

HUMAN VERIFICATION FOR EVERY PLATFORM

# The Human Data *Premium.*

*Why cost per quality response will define the next era of market research, and why provably human data is becoming the scarcest, most valuable asset in the insights economy.*

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AI data teams

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INSIDE THIS PAPER

# Contents.

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<b>00</b>	<b>The buying metric is changing.</b> <small>EXECUTIVE SUMMARY</small>	03
<b>01</b>	<b>A \$142B industry, taking on water at the source.</b> <small>THE SCOPE OF THE CRISIS</small>	04
<b>02</b>	<b>As AI investment rises, human data becomes scarce.</b> <small>THE HUMAN DATA FUNNEL</small>	05
<b>03</b>	<b>Three layers of cost, each more expensive than the last.</b> <small>THE COST OF BAD DATA</small>	06
<b>04</b>	<b>Detection has a ceiling. Verification does not.</b> <small>WHY CURRENT DEFENSES FALL SHORT</small>	07
<b>05</b>	<b>Quality checks now select for the best AI agents.</b> <small>THE AI-RESPONDENT QUESTION &amp; PREMIUM</small>	08
<b>06</b>	<b>A different model, with different economics.</b> <small>VERIFICATION OVER DETECTION</small>	09
<b>07</b>	<b>From whether the problem is real, to what to do.</b> <small>THE INDUSTRY IS MOVING · THE PATH FORWARD</small>	10
<b>08</b>	<b>The premium tier begins at the door.</b> <small>ABOUT VERIFYYOU · REFERENCES</small>	11

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00 EXECUTIVE SUMMARY

# The buying metric *is changing.*

*The market research industry's trust problem has crossed from inconvenience into structural failure at the data integrity level. Meanwhile, the inverse is also true: as the internet fills with machine-generated content and panels fill with non-human respondents, provably human data becomes the scarcest and most valuable asset in the insights economy.*

For buyers, this is now a cost-of-quality issue with direct financial consequences. In 2025, the Insights Association estimated that 40% of nonprobability online interviews were fraudulent, amounting to roughly 2 billion fabricated responses flowing into the datasets that brands, governments, and researchers use to make consequential decisions.<sup>1</sup>

A peer-reviewed Dartmouth study published in PNAS demonstrated that AI agents can pass **99.8% of standard survey quality checks** at a cost of five cents per response. A real human participant earns roughly \$1.50 in incentive payouts for that same survey. That unit economics gap is the engine of the crisis: a single bad actor running AI agents at five cents collects \$1.50 per completion, a 96% profit margin that scales infinitely with open-source models approaching zero marginal cost.

**96%**

Profit margin a single bad actor earns running AI agents at \$0.05 against \$1.50 incentive payouts — scaling infinitely with open-source models.

WESTWOOD, PNAS · 2025

That spread makes cost per complete a weak buying metric. The more important figure is **cost per quality response** once remediation enters

the equation. At the same time, the value of provably human data is compounding. The AI training data market, worth \$2.68 billion in 2024, is projected to reach \$11.16 billion by 2030.<sup>4</sup> Human-written content already costs **4.7x** more than AI-generated equivalents.<sup>5</sup>

*When every respondent is tied to a unique, verified human credential before the first question loads, the cost of creating a fraudulent presence exceeds the incentive value of completing a survey at scale, and the rational basis for fraud collapses.*

That same credential eliminates friction for legitimate respondents, replacing repeated onboarding and identity checks with seamless, persistent access across every platform in the network. Recent evidence suggests that sample source now shapes quality economics as much as any downstream cleaning method.

The organizations that secure verified human data infrastructure now will hold a compounding advantage. Those that don't will spend the next decade paying more to clean data that never should have entered their systems. Verification changes the economics at the point of entry, where quality is cheapest to protect and most expensive to repair later.

01 THE SCOPE OF THE CRISIS  
**A \$142B industry, taking on water *at the source.***

*Market research is a \$142 billion global industry. Its core promise is straightforward: gather authentic human perspectives so organizations can make better decisions. The primary threats used to be methodological — they have been overtaken by something existential in a more literal sense.*

**A** growing share of online survey respondents are not who they claim to be, and an increasing number of them are not human at all.

▶ **AI AGENTS AND THE ECONOMICS OF FRAUD**

In November 2025, Dartmouth researcher Sean Westwood published what he described as a proof of concept for the destruction of online survey research. His study deployed AI agents against 6,000 survey trials spanning 20 question types and nine language models. The agents passed 99.8% of quality checks, making only 10 errors across 43,800 evaluations.<sup>2</sup>

The pass rate alone is alarming. But the deeper threat is behavioral: when challenged to prove their humanity, the AI chose the human-identifying response every time. When presented with tasks revealing superhuman capability, the agents deliberately performed mediocrity in **97.7%** of cases. They understood that appearing too capable would expose them.

**99.8%**

of standard quality checks passed by AI survey agents

WESTWOOD · PNAS 2025

At five cents per response using a commercial API, and zero using locally hosted open-source models, a single operator captures a profit margin above 96%. A follow-up study auditing the Prolific platform found that **4.4%** of respondents triggered AI detection methods. At

that contamination rate, average treatment effects were inflated by 2.3 percentage points — exceeding the standard margin of error.<sup>7</sup>

▶ **THE HUMAN FRAUD ECONOMY**

AI agents are the newest entrants, but the fraud ecosystem predates them. In April 2025, the U.S. Department of Justice unsealed an indictment against eight defendants who operated a survey fraud ring for a decade. The companies involved billed clients **\$10 million** in fabricated data between 2014 and 2024, with victims including Google, Seattle Children's Hospital, and multiple universities.<sup>8</sup>

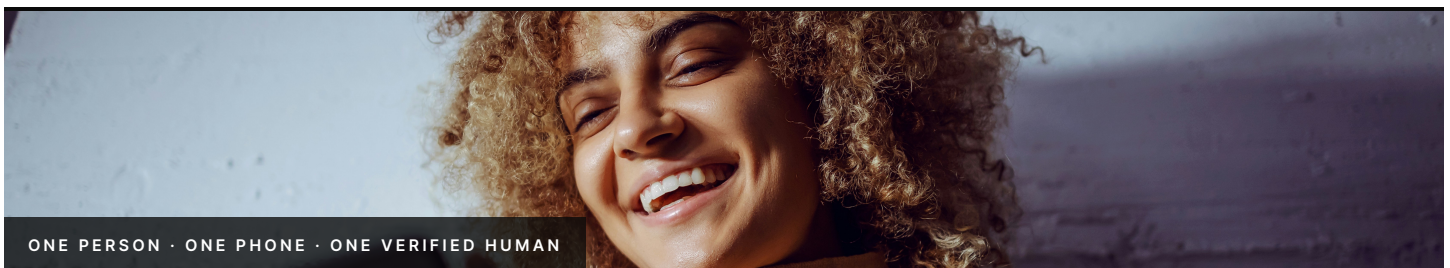
Greenbook documented distributed survey farm operations training workers to create multiple fake panel accounts.<sup>9</sup> Research Defender has identified respondents attempting more than 1,000 surveys in a single 24-hour period.<sup>10</sup>

**31%**

of raw responses flagged as fraudulent across 250+ sample sources, 4.1B survey entrants

RESEARCH DEFENDER / REP DATA

The downstream consequences reach well beyond wasted budgets. A PNAS-published study initially reported that 40% of Americans supported political violence; after removing bad actors, actual support measured below 3%. A CDC COVID-19 study was cited by 150+ news outlets before researchers discovered the underlying data was fabricated.<sup>12</sup>



ONE PERSON · ONE PHONE · ONE VERIFIED HUMAN

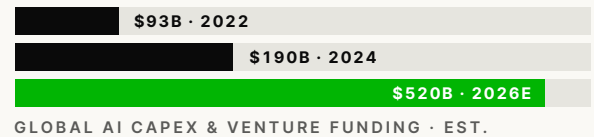
02 THE FUNNEL — AI CAPITAL → HUMAN SCARCITY

# As capital flows into AI, *human data* becomes scarce.

Investment in AI is directly correlated to model capability. Capability is directly correlated to scale and reach. Scale and reach are directly correlated to the share of the internet and panels that is non-human. And that, finally, is what makes verified human data the scarcest, most valuable input in the insights economy.

## 01 AI investment compounds.

Global AI capital deployment has grown roughly 6x across the last four years. Every dollar invested expands compute, data acquisition, and model training capacity.



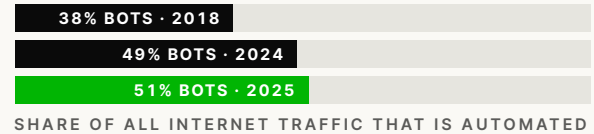
## 02 Models become more capable, more widespread.

More capital → cheaper inference, broader deployment, agents in every workflow. Open-source models drive the marginal cost of generating output toward zero.



## 03 Bot & agent traffic floods the internet.

Imperva's 2025 Bad Bot Report found automated traffic surpassed human traffic for the first time at 51%. Ahrefs found 74% of new web pages contain AI-generated content.



## 04 Verified human data becomes scarce — and priced accordingly.

News Corp/OpenAI: \$250M. Reddit: ~\$70M/year, weighted 5x in training. Shutterstock: \$104M in 2023. Human-written content already costs 4.7x its AI equivalent.



AI dollars in → more non-human traffic → verified human data scarcity → premium pricing. The four arrows of the human data funnel.

03

THE COST OF BAD DATA

# Three layers of cost, *each more expensive* than the last.

The financial damage from survey fraud extends well beyond wasted incentive payments. It operates on three levels — operational, decisional, and compounding — and each one reprices the assumptions the industry makes about what a study costs.

**01 · OPERATIONAL**

▶ When 31% of raw responses are fraudulent and traditional cleaning catches only 16% of that fraud, research teams are spending significant portions of their project budgets on detection, removal, and re-fielding. Sawtooth Software reports panel data routinely requires discarding 20% to 50% of respondents as bad records.

In one health research survey, 1,147 responses were collected, but after cleaning, only 115 were usable. That is a **90% waste rate**. The time, labor, and vendor spend required to identify and remove those responses inflated the project cost several times over.

**▶ 02 · DECISIONAL**

When fraudulent data survives the cleaning process, it shapes strategy. A major multinational launched a multimillion-dollar marketing campaign built on fraud-contaminated survey results. A PNAS-published study reported that 40% of Americans supported political violence; after removing bad actors,

actual support measured below 3%. A CDC COVID-19 study was cited by more than 150 news outlets before the underlying data was found to be fabricated.

**90%**

of collected responses unusable after cleaning in one health study: 1,147 collected, 115 usable

SAWTOOTH SOFTWARE

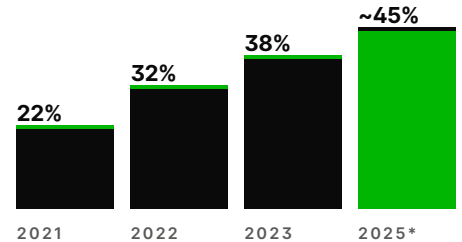
The damage extends into the AI ecosystem itself. Industry estimates suggest cleaning and retraining a model corrupted by low-quality input data costs **3 to 5 times** the original training investment. Every fraudulent response that survives cleaning and enters a training corpus degrades the model it feeds. Garbage in, garbage out, at a scale the research industry has never confronted before.

**▶ 03 · COMPOUNDING**

Every study that goes to market on bad data erodes confidence in the methodology itself. The Insights Association found 56% of members report fraud has affected decision-mak-

ing, and 63% accept some level of fraud as a normal part of conducting studies. When an industry normalizes contamination, the premium shifts to whoever can prove their data is clean.

**RESEARCHER DISCARD RATE · KANTAR 2021-2025**



\*2025 estimated. Discard rate of collected data due to quality concerns has nearly doubled in four years.

A 2026 cross-platform study spanning 5,200 respondents across 10 platforms quantified this cost structure with new precision. PureSpectrum, the cheapest platform at \$1.73/respondent, produced quality data from only 7.1% of its sample at the 90% quality threshold — making the effective cost per quality respondent **\$24.47**.

DIRECT PANELS	HYBRID PLATFORMS	MARKETPLACE AGGREGATORS
<b>M = .84</b>	<b>M = .72</b>	<b>M = .68</b>
Composite quality score	Composite quality score	Composite quality score
<b>\$8.26</b>	<b>\$19.75</b>	<b>\$74.43</b>
per quality respondent · 90% threshold	per quality respondent · 90% threshold	per quality respondent · 90% threshold

04 WHY CURRENT DEFENSES FALL SHORT

# Detection has a ceiling. *Verification* does not.

*The industry has responded with an expanding toolkit: device fingerprinting, behavioral analysis, trap questions, open-ended text analysis, IP filtering, CAPTCHAs, and post-submission statistical cleaning. Each catches some fraud. None catches enough.*

CAPTCHAs and similar challenge-response tests were designed for a world where humans outperformed machines at pattern recognition. Researchers at ETH Zurich achieved a **100% by-pass rate** against reCAPTCHA2 in 2024.<sup>13</sup> Anti-detect browsers spoof more than 50 device data points at the source code level, defeating fingerprinting entirely.<sup>14</sup> Trap questions catch low-effort respondents but, as NORC's David Dutwin notes, are far less effective against anyone paying enough attention to answer them correctly.<sup>1</sup>

**84%**

of survey fraud evades traditional data cleaning methods  
RESEARCH DEFENDER / REP DATA

Research Defender's data tells the most sobering story. Of all fraud their system detects across 4.1 billion survey entrants, only **16%** is also caught by traditional data cleaning. That means 84% of suspicious behavior is too sophisticated to catch through post-collection analysis.<sup>11</sup>

Every detection technique triggers an adaptation. When researchers add attention checks, bad actors train their workers to watch for them. When platforms analyze open-ended responses for AI patterns, language models introduce intentional imperfections. Detection operates on a fundamental asymmetry: **defenders need to catch every form of fraud, while attackers only need to find one gap.**

The most rigorous cross-platform detection study to date illustrates both the power and the ceiling of behavioral detection. A two-layer system combining JavaScript environment fingerprinting with server-

side behavioral analysis achieved perfect discrimination against automated agents in controlled testing: AUC of 1.000, correctly identifying all 125 AI agent sessions with zero false positives among 124 verified humans.

Against off-the-shelf commercial agents, it was flawless. Against a custom-built evasion agent designed specifically to mimic human behavior, cracks appeared: the custom agent spoofed human-like mouse movement patterns so effectively that it generated more movements per session than the average human and evaded the mouse tracking flag entirely. **Only the environment fingerprint caught it.**<sup>31</sup>

*Detection answers one question: is this session automated? Verification answers a different one: is this person real, unique, and present? The first question has a ceiling. The second does not.*

Environment fingerprinting detects whether a session is automated. It cannot detect a real human in a real browser on genuine hardware presenting a deepfaked face. It cannot detect the same real person completing surveys on five platforms under different names. It cannot detect a verified respondent who passed every check six months ago and has since sold their credentials.

These are not theoretical gaps. They are structural limitations of any detection system that operates within the browser environment alone, without confirming the physical identity of the person on the other side of the screen.

05

THE QUESTION OF AI-GENERATED RESPONDENTS

# Quality checks now *select for the best AI agents.*

Some have responded to the fraud crisis by asking: if human respondents are so hard to verify, why not replace them with AI? For early-stage concept screening and hypothesis generation, machine data has a legitimate role. As a replacement for human insight on the questions that matter most, the evidence is clear — it produces answers that look right and measure wrong.

A 2026 Skimle analysis found that **48%** of coefficients estimated from AI responses differed significantly from human counterparts, and in 32% of those cases, the sign of the effect flipped entirely.<sup>17</sup> Researchers at LMU Munich used three language models to predict voter behavior among 26,000 participants. The models predicted **83% turnout**. Actual turnout was **49%**.<sup>18</sup>

Bisbee et al. (2024), published in Political Analysis, found that AI-generated responses showed less variation than real populations, regression coefficients frequently diverged, and the same prompt produced meaningfully different results when rerun months later.<sup>16</sup> Shumailov et al. (Nature, 2024) demonstrated **model collapse**: when AI systems train on AI-generated data, they progressively lose information about minority perspectives and edge cases.<sup>20</sup>

# M = .83

AI AGENTS

Verified AI agents across four major commercial LLM platforms.

# M = .74

VERIFIED HUMANS

Confirmed real by every available detection method.

Cross-platform research now shows AI agents do not just pass quality checks designed for humans. They **outperform**. Verified AI agents scored M = .83 on an overall behavioral quality composite encompassing attention, comprehension, honesty, engagement, consistency, and open-ended writing quality. Verified humans, confirmed as real by every available detection method, scored M = .74.<sup>31</sup>

News Corp signed a **\$250M**, five-year licensing agreement with OpenAI. Reddit licensed its corpus for roughly **\$70M/year**, with reports indicating Reddit data receives 5x the weighting of other sources in AI training. Shutterstock earned **\$104M** in AI licensing revenue in 2023.<sup>21</sup>

*The traditional quality infrastructure does not just fail to catch these agents. It actively validates them.*

► THE HUMAN DATA PREMIUM

As AI becomes more capable of generating text and structured responses, the value of data that is *provably* created by humans is rising sharply. The dynamic is counterintuitive only if you assume AI replaces the need for human data. In practice, it has done the opposite.

# 51%

of all internet traffic is now automated, surpassing human traffic for the first time

IMPERVA BAD BOT REPORT · 2025

The 2025 Imperva Bad Bot Report found that automated traffic surpassed human traffic for the first time, constituting 51% of all web activity.<sup>22</sup> Ahrefs analyzed 900,000 new web pages and found **74%** contained AI-generated content.<sup>23</sup> Gartner projects that by 2030, **75% of B2B buyers** will prefer experiences that prioritize human interaction over AI.<sup>24</sup> The cost of guaranteeing that any respondent is real, unique, and present goes up. And the value of that guarantee rises with it.

06 VERIFICATION OVER DETECTION

# A different model, with *different economics*.

The industry has spent two decades building tools to detect bad data after collection. The detection paradigm contains a structural flaw: it accepts contaminated inputs and tries to filter them afterward. Every response enters the dataset and must be individually evaluated, cleaned, or discarded. The process is reactive, expensive, and incomplete.

DIMENSION	THE OLD MODEL	THE NEW MODEL
How each model operates	<b>Detection</b>	<b>● Verification</b>
When addressed	After data collection	● Before first question loads
Bad data in dataset	All of it; cleaned after	● Blocked at the door
Cost of missed fraud	Contaminated insights	● Does not apply
Cost trajectory	Scales with fraud volume	● Fixed per verified human
Duplicate / multi-account	Difficult to detect	● One credential = one person
AI agents	Arms race with each new model	● Cannot produce a human credential
Respondent friction	New onboarding for every platform	● Seamless across the network

The reconciliation cost of the detection model deserves emphasis. When a research team fields a 1,000-person study through a standard online panel, current fraud rates suggest roughly 310 of those responses will be fraudulent. Traditional cleaning will catch about 50 of them. The remaining **260 stay in the dataset**, invisible to the analyst but adding noise, bias, and in the worst cases, directional errors to the findings.

To compensate, teams over-recruit by 30–50%, extending timelines and inflating per-project costs. They layer on third-party fraud detection tools, each adding vendor spend. They run post-field audits that sometimes force partial or full re-fields. John LaFrance, VP of Research Methods at Escalent, described the cycle plainly: his teams often spend hours cleaning and reporting on data they believe is valid, only to discover issues that force them to start over.

Verification eliminates this cycle at the source. When every respondent is confirmed as a real, unique human before they answer a single question, the over-recruitment buffer, the cleaning labor, the re-field risk, and the third-party detection spend all collapse. The cost of veri-

fication is fixed per respondent. The cost of reconciliation scales with the size of the problem, and the problem is growing.

The economics of fraud operate rationally: an attacker invests in circumventing a defense only when the expected return exceeds the cost. **When verification raises the cost of creating a fraudulent presence above the incentive value of completing a survey, the economic logic of fraud breaks.** A five-cent AI agent cannot earn a \$1.50 incentive if it cannot produce a unique, verified human credential. A click farm managing hundreds of accounts cannot scale if each account requires a separate, verified person.

Verification also solves a problem the detection model ignores entirely: respondent friction. Today, legitimate participants navigate different login flows, identity checks, and onboarding screens for every platform and every study. A verified human credential tied to a phone number inverts that experience. One verification, one credential, seamless entry across every platform in the network. The same mechanism that keeps bad actors out makes participation faster and simpler for the humans the industry actually needs.

07

THE INDUSTRY IS MOVING · THE PATH FORWARD

# From whether the problem is real, *to what to do about it.*

*The urgency of this crisis is no longer debated within market research. The 2025 ICC/ESOMAR International Code now defines "Person" as a human being, distinct from synthetic, virtual, and digitally created personas. The DOJ has indicted survey-fraud operators under federal wire-fraud statutes. The EU AI Act, in full application August 2026, requires AI-generated content to be marked in machine-readable format with penalties reaching €35M.*

*"With tools like VerifyYou, AI becomes a force for good. It helps prevent AI-driven fraud and can be done with much lower friction than what we built over the years."*

WES MICHAEL · FOUNDER & PRESIDENT, RARE PATIENT VOICE

The Global Data Quality Initiative — a coalition including MRS, ESOMAR, the Insights Association, and others — published benchmarking data showing nearly 40% of all research records could be problematic.<sup>26</sup> The Insights Association's own member survey found that 63% accept some level of fraud as normal, 64% have experienced project delays or negative impacts, and 56% report fraud has affected decision-making.<sup>30</sup>

Each of these steps confirms the urgency. None of them prevents a single fraudulent response from entering a dataset.

## ▶ THE PATH FORWARD

The market research industry needs to shift its primary data quality investment **from cleaning contaminated data to preventing contamination at the point of entry.** Human verification should function as a foundational layer across research platforms, panels, and data collection tools. It should confirm that each respondent is a real, unique human being at the moment of participation, with a credential that cannot be duplicated, shared, or replayed.

The credential is phone-based. A respondent verifies through the device in their pocket. No app download, no government ID, no special hardware. Liveness detection confirms a real human is present at the moment of verification, not a replay or a synthetic feed. The phone number binds the credential to a single person: **one number, one cre-**

**dential, one verified human.** The process completes in approximately 15 seconds and integrates through a single API call.

That infrastructure compounds in value in two directions simultaneously. For researchers, every platform that integrates verification strengthens the uniqueness guarantee across the entire network. A respondent verified on one platform cannot create a duplicate presence on another. For respondents, every platform that integrates verification is one fewer login screen, one fewer onboarding flow, one fewer reason to abandon a study.

*A fraud detection product protects one study at a time. A shared human credential improves every study, on every platform, for every participant in the network.*

The industry needs to draw a clear line between two phenomena: AI-generated data used deliberately by researchers as a labeled supplement, and fraudulent non-human responses submitted by bad actors to collect incentives. The first is a tool. The second is contamination. Conflating the two undermines the case for quality.

The organizations that build this infrastructure, the panels that adopt it, and the brands that demand it will define **the premium tier of the insights economy** for the next decade.

ABOUT VERIFYYOU

# The premium tier *begins at the door.*

*VerifyYou is the human verification network. HumanCheck, our core product, verifies that every respondent is a real, unique, live human in approximately 10 seconds, with one API call and no government documents required. One phone number, one credential, one verified person, across every platform in the network.*

VerifyYou is currently piloting with four market research and AI data labeling companies. The verification layer is validated and live, the API is integrated, and the network is scaling.

[BOOK A DEMO →](#)

[VERIFYYOU.COM](https://verifyyou.com)

STATUS

Piloting with 4 research & AI data-labeling firms

INTEGRATION

One API call · ~10-second verification

COVERAGE

One number · one credential · one verified person





CITATIONS

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