What a modern-day insights stack looks like

zappi

Intro to the insights stack

Every day, big brands come up with new products with new names, packaging, and pricing. They work on new creative, craft new messaging, and explore new channels. Ideally, they base each of these decisions in their consumer's needs, goals, and preferences. Because if a product or service isn't made for the person who will use it, who is it made for?

This is why it's so common today to hear businesses talk about being "customer-centric." Sure, it's a buzzword. But realistically, it's the only way to run a sustainable business. If you don't have customers, you don't have a business.

As someone who works in consumer insights, your company relies on you to provide a deep understanding of your consumers. It uses that information to make decisions that drive purchases.

Of course, that's easier said than done. Consumer needs are constantly evolving, trends quickly come and go, and technology is improving at a rapid pace. How do you know what will land with your consumer if the world is always shifting?

Until somewhat recently, insights departments tended to jump from research project to research project — approaching their work in an ad-hoc way. Now, forward-looking researchers are viewing their insights holistically and doing more cross-project thinking. In other words, they're engaging in systematic market research. To approach insights like this, you need the right vendors and partners.

That's where your **market research stack** comes in.

There are a huge number of research vendors on the market today (Insight Platforms currently lists over 800 options![1]). It's hard to figure out what each vendor does when they're all using the same buzzwords to describe themselves. To get a handle on this landscape, we talked to over 75 global brands across different industries about what their MR stack looks like. We've compiled those learnings in this ebook.

This is by no means an exhaustive list containing every category of insights available on the market today. Instead, it's meant to give you some direction about which categories of insights and vendors you should prioritize based on what some of your peers find useful. And if we were starting an insights function and building our own stack, this is where we would start.

Knowledge Management

Store research and insights in a central place

Trend Spotting

Mine online conversations to identify patterns

Deep Human Understanding

Uncover the truths of what makes people "tick"

Pulse Check

Ask a few short questions to get a quick read on a situation

Ideation

Brainstorm ad/innovation ideas

Activation Insights

Test creative and innovation ideas to get insight on how to improve them to meet consumer needs

zappi

Shopper Insights

Analyze the consumer's retail shopping experience

Experiential Insights

Understand the overall experience you're delivering in the market

Market Measurement

Measure market activity (sales, ad-performance brand performance, etc.)

Consultants

Get expert help running research, interpreting results, etc

[1]Stevens, Mike. "Platforms Directory." Insight Platforms, insightplatforms.com/platform-directory/.

1. Trend spotting

In our modern world, the only constant is change. Trends come and go quickly. If you miss the window on something important, you may have missed a major opportunity for business growth.

To the average person, alcoholic seltzer and CBD-infused everything may seem like trends that came out of nowhere. But smart insights professionals saw these trends coming.

With so much on the line, spotting these future trends is definitely one area you should be paying attention to in your MR stack. Tools in this area typically mine online conversations to identify patterns.

These insights give you a great place to start when your organization is looking to spot emerging trends to tap into for short-term growth — or even to find breakthrough ideas that have long-term implications for your business.

Basic social listening tools fall into this category, but what we're most intrigued by right now are tools that use AI and data science to help you basically predict the future.

Best used for
Identifying emerging trends for further exploration

We recommend checking out
Black Swan Data

2. Deep human understanding

If you're like most insights professionals we know, you got into this type of work because you like to get into the minds of other humans and figure out what makes them tick. What do they like? Why do they buy what they buy? How do they live?

This is where research that helps you get at deep human understanding comes in. We're not talking about how people respond to specific stimuli — we mean uncovering real truths of human nature within specific cultures.

There's a wide range of research types in this area, including:

- **In-depth interviews**
- **Online communities**
- **Traditional and non-traditional focus groups**
- **Ethnographics/consumer safaris (observing consumers in their natural environment)**

Essentially, any time you do basic exploratory research to understand people at their core, you're doing deep human understanding research.

This type of research is essential because if you get it right, you'll be able to regularly offer insightful information to your organization about how to meet consumer needs — rather than just answer questions from your internal stakeholders when they ask.

Best used for

Exploratory research to better understand how to meet consumer needs

We recommend checking out

LRW

Fuel Cycle

Gongos

Voxpopme

3. Pulse check

Sometimes you want to get deep inside someone's head, other times you just want to ask a single question or two to get a quick read on a situation. When those situations come up, pulse check tools are what you're looking for.

These types of tools let a researcher craft a short and user-friendly survey to get into the market. With that information, you can inform a decision around a sponsorship or upcoming event, better understand a consumer usage pattern or attitude, or simply answer a quick question you may have about your consumers on the fly.

As a researcher, you're probably asked to answer one-off questions regularly. Other times, you want to be prepared for a meeting so you can provide the right information to your business to make a critical decision. That's where these types of tools shine.

Best used for
Quick insights to answer a specific question on the fly

We recommend checking out
SurveyMonkey
Suzy

4. Ideation

Once you know about a trend or opportunity you think you should jump on, you need to come up with ideas to address it.

Of course, there's never a shortage of ideas within businesses. You'll likely have plenty of them without turning to any type of technology or partnership.

To help you focus, you can turn to traditional agencies to come up with innovation or advertising concepts. There are also some players doing some interesting things in this space, like BeenThereDoneThat. This company works to co-create ideas with consumers to land on the best and most creative ad and innovation ideas that are likely to land in the market.

Best used for

Brainstorming creative or innovation ideas

We recommend checking out

BeenThereDoneThat

5. Activation insights

You can identify an opportunity and get all your best people to brainstorm ideas, but still miss the mark when it comes to bringing those ideas to market. To avoid that miss, you need to focus some of your research on making sure you bring the best ad and innovation concepts to market.

With innovations, initial testing ensures you move forward with the best ideas that consumers will ultimately purchase. Then you need to optimize the naming, packaging, pricing, etc. for each concept. The idea is that at the end of the process when you're ready to go to market, you're confident you've got a winning innovation.

The same goes for your ad concepts. You can test at various points to identify how to improve storyboards, animatics, or even finished ads based on consumer feedback.

It's often a good idea to use a mix of quantitative and qualitative techniques for this.

Quantitative

Quantitative techniques use structured data to answer your questions. They're best used to put some numbers behind your hypotheses for an accurate measurement.

Ask people directly what they think of your ad and innovation concepts with iteratively run surveys and a statistically significant base of your target customers. You can compare results to benchmarks in your category or industry, or own norms of past successful concepts, competitor's ads or innovation, etc. to predict what will land in the market.

When you approach your ad and innovation research systematically — testing in a consistent, comparable way over time — your data grows more valuable the more you test and learn. You can look across everything you've learned to spot macro-level trends. That is, assuming you have a platform that lets you do this (Zappi could be that platform for you!).

Qualitative

Qualitative techniques use unstructured data (like direct quotes and observation) to answer your questions. This type of data can be used to dig deeper into different topics and uncover the "why's" behind the quant data. You can use that deeper dive to optimize your ideas to better align them with the way your target consumer feels.

Best used for
Getting consumer feedback on advertising or innovation concepts to optimize them for the market

We recommend checking out
Quant:
Zappi
Qual:
Digsite
Voxpopme

6. Shopper insights

It's important to understand how consumers feel about their shopping experiences and how they actually shop in the real world. There's a lot you can learn that you can use to determine where to spend money in your marketing mix, how to optimize your promotional retail efforts, how to package products, and more.

There are a wide variety of options to explore in this category, and what you use depends on what you're looking for. Some companies are doing innovative things with technology and behavioral science to help you dive into shopper motivation. Some are even using virtual reality to let consumers interact with a virtual store experience so brands can spot gaps. Other tools help you understand the consumer's path to purchase online using behavioral data.

One platform we're excited about is Disqo, which helps brands track how people shop and purchase online and then lets them talk to shoppers one-on-one. Plus, it has the ability to geo target consumers and talk to them in the moment of purchase.

If you find this level of depth unnecessary, there are some low-cost options that provide data on how consumers shop in the aggregate that can provide helpful insights for your team.

Best used for
Understanding consumer behaviors and attitudes related to their shopping experiences

We recommend checking out
PRS IN VIVO
Disqo

7. Experiential insights

After you've invested in all of these research types, you may want to turn to measuring the entire experience you're delivering in the market.

How do consumers view their experience? What can be improved? Typically, tools in this category focus on measuring the customer experience (CX) or the user experience (UX) to answer these questions.

Tools in the CX category are typically aimed at surveying consumers after an experience to understand what they liked and didn't like about it. Qualtrics may be the best tool for this on the market right now. It offers the ability to pass survey data directly into a CRM to get it into the hands of product or sales people who can take action on the feedback.

UX research is typically focused on the online experience. Various tools allow brands to ask users to take specific actions or answer questions while using the brand's website, and give feedback in the moment as they go through the site. Even CPG companies these days are using UX research to understand subscription models or dig into the online grocery buying experience.

If your consumers interact with your brand online at all, UX research is a must-have tool.

Best used for
Understanding the experience you're delivering in the market (customer or user experience research)

We recommend checking out
Qualtrics (CX)
UserTesting (UX)

8. Market measurement

Next are the insights that help you measure some kind of activity in the market. This area of research is critical to helping your company understand the success of its efforts.

Some important areas of market measurement include:

- **Sales measurement:** Track sales across channels, categories, demographic groups, etc.
- **Ad performance:** Measure how your ads performed in awareness, favorability, purchase intent, behavioral metrics, etc.
- **Brand tracking:** Look at how your brand metrics perform over time to understand how various decisions affect your brand image.

Great minds have spent their entire careers trying to nail attribution — and many have not been successful. But some companies are leading the charge to make attribution more accurate and useful.

Best used for

Measuring in-market activity or attitudes to help you attribute your investments or calibrate your go-to-market efforts

We recommend checking out

Zappi's ad measurement solution (Ad Pulse)
Kantar Worldpanel
IRI
84.51°
dunnhumby
Proquo AI

9. Knowledge management

As much as we've tried to simplify things in this ebook, if you're investing in research from each of the eight areas we've mentioned so far, things can quickly get out of control. It's hard to focus on passing along important consumer or market information to the rest of the business if you're always running studies to answer a specific question at one point in time and then throwing away the results when you're done. If that's how your insights team operates, chances are you're seen as an order taker in your organization — not a strategic partner.

Knowledge management tools have cropped up to solve this problem. These solutions promise to bring all of your research together in one place so you can stop neglecting your past studies and look across everything to identify important themes.

Of course, knowledge management solutions are not always the silver bullet research teams have longed for. The B2B world was promised a single version of the truth in the CRM system, and we've been struggling to get it right for decades. Your knowledge management system will only be as good as your instance and the work you put into it.

But with the promise of solving a problem that has long plagued the insights community, it's worth including in your MR stack.

Best used for

Bringing it all together

We recommend checking out

Market Logic

KnowledgeHound

10. Consultants

One theme you may have noticed across the previous MR categories in this list is that they all use technology as much as possible. With technology making rapid strides every day, we see no reason not to rely on technology to uncover new insights and automate some of the more mundane parts of research.

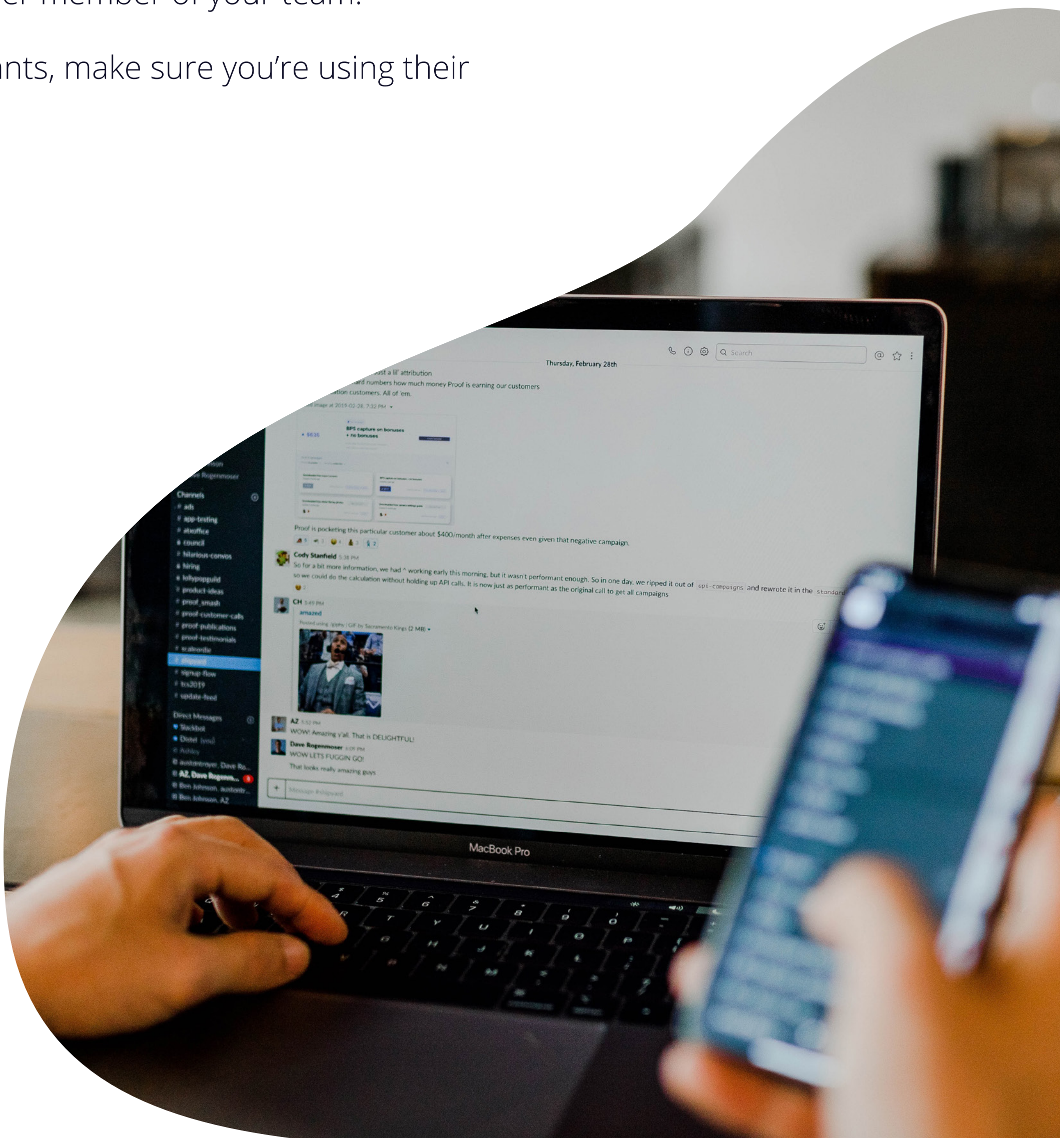
But there is still a role to play for humans. From our perspective, human partners are best employed to add value on top of your technology. If you're just using them for data collection, you may be wasting their brain power (and your money).

When you've automated those types of mundane tasks, you can pay a premium for experts to help you make sense of all of your research and offer strategic recommendations for what to do with it. Ideally, these people will understand your category will be able to work closely with you as another member of your team.

If you're going to pay for consultants, make sure you're using their expertise to the fullest extent.

Best used for
Making sense of your research and offering strategic recommendations

We recommend checking out
LRW
The Garage Group



BONUS:
The data layer

We can't wrap up without mentioning data. It may go without saying to a research audience, but your research is only as good as the quality of data behind it.

Typically, your relationship with data providers comes through the vendors you work with. Your vendors manage the relationship and you benefit from the data. This is normal and expected, but you should always remember that you are at the mercy of how your vendors collect their data. It's up to you to make sure you ask the right questions to understand how that data is gathered and analyzed. Your interpretation of the research hinges on your ability to understand where the data comes from.

With that in mind, data can be considered a "bonus layer." It's always there in the background of your relationships with all the partners on this list. Some researchers even take this a step further and form a direct relationship with data providers as well.

Best used for
Getting accurate research results

We recommend checking out
Cint

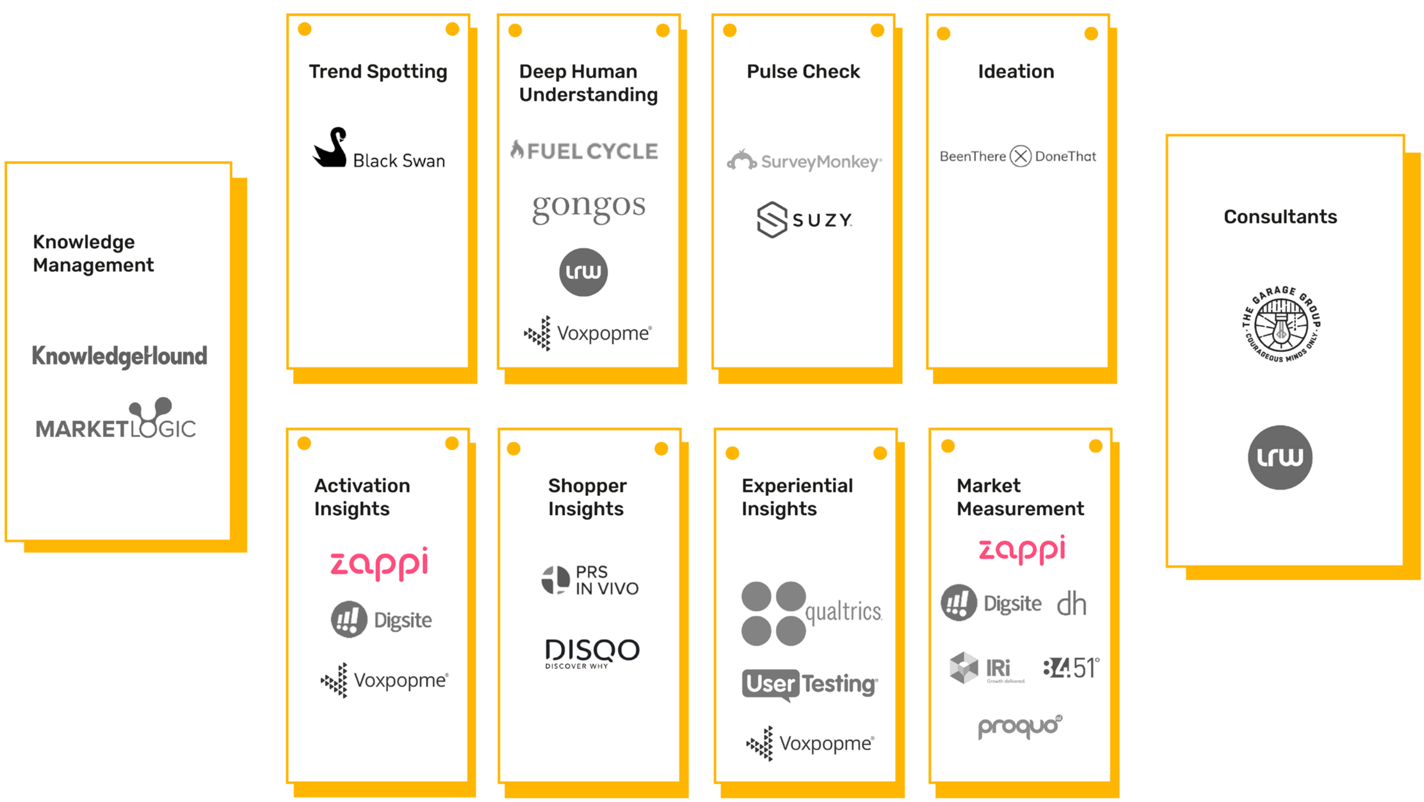
Wrapping up

We wish it were as easy as "just buy these three pieces of technology and you'll be all set!" But the truth is, the insights landscape is complicated because your needs are complicated. You have a variety of different questions to answer and truths to uncover to get into the minds of your consumers. And to make things more complicated, no two businesses have exactly the same needs.

But with that in mind, we think that we've come up with the 10 categories of insights (plus a bonus) to address the majority of your research needs.

Use this opportunity to evaluate your current MR stack. Is there anything that's missing? Anything that's not providing value?

And talk to Zappi about where we can fit into your current MR stack.



zappi