

— CROSS-MARKET SYNTHETIC RESEARCH STUDY

# Research is no longer constrained by time. Only by the questions we ask.

What 652 synthetic conversations across the UK, USA and Australia reveal about sustainability — and about a new layer of research that sits before fieldwork begins.

**< 2** hrs

EXECUTION TIME

**652**

VALIDATED RESPONDENTS

**3**

MARKETS · UK · USA · AUS

STUDY OVERVIEW

# At a glance.

A methodology demonstration in cross-market consumer research — same brief, three markets, conducted in parallel.

< 2h

EXECUTION

From brief to insights

652

RESPONDENTS

Validated & analysed

3

MARKETS

UK · USA · Australia

6,240

RESPONSES

Open-ended answers

WHAT WE DID

Ran the same qualitative brief across three English-speaking markets, with **~220 synthetic respondents per market**, to evaluate cross-market consistency.

WHAT WE FOUND

**Demand is not the problem. Trust is.** Each market expressed scepticism in a distinct cultural register, with deltas aligned to published research.

WHY IT MATTERS

The study took **under two hours** to execute, not months. That speed enables research workflows traditional methodology cannot accommodate — pre-test before pre-test, hypothesis iteration during a meeting, and brief A/B testing.

660

GENERATED



652

VALIDATED



8 (1.2%)

EXCLUDED — QUALITY THRESHOLD

— CATEGORY —

# This is not faster qualitative research. This is pre-fieldwork intelligence.

A new layer that sits *before* traditional research — for hypothesis formation, brief refinement, and cross-market exploration at a fundamentally different speed. It does not replace human research. It changes what is possible before it.

— KEY INSIGHT —

# Trust, not demand, is the **real constraint.**

The barrier to sustainable adoption is not price. It is not ideology. It is the credibility gap between what brands claim and what consumers believe.

## METHODOLOGY

# The setup.

An internal demonstration evaluating whether synthetic conversational respondents can produce coherent, market-specific findings.

## THE CORE QUESTION

Can a synthetic-respondent platform produce qualitative cross-market findings that are simultaneously **internally coherent**, **culturally distinct**, and **directionally consistent** with patterns observed in published research?

## Method

Identical research brief across three markets. Identical psychographic segmentation. The same ten open-ended questions. The same conversational interview format. **The only deliberate variable was the market itself.**

## STEP 01

### Single brief

FMCG sustainability positioning study — the kind commissioned by Unilever, Nestlé or P&G. Independent execution.

## STEP 02

### Three markets

UK, USA and Australia run in parallel with identical setup. Market is the only deliberate variable.

## STEP 03

### Three segments

Eco Skeptic, Conscious Mainstream, Eco Committed — equally represented across each market.

## Segmentation Model

### ● Eco Skeptic

Sceptical of sustainability claims. Price-first decision making.

### ● Conscious Mainstream

Sustainability-aware but constrained by practical factors.

### ● Eco Committed

Actively committed. Willing to pay a premium.

*Note on dataset — 660 generated · 652 validated · 8 excluded (1.2%) for failing minimum conversational coherence. Filtering is part of the methodology.*

BEHAVIOURAL REALISM

# Quality validation.

Synthetic research is only useful if respondents are coherent, distinguishable, and behaviourally realistic. We measure this through the **Synthetic Human Quality Index (SHQI)**.

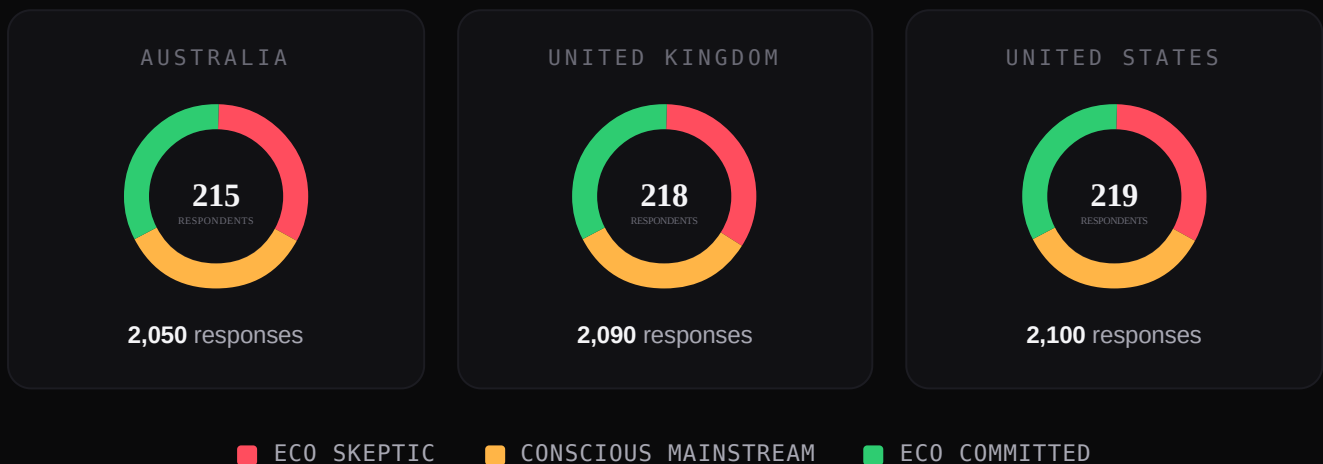


FIG 01 SAMPLE COMPOSITION BY MARKET AND PSYCHOGRAPHIC SEGMENT

METRIC	AUSTRALIA	UNITED KINGDOM	UNITED STATES	THRESHOLD	STATUS
SHQI average	0.984	0.990	0.990	≥ 0.90	PASS
Behavioural entropy	0.166	0.186	0.176	> 0.10	PASS
Accepted + marginal	95.3%	95.9%	95.9%	≥ 80%	PASS
Rejected responses	4.7%	4.1%	4.1%	≤ 10%	PASS

All internal quality gates passed. The slightly higher contradiction rate in Australian respondents is interpreted as *behavioural realism* — not error.

## FINDINGS

# What the data shows.

Three structural patterns emerged — consistently across all markets.

**01****Habit is the primary barrier.**

Not price. Not ideology. Habit. Default behaviour outweighs sustainability intent at the moment of purchase.

*"I just buy what I always buy."*

**02****Transparency is the only universal positive signal.**

Not "eco". Not "green". Concrete, verifiable claims earn consideration. Generic sustainability language is dismissed across every market.

*"Tell me exactly what's in it. Don't tell me it's better."*

**03****Third-party validation is the trust currency.**

Consumers trust verification, not brands. Independent certification consistently outperforms self-declared claims as a conversion driver.

*"If a brand says it, I'm sceptical. If a third party confirms it, I'll consider it."*

PROPRIETARY FRAMEWORK

# The Sustainability Conversion Chain.

A consistent structural pattern observed across every market we studied. Three sequential gates between sustainability intent and sustainable purchase.

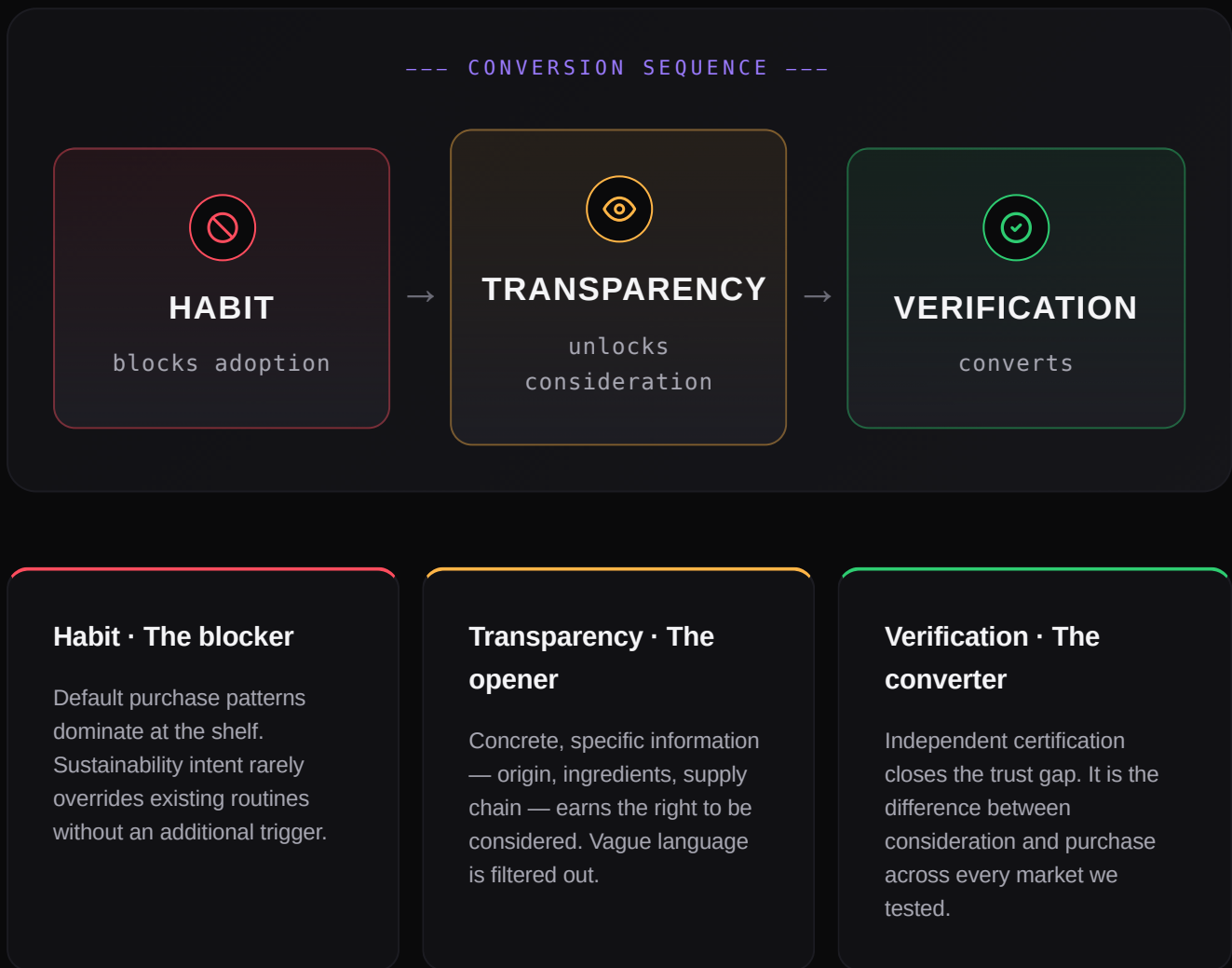


FIG 02 THE SUSTAINABILITY CONVERSION CHAIN – QUALISYNTH PROPRIETARY FRAMEWORK

## CROSS-MARKET DELTAS

# Market-specific dynamics.

Each market expressed a distinct barrier to sustainable adoption. **These are structural differences, not just tone.**

— AUS

## Australia

### Availability Gap

Sustainability is not rejected — it is inaccessible. Strong preference for local origin, but limited shelf-level availability constrains adoption regardless of intent.

*"I want to buy better, but the options just aren't there when I shop."*

— UK

## United Kingdom

### Proof-Driven Premium

Highest price sensitivity among the three markets. Respondents require hard evidence to justify any premium on sustainable products. Claims without substantiation are dismissed immediately.

*"Show me the data, then I'll consider paying more."*

— USA

## United States

### Communication Fatigue

Strongest rejection of sustainability messaging. The preference is clear: *do it, don't say it*. Visible action matters more than declared intent.

*"I'm tired of hearing how green you are. Just be green."*

# **This is not validation. This is directional convergence.**

The synthetic respondents were not trained on these studies — yet trust erosion patterns, conditional willingness-to-pay, and price sensitivity gradients all align. The model reproduces structural behaviour, not surface-level plausibility.

EXTERNAL REFERENCE

# Convergence with published research.

We compared findings against four independent studies to assess directional alignment.

REFERENCE STUDY	YEAR	ALIGNED FINDING
Edelman Trust Barometer	2025	Trust erosion in institutional sustainability claims accelerating globally.
Simon-Kucher Sustainability Study	2024	Conditional willingness-to-pay correlates with verification availability.
PwC Voice of the Consumer	2024	Habit and convenience outrank price as adoption barriers.
L.E.K. Sustainability Survey	2024	UK consumers show highest price sensitivity on sustainable premiums.

WHAT THIS TELLS US

Trust erosion patterns align. Conditional willingness-to-pay aligns. The UK > US price sensitivity gradient aligns. **The model reproduces structural behaviour patterns**, not surface-level plausibility.

THE SIGNAL

The system was not trained to reproduce these findings. **The fact that it does is the signal.**

*Convergence is directional, not statistical. The purpose is to demonstrate that synthetic responses behave consistently with documented patterns — not to claim equivalence with quantitative panels.*

— WHY IT MATTERS —

# Executed in under 2 hours.

Not faster research. New research behaviour. Speed at this magnitude doesn't compress the existing workflow — it changes what is possible before fieldwork begins.

WORKFLOW IMPLICATIONS

# Why this matters.

The key number is not sample size. It is execution time — and what becomes possible at that speed.

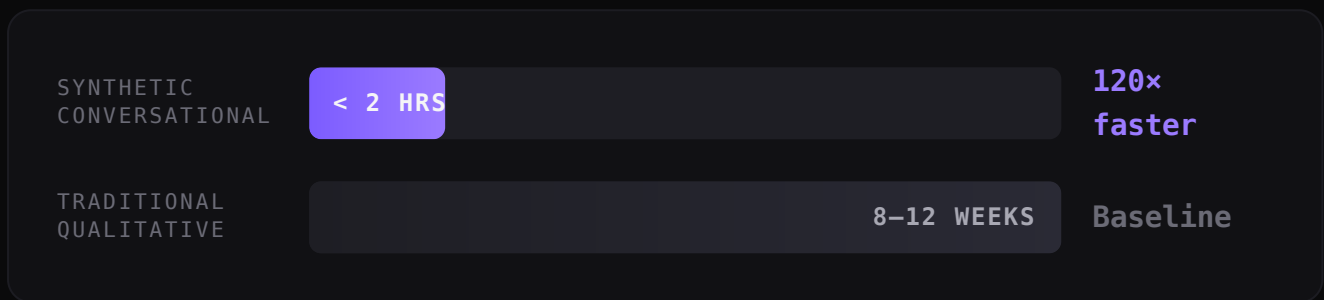


FIG 03 TRADITIONAL QUALITATIVE RESEARCH VS. SYNTHETIC CONVERSATIONAL RESEARCH

*Indicative comparison based on typical cross-market qualitative timelines (8-12 weeks).*

This does not compress research.  
**It changes when research begins.**

## New research behaviours enabled

<p><b>Pre-test before pre-test</b></p> <p>Run a synthetic wave to refine your brief before committing to fieldwork. Identify weak questions, gaps in coverage, unproductive lines of inquiry.</p>	<p><b>Hypothesis iteration in real time</b></p> <p>Test multiple hypotheses during a single meeting. Generate directional data, discuss implications, and refine questions in the same session.</p>	<p><b>Brief A/B testing</b></p> <p>Compare how different framings, wordings, or stimulus materials perform across segments and markets before committing to full-scale research.</p>
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BOUNDARY CONDITIONS

# What this is not.

Understanding the limits of synthetic conversational research is essential to using it well.

WHAT IT IS NOT	WHY	WHERE IT BELONGS INSTEAD
<p>✘ <b>Statistically projectable</b></p>	Qualitative depth, not quantitative breadth.	Hypothesis formation, directional signals.
<p>✘ <b>A replacement for human research</b></p>	Synthetic respondents model behaviour; they do not live it.	Upstream exploration and iteration.
<p>✘ <b>A shortcut to truth</b></p>	All models have biases and blind spots.	Pattern recognition, not validation.

## Limitations

LIMIT 01

**Reflective bias**

Like human interviews, synthetic respondents are subject to the gap between stated and actual behaviour.

LIMIT 02

**No human panel comparison**

A parallel human panel study would strengthen the validity argument. Planned but not yet executed.

LIMIT 03

**Quantitative validation needed**

For high-stakes decisions, synthetic qualitative findings should be followed by quantitative validation.

WHERE IT BELONGS

Synthetic conversational research belongs **earlier in the cycle** — hypothesis formation, concept stress-testing, research design — where speed and iteration matter more than statistical projection.

3

MARKETS

652

VALIDATED  
RESPONDENTS

< 2h

EXECUTION TIME

The constraint is no longer  
time.

It is whether you are  
asking the right question.

That is a different kind of research problem. **And a different  
kind of research company.**