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How consumers think about value

A Medallia Market Research Briefing



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Hotel Deep Dive

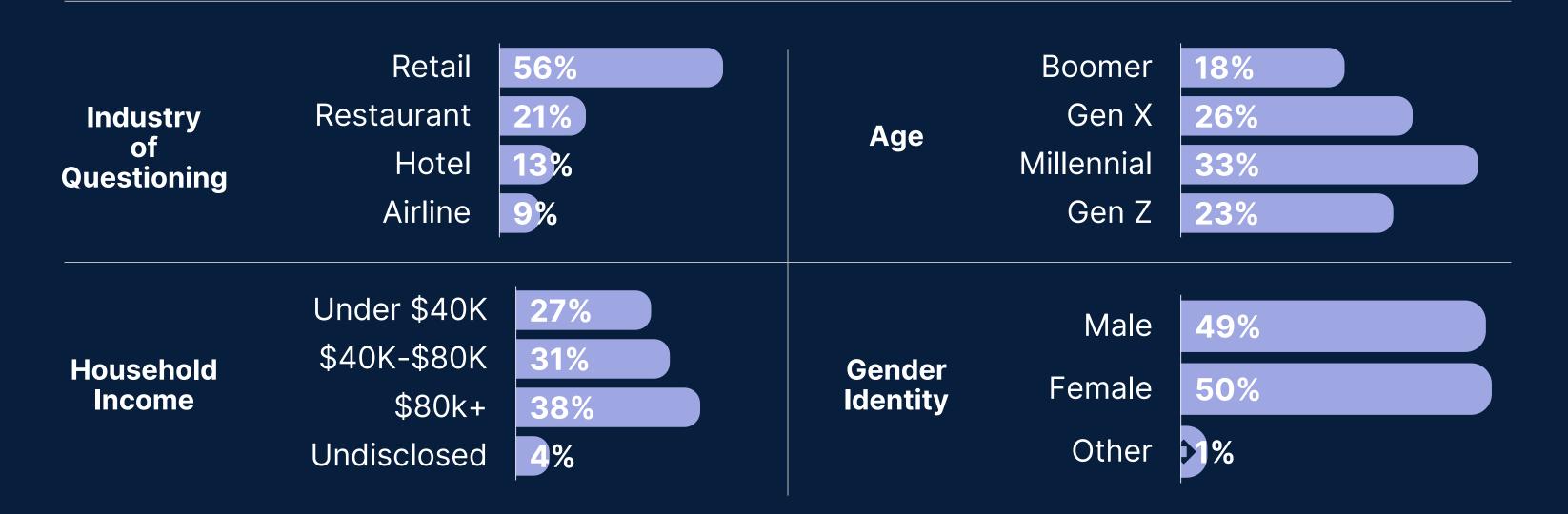
Airline Deep Dive

Recap

Research methodology



Andrew Custage Head of Research Insights **n = 1,852** general population of US consumers. Results were collected



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November 12-14, 2024 using Medallia's Agile Research survey platform.



Value Perceptions Overview

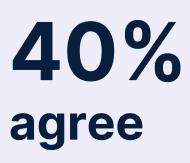
The macroeconomic environment makes affordability perceptions critical to winning over the customer.



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From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "For each of the following, select what best represents your view"





"I often **sacrifice my** enjoyment by picking something cheaper but worse, in order to save money."

Customers make about half of their purchases by choosing the cheapest option, but it varies by industry.

% of customers whose most recent transaction was with the cheapest brand option

by industry



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From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "Was this the cheapest possible option you were considering on this occasion?"



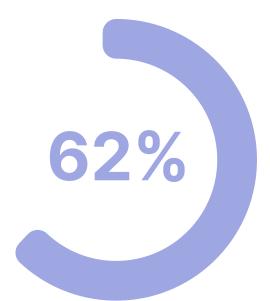
The "consumer surplus": Though consumers are savvy to find the best price, it doesn't mean they wouldn't have spent more if required.

% who would have spent even more to get what they did (if necessary) % of customers indicating willingness to spend additional was >\$0, by industry



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From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "How many more dollars would you have been willing to spend to get everything you did, with the exact same experience you had? Think of the maximum amount more you would have paid, where if the cost was any amount more, you would have made different choices instead."



Retail customers

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Even when budgets are tight, better experiences can drive additional spend for a majority of customers.





From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "For each of the following, select what best represents your view"



of customers feel a better experience is usually worth paying extra.

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Product quality and convenience are the most common things people feel are worth spending extra.

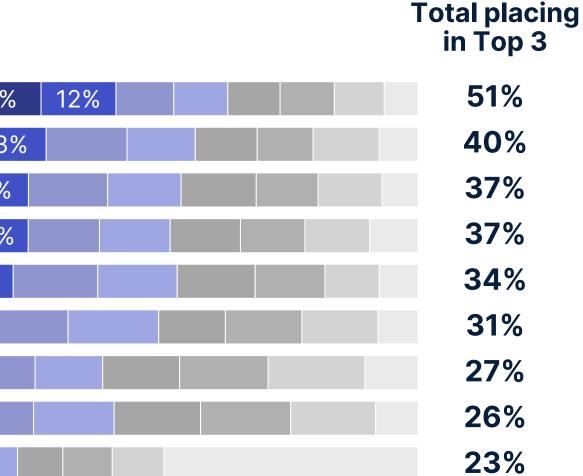
What is worth spending more money on?

% of customers placing attribute in rank listed #1 #2 #3 #4 #5 #6 #7 #8 #9

24% 15%	Higher quality products
13% 14% 13%	More convenience (e.g. closer locations, more ways to buy, etc.)
10% 15% 13%	More options / variety to choose from
13% 13% 11%	Healthier / better for you products
8% 13% 14%	Better service (e.g. more attentive, friendlier, etc.)
9% 10% 12%	Shorter waits
7% 9% 10%	More personalized experiences
7% 8% 11%	More pleasant atmosphere
12% 5% <mark>5%</mark>	Something else

From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "In general, what do you feel are the things that make the most sense to spend more money on, versus just going with the cheapest option? Rank the following in order from 1 to 9"

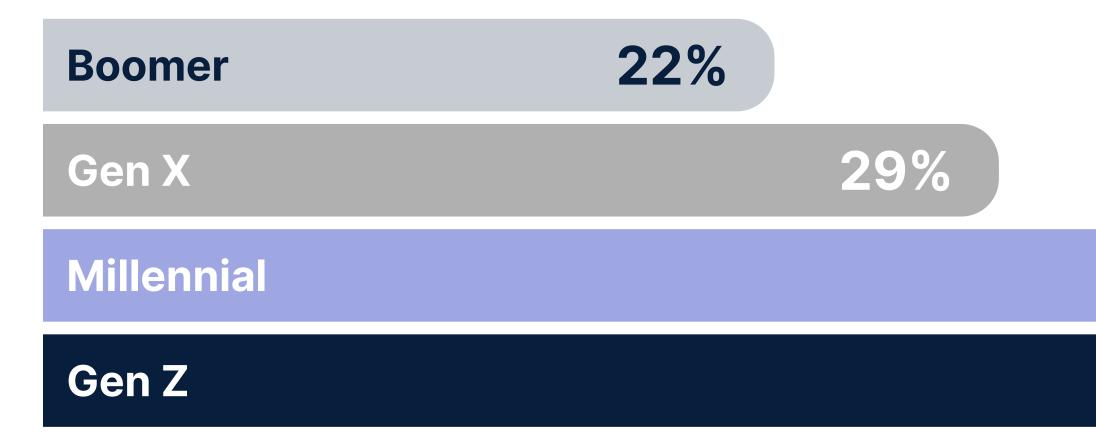
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Younger generations are more likely to think that when something is more expensive, it is justified.

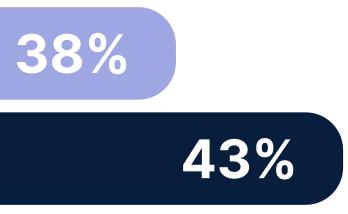
"If something is priced higher than the competition, it is usually better than the competition in some way"

% agreeing, by generation



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From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "For each of the following, select what best represents your view"



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pricing can ruin a



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From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "For each of the following, select what best represents your view"

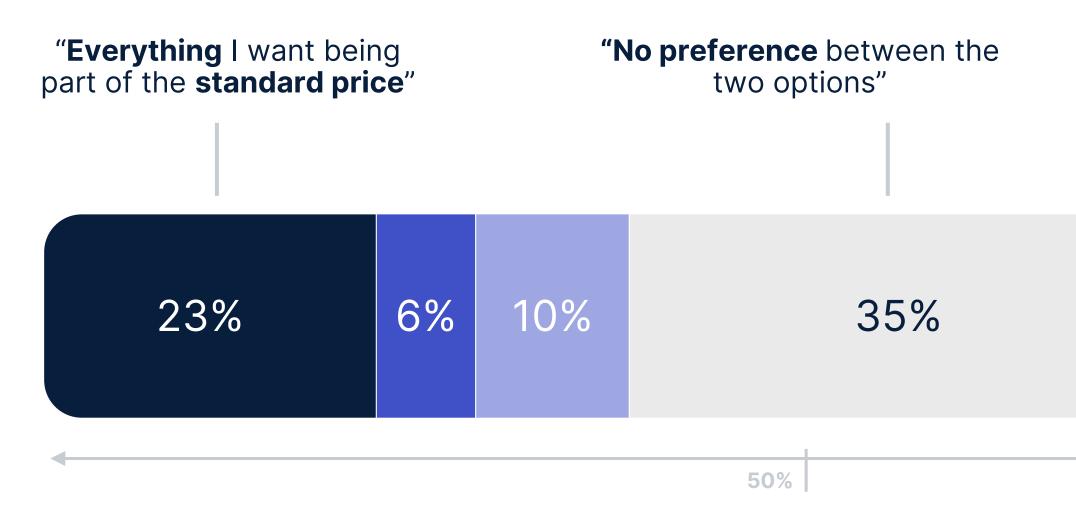
Just as premium pricing can affect perceptions of value, manipulation with deceitful customer's experience.

"Companies often try to trick the customer with confusing pricing or the appearance of a deal."

Preferences vary, but people lean slightly more toward bundles instead of a low starting price with costly add-ons.

Pricing structure preferences

% selecting their preferred placement on scale



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From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "What do you prefer more: having everything you want all be part of the standard price, or the standard price being lower but you need to pay more to add in all the things you wanted? Select where you fall on the scale below."





Retail Deep Dive

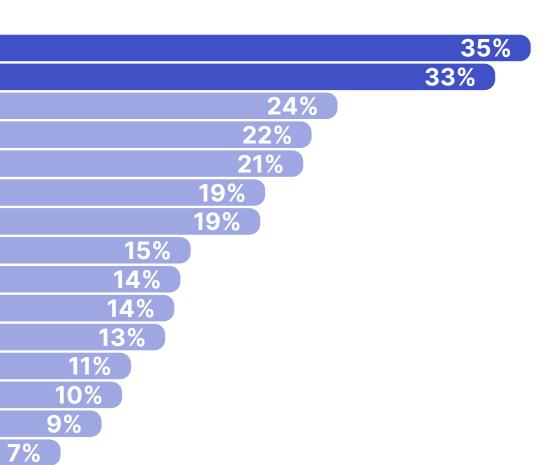
Prices lead drivers of choice for retailers more often than product quality.

Top reasons for choosing retailer over others, % indicating

Best value for the money Lowest prices overall Most convenient location to me They had a deal / promotion Had best quality products Had best variety of products Loyalty / rewards / subscription program Carried specific kinds of products I wanted Had best service Had my preferred way of shopping (e.g. web, app) Had most things in-stock Had best return policies Had my preferred way of receiving products (e.g. delivery, pick-up) Had nicest atmosphere I wanted to support a business that has good values Trusted the cleanliness / safety of this place the most I wanted to support a local business Other people I was with want to shop at this place Partnership with a credit card / payment system I use Noticed it from advertising or when driving / walking by

From Medallia Market Research November 2024 US General Population Retail Customer Survey (n =1,096); "During the last time you made a purchase from a retailer, why did you choose that one over others? Select up to 4 reasons.'

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6%

5%

5%

5%

4%

However, of the **40% of customers** who didn't choose the cheapest retail option, reasons are much more around product quality / selection, and location.

Why choosing retailer over cheaper options % indicating

- Better pro
- More conve
- Better selecti
- Loyalty rew
- Special dea
- Faster spe
- I wanted a specific type
- Had preferred method of purch
 - Company supports
 - I didn't think ab
 - I had a gift card / cer
 - More friendly
 - Better at

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From Medallia Market Research November 2024 US General Population Retail Customer Survey (n = 231); "Why did you choose this retailer over a cheaper option? In other words, what about the option you chose made you think it was worth spending more? Select all that apply."

oduct quality	29%
enient location	25%
tion of products	23%
vards program	22%
al or promotion	17%
ed of service	16%
e of product only they sell	14%
nasing (e.g. order ahead, delivery)	11%
s causes I care about	11%
oout other options	10%
rtificate / coupon to use	10%
ly / helpful staff	9%
itmosphere	8%

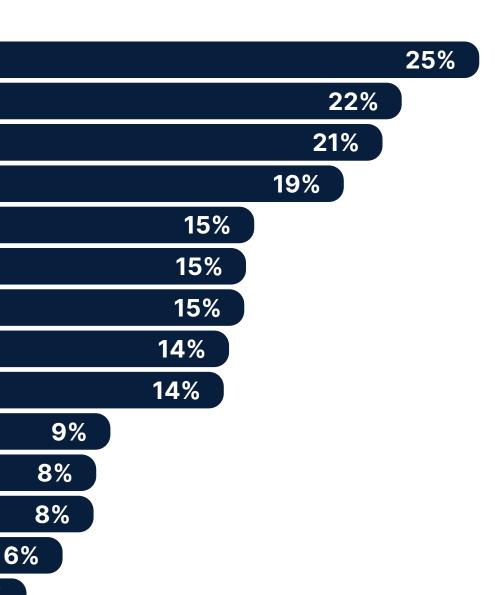
42% of retail shoppers chose product(s) that weren't the cheapest options. Top reasons also involve quality.

Reasons for choosing a more expensive product option, % indicating

Better product quality / features I wanted a specific type of product and this was the only one Special deal or promotion This was the best size, count, etc. for what I wanted I had a coupon to use I had heard more of this brand / reputation was better Section of store, shelf, website, etc. most accessible to me Product / packaging was more appealing in terms of look, feel, smell, etc. Brand had better customer support / maintenance / return policies Someone else chose for me Brand uses safer / healthier materials or ingredients I didn't think about other options Brand supports causes I care about Others would have had a longer wait to receive it

From Medallia Market Research November 2024 US General Population Retail Customer Survey (n =248); "Why did you choose those products over cheaper options? In other words, what about the options you chose made you think they were worth spending more? Select all that apply."

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5%

What retail customers would have paid more to get, and what they didn't get because of price:

Top cited, of 13 experience components asked:

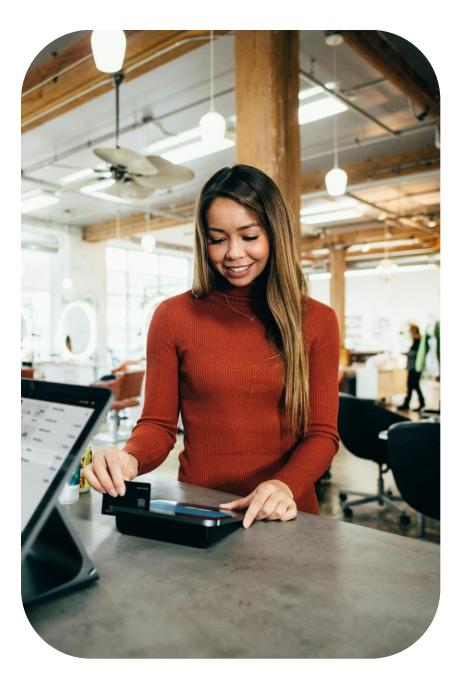
Most often received	 Friendly and professional service Clean and appealing atmosphere Faster receiving of product (e.g. faster delivery)
If received, most often paid for	 Gift wrapping Extended warranty, return period, or maintenan Access to content / entertainment while shopping
If received, most willing to pay / pay more to have	 Personalization / customization of product Dedicated salesperson / consultant to assist Extended warranty, return period, or maintenan
If not received, most willing to pay for if cheaper	 Extended warranty, return period, or maintenant Faster receiving of product (e.g. faster delivery Personalization / customization of product

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From Medallia Market Research November 2024 US General Population Retail Customer Survey (n = 391); "During your restaurant interaction, which of the following did you receive?"

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People rarely pay for additional experience components in a retail transaction, but in some cases would have if needed.

Payment for components of the retail experience

% of customers indicating, displayed by width of bubble (\bigcirc = 75% indication among the customers asked)

		If rec	eived	If not received
Experience Component	Received?	Paid to get it?	Would have paid / paid more?	Would have paid for if cheaper?
Friendly and professional service	•			•
Clean and appealing atmosphere	•			•
Faster receiving of product (e.g. faster delivery)	•	•		•
Faster or priority service	•	•		•
Dedicated salesperson / consultant to assist with shopping	•	•		•
Personalization / customization (e.g. engraving, size, material, color)	•	•		•
Extended warranty, return period, or maintenance plan	•	•		•
Advance time to enter store / access certain items	•	•		•
Item substitutions within a package / bundle	•	•		•
Access to content / entertainment while shopping	•	•		•
Gift wrapping	•	•		•
Trial / sample of product before buying	•	•		•
Pre-assembly of items	•	•		•

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From Medallia Market Research November 2024 US General Population Retail Customer Survey (n = 391); "During your restaurant interaction, which of the following did you receive?"



Restaurant Deep Dive



Taste, location, and cuisine type lead restaurant drivers of choice.

Top reasons for choosing restaurant over others, % indicating

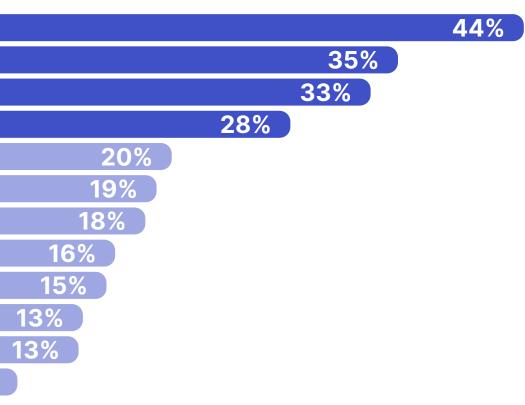
9%
8%
7%
6%
5%
4%

Taste

Convenient location I wanted a specific type of cuisine Low prices Quality of ingredients Speed of service Loyalty rewards program Friendly / helpful staff Healthiness of food Special deal or promotion Portion size Atmosphere Preferred method of ordering available (e.g. order ahead, delivery) I had a gift card / certificate / coupon to use Someone else chose for me Company supports causes I care about Ease of transport / storing this type of food

From Medallia Market Research November 2024 US General Population Restaurant Customer Survey (n = 391); "During the last time you got food from a restaurant, why did you choose that one over others? Select up to 4 reasons.'

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Of the 59% of customers who didn't choose the cheapest restaurant option, reasons often center on the food itself.

Why choosing restaurant over cheaper options % indicating

Better taste I wanted this specific type of cuisir Better quality of ingredients More convenient location Better atmosphere Better portion size More healthy food Loyalty rewards program More friendly / helpful staff Special deal or promotion Faster speed of service I had a gift card / certificate / coupon t Someone else chose for me Company supports causes I care ab Had preferred way to order (e.g. order ahea Better base of transport / storing this type I didn't think about other options

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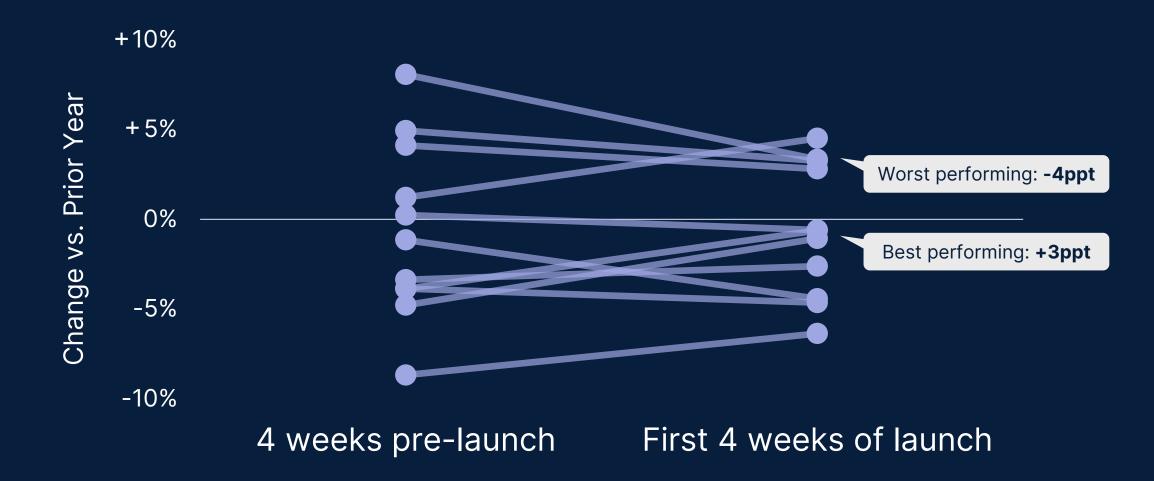
From Medallia Market Research November 2024 US General Population Restaurant Customer Survey (n = 180); "Why did you choose this restaurant over a cheaper option? In other words, what about the option you chose made you think it was worth spending more? Select all that apply."

	Total	Full Service Restaurant	Limited Service Restaurant
	44%	47%	36%
ine	34%	35%	33%
	27%	34%	16%
	26%	23%	31%
	21%	28%	11%
	16%	19%	13%
	13%	15%	10%
	12%	10%	14%
	11%	12%	11%
	10%	9%	11%
	10%	11%	8%
to use	9%	8%	12%
	6%	6%	6%
oout	5%	5%	7%
ad, delivery)	3%	3%	3%
e of food	3%	1%	6%
S	1%	2%	0%

Competing on price alone may have limited results. Notable 2024 restaurant value-centric promotions have been mixed in driving incremental sales.

Wallet share shift of 11 restaurant brands: pre-vs. post-launch of promotion

Year-over-year relative change in wallet share during period listed Each — represents one brand promotion (11 in total)





From Sense360 by Medallia US credit / debit transaction panel.

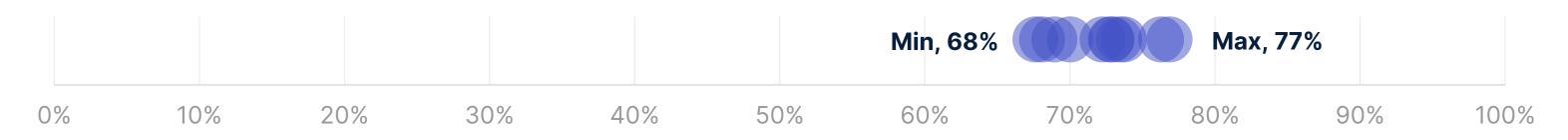
Wallet share: proportion of all limited + full service chain restaurant market dollars going to brand listed.

Of the 11 promotions studied, brands' wallet share trends were measured in the weeks following the promotion (compared to the trend in the weeks leading up to it). Trends only improved in 5 cases.

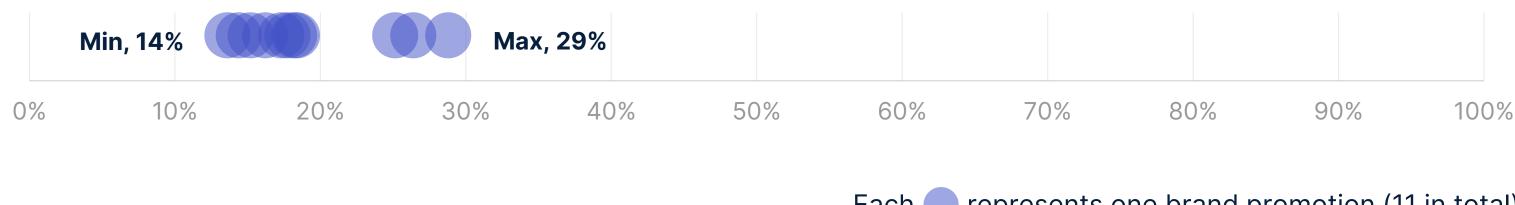
Wallet share trends actually worsened in the other 6, suggesting either the promotions resonated little with customers, or were not sufficient in overcoming other brand deficiencies vs. the competition that existed in that same time period.

The 11 restaurant promotions studied: most were considered good value, but also did not drive an incremental visit for most who purchased it.

% perceiving restaurant promotion as good value (4-5 on 1-5 scale)



% of purchasers who chose restaurant solely because of promotion



From Medallia Market Research November 2024 US General Population Consumer Survey (n = 1,852); "For those in which you were aware and/or purchased, please select your perceptions of their value (i.e. how good of a deal they were)" / "For those in which you made a purchase, please select what you would have done if that promotion / limited time offer wasn't available on that occasion" Questions among those aware / having purchased promo.

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Each represents one brand promotion (11 in total)

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What restaurant customers would have paid more to get, and what they didn't get because of price:

Top cited, of 13 experience components asked:

Most often received	 Friendly and professional service Clean and appealing atmosphere Side items to accompany the main food item
If received, most often paid for	 Alcoholic beverage with meal Non-alcoholic beverage with meal Dessert item with meal
If received, most willing to pay / pay more to have	 Upsized portions (e.g. double meat, cheese, etc. Dessert item with meal Ingredient substitutions based on preferences
If not received, most willing to pay for if cheaper	 Side items to accompany the main food item Upsized portions (e.g. double meat, cheese, et Dessert item with meal

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From Medallia Market Research November 2024 US General Population Restaurant Customer Survey (n = 391); "During your restaurant interaction, which of the following did you receive?"



For many components people received (often without paying), 50%+ would have paid or paid more to have it.

Payment for components of the restaurant experience % of customers indicating, displayed by width of bubble (\bigcirc = 75% indication among the customers asked)

		If rec	eived	If not received
Experience Component	Received?	Paid to get it?	Would have paid / paid more?	Would have paid for if cheaper?
Friendly and professional service	•		•	•
Clean and appealing atmosphere	•	•	•	•
Side items to accompany the main food item	•	•		•
Faster or priority service	•	•		•
Non-alcoholic beverage with meal	•			•
Selection of table within restaurant	•			•
Dessert item with meal	•			•
Ingredient substitutions based on preferences	•	•		•
Reserved time to dine at restaurant	•	•		•
Upsized portions (e.g. double meat, double cheese, etc.)	•			•
Alcoholic beverage with meal	•			•
Access to entertainment along with meal	•	•		•
Toy / souvenir with meal	•			•

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From Medallia Market Research November 2024 US General Population Restaurant Customer Survey (n = 391); "During your restaurant interaction, which of the following did you receive?"

For restaurant delivery specifically, premium packaging and heating / cooling packs top the list for willingness to pay.

Payment for components of the restaurant delivery experience Low sample % of customers indicating, displayed by width of bubble (\bigcirc = 75% indication among the customers asked)

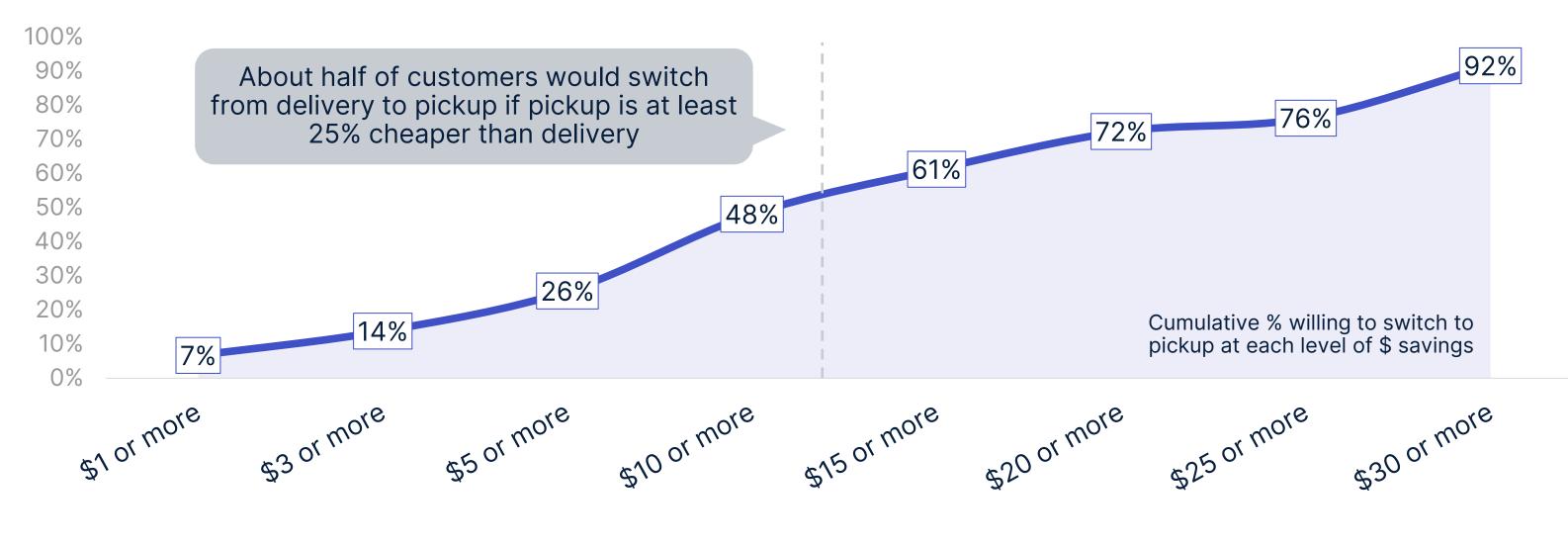
		If rece	eived	If not received
Experience Component	Received?	Paid to get it?	Would have paid / paid more?	Would have paid for if cheaper?
Utensils, napkins, condiment packs in package	•		•	•
Faster or priority delivery	•	•		•
Option to be handed food vs. left at door	•		•	•
Pickups for order from more than one restaurant / store	•	•		•
Premium packaging (e.g. better-than-normal materials, compartments)	•	•		•
Real-time GPS tracking of order location	•		•	•
Heating / cooling packs with packaging		•		•

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From Medallia Market Research November 2024 US General Population Restaurant Customer Survey (n = 391); "During your restaurant interaction, which of the following did you receive?" Subset: n = 67 delivery customers

People have a breaking point on the value of delivery over pickup vs. the incremental cost.

Switching to pickup over delivery on a \$50 order: How much would savings need to be?



From Medallia Market Research November 2024 US General Population Restaurant Customer Survey (n = 391); "Imagine a situation where your plan is to order delivery from a restaurant. When getting ready to order, you see the total cost would be lower if you were to go to the restaurant to pick up the food inperson (instead of getting it delivered). If getting the food delivered would be \$50 total cost, how much cheaper would it need to be for you to do pick-up instead and be willing to travel 20 minutes each way?."

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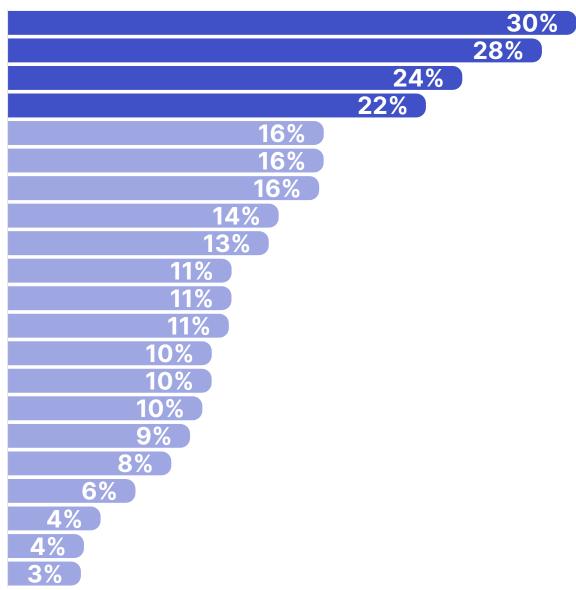


Hotel Deep Dive

Top drivers of choice for hotels are location and several value attributes – including loyalty / rewards.

Top reasons for choosing hotel over others, % indicating

Most convenient location to where I wanted to be Best value for the money Lowest price overall Loyalty / rewards program Had best service Had certain amenities on site (e.g. restaurant, gym, entertainment) Trusted the cleanliness of this place the most Was part of a hotel chain I prefer Had style I was looking for (e.g. modern, traditional) Had my preferred way of booking (e.g. online, portal like Expedia) Had nicest atmosphere Had most spacious rooms Had friendliest staff Had dates available that others didn't They had a deal / promotion Had best cancellation / refund policies Partnership with a credit card / payment system I use I wanted to support a business that has good values Noticed it from advertising I wanted to support a local business Other people chose this hotel for me



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From Medallia Market Research November 2024 US General Population Hotel Customer Survey (n = 244); "During the last time you made a hotel room reservation, why did you choose that one over others? Select up to 4 reasons."

Of the 57% of hotel customers who didn't choose the cheapest option, the top driver is quality of the room itself. **Reputation ranks** high too.

% indicating

Better room quality (e

More cor

Brand had

Better property ameniti

Loyalty r

More frier

Better c

Special d

Wider selection of

Someone

They had the method of boo

I had a gift card / c

Company suppo

I didn't think

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From Medallia Market Research November 2024 US General Population Hotel Customer Survey (n = 110); "Why did you choose this hotel over a cheaper option? In other words, what about the option you chose made you think it was worth spending more? Select all that apply."

Why choosing hotel over cheaper options

e.g. size, furniture, cleanliness)	43%
nvenient location	38%
a better reputation	32%
ties (e.g. gym, pool, restaurant)	28%
rewards program	20%
ndly / helpful staff	14%
dates available	13%
deal or promotion	13%
of rooms to choose from	9%
else chose for me	9%
oking I wanted (e.g. travel site, app)	7%
certificate / coupon to use	6%
orts causes I care about	2%
about other options	2%

What hotel customers would have paid more to get, and what they didn't get because of price:

Top cited, of 18 experience components asked:

Most often received	 In-room wifi Pool / spa access Smart TV with streaming apps in room
\$ If received, most often paid for	 Upgraded rooms Choice of room view Lounge access
If received, most willing to pay / pay more to have	 Upgraded rooms Baggage storage by lobby Lounge access
If not received, most willing to pay for if cheaper	 In-room wifi Upgraded rooms Pool / spa access

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From Medallia Market Research November 2024 US General Population Hotel Customer Survey (n = 244); "During your hotel interaction, which of the following did you receive?"



Depending on the guest, room upgrades rank high in willingness to pay more, but also avoidance because of too high a cost.

Payment for components of the hotel experience

% of customers indicating, displayed by width of bubble (\bullet = 50% indication among the customers asked)

Experience Component	Received?	If received		If not received
		Paid to get it?	Would have paid / paid more?	Would have paid for if cheaper?
In-room wifi			•	•
Pool / spa access			•	•
Smart TV with streaming apps in room	•	•	•	•
Gym access	•	•	•	•
Onsite parking / valet	•	•		•
Early check-in	•	•		•
Water bottle in room	•		•	•
Room location choices (e.g. higher floor, away from elevator)	•	•		•
Extra appliances (e.g. iron, coffee machine, fridge) brought to room	•	•		•
Extra bedding (e.g. pillows, blankets) brought to room	•	•		•
Late check-out	•	•		•
Snacks or non-water beverages in room	•			•
Lounge access	•	•		•
Choice of room view (e.g. city view, nature view)	•	•		•
Baggage storage by lobby	•	•		•
Concierge assistance with reservations, activities, etc.	•	•		•
Upgraded rooms (e.g. bigger size room, separate living room)	•			•
Bluetooth music speaker in room	•			

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From Medallia Market Research November 2024 US General Population Hotel Customer Survey (n = 244); "During your hotel interaction, which of the following did you receive?"



Airline Deep Dive

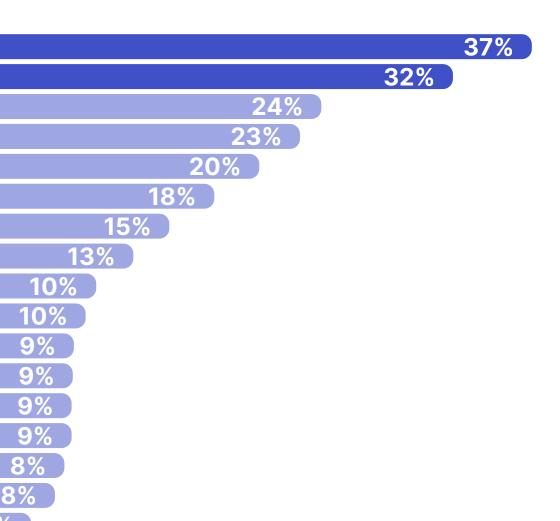
Top drivers of choice for airlines are price-driven.

Top reasons for choosing airline over others, % indicating

	Lowest price overall
	Best value for the money
	Loyalty / rewards program
	Had flight hours / flight length (e.g. direct vs. layover) that others didn't
	They had a deal / promotion
	Had my preferred way of booking (e.g. online, portal like Expedia)
	Had best service
	Had flights to airports that others didn't
	Was part of an airline alliance I prefer
1	Had friendliest staff
ç	Noticed it from advertising
ç	Partnership with a credit card / payment system I use
9	Had best cancellation / refund policies
9	Had dates available that others didn't
8	Had certain amenities (e.g. Wifi, electrical outlets, free checked bag)
8%	Had most spacious seats / legroom
6%	Had nicest atmosphere / types of planes
6%	I wanted to support a business that has good values
6%	Other people chose this airline for me
5%	Trusted the cleanliness of their planes the most

From Medallia Market Research November 2024 US General Population Airline Customer Survey (n = 174); "During the last time you made an airline ticket purchase, why did you choose that one over others? Select up to 4 reasons."

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Of the 41% of airline customers who didn't choose the cheapest option, airport preference and direct flight availability were the biggest drivers.

% indicating

Flight to preferre Had flight hours / flight length Had certain amenities (e.g. Wifi, Had most space Bette Better repu Had dates availa Had a gift car Had better cancel Loyalty / re Friend Partnership with a credit Had my preferred way of book They had a Was part of an ai Nicer atmosphere / cle Airline supports

Other people cho

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From Medallia Market Research November 2024 US General Population Airline Customer Survey (n = 60); "Why did you choose this flight over a cheaper option? In other words, what about the option you chose made you think it was worth spending more? Select all that apply."

Why choosing airline over cheaper options

ed airport (if multiple)	29%
(e.g. direct vs. layover) over others	23%
electrical outlets, free checked bag)	20%
ious seats / legroom	19%
er service	16%
utation of airline	16%
able that others didn't	14%
rd / coupon to use	14%
llation / refund policies	13%
ewards program	12%
ndlier staff	12%
t card / payment system I use	11%
king (e.g. online, portal like Expedia)	11%
deal / promotion	9%
airline alliance I prefer	8%
eanliness / types of planes	8%
s causes I care about	3%
ose this airline for me	3%

What airline customers would have paid more to get, and what they didn't get because of price:

Top cited, of 16 experience components asked:

. In-flight snack . Carry-on baggage allowance . In-flight Wifi
 Premium class / section seats (e.g. first class) Refundable / insured ticket purchase In-flight alcoholic beverage
 Seat selection in advance Transportation services pre- or post-flight Premium class / section seats (e.g. first class)
 Refundable / insured ticket purchase In-flight non-alcoholic beverage Premium class / section seats (e.g. first class)

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From Medallia Market Research November 2024 US General Population Airline Customer Survey (n = 174); "During your airline experience, which of the following did you receive?"

10 0

Those paying for seat selection or premium classes considerate it a non-negotiable – they'd pay in even more if needed.

Payment for components of the airline experience

% of customers indicating, displayed by width of bubble (\bullet = 50% indication among the customers asked)

Experience Component	Received?	If received		If not received
		Paid to get it?	Would have paid / paid more?	Would have paid for if cheaper?
In-flight snack	•		•	•
Carry-on baggage allowance	•	•		•
In-flight Wifi	•	•	•	•
Checked baggage	•	•		•
Seat selection in advance	•	•		•
Ability to recline seat	•		•	•
In-flight entertainment	•	•	•	•
In-flight non-alcoholic beverage	•		•	•
Refundable / insured ticket purchase	•	•		•
In-flight alcoholic beverage	•	•		•
Available electrical outlets at seat	•	•	•	•
In-flight meal	•	•		•
Priority boarding	•	•	•	•
Lounge access	•	•	•	•
Transportation services pre- or post-flight (e.g. shuttle, limo)	•			•
Premium class / section seats (e.g. first class, business class)	•			•

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From Medallia Market Research November 2024 US General Population Airline Customer Survey (n = 174); "During your airline experience, which of the following did you receive?"

Recap

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- though this varies by industry.
- confusing pricing or "deals" that aren't truly discounts.
- tickets.

• The current macroeconomic environment makes affordability perceptions especially critical to winning over the consumer. Many consumers pick the cheapest store / brand when making a purchase,

• Although consumers are diligent to avoid overpaying (in the context of what other options existed), many still would have been willing to pay more if needed. This, plus sentiments that better experiences are worth paying extra and the belief by some (especially younger generations) that higher prices typically mean better quality, allows some brands to compete well as a more expensive option. However, consumers are also perceptive of when brands aim to manipulate with

• If given the choice, consumers lean more toward wanting everything they'd need in a purchase being built into the standard price, vs. a lower teaser price but required added spend on numerous add-ons.

• For industry deep dives, some notable patterns include the relatively higher importance of price for retail and airline customers compared to restaurant and hotel customers, the inconsistent results restaurants see when running with value-based promotions, and the polarizing price perceptions (customers split on seeing a good deal vs. too high a price) for things like hotel room upgrades and refundable airline

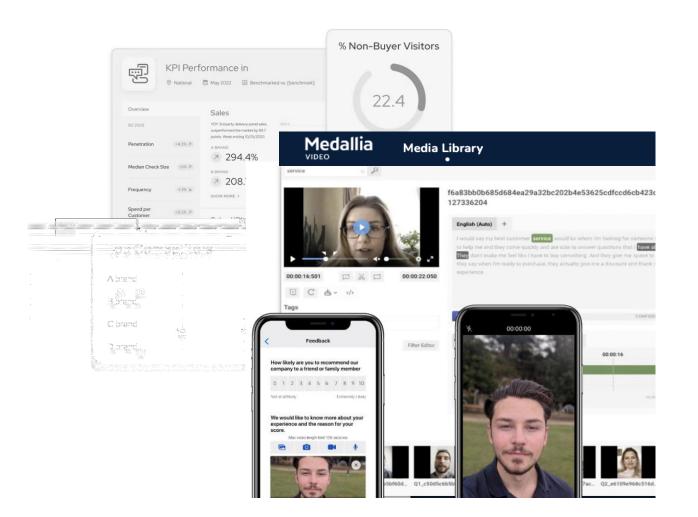






Questions? Contact briefings@medallia.com

Medallia Market Research Suite





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• Quickly gather insights with a user-friendly DIY survey tool, built to support over 50 languages and complex methodologies (Max Diff or Conjoint).

• Capture and analyze rich video feedback from surveys, focus groups, or online journaling exercises. Bring these insights to life through video showreels and storytelling.

• A real-time ideation platform that inspires innovation development.