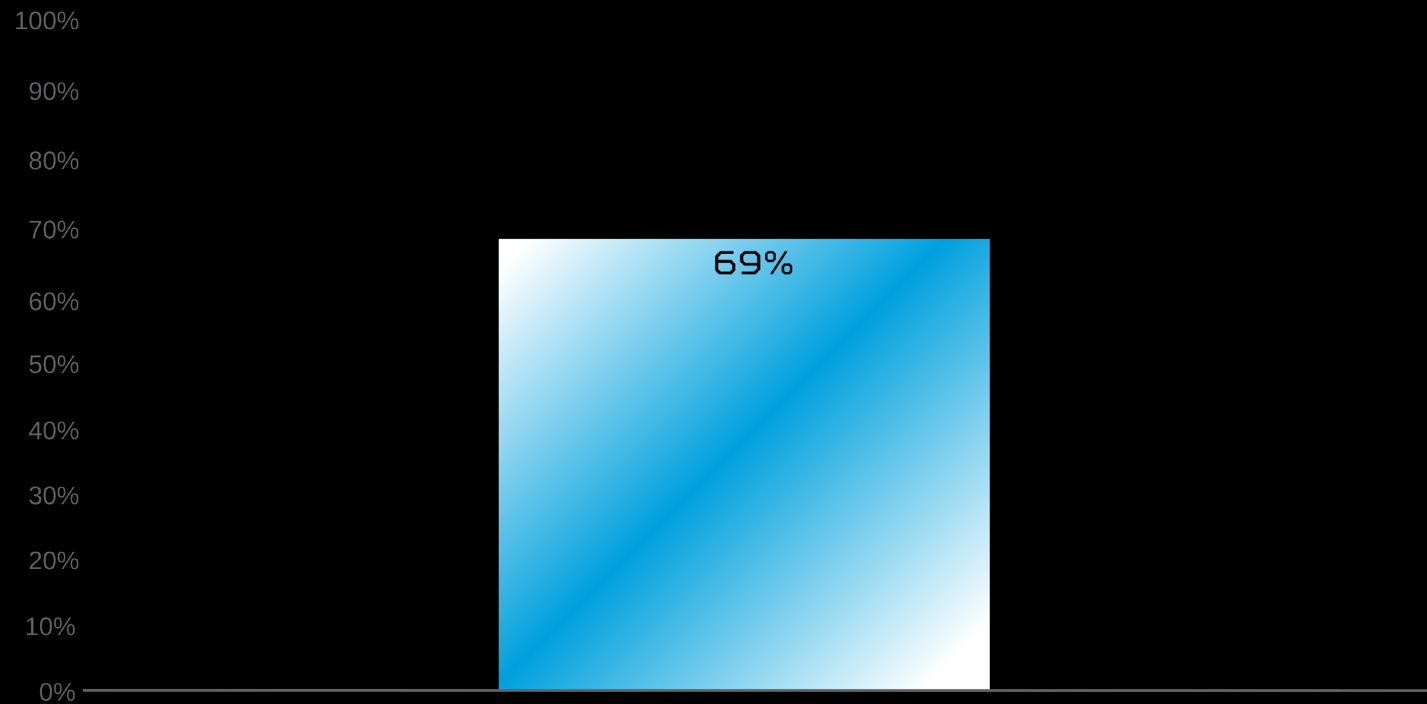


## Election 2024: Who Are You Voting For?

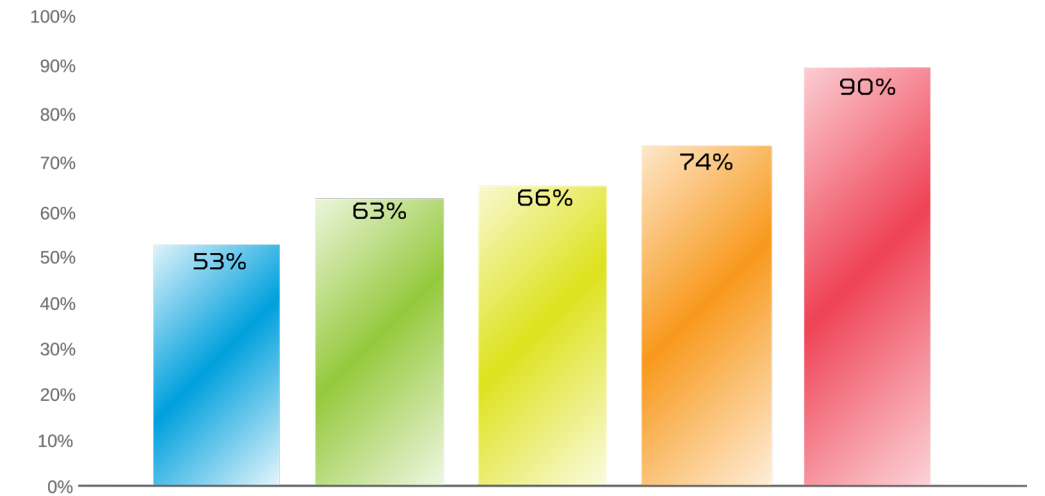
Election season is upon us. As the first steps in the race to the White House were taken, we wanted to know if people were going to vote and who they were likely to vote.

First, let's look at the likelihood of voting in the 2024 election. When asked if they would vote, 69% of respondents indicated they are highly likely to vote, falling into the 'Top 3 Box' of voter likelihood.

How likely are you to vote in the next presidential election? (Top 3 Box)

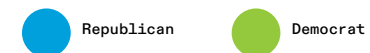
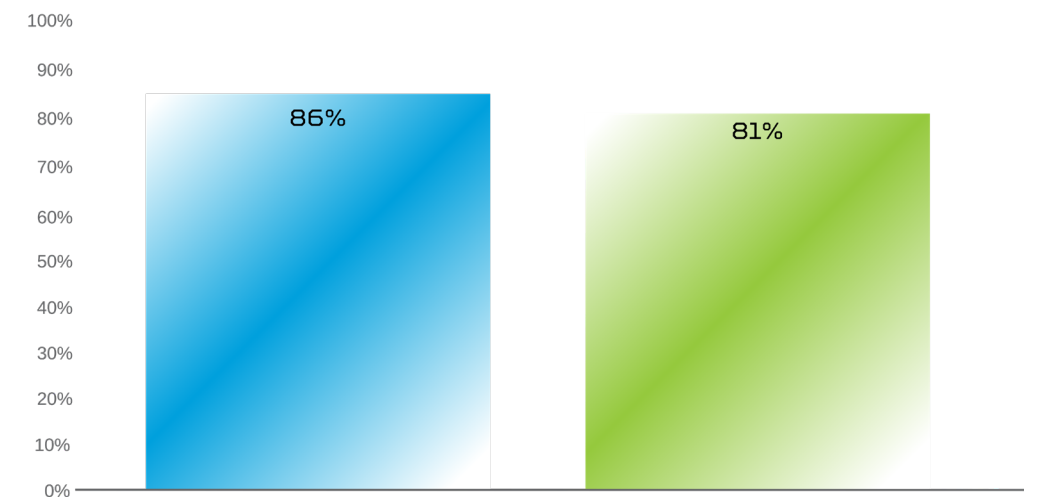


Breaking the results down by age, we found as age increases, so does the likelihood of voting, with 63% of those 25-34 years old, 66% of 35-44, 74% of 45-64, and a significant 90% of those aged 65 and above indicating they are likely to vote.



How likely are you to vote in the next presidential election? (Top 3 Box)

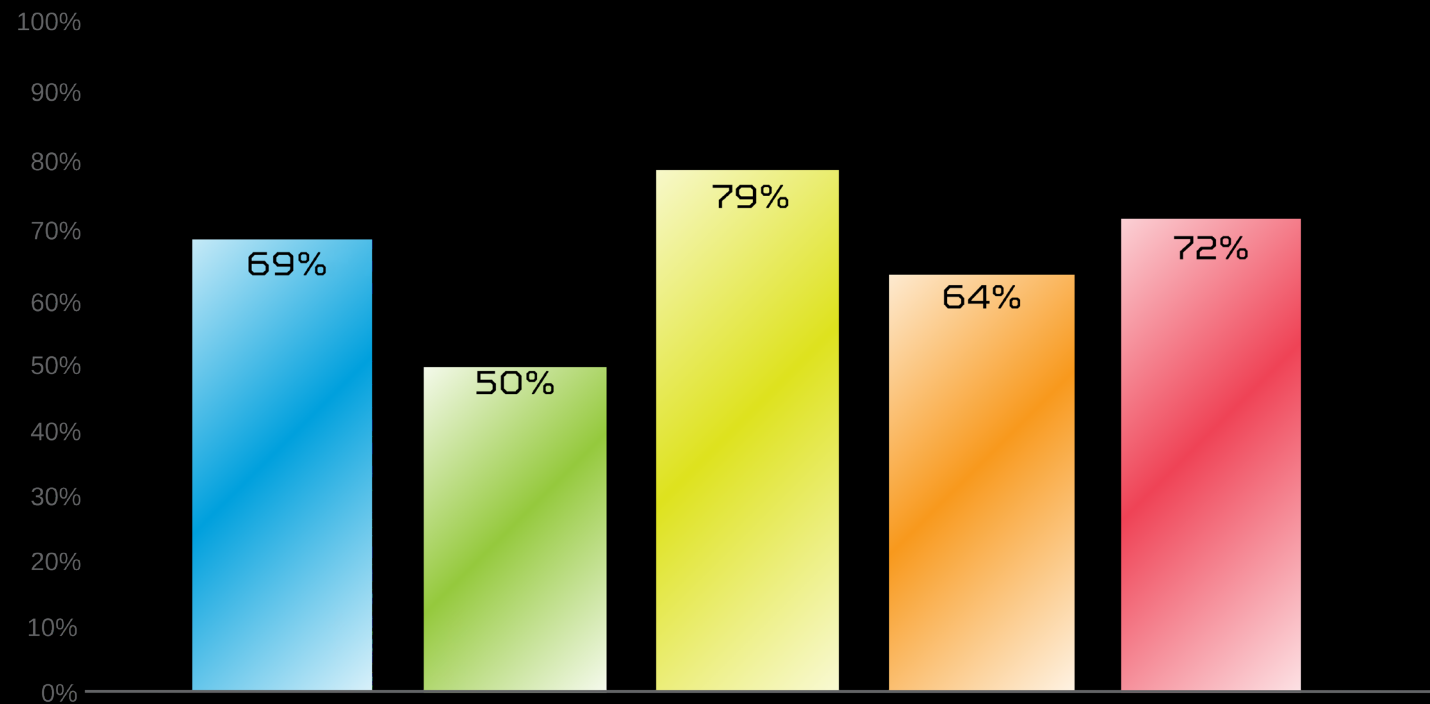
Looking at the results by political affiliation, we see a high voter intent for both major parties. An impressive 86% of self-identified Republicans are likely to vote, as represented in the 'Top 3 Box'. Democrats are not far behind, with 81% indicating a similar propensity for electoral participation.



When breaking down the results by Panel, the disparity between Panels B and C is particularly striking. Panel C exhibits the highest likelihood of voting, with 79%, whereas Panel B reveals a substantially lower intent to vote at just 50%.

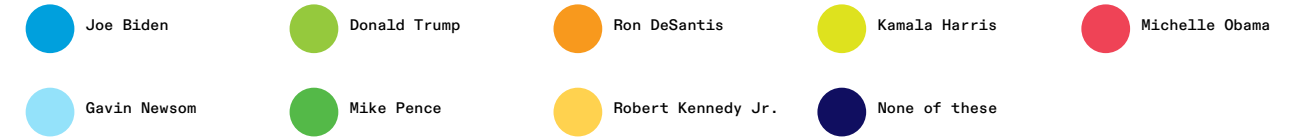


How likely are you to vote in the next presidential election? (Top 3 Box)

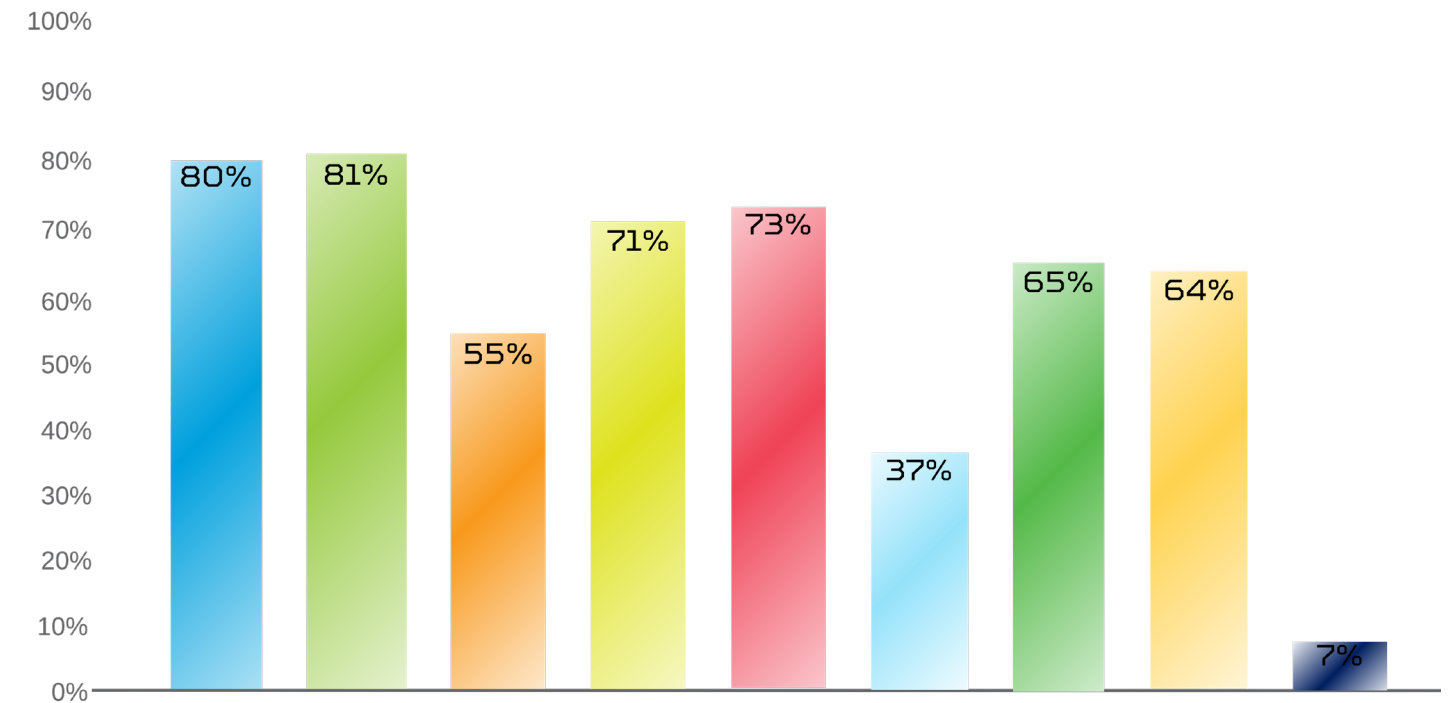


Next, we asked respondents about their awareness of various candidates and potential candidates. Donald Trump and Joe Biden emerged as the most recognized figures, with 81% and 80% of respondents aware of them.

While the spotlight on Trump and Biden is strong, other political figures also register significantly in public consciousness. Kamala Harris, the Vice President, is known to 71% of those surveyed, and Michelle Obama, the former First Lady, to 73%. Conversely, Gavin Newsom, the Governor of California, is recognized by 37%.



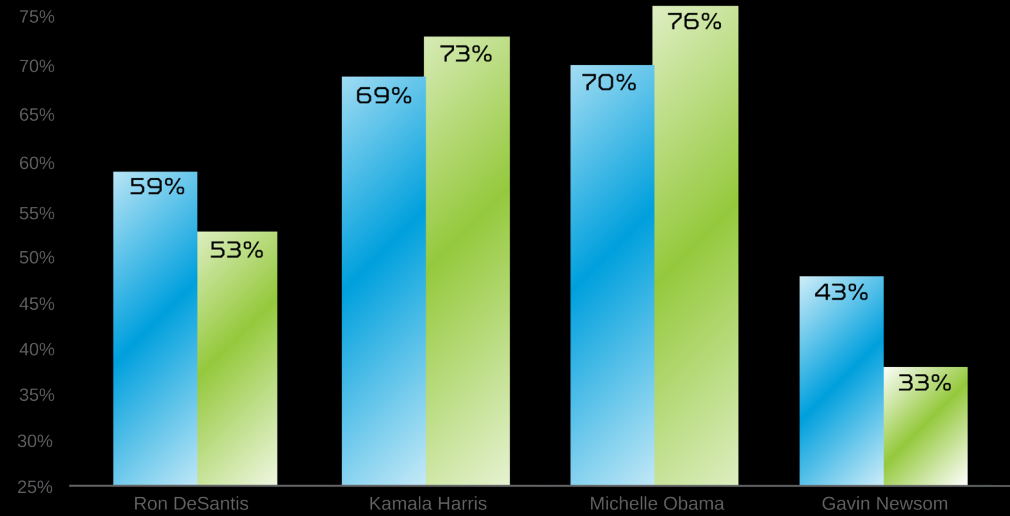
Which of the following people are you aware of?



Male Female

Which of the following people are you aware of?

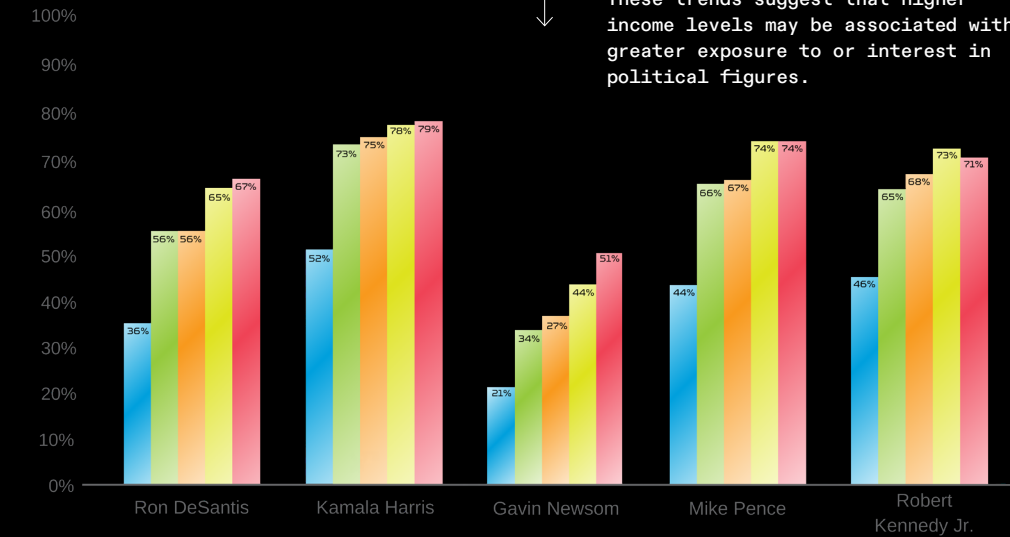
Ron DeSantis, Kamala Harris, Michelle Obama, and Gavin Newsom all show varying levels of public awareness between male and female respondents. Men are more familiar with DeSantis at 59%, while women show a slightly lower awareness at 53%. In contrast, female respondents recognize Kamala Harris and Michelle Obama more than males, with awareness levels at 73% and 76%, respectively, compared to 69% and 70% of their male counterparts. Newsom's recognizability is higher among men (43%) than women (33%).



The trend continues with Gavin Newsom, who has a 21% awareness rate at the lowest income level and a 51% rate at the highest. Mike Pence and Robert F. Kennedy Jr. both have higher recognizability in the upper-income brackets, with both figures recognized by 74% of those earning between \$60,000 and \$99,999, and Pence maintaining the same percentage in the \$100,000+ bracket. In comparison, Kennedy sees a slight dip to 71%. These trends suggest that higher income levels may be associated with greater exposure to or interest in political figures.

Under \$20K \$20,000-\$39,999 \$40,000-\$59,999 \$60,000-\$99,999 \$100,000+

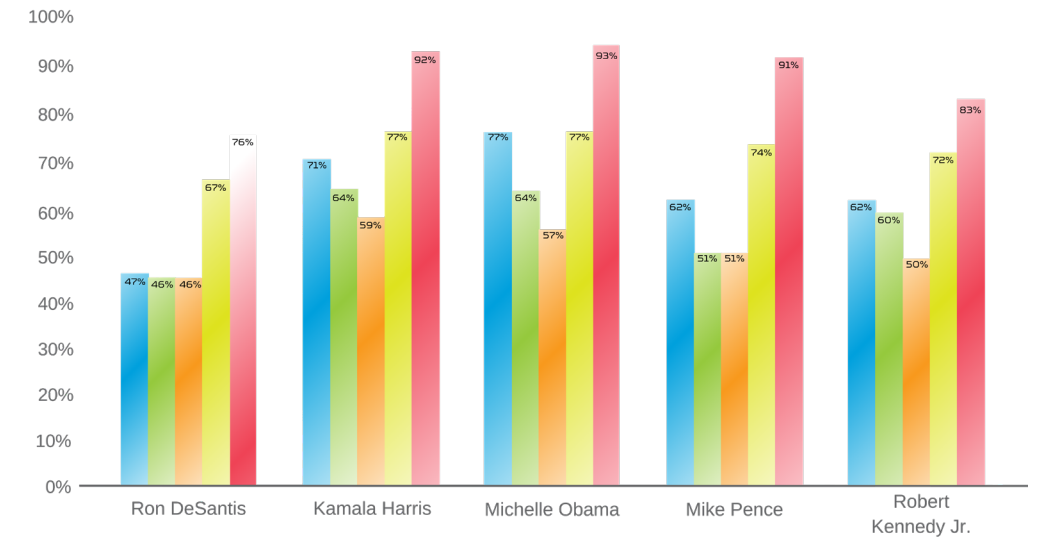
The awareness of various political figures is impacted by income level. For Ron DeSantis, only 36% of those earning under \$20,000 are aware of him, with this figure steadily climbing through each income bracket, reaching 67% among those earning \$100,000 or more. Kamala Harris sees a similar pattern, starting with a 52% recognition rate among the lowest income bracket and rising to 79% in the highest.



Which of the following people are you aware of?

Panel A Panel B Panel C Panel D Panel E Panel F

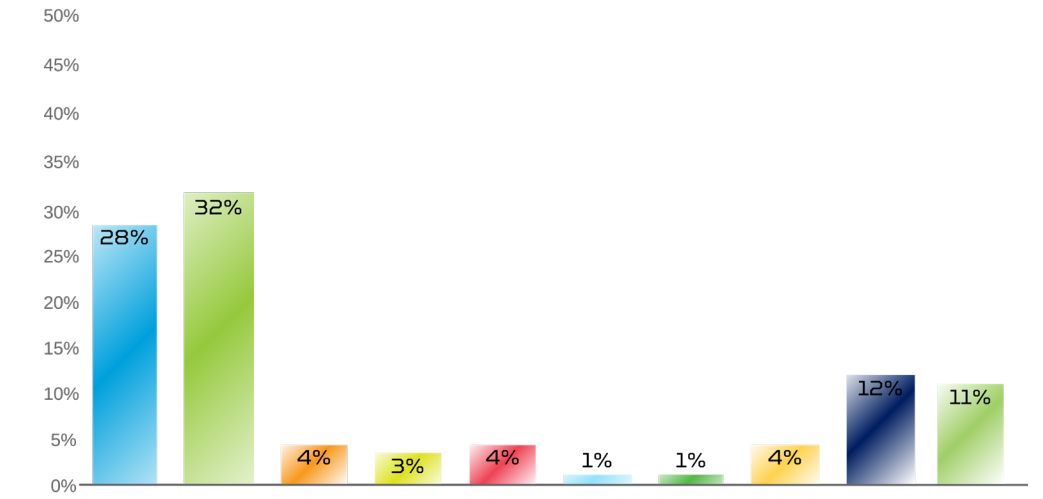
Panel composition can influence the awareness of political figures. Kamala Harris and Michelle Obama see the most significant recognition gap; Harris ranges from 59% in Panel C to a striking 92% in Panel E, while Obama's recognizability spans from 57% in Panel C to 93% in Panel E, both showing a 33-36% difference. Ron DeSantis' awareness also varies widely, with a 29% increase from Panels A and C to Panel E. Mike Pence and Robert F. Kennedy Jr. experience a substantial rise in recognizability in Panel E, at 91% and 83%, compared to just over 50% in Panel C. These differences highlight how demographic and socioeconomic factors within panels can significantly affect the data when conducting polling.



Which of the following people are you aware of?

Joe Biden Donald Trump Ron DeSantis Kamala Harris Michelle Obama Gavin Newsom Mike Pence Robert Kennedy Jr. Someone else I don't care

Finally, we asked respondents who they think will win the 2024 presidential election. Their responses were notably divided. Donald Trump emerged as the front-runner, with 32% of those surveyed predicting he would win. Close behind is the prospect of 'Someone else' clinching the presidency, a viewpoint held by 29% of respondents, reflecting a significant portion of the public open to alternatives outside the leading two candidates. Joe Biden was predicted to win by 28% of participants, placing him just slightly behind public expectations.



Who do you think will win the presidency in 2024?



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**EMI Research Solutions**

[www.emi-rs.com](http://www.emi-rs.com)  
8280 Montgomery Road  
Suite 200, Cincinnati, Ohio 45236

p 866-661-7075  
e [sales@emi-rs.com](mailto:sales@emi-rs.com)

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