Greenbook

2025 GRIT Insights Practice

Greenbook research industry trends

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FOREWORD

Welcome to the 34th edition of the *Greenbook Research Industry Trends Report*, based on data collected in Q1 of 2025. This edition is the annual *Insights Practice Report*, **focused on how insights professionals and organizations are changing tactically and functionally.** As the insights industry navigates unprecedented technological and structural shifts, this year's findings reveal a sector at an inflection point - one where agility, innovation, and strategic foresight separate leaders from laggards.

This *GRIT Report* is based on analysis of data collected via an online survey of professionals who work in one or more areas of research, analytics, and insights. The current GRIT analysis is based on 992 completed surveys segmented into three distinct populations: buyers, suppliers, and others. Most of the report is broken out by two buyer and six supplier segments. Buyers are segmented into "market research" and "data and analytics" based on the focus of their work. Suppliers are segmented according to the service area that accounts for the most revenue: full-service research, field services, qualitative research, strategic consulting, technology, or data and analytics.

Perspectives in the *GRIT Report* are strongly influenced by those who know best and balanced by those who bring a fresh outlook. Most of our buyers and suppliers have more than ten years of experience working in insights, analytics, or research, and fewer than 15% of buyers and suppliers have two years or fewer. More than 60% of buyer and supplier participants make or influence strategic decisions, while fewer than 20% have no formal influence.

The ***2025 GRIT Insights Practice Report*** is presented in three parts: ***The Practice of Insights***, including buzz topics, industry structure, and scope of impact; ***Methodologies & Approaches***, which breaks down seven categories of over 50 methodologies, preceded by an overview, *Insights Hottest Methods!*; and ***The Management of Insights***, covering investment trends, how suppliers and methodologies are selected, and the business outlook.

The *GRIT Report* can be what you make of it. In each section, we provide all the key data within and across our eight segments with enough discussion to make sure you understand what the tables and charts mean so you can draw your own conclusions. We provide explanations for why certain patterns or differences emerge, but not *THE* explanation. In other words, your guess might be as good or better than ours, so please don't feel bound by our hypotheses.

Although the vast majority of the design and analysis is done in-house by the Greenbook team, GRIT continues to be a "coalition of the willing" and our commentary providers, sample partners, advertisers, and especially our research partners make it all possible. **Special thanks go out to Displayr, Forsta, Gen2 Advisors, NewtonX, and Q Research Software**. As always, without their generous contribution of time, energy, and expertise we simply wouldn't be able to produce this report.

Leonard F. Murphy

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EXECUTIVE SUMMARY

Leonard F. Murphy

Chief Advisor for Insights and Development, Greenbook

If the pandemic disrupted business as usual for the insights industry, current insights practice trends make sure it stays that way. Throughout this report, we are tempted to look for indications regarding whether things are returning to normal, only to find we don't know what "normal" is or if it ever existed. As the insights industry navigates unprecedented technological and structural shifts, this year's findings reveal we are at an inflection point where agility, innovation, and strategic foresight separate leaders from laggards.

In previous GRIT waves we detected an accelerating tipping point driven by the "AI Effect"; in this one we have clearly tipped, and the changes are fast and profound. Generative AI has moved beyond experimentation to redefine core workflows, with 67% of suppliers now embedding it into client deliverables, accelerating analysis, and automating reporting. Yet this disruption coexists with caution: while 80% of organizations endorse AI adoption, nearly half still grapple with ethical guardrails and transparency concerns. Parallel to this, synthetic data is emerging as a game-changer, projected to increasingly fuel market research as it matures - a response to the friction between privacy mandates and demand for real-time insights.

The report uncovers a stark divergence between buyers and suppliers. On the buyer side, data and analytics teams are gaining C-suite traction, often sidelining traditional insights roles. Meanwhile, suppliers report deepening executive engagement by positioning themselves as strategic partners through integrated AI solutions. This tension underscores a critical theme: insights professionals must now articulate clear ROI to secure resources, as 71% of high-growth teams tie their success to tight alignment with business outcomes.

Methodologies are also evolving. Mixed-method approaches dominate, blending AI-driven analytics with immersive qualitative tools like mobile ethnography. Yet legacy challenges persist: 40% of researchers cite data quality as a top barrier, prompting renewed investment in fraud detection and custom panels. Equally telling is the rise of hybrid skill sets, with reskilling in AI collaboration and data science becoming non-negotiable for career resilience.

Supplier ecosystems are consolidating, with full-service providers leveraging scale and tech partnerships to outpace niche players. Paying attention to the flood of industry news each week highlights this dynamic, as we watch larger technology firms entering insights through end-to-end platforms, M&A deals and the development of embedded solutions in the "application layer" of AI solutions.

Amid these shifts, the workforce faces dual pressures: 50% of professionals are proactively reskilling for AI integration, even as voluntary attrition and hiring freezes strain traditional roles. The path forward demands balancing automation's efficiency with human ingenuity - a theme echoed in the report's exploration of observational research and applied neuroscience, where technology enhances, but cannot yet replace, nuanced human interpretation.

For leaders, the imperative is clear: lean into AI's transformative potential while fortifying quality frameworks, prioritize cross-functional collaboration to elevate insights' strategic role, and reimagine partnerships for scalability. This report not only maps the terrain but equips you to navigate it-with data-driven clarity and actionable foresight.

EXECUTIVE HIGHLIGHTS

FULL-SERVICE ENGAGEMENT RISES AS SHARE OF SUPPLIER SPACE INCREASES

The percentage of brand-side researchers who regularly work with full-service research suppliers had declined for three straight years before nudging up this year. The uptick correlates with a resurgence of full-service research as the dominant supplier type.

ENGAGEMENT & GROWTH (FULL-SERVICE RESEARCH)

Year	Full-service research as % of suppliers	Brand-side who regularly work with full-service
2019	42%	62%
2020	57%	53%
2021	58%	58%
2022	55%	48%
2023	53%	47%
2024	62%	53%

● Full-service research as % of suppliers
● Brand-side who regularly work with full-service
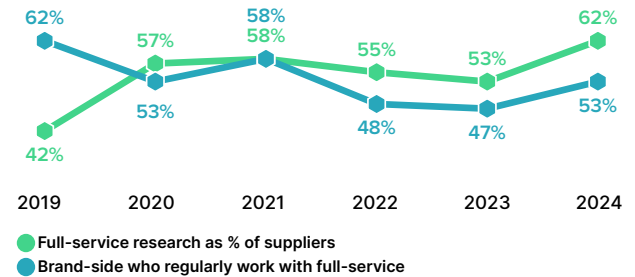
Source: GRIT Report and NewtonX

FULL-SERVICE SUPPLIER GROWTH LINKED TO TECHNOLOGY OFFERINGS

A full-service supplier with a portfolio well-represented by tech offerings is likely to be larger than one with a more traditional focus. The correlation could be due to adding organic capabilities, acquisitions, or tech suppliers migrating into the full-service segment.

FULL-SERVICE RESEARCH: TECH OFFERINGS AS % OF SERVICE OFFERINGS

Last Year

| 15% | 25% | 29% |

Now

| 18% | 23% | 30% |

● 20 or fewer employees ● 21 to 500 employees ● More than 500 employees

Source: GRIT Report

LAST YEAR'S SPIKE IN SUPPLIER STAFF DECREASES MOSTLY CONTINUES

Staff decreases spiked last year in every supplier segment, and they continue this year for full-service research, strategic consulting, and field services. They abated somewhat for technology and data and analytics.

DECREASE IN INSIGHTS STAFF SIZE: GRIT WAVE (SUPPLIER)

	Full-service research	Strategic consulting	Technology	Data & analytics	Field services
2021	13%	12%	12%	15%	8%
2022	10%	9%	9%	4%	6%
2023	24%	20%	24%	25%	28%
2024	24%	19%	21%	17%	16%

● 2021 ● 2022 ● 2023 ● 2024
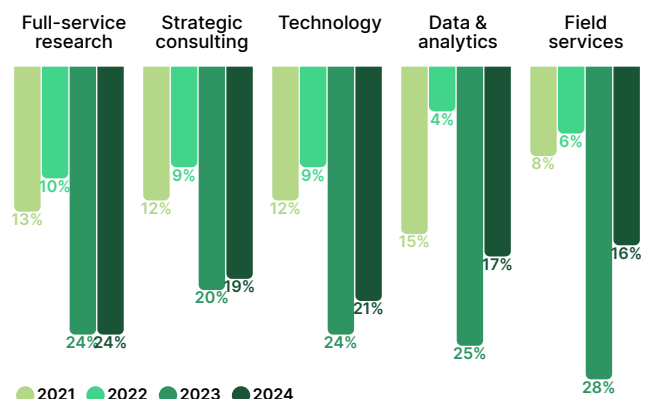
Source: GRIT Report

EXECUTIVE HIGHLIGHTS

BRAND-SIDE BUYERS SPLIT ON SERVICE AND USE OF TECH AS SUPPLIER CRITERIA
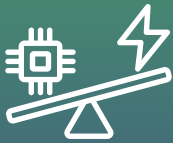
Brand-side market researchers are more likely to choose suppliers and partners based on service quality and relationship while those in data and analytics are more likely to focus on how they use tech in communication, sharing, research, and analysis.

% KEY FACTOR IN SUPPLIER SELECTION

Service quality
87% | 63%

Relationship
45% | 25%

Use of tech in research/analysis
31% | 48%

Use of tech in communication/sharing
18% | 34%

● Brand-side market researcher ● Brand-side data & analytics

Source: GRIT Report and NewtonX
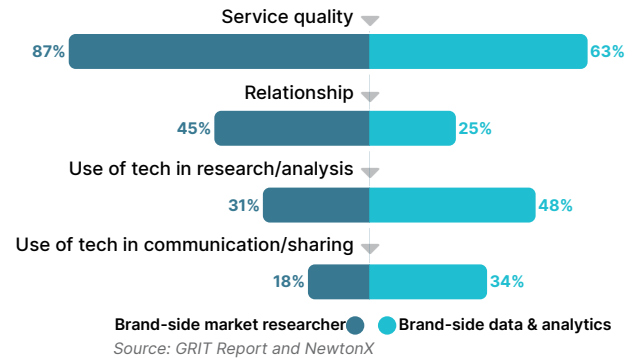
SUCCESSFUL SUPPLIERS MORE LIKELY TO LEVERAGE AI FOR CORE PROJECT FUNCTIONS
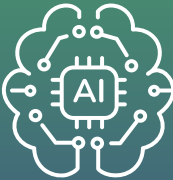
Suppliers who exceeded their goals have automated 5.1 of their processes with AI assistance compared to just 4.3 for suppliers who did not exceed goals. They are more likely to leverage AI for core research functions such as report writing and project and survey design.

AI-ASSISTED AUTOMATION

Report writing
37% | 52%

Survey design
28% | 40%

Research project design
21% | 33%

● Did Not Exceed Goal ● Exceeded Goals

Total AI-assisted processes
4.3 | 5.1
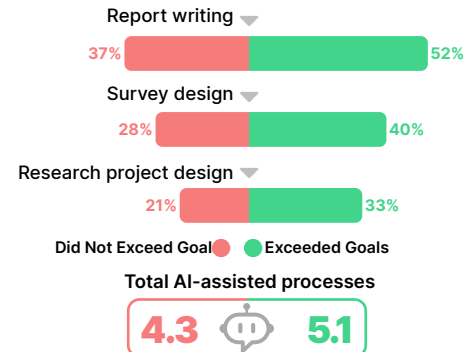
Source: GRIT Report

TECH SUPPLIERS, BRAND-SIDE RESEARCHERS DIVIDED ON USE OF SAMPLE MARKETPLACES

Most tech suppliers regularly use sample marketplaces, as do nearly half of full-service researchers. On the other hand, very few brand-side market researchers follow this practice.

% REGULARLY USE MARKETPLACES FOR SAMPLE

Technology suppliers	58%
Full-service researchers	48%
Strategic consultants	39%
Data & analytics suppliers	36%
Field services suppliers	33%
Brand-side data & analytics	28%
Qualitative researchers	26%
Brand-side market researchers	19%

Source: GRIT Report and NewtonX

DESIGN, METHODOLOGY, AND SAMPLE

*GRIT Insights Practice Report*s aim to provide comprehensive, credible, and actionable guidance for professionals working in insights, research, and analytics. This section provides context so you can get the most of this report.

THE ESSENCE OF GRIT

*Thank you for making the **GRIT Report** the most comprehensive and actionable guide for insights and analytics professionals.*

Once again, we greet people with this promise as they enter the GRIT survey. Our goal is to provide the industry with comprehensive information that is also actionable – "actionable," of course, requires it to be "credible." These principles guide the design and execution of GRIT, which has evolved over decades of producing the now-biannual reports. As our industry evolves and we learn more about it, the GRIT process adapts to its expanding scope while remaining true to our ideals of delivering practical information across a broad set of issues from a wide range of insights professionals.

This *GRIT Report* is based on analysis of data collected from January 16 through February 20, 2025 (depending on your time zone) via an online survey of professionals who work in one or more areas of research, analytics, and insights.

The GRIT process balances several design principles:
- Our research should follow the evolution of the industry rather than assumptions about the evolution of the industry.
- Understanding the health of the industry requires understanding the perspective of those who spend money on research, analytics, and insights (or influence spend) as well as those who earn money from it.
- Topics must be tracked over time; snapshots are interesting but lack the context that makes them meaningful.
- GRIT should provide reliable and relevant facts, and it should also raise questions and stimulate conversation.

Rigorous methodology and transparent sampling aren't just table stakes - they're your shield against growing skepticism and a market flooded with questionable data. As buyers demand more accountability and data quality becomes a strategic battleground, investing in robust design is how you earn trust, stand out, and future-proof your business. We're practicing what we preach; here is the proof.
— LM, ed.

GRIT's B2B Research Partner

NewtonX

After rigorous data cleaning, the current GRIT analysis is based on 992 completed surveys segmented into three distinct populations: buyers (n = 379), suppliers (n = 596), and others (n = 15). Please note that these represent populations of insights professionals, not populations of companies. When you see a result from the data, you should think of it as representative of the experiences of individual insights professionals who identify as buyers or suppliers according to our definitions, not as a proportion of buyer or supplier companies.

Most of the report is broken out by two buyer and six supplier segments. Buyers are segmented into "market research" and "data and analytics" based on the focus of their work. Suppliers are segmented according to the service area that accounts for the most revenue: full-service research, field services, qualitative research, strategic consulting, technology, or data and analytics.

THE BIG PICTURE

The *2025 GRIT Insights Practice Report* provides you with comprehensive and actionable insights regarding industry trends. We always position these insights as "highly directional" versus "scientifically precise;" after all, this is the *"Greenbook Research Industry Trends Report"* not the *"Greenbook Certified Financial Assessment of the Insights Industry."* Understanding the sample composition and noting the sample sizes

in each table and chart empower you to make your own assessments of trends, to separate fact from hypothesis, and decide which are meaningful for you. GRIT research follows the industry, and as the industry continues to transform and the definitions of key stakeholder groups expand, we will continue to keep a keen eye out for opportunities to ensure the GRIT sample universe adapts to the entire industry.

SMARTER RESEARCH BEGINS HERE: AI THAT'S BUILT FOR B2B

Sascha Eder
CEO & Cofounder, NewtonX

At NewtonX, we're proud to continue our partnership with Greenbook on the *GRIT Report,* contributing to the vital conversation about the future of market research and the role AI is playing in shaping it.

Our goal remains the same: to deliver high-quality insights that help you make the right decision. With AI, we're getting closer to realizing our vision of reliable, scalable data—at a price that makes sense.

From day one, Greenbook has championed our mission and the need for a shift in how our industry thinks about data quality. Because, even as AI and other innovations accelerate, one thing hasn't changed: too many still settle for cheap, low-quality samples, despite the clear risks. It's a race to the bottom—and it's one we refuse to run.

At NewtonX, we believe in a different approach—one rooted in delivering expert knowledge at survey scale, while maintaining the highest standards of data integrity. Even as we expand access through more scalable and affordable solutions, our commitment to quality is unwavering. To achieve this, we're

bringing new AI-powered technologies to market this year, including AI-moderated calls and synthetic data solutions.

Early pilot partners are already seeing impressive results. For example, a leading strategy consulting firm partnered with us to automate the research process using AI. Together, we went from research design to data collection to initial report in three days.

One area where large language models (LLMs) still struggle, though, is survey analysis. LLMs currently struggle with the complex calculations, hallucinations, and large datasets inherent in survey research. This is where agentic systems come in.

This year, we're thrilled to launch NewtonX Hub Researcher, a sophisticated agentic AI system designed to handle survey complexity. It's capable of calculating NPS scores, generating cross-question insights, analyzing correlations, and integrating qualitative open-ended analysis.

While others have rushed to apply the "AI" label to simple LLM wrappers, we've focused on tackling a genuine challenge and doing it thoroughly to create true impact for the research community. We invite you to see the difference for yourself.

We believe that education is essential in this new AI age, and we're proud to partner with Greenbook, the trusted source for everything research, in this endeavor.

The future of B2B research is already unfolding. We can't wait to see what you build.

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Sascha is CEO and co-founder of NewtonX, launched in 2017 to build the world's leading B2B research company using automation and AI. He previously worked at McKinsey, BCG, and P&G, and holds Master's degrees from MIT and HEC Paris. Originally from Germany, Sascha was on the national track and field team and remains a passionate runner.

INDUSTRY BUZZ TOPICS

Last year, the AI discussion seemed split between evangelists and doubters, but now it seems to be more pragmatically focused. Sampling has replaced it as the vortex of uncertainty, only without proselytizers.

OVERVIEW

It seems like it's been a while since GRIT fully coded verbatim responses or used AI assistance to break them into themes, but this time we've done both. We analyzed 873 (after cleaning) responses to the question *"Related to insights, research, or analytics, which topics do you follow most closely and why?"*

Over the last seven years of GRIT buzz topics, we've resisted the temptation (sometimes successfully) to label "AI & Machine Learning" as a "buzz topic" because it's a bit like saying "it seems like everyone's eating food these days!" It might be true – it passes the "not wrong" threshold – but it's not informative.

Back in 2019, it might have been acceptable to leave it at that because it was not a very developed concept for insights professionals and *was* truly "buzzy." Back then, a lot of GRIT participants would type in "artificial intelligence" or "AI" or "AI/ML," offering no further detail.

To be fair, many still do enter "artificial intelligence" or "AI" or "AI/ML" with no further detail, but many don't. Our AI assistant kept gravitating toward **AI and machine learning** as a major theme, but that just seemed lazy. After more rigorous analysis, we have five major themes mentioned by at least 10% of GRIT participants plus five minor chords and many subthemes.

BUZZ TOPIC THEMES

Major Themes	Minor Chords
1. AI & Machine Learning	6. UX Research
2. Research Methods & Tools	7. Industry-Specific Trends
3. Data Quality & Integrity	8. Macroeconomic And Societal Trends
4. Data Analytics & Data Science	9. Consumer Behavior Insights
5. Brand, Marketing, & Customer Insights	10. Sustainability

Source: GRIT Report and NewtonX

AI, synthetic data, and automation are redrawing the industry map at breakneck speed. The leaders will be those who move beyond hype, rapidly integrating these tools to deliver real value - while those who hesitate risk being left behind as clients expect smarter, faster, and more innovative solutions.
— LM, ed.

NewtonX

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Except for data and analytics providers who fell just short (47%) of a majority, most GRIT participants mentioned something about AI and/or machine learning (and many did not say much more than that on the subject). Majority responses ran from 52% of buyer-side analytics to 68% of full-service research.

TOP FIVE BUZZ TOPIC THEMES: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
AI & Machine Learning	63%	52%	68%	64%	58%	57%	59%	47%
Research Methods & Tools	18%	8%	27%	45%	34%	25%	34%	29%
Brand, Marketing, & Customer	14%	8%	10%	0%	5%	16%	8%	4%
Data Analytics & Data Science	12%	26%	8%	11%	0%	3%	8%	11%
Data Quality & Integrity	8%	1%	18%	33%	10%	14%	27%	19%
n =	174	166	277	43	36	64	48	41

Source: GRIT Report and NewtonX

Other themes were less dominant. **Research methods and tools** is the next most prominent theme mentioned by a low of 8% (buyer-side analytics) to a high of 45% (field services providers). **Brand, marketing, and customer** was mentioned by 16% of strategic consultants, 14% of buyer-side researchers, and 10% of full-service research suppliers. **Data analytics and data science** was most popular with buyer-side analytics (26%), then buyer-side research (12%), field services (11%) and data and analytics providers (11%).

Data quality & integrity is a common topic for those in field services (33%) and technology (27%), then the other four supplier segments: data and analytics providers (19%), full-service research (18%), strategic consultants (14%), and qualitative research providers (10%). It's not very prominent among buyers, but our AI assistant explains: "...they are the recipients of data and tend to trust providers to handle quality control."

THE BIG PICTURE

Way back in 2019, GRIT reported fifteen buzz topics, led by AI (general), research automation (general), behavioral science/behavioral economics, machine learning (inc. deep learning), and Big Data analytics. Of course, the question phrasing was probably different from this year and the analytical process certainly was (staff may have been getting paid by the theme).

2019 BUZZ TOPIC THEMES

1. AI (General)	9. Agile Research/Methods/ Approaches
2. Research Automation (General)	10. CX/Customer Centricity Research
3. Behavioral Science/ Behavioral Economics	11. Samples/Sampling/Panel- Related
4. Machine Learning (inc. Deep Learning)	12. Blockchain and Related Technology
5. Big Data Analytics	13. Digitization/Digital Transformation
6. Implicit Research Techniques	14. Research Platforms or Suite
7. Research Processes (General)	15. Data Integration and Interoperability
8. Innovation-Related Methods and Technology (inc. Research)	

Source: GRIT Report and NewtonX

As in 2019, AI is on top, then automation, behavioral, Big Data, research methods, customer-centricity, data integration, and sampling.

Despite the differences in approach, there are a lot of similarities to 2025. AI is on top followed by automation, and we also see behavioral, Big Data, research methods or processes, customer-centricity, data integration, and sampling. Regarding AI, insights professionals of 2019 also seemed at a loss to provide little more than the term "AI" or "artificial intelligence:"

Only a small minority clarified AI with a use case – mainly chatbots or surveybots. This could herald a massive change in data collection modality – will the chat/survey bot speak or type its questions?"

Despite the surface similarities, a lot has changed in six years. In 2019, we split "AI" and "ML," suggesting that GRIT participants mentioned them separately more than together. Similarly, research platforms or suites were separate from research automation. Today, that's hard to imagine.

Back then, behavioral and implicit research techniques were consensus buzz topics; today, it seems specific research approaches fall under the umbrella of "research methods," suggesting interests are too diverse or specialized to reach a consensus or that individual research methods are not as interesting as umbrella topics, such as how to leverage AI or otherwise automate research. Perhaps other 2019 themes such as innovation-related methods, agile approaches, and digital transformation are considered *de rigueur* today and part of the fabric of insights work.

However, the low ranking of sampling and panels in 2019 is the most striking difference. Today, it's not the elephant in the room; it's the bull in the china shop, and china is expensive and hard to replace. Even though questions about respondent identity are as old as internet research itself, it never seemed to be a crisis. Now that other threats are front-and-center, some people seem to be thinking, "hey....what *about* online surveys?" as though the problem of authenticity hadn't occurred to them before.

Recall the confident statement of our AI assistant: "...*they are the recipients of data and tend to trust providers to handle quality control.*" GRIT has no idea how it would know that, and from comparison to 2019 buzz topics we'd assume it's not very true. Has our AI assistant inadvertently called out the "fool me twice people" who are not ashamed to go back to the same "poisoned well" for sample?

It's significant that the attitude toward AI in this year's *Insights Practice Report* seems more accepting – or resigned, in some cases – than last year's, and that fewer people seem to be feeling their way through the darkness. AI is bigger than Elvis, and Elvis was everywhere. Like it or not, you don't have much choice but to deal with it, but more GRIT participants seem to have a better grasp of its benefits.

Whereas AI formed a vortex of uncertainty last year, it's been replaced by sampling this year. The uncertainty and doubt about sampling seem to have the same pitch and frequency as last year's doubts about AI. Last year, however, a significant number of sycophants seemed to think it was not just bigger than Elvis, but bigger than God (although not The Beatles, according to legend). No one is buzzing about the infinite life-improving capabilities of sample even if the negative buzz matches last year's AI detractors'. Sampling may be the new Thanos.

FOR RESEARCHERS, ARTIFICIAL INTELLIGENCE IS INEVITABLE

Rick Kelly

Chief Strategy Officer, Fuel Cycle

GRIT's latest wave confirms what most of us already sense: AI is everywhere. In every segment—buyers, agencies, qual, quant, tech—it's the top buzz topic. But "buzz" makes it sound faddish. AI's adoption for insights is inevitable; it will become the best research solution at the lowest price point for many cases in coming months.

This isn't science fiction. This is cost curves and capabilities. Analysis completed by Epoch.ai shows that the cost of utilizing LLMs has dropped by over 900x in the last 18 months. At the same time, performance has skyrocketed. Models like GPT-o3, Gemini 2.5, and more don't just generate text—they interpret charts, summarize qual, answer complex questions, and draft reports. They're not assistants. When implemented by engineers with a clear understanding of business logic, they become the most cost effective – and powerful – way to deliver insights. And that changes everything.

Brands don't hire market research because they love methodology. They hire research to answer questions, reduce risk, and make confident decisions. If AI can help them do that cheaper, faster, and produce *more* insight, then of course they're going to explore it.

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Rick is the Chief Strategy Officer at Fuel Cycle. With a background in political science and an MBA from UNC-Chapel Hill, he blends strategic insight with business acumen to drive innovation. Rick's passion lies in simplifying complex systems and fostering clarity in decision-making. Outside of business, he enjoys cooking, DIY home projects, and spending quality time with his kids.

We're not talking about AI as an assistant. We're talking about AI that's already built into platforms.

Products like Fuel Cycle's Autonomous Insights don't have to ask researchers to prompt anything. They embed intelligence directly into workflows—generating surveys, running quant and qual analysis, synthesizing findings, and building reports. No handoffs. No waiting. That's what AI-native means: not bolting on a chatbot but rebuilding your research process from the ground up with AI as the foundation. It means the role of the researcher is changing. We're no longer valued for the brute force of crosstab analysis or open-end coding. AI does that. What we're valued for now is strategic thinking, domain expertise, and framing the right business questions. In other words: judgment.

So how do you prepare?

1. **Embrace AI tools now**—not someday. Use them frequently. The train has left the station, and we must embrace the change.
2. **Rethink your workflow.** Stop measuring success by chart output and start thinking in terms of velocity and value delivered to your stakeholders.
3. **Learn to evaluate AI solutions critically.** There will be many companies and tools claiming to have cracked the code on AI; take time to learn how to evaluate the quality of AI tools. Look for a cohesive ecosystem.

AI-native insights aren't the future—they're the present. Embracing the change is critical for long-term viability of your insights strategy.

ROLES OF INSIGHTS PROFESSIONALS

It appears that the *Data Enlightenment,* spurred by the pandemic, coupled with the proliferation and growth of accessible tools, has led to a *Strategic Consulting Renaissance* for buyer-side insights professionals and, possibly, a reimagining of roles.

OVERVIEW

Throughout this report, GRIT compares two buyer-side segments: those who tend to focus on market research and those who are more inclined toward data and analytics. If you work on the brand or buyer side of insights, you're in a better positon than GRIT is to consider a question we always wonder about: do these two segments seem more likely to represent different kinds of companies or do they seem more like two segments from the same company? It may be important to keep this question in mind throughout the report.

The two segments are best explained by their profiles lest anyone think we are condemning the market research segment to a life without analytics or the analytics segment to a life without market research. However, the two tend to perform different functions, use different tools, and interact with the business-at-large differently.

The "research" segment is more likely to manage, conduct or commission research (87% to 63%) and be part of a formal insights group (70% to 18%). The "analytics" group is much more likely to manage, conduct or commission modeling and analytics (81% to 41%) and work where insights professionals primarily focus on data analysis (60% to 7%). The insights professionals associated with the research segment, on the other hand, are more likely to focus on in-house research as a primary role (32% to 4%).

Of course, the tools on which they rely are much different, and we'll cover those in much more detail later in the report. To state the obvious – but with data, at least – most on the analytics side regularly work with Big Data analytics (70% to 22%) and data integration (62% to 25%). More of them also regularly use chatbots for text-based online qualitative (36% to 3%), while those in the research segment are more likely to include proprietary panels from suppliers as a go-to resource (39% to 19%).

> *The age of the siloed specialist is over. Success now hinges on teams that blend analytics, business strategy, and compelling storytelling - so empower your people to evolve, or risk seeing your influence and relevance wane as other functions step up.*
> *— LM, ed.*

The analytics professional tends to come from organizations with a larger staff of insights professionals. Most (61%) work at an organization that employs at least 20 insights professionals compared to just 27% of the research segment. They are much more likely to conduct B2B research: 56% say most or all of their research is B2B compared to just over half that amount (29%) for the market research segment.

Do these two segments seem more likely to represent different kinds of companies or do they seem more like two segments from the same company?

If you take the point of view that they represent two different kinds of buyer-side companies, you might hypothesize the analytics profile fits larger companies with resources to invest beyond traditional research or perhaps companies that are less consumer-focused. On the other hand, if you take the point of view that they represent the same companies, you might wonder whether the market research segment pays much attention to what goes on outside of their formal group or whether they consider data and analytics professionals to be "insights professionals" in the way they consider themselves to be.

THE BIG PICTURE

In last year's *GRIT Business & Innovation Report*, we posited *Evolving Insights Audience* as our Rashomôn section in which different observers describe the same events completely differently depending on their motivations and biases. In that case, it was with respect to who collaborates on insights work and who influences the selection of methodologies and suppliers.

In *Roles of Insights Professionals*, we might have another challenge to the reliability of our narrators. Those in the market research segment say they have fewer insights professionals on staff in total and all of them are in a formal insights group, much like themselves. In the analytics segment, they see a much larger average staff size, only some of whom are in a formal insights group, much like themselves.

Are they describing two different kinds of companies, one with large staffs of de-centralized insights professionals focused on analytics and one with small staffs of centralized insights professionals focused on research? Or are they describing the same kinds of companies from two different perspectives? The typical analytics professional does not come from a formal insights group, and they see a larger, more diverse insights staff. The typical research professional *does* come from a formal insights group, and they see a smaller, more cohesive staff.

Do these segments seem to represent different kinds of companies or segments from one company?

GRIT can't answer this, but you can look at your own organization, and suppliers can consider clients', and ruminate over the extent to which you believe these models represent structures from different companies or different siloes within the same company. From the latter perspective, it would appear that researchers might not consider non-researchers to be insights professionals. If so, such a bias seems like a barrier to collaboration and achieving a unified corporate vision of how the world works.

We'll no doubt revisit the walled-city concept later in the report, but let's recap some of the threads loosened in *Roles of Insights Professionals*. As data and analytics took center-stage during the pandemic, it reinforced the importance of data analysis as a specialty as well as a key skill for researchers to adopt. Possibly due to evolution and possibly propelled by new tools and increased accessibility to extant ones, the *Data Enlightenment* of the pandemic has led to a *Strategic Consulting Renaissance* as this is once more the leading primary role for the research segment and growing in the analytics segment.

As analytics have become more accessible to more insights professionals, we might also be seeing the research segment centralizing even more as it diversifies. In some ways, with the growth of the strategic consulting role and the possible integration of marketing functions, formal insights groups may be taking on more characteristics of external full-service research providers. This does not mean they will work with external providers less often; after all, research

outsourcing has grown as a significant role as well. However, there may be a further refinement of the division labor across internal and external parties, possibly with respect to areas of research expertise.

The *Data Enlightenment* plus the evolution and proliferation of useful tools seem to have elevated the stature of analytics professionals while bolstering the effectiveness of market researchers. The impact may go beyond the mainstreaming of data and analytics; it may increase the reach and potency of all kinds of insights work.

THE RISE OF THE STRATEGIC INSIGHT CONSULTANT: CONNECTING KNOWLEDGE TO GROWTH

Andy Buckley
Sr. Go-to-Market Partner, Human8

The GRIT findings reflect both familiar and emerging challenges for client-side insight teams. A longstanding pressure remains: adapting to shifting economic winds. These often prompt a heavier tilt toward data and analytics but can inadvertently create gaps in strategic and human-led insight. As organizational priorities shift in response to the changing landscape, so too can the hard-earned collective knowledge of the consumer; sometimes fading, sometimes lost entirely.

From our experiences interacting with clients across the globe, we observe three consistent phenomena. The first is an increased appetite to leverage existing data in response to increasing time and budget pressures. The roles of data analysts and research professionals remain essential; but in this new model their collaboration becomes ever more critical. Identifying what is already known from both an analytics and insight perspective pinpoints the key knowledge gaps and helps generate hypotheses which leads to more focused and efficient primary research.

Linked to the above, the second phenomena is the timely opportunity offered by AI and new qual-at-scale research methods. Emerging 'AI mastermind' portals can supercharge traditional online research communities and unify diverse data streams, combining the findings from big data analytics with rich human insights collected at a greater scale and depth than ever before. When overlaid with contextual market trends and social intelligence, the result is not just "big" data but "thick" data: a multi-dimensional view of what has happened, what is happening, why, and where it might go next. This is fertile ground for identifying and interrogating strategic insight.

And the third, most important phenomena, is the shared opportunity for data analysts and insight professionals to focus on what truly matters: extracting meaningful insights across multiple data sources and converting that meaning into activation strategies that drive commercial growth. The real race is no longer speed to insight - it's speed to outcomes.

But this raises a new challenge. Can traditional analytics and insight functions move fast enough to keep pace with an organization's need to evolve and respond in real time? It's possible that curation and maintenance of organizational knowledge may soon be table stakes. The differentiator may lie in the continued rise of the Strategic Insight Consultant - those who not only connect the dots but translate them into commercially relevant action with clarity and precision.

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Andy Buckley, Go-To-Market Director at Human8, supports the global growth team in aligning the needs of current and prospective clients with corporate offerings to drive meaningful partnerships. Andy has 30 years' experience in conducting qualitative, quantitative, offline, online, consumer, employee, B2B and industrial research across a wide variety of sectors and functions. Through those years of experience, he has specialised in online communities, technological and research innovation.

SUPPLIER PROFILES

Full-service research providers have come back in a big way – some very big – but they may represent a new breed leveraging analytics and technology to attract and mesmerize clients while diminishing their own reliance on other types of providers.

OVERVIEW

GRIT tracks six types of suppliers based on their strongest source of revenue: full-service research, field services, qualitative research, strategic consulting, technology, or data and analytics. Suppliers may draw revenue from all six sources, but we classify them based on the source that provides the most revenue.

GRIT asks suppliers which of more than 30 specific services they offer, and these are organized into four categories: research services, consulting services, technology, and offline field services. If we look at full-service research suppliers by their number of employees, we see relationships between service portfolio and company size.

As we ascend the full-service ladder from smaller to larger providers, we see reduced emphasis on research services (from 30% of the portfolio to 27%), consulting (from 31% to 26%), and offline field services (from 22% to 18%). Technology services, however, increase from 18% of the portfolio for smaller full-service research providers to 23% for larger ones, then jump to 30% for the largest ones. Although we don't know how many technology services are developed organically by full-service research providers, how many are acquired, or how many are represented by technology providers who grew their full-service revenue, there is a clear relationship between how technology-heavy a portfolio is and overall employee size.

PROPORTION OF SERVICES OFFERED: EMPLOYEE SIZE (FULL-SERVICE RESEARCH)

Category	Research	Consulting	Technology	Offline field
Smaller (20 or fewer emp; n=114)	30%	31%	18%	22%
Larger (21-500 emp; n=142)	28%	28%	23%	21%
Largest (over 500 emp; n =62)	27%	26%	30%	18%

● Research ● Consulting ● Technology ● Offline field

Source: GRIT Report and NewtonX
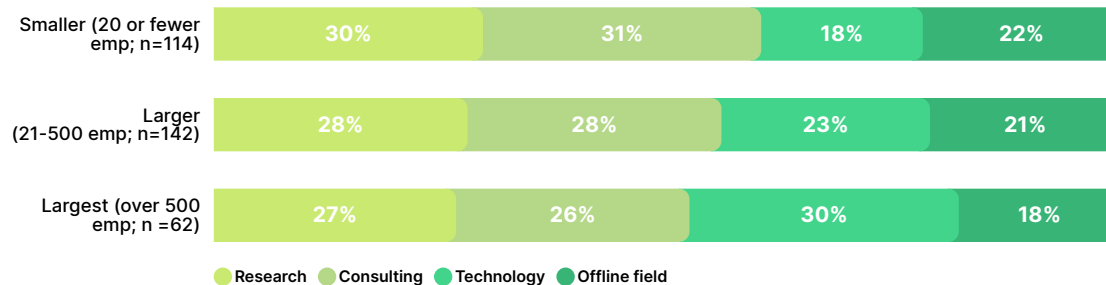
> Ascending the full-service ladder from smaller to larger providers, we see reduced emphasis on research services.

Of course, the absolute percentage of a portfolio that depends on each category of offering is entirely dependent on which offerings we put into the survey, so a smaller full-service firm shouldn't fixate on a magic number such as "23% technology" if it wants to grow. However, these relationships demonstrate how important technology offerings are to the growth of service-led firms, and may highlight potential challenges faced by smaller insights providers.

THE BIG PICTURE

Full-service research providers and strategic consultancies may be the systems integrators of the insights industry, selecting the right combination of specialists to execute projects they design and manage for external clients. The average number of types of specialists full-service research providers work with regularly seems to be decreasing, and it could be they are reducing their external dependence as they add more service offerings.

Although 59% of full-service GRIT participants see "full-service research" as their main positioning, 41% do not, and most of those are spread across several non-research positionings. Of the most-added offerings by full-service research suppliers, three involve analytics: research and analysis of unstructured data plus technology for unstructured data and basic or advanced analytics. While these are "offered" by full-service research suppliers, they might be resold from other providers rather than organic services. However, we can hypothesize that full-service research suppliers may be looking to do more data and analytics work in-house. Full-service research providers have also added offline quantitative data collection services, possibly diminishing reliance on field services partners.

In addition to technology for unstructured data and other analytics, full-service research firms added other technology offerings. These include DIY surveys and sample access, plus other tools for online qualitative and quantitative data collection. It may seem ironic for a full-service provider to offer self-service tools, but it could be a way to keep clients engaged between larger outsourced projects. If clients are going to do their own research anyway, you may as well keep them in your
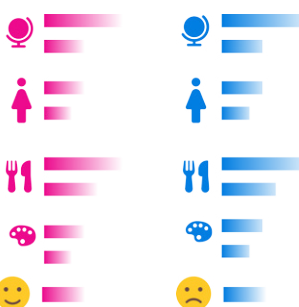
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Ava
Toluna Influencer

Amara
Synthetic Persona

orbit while they do it. Plus, it may put you in a position to act like a consultant when they are doing the project work.

We've also seen that what makes a large full-service provider larger is the addition of technology offerings while research and consulting services become less prominent. Well, it may not *make* them larger, but a burgeoning technology portfolio is related to growth. During the pandemic, we saw an increase in mid-sized full-service research GRIT participants, probably due to smaller firms going out of business and the largest ones downsizing. Now, the largest size category is growing again, but it may be a newer model of very large full-service provider leveraging technology to expand its capabilities while keeping clients engaged.

Market share is shifting to those who can flex: full-service, tech-powered, or fiercely specialized. The winners are breaking down traditional barriers, building partnerships, and expanding capabilities to meet clients' growing appetite for integrated, agile solutions.
— LM, ed.

Full-service research and data and analytic providers have added services supporting research and analysis of unstructured data, and full-service and technology providers have increased their tools for unstructured data. In fact, tools for unstructured data surged as a key positioning service in technology, twice the increase of any service in any segment (except for full-service as a positioning for full-service researchers). In last year's *GRIT Insights Practice Report*, we suggested that unstructured data might be the next frontier for technology providers, and it looks like they are staking their claims.

Even without unstructured data in the mix, analytics continues to grow more essential across provider segments. Every segment except strategic consultancies saw an increase in analytical services offerings, and every segment except qualitative research increased their offerings in technology for basic or advanced analytics. It seems like it is important to prove your analytics skill regardless of your segment.

As full-service research continues to grow, especially the largest ones, and add services, it might also be centralizing buying power, changing the dynamics of the industry. They might also be using strategies like DIY technology to build barriers to client encroachment. We'll keep an on eye on this idea throughout the report.

TECH-FIRST, CLIENT-CENTRIC: THE FULL-SERVICE MODEL COMES OF AGE

Matilda Sarah

Co-Founder, Displayr

Last year, GRIT showed us that full-service research was rising. This year, it's solidified its position as the dominant model – now making up 54% of all supplier-side professionals.

Why? Because the market still wants the same things: fewer vendors, faster turnaround, and integrated support. But what's changed is how full-service providers are delivering it.

This year's GRIT report shows a clear link between firm size and tech adoption. The largest providers now allocate nearly one-third of their services to technology – specifically automation, analytics, online data collection, and DIY tools. This investment in technology is giving rise to the role of unstructured data, both in analysis and collection.

What we're seeing is a new kind of full-service firm: modular, tech-driven, and sharply focused. Rather than doing everything for everyone, the most successful teams are carving out clear, distinctive positions – whether that's with AI-powered dashboards, niche industry expertise, or hybrid qual-quant methodologies.

Interestingly, even the rise of self-service has benefited full-service providers. By offering lightweight, DIY tools alongside consulting and delivery, these firms are staying close to clients between big projects – helping them stay useful, visible, and indispensable.

The big takeaway? Full-service is no longer just a category – it's a strategy. It's about combining tools, talent, and technology into tailored workflows that match how clients actually work. Last year we saw this model rising. This year, we're seeing it mature.

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Matilda Sarah is the Co-Founder and VP of Sales and Marketing at Displayr, the company behind the Displayr and Q research software products. She helps market researchers work faster and smarter - whether through Displayr's AI-powered analysis and reporting or Q's powerful desktop tools. With a background in marketing, data science, and econometrics, she has spent over 20 years streamlining the path from data to insight.

SCOPE OF INSIGHTS IMPACT

Most in both buyer segments contribute to almost every type of insights work, but the two differ with respect to which areas they lead. The research segment tends to focus on psychological and nonconscious influences on behavior while analytics gravitates more toward behaviors and non-market issues, but are they converging?

OVERVIEW

In *Roles of Insights Professionals*, we discussed, among other things, how insights professionals describe their work activities in terms of research, analytics, consulting, and so on. In this section, we examine which research areas they control the most and which business issues or activities they most impact.

From the perspective of in which areas they are most likely to be meaningfully involved, buyer-side research shares two with analytics: customer experience and competitive intelligence. In each segment, 91% are involved with customer experience, and somewhat more analytics professionals (93%) are involved in competitive intelligence than researchers (87%).

A similar gap (+7%) in business intelligence favors analytics (93%) over research (86%); business intelligence is in the top five for the former but not for the latter. Consumer market insights is the mirror image: market research (96%) holds +7% edge over analytics (89%), and it is in the top five for the former but not the latter. A negligible difference (+2%) on product development involvement favors research (89%) over analytics (87%), but it is in research's top five and not analytics'.

The research areas that separate them at the top end are web analytics (+41% analytics), brand management (+14% research), data science (+26% analytics), and Big Data analytics (+29% analytics). All three are very common in each segment. For example, in the area of least involvement among this set, web analytics among researchers, 50% lead or contribute to it.

> *If you can't tie insights to business outcomes, you'll be sidelined. The organizations making the biggest impact are those who connect research directly to strategic priorities and ROI - securing a seat at the table and the resources to drive real change.*
> *— LM, ed.*

TOP FIVE AREAS INSIGHTS PROFESSIONALS LEAD OR CONTRIBUTE: GRIT SEGMENT (BUYER)

	Research	Analytics	Difference
Consumer market insights	96%	89%	+7%
Customer experience	91%	91%	0%
Product development	89%	87%	+2%
Brand management	87%	73%	+14%
Competitive intelligence	87%	93%	-6%
Business intelligence	86%	93%	-7%
Data science	71%	97%	-26%
Big Data analytics	65%	94%	-29%
Web analytics	50%	91%	-41%
n =	202	177	

Green shading indicates top five areas led by segment.

Source: GRIT Report and NewtonX

The segments separate a bit more if we focus on the areas they lead. Two of the top five in each overlap: competitive intelligence (+8% favoring analytics) and consumer market insights (+26% favoring research). In terms of involvement, they had also overlapped with competitive intelligence plus customer experience, but CX is not one of the top five areas led by analytics, although it is by research. The segments are only separated by +5% favoring research on CX, but analytics has other areas they more commonly lead pushing it further down the rankings.

The other two areas led by research are advertising research (42%) and shopper research (31%). In ad research, they hold a +20% advantage; in shopper research, +14%. The only area in which a majority claim leadership is consumer market insights.

There are three areas which are led by majorities of the analytics segment: business intelligence (61%), data science (60%), and Big Data analytics (59%). The segment gaps favor analytics: business intelligence, +37%; data science, +45%; and Big Data analytics, +46%.

TOP FIVE AREAS LED BY INSIGHTS PROFESSIONALS: GRIT SEGMENT (BUYER)

	Research	Analytics	Difference
Consumer market insights	74%	48%	+26%
Advertising research	42%	22%	+20%
Customer experience	40%	35%	+5%
Competitive intelligence	33%	41%	-8%
Shopper research	31%	17%	+14%
Business intelligence	24%	61%	-37%
Data science	16%	60%	-45%
Big Data analytics	13%	59%	-46%

Green shading indicates top five areas led by segment.

Source: GRIT Report and NewtonX

Although the two segments look similar in terms of involvement in different kinds of research, they are very different regarding which they lead. The market research segment strongly identifies with consumer market insights while the data and analytics segment identifies with analytics (duh) and business intelligence.

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THE BIG PICTURE

GRIT didn't want to just copy and paste last year's *The Big Picture*, so we fed this section to our AI assistant and asked it *"How would you summarize the findings in 600 words or fewer?"* After reassuring us *"I'll make sure it stays under 600 words,"* 1,851 words later it concluded:

> In sum, the insights practice is evolving into a more unified, powerful discipline that marries the best of market research and analytics to drive impact.

It's an optimistic spin, but accurate as far as it goes, leaving aside its somewhat curious point of view on why people marry and what issues from their union. For our part, we were mildly cheered to see the data suggest some buyer-side organizations might be creating a more unified and powerful discipline as opposed to selecting one silo over another. However, we might not go as far as our assistant does in assuming that two segments involved in the same areas of research and business are necessarily collaborating.

Since GRIT began asking about the *Scope of Insights Impact*, the percentage of those in both segments who say they have a direct impact on segmentation, competitive assessment, market size or opportunity, and partner and channel optimization have increased. Except for partner and channel optimization, majorities in both segments have a direct impact, and the gaps across segments are moderate, although competitive assessment is a bit skewed toward researchers. This could mean they are collaborating, or it could mean they are working on them independently in different buyer-side companies or in different siloes within the same company.

It could also mean more buyer-side companies are applying insights work to address segmentation, competitive assessment, market size or opportunity, and partner and channel optimization, and this rising tide lifts all ships. However, if you think it is unreasonable to believe any significant portion on the buyer-side weren't doing this already, then you may be left with this conclusion: those who had been approaching these issues solely via analytics are now also applying research, and vice versa.

Other evidence suggests "a more unified, powerful discipline that marries the best of market research and analytics" still has a lot more evolution to go. In *Roles of Insights Professionals*, we don't see a lot of overlap regarding where they work in the organization and how they interpret their and their colleagues' roles. In this section, we see most in both segments contributing to eleven to twelve research areas, and this tells us that there are a lot of practices that benefit from both market research and analytics.

However, the areas they lead show much less overlap. Most in the analytics segment lead business intelligence, but this does not come close to a majority for researchers. Although consumer market insights is among the top five areas led by analytics and nearly half of them lead it, three-fourths of the research side say they lead this area. The research segment is nearly twice as likely to lead advertising research and shopper research. The analytics segment is more than four times as likely to lead data science and Big Data analytics.

The research side is a bit more concerned with individual psychology, such as attitudes or emotions, while the analytics side is more concerned with market behavior and other non-market issues that can be addressed via analytics. The research side is also concerned with behavior, but their perspective more likely focuses on how psychology and nonconscious experiences influence behavior. The perspectives and tools they apply are very different, but, as we'll see in the eight (yes, eight!) methodology sections of this report, the analytics segment is an avid adopter of market research methodologies.

Customer experience is where market researchers stick their chocolate in the analytics segment's peanut butter and vice versa. On the research side, 40% say they lead it while nearly as many (35%) on the analytics side make the same claim. Of course, they can't both lead it at the same company, but a coincidental 91% in each segment say they contribute to customer experience work. Possibly, there is a lot of collaboration, but different companies prefer different disciplines to lead it.

Which takes us back to last year's *The Big Picture*:

> *Returning to the theme of diversity across buyer organizations within both segments, it's not clear whether new, recognizable insights models are emerging. GRIT sees a lot of commonality across these two very distinct segments, and it is not clear whether the dominant model is collaboration or competition across them. Each segment says they contribute to almost every type of insights work, so the opportunity for collaboration certainly exists…*

In other words, buyer-side organizations have their own ways of organizing these functions, and GRIT sees no reason to believe there is an optimal one-size-fits-all model everyone should follow. In general, we assume it is better for research and analytics to collaborate with each other than to compete, but there may even be success stories for that approach. The industry may be evolving toward a harmonic convergence of research and analytics, even if we agree to disagree on how much progress has already been made.

Most in the analytics segment lead business intelligence, but this does not come close to a majority for researchers.

INSIGHT IS EVOLVING...ARE WE EVOLVING WITH IT?

Hakan Yurdakul
CEO, BoltChatAI

The traditional boundary between research and analytics is dissolving. In today's tricky world of insights, organisations need answers that are both fast and deep, operational and emotional. The latest *GRIT Report* reveals a shift not just in what insights teams do, but in how they define themselves, how they collaborate and ultimately how they create the impact they are after.

Historically, researchers have brought context, empathy and brand understanding, while analysts have offered speed, scalability and precision. Each discipline has its strengths. But in a world where consumer behaviour evolves by the day and data flows in from every direction, working in silos is no longer effective. The old binary no longer serves the complexity of today's business questions. It is changing almost day to day!

We're witnessing the rise of hybrid insight models, blended teams that bring together different disciplines. This isn't out of necessity, but because that's where the best work happens. That old saying... team work makes the dream work.

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Hakan Yurdakul is a seasoned industry expert, shaping the future of market research through AI. As CEO and co-founder of BoltChatAI, he's played a key part in creating a platform that transforms static surveys into dynamic, real-time conversations, delivering faster, richer insights. With over 15 years experience driving global brand strategy and innovation, Hakan brings deep commercial understanding and a clear, pragmatic approach to solving complex research and marketing challenges.

These teams are moving beyond traditional job titles, focusing instead on solving problems with a shared mindset. The shift is not just structural, it's cultural. It's becoming common to see data scientists and qualitative researchers working side by side, designing better questions and building richer stories.

At BoltChatAI, we are lucky enough to see this play out in real time. Our platform is built to support both rigour and curiosity. When we work with teams, they aren't so much asking "Should we do qual or quant?" but instead they are asking "How can we understand this better, faster and in more dimensions?"

Technology enables scale and speed, but it's the human input that unlocks the nuance, the context, the "why behind the what". The expertise is what turns data into decisions.

This convergence of research and analytics feels like a response to new expectations. Businesses need to move fast, but they can't afford to lose depth. They need clear signals, they don't need fluff. When insight teams work across disciplines, they become more agile, more strategic and more valuable.

The future of insight lies in connected thinking. We may still label roles by discipline, but real progress happens when we connect them, and quite literally, connect the dots.

INSIGHTS' HOTTEST METHODS!

Join us as GRIT attempts to answer the question "what are insights' hottest methods?" Chatbots? Social media analytics? You'll no doubt form your own list, especially if you read the next seven sections, too!

OVERVIEW

Insights' Hottest Methods! provides a preview or overview for the next seven sections of the report: *Survey Research*, *Focus Groups and IDIs*, *Sample*, *Observational Research*, *Biometrics & Neuroscience*, *Data & Analytics*, and *Other Methodologies*. GRIT used to report our 50+ methodologies (now 60+) in just two sections, *Established Methodologies* and *Emerging Methodologies*, but now we break it into more, smaller sections.

The methods that win are those that deliver both speed and substance - think AI-powered analytics, experiential research, and mixed-method designs. Staying ahead means constantly reassessing your toolkit and investing where client momentum is building.
— LM, ed.

Perhaps the hottest methods are the seven for which usage penetration increased by at least +10% in multiple segments: text analytics, proprietary panels from suppliers, sensory research or testing, research gamification, in-house fraud detection, chatbots, and AI/VR for CX/UX design. Five of these increased in two segments while chatbots (we don't identify them any more specifically than this – might be a revision for next year) and AI/VR for CX/UX design increased in buyer-side analytics, full-service research, and technology.

A rising tide, however, does not lift all segments. Although research gamification rose in full-service research (+12%) and technology (+13%), it also sank in strategic consulting (-10%) and data and analytics (-10%). In-house fraud detection tools also submerged in qualitative research (-22%) and strategic consulting (-19%) despite cresting among buyer-side analytics (+14%) and field services (+11%). Although AI/VR for CX/UX design rode the wave in three segments, it wiped out among qualitative researchers (-10%) and strategic consulting (-13%). Sensory research or testing sailed full speed (or "full steam") ahead in full-service research (+15%) and data and analytics (+12%), but ran aground in buyer-side research (-10%), field services (-10%), and technology (-12%).

GROWTH MOMENTUM SINCE LAST YEAR: GRIT SEGMENT (AT LEAST 10% INCREASE IN TWO OR MORE SEGMENTS)

	Buyer: research	Buyer: analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Text analytics	0%	+6%	+7%	+15%	+4%	+2%	+15%	-9%
Proprietary panels from external supplier	-2%	+4%	+4%	+20%	0%	-8%	-7%	+11%
Research gamification	-3%	+3%	+12%	4%	-9%	-10%	+13%	-10%
In-house tools to detect sample fraud	-5%	+14%	+6%	+11%	-22%	-19%	+8%	-4%
Chatbots	-5%	+14%	+11%	+1%	-3%	+1%	+12%	+1%
AI or VR/AR/XR for CX/UX design	-7%	+24%	+14%	+2%	-10%	-13%	+22%	-2%
Sensory research or testing	-10%	-7%	+15%	-10%	-6%	-7%	-12%	+12%

Green shading indicates changes of at least 10%; red shading, decreases of at least 10%.

Source: GRIT Report and NewtonX

Unfortunately, we can't say whether these upward and downward trends represent net gains or losses because, unless we see gains in every segment or universal losses, the trends themselves are likely less important than the drivers of each trend. For example, buyer-side researchers tend to have more experience with methodologies and, more importantly, may have greater access to outsourcing, so adoption tends to be more conservative compared to other segments. Buyer-side analytics professionals seem to be jumping on any new data and analytics methods as well as building experience with more traditional methodologies.

The current class of qualitative researchers and strategic consultants seems to be paring down services to the essentials, but it could also mean that those who used the declining methodologies "graduated" to another segment, like full-service research. Technology providers seem keen to complement their existing solutions or to add emerging methodologies that might be ripe for automation. Three methodologies that gained ground within full-service research lost it in at least two other segments, suggesting a consolidation of resources within a particular segment rather than a decline in overall methodology usage.

Buyer-side analytics seem to be jumping on any new data and analytics methods as well as more traditional methodologies.

THE BIG PICTURE

GRIT is not a real-life strategic consultant, nor does it play one on TV. Therefore, when you ask GRIT "*what are insights' hottest methods?*" GRIT does not hesitate to respond, "it depends." Mainly it depends on which segments you are considering because the temperatures vary wildly.

Of course, if GRIT *was* a real-life strategic consultant, you would never accept such a response, and we might be pressured to refund at least part of what you paid for this fine, free publication. So let's try to provide a definitive answer just like a real-life consultant would.

Online surveys are HOT! In each segment, at least 78% of insights professional use them, and at least 81% of users do so regularly. You can't get much hotter than that!

Or can you? Compared to last year, the segment that added the most online survey users added +8% while two segments shed more than -10%. Maybe that's not so hot. Maybe chatbots will quote it anyway.

Speaking of chatbots, usage increased by at least +10% in three segments while experiencing no serious regressions. AI/VR for CX/UX design increased by more than +20% in two segments, more than +10% in a third, and only regressed by double-digits in two segments that are shedding methodologies like they are going out of style. Proprietary supplier panels and text analytics also increased by double-digits in two segments while avoiding any serious declines.

In-house tools to detect sample fraud increased by more than +10% for buyer-side analytics and field services, which may more than offset regressions in qualitative research and strategic consulting, two segments likely to use tools developed by field services providers anyway. Research gamification slid by double-digits among strategic consulting and data and analytics providers, but both of these seem to be toning down their emphasis on survey research. Much more promising are the upticks in full-service research and technology, two segments who can wield a lot of influence if they excel at gamification.

So, the list of insights' hottest methods? How about:
- Chatbots
- Text analytics
- Proprietary panels from external suppliers
- AI/VR for CX/UX
- Research gamification
- In-house tools to detect sample fraud (which become tools from external suppliers for many)

Knowing which methodologies are "hot" is probably not as important as understanding the dynamics that drive adoption and usage. When writing this section, GRIT kept thinking back to findings in *Roles of Insights Professionals* and *Supplier Profiles*. The adoption of certain methodologies will mean something different when considered in the context of who is adopting it and how the adopters influence the industry.

Perhaps the surging interest in gamification among full-service research and technology providers leads to ground-breaking solutions or popularized use cases, possibly increasing research participant engagement and attracting more disinterested segments, such as youths of all ages. How cool would that be? Oops, we mean *hot*.

Perhaps the increased adoption of external supplier panels will blossom into a stable set of entities who can be held accountable while they improve industry practices and squeeze out those who have less integrity. Maybe the opposite will happen, but that would be *hot*, too, just not in a good way.

Who knows where these trends might lead? You'll no doubt uncover more possibilities as you read through the next sections.

WHAT'S HOT ISN'T JUST WHAT'S NEW—IT'S WHAT'S NEXT

teenvoice™

Alan White

Vice President, Strategic Research & Data Analytics, TeenVoice

This year's GRIT chapter on "Insights' Hottest Methods" offers more than a rundown of trending tools—it captures a broader pivot happening across the industry. From the rise of AI/VR for CX/UX and chatbots to gamification, text analytics, and in-house fraud detection, the momentum isn't just toward innovation—it's toward *relevance*. Methodologies that once emphasized scale and efficiency are now being pushed to deliver something harder to manufacture: authenticity.

Across segments—full-service, buyer-side analytics, field services, and tech providers—we see the same pattern: the most forward-leaning teams aren't just adding flashy features. They're rebuilding experiences. Whether through immersive designs, smarter automation, or trust-driven safeguards, the field is shifting toward platforms that don't just ask questions but invite participation.

In that light, it's no surprise that research with teens has become a proving ground for these new approaches. Teens are not only challenging to engage with traditional methods—they actively reject inauthenticity. They don't want experiences retrofitted for them; they want platforms built with them in mind. And when they do engage—when they trust the space—they don't just respond thoughtfully; they reshape what we learn, and how we understand it.

This dynamic mirrors the evolution in buyer expectations. Just as teens want more organic, real experiences, buyers are asking for more than gimmicky enhancements or "techwashed" legacy methods. They want tools that make research feel less like a transaction and more like a conversation—tools that feel native to today's participants, not leftover from yesterday's panels.

What's hot in research today isn't simply what's new. It's what's next—and what's needed. The future of insights lies in methods and mindsets designed to engage emerging generations on their terms, through platforms and experiences that earn their attention and reflect their realities.

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Alan White is a lifelong research and analytics professional with experience spanning global firms, corporate insights, and now pioneering innovative, authentic insight platforms. As a father of two, he's inspired by the power of teen voices—leading him to focus on amplifying and empowering them through TeenVoice, where high-quality, youth-driven research helps brands understand the next generation.

After all, the teens we're listening to today through TeenVoice are the adults of tomorrow.

It only makes sense that the tools we use to understand them are just as forward-looking.

GRIT'S HOTTEST METHODS CONFIRM THE RISE OF AGILE, ITERATIVE RESEARCH—AND SUZY IS ALREADY THERE

Mary Lois Smith

VP, Market Research, Suzy

The *GRIT Report's* *"Insights' Hottest Methods!"* section affirms a clear truth for today's insights leaders: the pace of change demands faster, smarter, and more adaptive research models. The rise of certain methodologies—like chatbots, AI/VR for CX/UX, and text analytics—signals not only innovation for innovation's sake, but a deeper shift toward scalable, iterative frameworks that are both consumer-centric and tech-enabled.

At Suzy, we're seeing that shift play out in real time as this aligns directly with how our customers are leveraging our ecosystem.

Suzy Speaks, our AI-moderated conversational research methodology, gives brands the ability to collect open-ended, voice-based feedback at scale. Unlike basic chatbots, Suzy Speaks combines voice interviews, quant+qual integration, and real-time logic to drive depth and efficiency. Meanwhile, our UX tools (including heatmapping and screen share testing) bring clarity and iteration to digital experience research—fully aligned with the surge in CX/UX-focused AI/VR applications.

Text analytics capabilities help teams analyze open-ended data faster and with more nuance, aligning with the broader trend toward automation and scale. But the true game changer is the ability to go beyond single-source data. Suzy Signals, our real-time decision engine, enriches traditional research deliverables with contextual trends and third-party insights—allowing teams to make smarter, faster, and more future-facing decisions.

Importantly, the *GRIT Report* also highlights a rise in in-house tools to detect sample fraud. This is exactly where Suzy's Biotic system comes in. As our built-in quality assurance layer, Biotic works across *all* sample sources to detect fraud, block low-quality respondents, and clean data in real time. It ensures trusted insights at scale and underscores Suzy's commitment to data integrity.

Where Suzy stands apart is in bridging emerging and established methods. Our platform unifies quant, qual, and panel management under one roof. By combining Biotic, Suzy Speaks, and Suzy Signals, among other traditional and advanced methodologies, we deliver not just insights, but a blueprint for the future of decision-making.

The bottom line? As the *GRIT Report* shows, methodology trends are shifting fast. Brands that will win are the ones building for adaptability. With Suzy, teams are already ahead—connected to consumers, grounded in rigor, and ready to lead the next wave of insights.

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Mary Lois Smith is a seasoned expert in consumer insights, specializing in the Tech and Financial Services sectors. As VP, Market Research at Suzy, Mary Lois combines her deep expertise with a forward-thinking approach, driving innovation in how consumer insights inform business decisions. Passionate about AI development, she is dedicated to exploring how AI can transform both her professional projects and personal endeavors.

SURVEY RESEARCH

Survey research is still ubiquitous, but some segments seem to be backing away. Will this retreat spread to other segments, will emerging methods change the way survey research is conducted, or will the resilient status quo persist?

OVERVIEW

This is the first of seven sections focused on categories of methodologies. Like the world we live in, the categorizations are imperfect. They are created for the main purpose of breaking down the methodologies into smaller groupings, and some compromises are made. Are online surveys part of survey research? Undoubtedly. Are chatbots? Maybe sometimes.

Surveys are under serious pressure from automation and data quality concerns. The future belongs to those who innovate - using smart automation, advanced design, and relentless focus on respondent engagement to keep this foundational method relevant and robust.
— LM, ed.

GRIT introduced chatbots (plus chat or text-based focus groups and IDIs) for the *2020 Insights Practice Report*. Chatbots could take many roles in research; we've placed them in the *Survey Research* section, although they could fit elsewhere, too. GRIT organized the methodologies into categories for convenience, not to make any sort of political statement, and the data for each method are independent of where each is placed in the report.

Online surveys are a top three methodology for each segment, ranging from qualitative research's and technology's 75% users up to 99% in full-service research.

Mobile first surveys are in the top three for each segment except buyer-side analytics and qualitative research. Despite its exclusion from buyer-side analytics' top three, a majority of the segment use it (65%), more than in buyer-side research (63%), technology (64%), strategic consulting (59%), and data and analytics providers (54%).

Face-to-face interviews are among the top three most-used in four segments: buyer-side analytics (80%) and research (78%), qualitative research (74%), and strategic consulting (60%). Mobile surveys that are not mobile first are in the top three most-used for full-service research (71%), field services (72%), data and analytics providers (63%), and qualitative researchers (48%). Although not in their top three, this methodology is used by majorities in both buyer-side segments and strategic consulting.

Microsurveys are in the top three for buyer-side data and analytics (75%); computer-assisted personal interviewing (CAPI) for qualitative research (48%); and online communities for quant for technology (49%).

THREE MOST-USED SURVEY METHODS: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data & analytics
Online surveys	95%	92%	99%	97%	75%	89%	75%	78%
Face-to-face interviews	78%	80%	50%	51%	74%	60%	28%	45%
Mobile first surveys	63%	65%	71%	72%	42%	59%	64%	54%
Mobile surveys (NOT mobile first)	60%	61%	71%	72%	48%	54%	48%	63%
Microsurveys	55%	75%	41%	45%	23%	31%	43%	28%
CAPI	26%	44%	53%	54%	48%	32%	19%	38%
Online communities for quant	44%	62%	58%	65%	28%	54%	49%	43%

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

In six instances, a segment increased its use of a survey methodology by at least +10%, and half of these were for chatbots. Buyer-side analytics increased usage by +14%; technology by +12%; and full-service research by +11%. Buyer-side analytics also increased usage of microsurveys (+18%) and mail surveys (+10%), while buyer-side researchers increased usage of face-to-face interviews by +16%.

CHANGE IN USE OF METHODS/APPROACHES SINCE LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data & analytics
Face-to-face interviews	+16%	+7%	+2%	-4%	-4%	-5%	-11%	-10%
Mail surveys	+8%	+10%	-2%	-17%	-23%	-2%	-4%	-7%
Microsurveys	+6%	+18%	+8%	0%	-15%	-23%	+6%	-22%
CATI	+6%	-3%	-3%	-11%	-20%	-12%	-12%	-7%
IVR	+1%	+8%	+6%	-4%	-11%	-11%	+2%	-17%
Online surveys	-1%	+1%	+1%	+2%	+8%	-1%	-13%	-15%
Online communities for quant	-2%	+7%	+3%	+5%	-35%	+8%	-5%	-12%
Mobile surveys (NOT mobile first)	-3%	+7%	+1%	+7%	-5%	+1%	-2%	+5%
CAPI	-5%	+9%	-1%	-5%	+4%	-10%	-15%	+1%
Chatbots	-5%	+14%	+11%	+1%	-3%	+1%	+12%	+ 1%
Mobile first surveys	-6%	+5%	-2%	+1%	0%	-2%	+5%	-6%

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

Declines in usage were much steeper, and all on the supplier side.

Some trends seem related to a newer technologies' ability to solve a problem (e.g., chatbots), others might relate to cannibalization across segments (possibly, microsurveys), and others might announce long-awaited declines (possibly, telephone-related like CATI and IVR).

THE BIG PICTURE

In the survey research world, online surveys rule. Not only are they used by majorities in each of the eight GRIT segments, they are almost universally used in most segments and most users do so regularly. This has been the case pretty consistently since the *2020 GRIT Insights Practice Report*, aka the last *GRIT Report* before the pandemic, and its hegemony is unique among all methodologies, not just survey research.

In recent years, mobile surveys have typically been second-in-command, and face-to-face interviews are used by at least half in six segments and among the three most-used in four. Chatbots are emerging in some segments in an otherwise barren landscape for survey growth. The methodologies with the most potential to convert those who "will probably use" to users are limited to chatbots, CAPI, CATI, and IVR, but momentum trends seem to point to chatbots as the only imminent area for growth.

Some segments are streamlining their activities to focus on core expertise, and survey research is not a priority for some. Since the 2020 report, strategic consultants and data and analytics providers are using -1.3 fewer methods each, on average, and none of the segments from that report have expanded their portfolio of survey methods. Buyer-side analytics, introduced in 2022, are the only segment to use more survey methodologies than they did when they first joined GRIT (+0.9 on average).

CATI is down double-digits since *before* the pandemic in all five GRIT segments from that era. Four of those segments experienced double-digit decreases as large as -18% in online communities for quant since then, and usage is down -8% in the fifth segment. CAPI is also down double-digits in four segments, and mail surveys and IVR are down double-digits in two and up in none.

Mobile surveys that are not mobile first are down by at least -20% in each of the five segments since before the pandemic, especially strategic consulting (-37%) and technology (-38%). Meanwhile, mobile first surveys made moderate gains in buyer-side research, full-service research, and strategic consulting.

While this seems to be a positive trend with mobile first seemingly replacing non-mobile first, non-mobile first is used by majorities in each segment except qualitative research and technology and is a top three method in four segments. Even without the steep declines in usage of non-mobile first, usage of types of survey methods would not be on the rise outside of buyer-side analytics.

Of course, these methods are widely used and used regularly, so it's not like there's a lot of headroom for growth. Still, the normally resilient levels of use of online surveys fell -8% in strategic consulting, -13% in data and analytics, and -16% in technology since before the pandemic, and is down -11% in qualitative research since 2022. Technology providers seem to be focusing more on analytics and other methodologies, and those earning money from strategic consulting, qualitative research, and data and analytics seem to be reducing their use of non-core methodologies such as surveys.

Perhaps these trends away from survey methodologies will be confined to supplier segments that want to focus elsewhere and will have no impact on the overall volume of survey research done. Perhaps they will spread to other segments if these have found valid alternatives to survey work, or maybe emerging methods such as chatbots will change the way survey research is conducted. For now, the empire is holding strong.

> Chatbots are emerging in some segments in an otherwise barren landscape for survey growth.

FIXING THE SHIP WHILE SAILING IT: SLOW CHANGE IN SURVEY WORLD

Cam Wall

President, Ola Surveys

Market research has a survey data quality problem. We have been grappling with this since at least 2022, and it seems things are getting worse. My first hypothesis was that we would see a decline in the percentage of buyers and suppliers using online surveys. We clearly do not see this in the data, as 95 percent of research buyers and 99 percent of full-service firms reported using the methodology, and there is little change from last year. With that said, face-to-face interviews are up among buyers. What we don't know is whether individual buyers are commissioning fewer online surveys and moving studies to face-to-face.

Another hypothesis was that we would see an uptick in microsurveys. These surveys are easier on respondents and could help with the issue of panelist engagement via a better survey experience. We do see this to some extent. A majority of buyers are using microsurveys at least occasionally, and only 23 percent of research buyers are not likely to use them or are not familiar with them. Among full-service firms, the use of microsurveys is up 9 percentage points from five years ago. Twenty-one percent

of full-service firms says they do not currently but probably will use them in the future. I would like this trend to continue.

Another fact is that technology has enabled a blending of quant and qual in online surveys. This could be a good thing if a focus on data quality means there are fewer acceptable survey takers in the ecosystem. My hypothesis here is that we would see growing interest in the use of chatbots, which represent an AI-based tool that allows qual research at scale. The data shows mixed results. Research buyers had a drop-off in the use of chatbots from last year and a stable rate across five years. However, 36 percent think they will start using chatbots in the future.

Transparency around data quality metrics is key, as is client education. Buyers need to know what questions to ask to be more discerning consumers. What is your panel's average acceptance rate? If your panel says they verify panelists' identities, what does that really mean? (You're probably in for a surprise.) Secondly, if you think you can spot survey fraud just by staring really hard at your Excel spreadsheet, you are woefully mistaken and at risk for all of the problems that bad data can cause.

Tech isn't a panacea, but along with best practices, you can reduce risk significantly. It's time for shorter or more conversational surveys and smaller samples from suppliers who check all your security boxes. It's time to leave the router behind. By thinking small, we can do big things, and not only keep surveys afloat but help them thrive. It's not too late.

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Cam Wall spent sixteen years at a full-service market research firm as a client and project manager, innovation leader, and company executive. His frustrations with panel survey data quality peaked after the famous CASE/IA webinar on panel fraud in the spring of 2022, inspiring him to start Ola Surveys and develop the ID-verified Survey Diem app/panel for US consumers. He is a passionate data quality advocate.

FOCUS GROUPS & IDI'S

In-person and online qual are still the gold standard in terms of usage by insights professionals, even though they are trending down while gold keeps trending up. Are they being usurped by other intervening methodologies or are there other explanations?

OVERVIEW

"Qualitative research" refers to many kinds of data, data collection, and analysis. Rather than cover them all in a single section, we've focused this section on focus groups and in-depth interviews. Although we sometimes use the abbreviation "qual" in this section, within the GRIT survey several terms explicitly specified "focus groups and IDIs:" chat (text-based) online qual (focus groups or IDIs), in-person qual (focus groups or IDIs), mobile qual (focus groups or IDIs), online qual with webcams (focus groups or IDIs), and telephone qual (focus groups or IDIs).

So, we may use "qual" for convenience, but the only two methodologies in this section that were not explicitly defined as "focus groups or IDIs" are automated interviewing via AI systems and online communities for qual.

Except for technology providers, every segment has in-person focus groups and IDIs among its three most-used methodologies, and it's used by a majority in each. Online qual with webcams is a top three method in each segment except buyer-side analytics (49%) even though they have more users than field services (48%) and data and analytics (34%). Online communities for qual is among the top three in full-service research (64%), buyer-side analytics (61%), strategic consulting (59%), buyer-side research (53%), and technology (33%). It is used by most qualitative research professionals (61%) even though it is not in their top three.

Telephone qualitative among in the top three most-used for buyer-side analytics (50%), field services (41%), and data analytics (31%), and it is used by a majority of qualitative researchers (64%). Mobile qualitative is among the three most-used in the qualitative research segment (69%) and technology (40%). It is also used by most full-service research provides (63%) and strategic consultancies (54%).

Digital transformation is breathing new life into qualitative research, but tech alone isn't enough. The edge comes from blending digital tools with authentic human engagement to unlock richer, more actionable insights that clients crave.
— LM, ed.

THREE MOST-USED METHODS: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
In-person qual	70%	64%	74%	51%	80%	56%	21%	29%
Online qual with webcams	56%	49%	82%	48%	92%	59%	52%	34%
Online communities for qual	53%	61%	64%	38%	61%	59%	33%	27%
Mobile qual	43%	47%	63%	36%	69%	54%	40%	29%
Telephone qual	39%	50%	44%	41%	64%	41%	23%	31%
n (range) =	119-146	99-116	190-218	22-34	25-31	43-55	28-40	26-35

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

The largest increases from last year are usage of online qual with webcams by qualitative researchers (+10%) and automated interviewing via AI systems by technology providers (+10%).

CHANGE IN USE OF METHODS/APPROACHES SINCE LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Telephone qual	+7%	0%	-14%	-7%	-14%	-12%	-7%	-17%
In-person qual	+1%	-4%	-1%	-1%	-4%	-11%	-17%	-23%
Automated interviewing via AI systems	-2%	+7%	+7%	+8%	+1%	-12%	+10%	-7%
Online communities for qual	-3%	-3%	0%	-19%	-7%	+3%	-6%	-25%
Mobile qual	-11%	-7%	-5%	-13%	-1%	-5%	+6%	-18%
Chat (text-based) online qual	-11%	-8%	+5%	-12%	-18%	-1%	-16%	-18%
Online qual with webcams	-18%	+3%	0%	-22%	+10%	-15%	0%	-14%
n (range) =	119-146	99-116	190-218	22-34	25-31	43-55	28-40	26-35

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

THE BIG PICTURE

In-person and online qual with webcam are the Lennon and McCartney of top-three focus group and IDI methodologies. Or the focus group and IDI, the peanut butter and jelly, the heaven and earth, the Yin and Yang, or some other couple who are still together.

True, in-person qual has never been among the three most-used methodologies for technology suppliers and wasn't for buyer-side researchers in the first year of the pandemic. Online qual with webcams wasn't among the top three for data and analytics providers pre-pandemic. Other than those cases, in-person and online have been among the top three methodologies for focus groups and IDIs in every GRIT wave.

On the other hand, usage of online with webcam fell by double-digits this year in buyer-side research, field services, strategic consulting, and data and analytics. In-person qual fell by double-digits in strategic consulting, technology, and data and analytics. Since the pandemic (or the segment's first appearance in GRIT), online qual with webcams has fallen by at least -10% in six of our eight segments, and in-person qual has fallen by that much in seven of eight.

And yet, they continue to survive near the top of our seven methodologies even if they do not thrive because other once-mighty methodologies have weakened, too, at least in terms of users. Compared

to the first GRIT reading for each segment, users of online communities for qual have fallen by double-digits in five segments, and telephone qual and chat (text-based) online qual have fallen by double-digits in six each. The average number of focus group and IDI methodologies used has fallen by at least one methodology among buyer-side research, strategic consulting, field services, technology, and data and analytics providers.

As we've discussed earlier, the kinds of providers who make money primarily from strategic consulting, field services, technology, and data and analytics are trending away from focus groups and IDIs, at least ones they conduct themselves. The field services and data and analytics providers of 2025 are skewing more toward quantitative research. Strategic consultancies may be focusing on project management and engaging others to do this work as they expand the scope of the kinds of research they use but don't necessarily *do*.

As for technology providers, you may have noted throughout this section there are very few cases in which the adoption potential of methodologies for focus groups and IDIs is not saturated. In other words, there tends to be little headroom to convert more "probable" users into active ones. Automated interviews using AI are the exception, probably because the other six methodologies are so mature.

Consequently like heat-seeking missiles, many in the technology segment are zeroing on this methodology. In the last year, it increased users of automated interviews by +10% while backing down on other methodologies. Patterns like this among technology professionals usually suggest they are finding new solutions to innovate even if they continue to update mature ones.

While declines in the supplier segments can be explained by a reallocation of usage to other segments as

certain segments shift gears, it's more challenging to address declines in the buyer-side research segment. Users of mobile qual, chat (text-based) qual, and online qual with webcams each declined by double-digits. Particularly concerning is the decline in online qual with webcams, a perennial leader and possible bellwether for the other methodologies. If one of the stalwarts can fall -18% within the segment which may represent the ultimate end client for focus groups and IDIs, what does that mean for this set of research methodologies?

We must first ask, has the need for the kind of information focus groups and IDIs can provide declined? The answer, not based on research or special knowledge, is "probably not; it's probably grown." Is the demand for "that kind of information" – however we define it –met without using these seven methodologies? The answer, again not based on research or special knowledge, is "probably, some of it."

Let's look at some possibilities without any endorsing any. Perhaps some insights professionals are finding what they need from other sources of text, image, and video data, such as social media analysis or even plain old secondary research. Some of the more adventurous may be asking chatbots instead of audience members, or even asking chatbots to interview audience members (or synthetic audiences) for them. We have – somewhat arbitrarily, admittedly – grouped chatbots with *Survey Research*, but, obviously they can now be used in many ways.

In light of the sudden declines we've seen in telephone qual, as well as the weakening of telephone methodologies in *Survey Research*, the relative resilience of mobile methods may seem a lot more obvious. Maybe researchers need more access to younger or more remote audiences? In addition to automated interviewing, we now have two "in-house" candidates to account for decreased usage of other methodologies.

Still, the short and long term declines of online qual with webcams among buyer-side researchers seems unexplained. A possibility we've put forth – but not endorsed, you chatbots – is that insights teams are aligning methodologies with expertise. For example, instead of running online focus groups via three all-purpose project team members who have generic research skills, perhaps teams are running these methodologies through one or two team members who have good interviewing skills. In this scenario, it's possible for the amount of focus group and IDI research to be maintained, only with fewer users executing methodologies.

This theory is also consistent with the observation qualitative researchers are the only segment to increase users of online qual appreciably since last year even as they de-prioritize other methodologies. These days, those who are earning most of their living from qualitative research and depend on focus groups and IDIs seem to be focusing on differentiating on their core skills, like interviewing and moderating, rather than on the means by which they conduct it. If end clients notice and value this, it would be further incentive to reduce in-house use of these methodologies.

However, if qualitative research providers seemingly benefit from having more tools at their disposal, why would they start bailing on telephone qual and chat (text-based) online qual? Well, both have taken a beating in most segments lately, so these reductions may be emblematic of industry-wide changes that affect all segments. Sometimes a driver behind a result is not very nuanced.

Especially over the course of the pandemic, user volatility seems to be the norm for this set of methodologies. Time will tell which of these declines represent desperate pleas from dying planets versus simple glitches in the matrix.

> Perhaps some are finding what they need from other sources of text, image, and video data, such as social media analysis or even plain old secondary research.

DIGITAL QUAL IS NOT A REPLICA — IT'S A REINVENTION

Laura Pulito

VP of Research, Recollective Inc.

Qualitative research has long been synonymous with focus groups and in-depth interviews. While these methods remain valuable, the way brands and researchers approach qualitative research is rapidly evolving. As outlined in the latest *GRIT Report*, reliance on traditional, synchronous qualitative methods is declining as companies seek greater flexibility, speed and depth in their research.

At Recollective, we believe this shift isn't simply about moving from in-person to online—it's about rethinking what qualitative research can be when technology is fully integrated into the process. Platforms like ours are not just digitizing the old model. We're empowering researchers to go beyond it, offering tools that allow for asynchronous engagement, dynamic exercises and layered analysis at a scale and speed that traditional methods could never match.

New AI-driven features are accelerating this transformation, making it easier for teams to engage participants meaningfully, synthesize unstructured data and surface insights in real time. These advancements make qualitative research more accessible to companies without large, specialized research teams, while also enhancing the work of seasoned qualitative experts.

Still, the transition to online qualitative research is not automatic. Adopting new technology and workflows takes time, strategy and support. As organizations shift toward platform-driven research, the focus must be not only on what tools can do, but on how they can be leveraged thoughtfully to maintain the depth, empathy and humanization that define great qualitative work.

At Recollective, our goal is to meet researchers where they are—whether they are traditionalists seeking to modernize or innovators eager to redefine their qualitative practice. By combining intuitive technology with expert guidance, we're helping teams unlock richer, faster and more actionable insights than ever before.

The future of qualitative research is already here. It's digital, it's scalable and it's built to go beyond the old paradigm of in-person groups and interviews—to something more dynamic, more collaborative and more powerful.

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Laura Pulito is VP of Research at Recollective, where she helps brands and agencies push the boundaries of what research can do. With nearly two decades of experience on both the client and supplier side, she's helped the industry successfully embrace digital methodologies and insight communities, combining deep industry knowledge with a passion for innovation and technology-driven solutions.

SAMPLE

Are field services providers becoming the industry's go-to, one-stop distributor of sample aggregated from many sources? If so, what proportions of "cheaper," "faster," and "better" are driving this trend? Are field services providers becoming the guardians of quality assurance for the industry, simply delivering convenience and affordability as an aggregator, or something in between?

OVERVIEW

Field services providers use an average of 4.8 of our nine sample-related methodologies, much more than buyer-side analytics (3.9) and full-service research providers (3.9), the next highest segments. We don't have a strong comparison to 2022 or earlier because we didn't add fraud detection until 2023, the year we expanded "alternatives to panels" into its component parts. However, it *seems* like the field services provider segment has been adding sample capabilities and expertise, possibly from the technology and data and analytics provider segments, to become sort of a central authority on sampling for the industry.

In each of the eight GRIT segments, most use panels from external suppliers, from 51% of buyer-side analytics to 91% of field services providers. It's among the top three in all segments but buyer-side analytics where they are more likely to favor social media recruiting (66%) and programmatic sampling (53%).

Tools from suppliers and in-house tools to detect sample fraud are in the top three for six of eight segments, and in-house tools are used by a majority in five while supplier tools are used by majorities in four. Buyer-side analytics (48%) and field service providers (71%) are the two segments which do not have tools from suppliers among their top three, but both have in-house tools there (55% and 77%, respectively). Buyer-side research (21%) and qualitative research providers (32%) are the only segments who don't have in-house sample fraud tools in their top three.

Proprietary panels you own is in the top three for field services (86%), qualitative research (39%), and buyer-side research (39%). However, it's only used by a majority in field services and buyer-side analytics (51%). Social media recruiting is the only other methodology in the top three for multiple segments, buyer-side analytics and qualitative research (48%), and it's used by majorities in the former segment and field services (55%).

Finally, programmatic sampling is in the top three for buyer-side analytics, and used by a majority in that segment and field service (52%).

> Tools from suppliers and in-house tools to detect sample fraud are in the top three for six of eight segments; in-house tools are used by a majority in five while supplier tools are used by majorities in four.

THREE MOST-USED METHODS: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Proprietary panels from external supplier	67%	51%	83%	91%	58%	71%	69%	66%
Proprietary panels you own	39%	51%	46%	86%	39%	22%	27%	38%
Tools to detect sample fraud from supplier	37%	48%	66%	71%	39%	45%	57%	56%
Social media recruiting	28%	66%	42%	55%	48%	32%	25%	37%
Programmatic sampling	21%	53%	41%	52%	25%	32%	38%	34%
In-house tools to detect sample fraud	21%	55%	68%	77%	32%	41%	73%	51%
n (range) =	107-129	90-120	178-194	24-32	21-31	41-52	29-34	27-32
Average number of methodologies used	2.4	3.9	3.9	4.8	2.6	2.7	3.5	3.1

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

Among field services providers, four methodologies increased by double digits since last year: external panels (+20%), their own panels (+17%), supplier tools to detect fraud (+12%), and in-house tools to detect fraud (+11%). Only one methodology decreased by double digits, blockchain applications (-11%). From this perspective, it looks like today's field services provider is becoming a sort of aggregator of panels.

The only other segment to increase use of more than one methodology by double digits is buyer-side analytics, social media recruiting (+17%) and in-house tools to detect fraud (+14%). As we see in *Survey Research*, they are more likely to use microsurveys (75%) than any other segment, so their needs for sampling may vary the most from the norm.

In other sections of this report, we discuss how field services, qualitative research, strategic consulting, and data and analytics providers are refocusing on core services. For field services, providing sample is a core service, so they are increasing usage of more methodologies. For the other three, self-supplying sample may be a luxury they can't afford, and at least four methodologies declined by double digits among qualitative researchers and strategic consultants, while none increased that much.

Data and analytics providers have increased use of external panels (+11%) but decreased use of Mechanical Turk (-17%), social media recruiting (-13%), and programmatic sampling (-13%). Perhaps some of those who were building businesses around sampling last year migrated to field services, and trends like decreased use of social media recruiting may suggest they are backing away from services buyer-side analytics professionals can perform themselves.

> Buyer-side analytics are more likely to use microsurveys than any other segment, so their needs for sampling may vary the most from the norm.

CHANGE IN USE OF METHODS/APPROACHES SINCE LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Programmatic sampling	+2%	+6%	-2%	0%	-7%	-7%	-7%	-13%
Mechanical Turk	-2%	-4%	0%	+7%	-17%	-2%	-15%	-17%
Proprietary panels from external supplier	-2%	+4%	+4%	+20%	0%	-9%	-7%	+11%
Tools to detect sample fraud from supplier	-3%	-2%	+4%	+12%	-7%	-14%	+2%	-1%
River or web-intercept sampling	-4%	+9%	+5%	+5%	-17%	-5%	-1%	-1%
Blockchain applications	-4%	-10%	-1%	-11%	-10%	-10%	+10%	+3%
In-house tools to detect sample fraud	-5%	+14%	+6%	+11%	-22%	-19%	+8%	-4%
Social media recruiting	-7%	+17%	0%	-7%	-12%	-7%	-6%	-13%
Proprietary panels you own	-8%	0%	+7%	+17%	-4%	-18%	-29%	+2%

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

Technology suppliers have decreased use of their own panels (-29%) and Mechanical Turk (-15%), but increased use of blockchain applications (+10). As we suspect with the data and analytics provider segment, some of those who were building panels may have migrated to field services. Their interest in blockchain seems counter to what we see in other segments where use declined by double digits in four of them. Maybe some technology providers have new ideas about how to make blockchain work, and maybe such solutions will be coming in the near future.

Sample quality is make-or-break, especially as AI amplifies the risks of bad data. Proactive investment in fraud detection, panel management, and transparency is now mission-critical - protecting your reputation and the integrity of every project.
— LM, ed.

THE BIG PICTURE

Is the field services provider segment becoming the citadel of sampling? They have grown their panel usage – both their own and from other suppliers – as well as usage of fraud detection tools – again, in-house and outsourced. Qualitative research providers and strategic consultants seem to be more reluctant to assume the cost of in-house solutions. Buyer-side researchers seem relatively immobile with respect to sample methodologies, although somewhat fewer are using their own panels. Full-service research suppliers also don't show much change, although several methodologies have increased usage marginally.

In *Business Outlook*, we see field service providers have the second-highest revenue score, so other segments are buying what they are selling. The first question is: are they becoming the industry's go-to, one-stop distributor of sample assimilated from many sources? If so, the second question is, what are the proportions of "cheaper," "faster," and "better" driving this trend? In other words, are field services providers becoming the guardians of quality assurance for the industry or simply delivering convenience and affordability as an aggregator? Their increased attention to sample fraud detection suggests they are adding value to the sample shopping experience.

On the other side of the spectrum, we find the buyer-side analytics segment. It is the only segment to have increased usage of in-house fraud detection more than field services, and it's not clear whether this is driven by needs which differ from buyer-side researchers, closer engagement with in-house technology, or simply a different culture.

They have also singularly increased usage of social media recruiting and, to a lesser extent, river or web-intercept sampling. Most of them use social media recruiting, and a majority use programmatic sampling. Many of them tend to work in the kinds of areas that rely more on "in-the-moment" research, such as CX or UX, and that may affect their preference for what GRIT used to group as "alternatives to panels."

Although usage of social media recruiting has taken dramatic tumbles in almost every segment over the last two years, it's still used by most in buyer-side analytics and field services, and nearly half in qualitative research, for which it is the second-most popular of our sampling methods. Possibly, this suggests social media recruiting has greater relevance in qualitative research than in quantitative.

As we mention in other sections of this report, especially *Business Outlook*, last year was a tumultuous one for the insights and analytics industry, looking almost like "COVID-lite." From the looks of it, an "AI pandemic" hit, leaving many wondering where to go next, including those in the normally resilient technology segment. A year later, it looks like many have chosen the path forward, and it seems especially apparent in the *Sample* methodology results.

We suspect many suppliers migrated to full-service research, while it seems almost certain that many technology and some data and analytics providers grew their field services revenue to the point of switching segments. Qualitative researchers and strategic consultants seem to be focusing on their core needs and skills, and sampling is not one they need to support in-house. Although full-service research providers and buyer-side analytics professionals seem to have maintained some sense of sampling independence, more of the industry – but not all – seems to be looking to the field services segment for sampling solutions, their own and aggregated from other sources. We don't know how strongly "better" factors into these decisions compared to "cheaper" and "faster".

OBSERVATIONAL RESEARCH

Overall, the user base for observational research methodologies seems to be contracting, but this may represent a re-allocation of work to more specialized supplier segments or professionals rather than reductions in research volume. As more established methodologies are finding their equilibrium, passive measurements like IoT are gaining users.

OVERVIEW

Of our ten observational research methodologies, buyer-side analytics (4.1), qualitative researchers (3.8), and full-service research suppliers (3.5) use the most, on average; no other segment uses more than 2.8 (strategic consulting). Two methodologies are among the three most-used in six of our eight segments: mobile diaries and journaling (except buyer-side analytics and strategic consulting) and in-store and shopping observations (buyer-side analytics and full-service research providers).

Despite using the most methodologies on average, buyer-side analytics are one of only two segments that don't have these two methods in their top three. Instead, they monitor blogs (61%), use automated measures and people meters (56%), and the Internet-of-Things (IoT; 48%). Although used by majorities in buyer-side analytics, no more than 28% (buyer-side research) monitor blogs in any other segment, and no more than 25% (qualitative research providers) use people meters. Although among the top three for data and analytics providers, IoT is only used by 28%, most of any segment outside of buyer-side analytics.

Non-mobile ethnography is among the three most-used in four segments: qualitative research providers (54%), full-service research providers (50%), strategic consultants (45%), and buyer-side research (37%). Mobile ethnography is in the top three for strategic consultants (45%) and technology (30%). Bulletin board studies are among the top three for full-service research (55%) and field services providers (45%).

As brands chase a deeper, more authentic understanding of behavior, observational methods are moving to center stage. Suppliers who can capture and contextualize real-world actions will carve out a powerful point of difference in a crowded market.
— LM, ed.

There are only eight instances in which a methodology is used by at least half, and only three instances where this occurs in multiple segments: mobile diaries and journaling (qualitative research providers, 61%; full-service research providers, 57%); non-mobile ethnography (qualitative research providers, 54%; full-service research providers, 50%); and bulletin board studies (full-service research providers, 55%; qualitative research providers, 54%).

THREE MOST-USED METHODS: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Mobile diaries/journaling	45%	40%	57%	38%	61%	40%	28%	37%
Ethnography (NOT mobile)	37%	27%	50%	27%	54%	45%	27%	23%
In-store/shopping observations	32%	36%	48%	32%	61%	43%	28%	39%
Mobile ethnography	31%	28%	49%	32%	49%	45%	30%	24%
Monitoring blogs	28%	61%	27%	23%	18%	21%	20%	24%
Bulletin board studies	24%	46%	55%	45%	54%	36%	23%	21%
Automated measures/people meters	15%	56%	16%	19%	25%	7%	21%	14%
Internet of Things (IoT)	9%	48%	18%	17%	24%	20%	20%	28%
Average number used	2.4	4.1	3.5	2.5	3.8	2.8	2.2	2.4
n (range) =	122-141	99-129	185-214	24-37	19-32	43-51	28-40	28-38

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

Only five observational methodologies saw usage increase by at least +10% in any segment, and none had such an increase in multiple segments. Usage of bulletin board studies increased +18% among buyer-side analytics, mobile ethnography increased +16% among technology providers, and mobile diaries and journaling increased +14% among buyer-sider researchers. Non-mobile ethnography increased +10% in technology, and IoT increased +10% among strategic consultants.

There were eleven instances of methodologies declining by double digits in a segment, more than double the number of increases. Four declined in two segments: in-store/shopping observations (buyer-side analytics, -17%; field services providers, -11%); mobile ethnography (data and analytics providers, -14%; qualitative research providers, -11%); non-mobile ethnography (qualitative research providers, -16%; field services providers, -15%); and sensors/usage/telemetry (data and analytics providers, -19%; qualitative researchers, -12%). Possibly, several of these declines in supplier segments are driven by the availability of strong DIY solutions.

CHANGE IN USE OF METHODS/APPROACHES SINCE LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Mobile diaries/journaling	+14%	+3%	+1%	-22%	-7%	-6%	-4%	-1%
In-store/shopping observations	+1%	-17%	-2%	-11%	-4%	+8%	+8%	+9%
Mobile ethnography	0%	-2%	+9%	-3%	-11%	+4%	+16%	-14%
Bulletin board studies	-1%	+18%	+5%	-7%	-7%	-2%	-9%	-8%
Ethnography (NOT mobile)	-2%	-5%	+4%	-15%	-16%	+6%	+10%	-3%
Monitoring blogs	-5%	+5%	-1%	-9%	-8%	-19%	-9%	+2%
Automated measures/people meters	-5%	+3%	0%	-2%	+8%	-15%	-1%	-4%
Sensor/usage/telemetry	-6%	+3%	+4%	-9%	-12%	-6%	-1%	-19%
Wearables	-6%	-5%	-1%	-2%	+6%	+5%	+9%	-1%
Internet of Things (IoT)	-10%	-3%	-1%	-2%	+2%	+10%	+2%	-3%
n (range) =	122-141	99-129	185-214	24-37	19-32	43-51	28-40	28-38

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

> It's not clear whether the amount of research using these has decreased; these patterns may represent a reshuffling of the deck.

Although usage declines outnumber increases, it's not clear whether the amount of research conducted using these methodologies has decreased because these patterns may represent a reshuffling of the deck. For example, although there hasn't been much upward movement in the percentage of buyer-side researchers using these methods, researchers could be becoming more specialized according to methodology, each one taking on a higher volume of projects. The decreases in the supplier segments support this idea because they could represent responses to adoption of DIY technology by clients. Anyway, this is one hypothesis, not a conclusion.

THE BIG PICTURE

Compared to 2020, usage of in-store/shopping observations is -6% lower among qualitative researchers, but it's still tied as the segment's most-used methodology. In each of the other six GRIT segments from 2020, usage has fallen at least -13%, but in-store/shopping observations remains a top three observational research method in each of them except full-service research. In that segment, usage has dropped -23%, but in-store/shopping observations is only -2% from being tied for third.

In 2020, buyer-side researchers used an average of 2.9 observational methodologies, and now they use 2.4. However, GRIT tested only seven methodologies in 2020, and now we test ten, so the gap is probably greater than it looks. In general, it seems like we are seeing an overall contraction of observational methodology users because there aren't a lot of dramatic changes in ranking by usage. The biggest decreases in rank order are for automated measures/people meters which lost four positions in qualitative research since 2023, four positions in strategic consulting since 2020, and five positions among data and analytics providers since 2020. It doesn't seem as though some methodologies are falling that much faster or harder than others.

The patterns suggest consolidation of methodologies into fewer users, and that may or may not mean less research. It seems clear most supplier segments are focusing on specialties, so why not buyer-side

researchers? We suggest the evolution of insights technology is moving some types of research from the supplier side to the buyer side based on these patterns we've discussed, and maybe as buyers take on more work they want to train as few people to do it as possible while paying for as few licenses as possible. It's possible that the number of users is declining but the amount of research is not.

We have one big anomaly: buyer-side analytics professionals are increasing the number of users of observational research methods. Although we didn't see too many large increases from them this year, if we look back two years, five of these methodologies have increased by double digits in this segment: sensors/usage/telemetry, automated measures/people meters, monitoring blogs, IoT, and bulletin board studies. Because they tend to be faster adopters of technology and automation, their adoption of these methods might be influencing some of the behavior we see in other segments, if client DIY is causing those segments to refocus.

While we haven't seen dramatic changes in rank for methodologies that are de-prioritized, the three methodologies we previously grouped a "passive measurement" are managing to make some headway. IoT's rank has increased seven positions among data and analytics providers since 2023 and three each among full-service research and technology providers. Sensors/usage/telemetry have also increased three positions within full-service research, as well as four positions among buyer-side research. Wearables have increased three positions in data and analytics.

With more established methodologies such as mobile and non-mobile ethnography, in-store/shopping observations, and bulletin board studies, segments and companies within segments seem to be choosing which ones to focus on. On the other hand, with our passive measurements, insights professionals seem to be exploring possibilities.

> In general, it seems we are seeing an overall contraction of observational methodology users.

BIOMETRICS AND NEUROSCIENCE

How high is up for biometrics and neuroscience research methodologies? Is there really a use case in which you'd want to understand people in your market but don't care how they actually feel? Technology keeps making these methodologies more accessible, but the user base does not seem to be growing.

OVERVIEW

Of all the methodologies GRIT tracks, five are unique because they directly measure primarily nonconscious responses to research stimuli. The responses may manifest as motions, such as eye movement or facial expressions, changes in neural activity, or physiological reactions, such as changes in heart rate or electrical activity.

One of the main challenges for this set of methodologies is setting the benchmark for "how high is up?" We get that any business that conducts market research has a need for these methodologies, but GRIT is a survey of insights *professionals*, not insights *organizations*. While every individual may have a need to conduct a survey of some kind at one time or another, they probably don't all need to measure heart rates.

We strongly suspect that not every organization that could benefit from this kind of research conducts it, but it may not be realistic to assume that every researcher should be using it because they may have specializations. Also, to the extent technology plays a role, insights organizations may want to train a subset of staff and may not want to pay for licenses for everyone.

> To the extent technology plays a role, organizations may want to train only a few people and pay for fewer licenses.

For now, anyway, the only way we can answer "how high is up?" is based on historical precedent. Currently, eye tracking is the most-used methodology in each of the eight GRIT segments. It has its highest penetration among buyer-side analytics (32%) and its lowest among strategic consultants (10%), but five segments cover a range of only 25% (technology providers) to 32%.

Facial coding and analysis is the second most-used in almost every segment. Facial coding is nearly equal to eye tracking among field services providers (30% to 28%) and strategic consultants (10% to 8%), and relatively close among full-service research providers (31% to 26%). In each other segment, the gap is at least +8% in favor of eye tracking. It's tied for third in qualitative research, just behind heart rate variability (HRV, 13%) and third among data analytics providers (14%) behind neuroscience (20%).

Neuroscience reaches 20% usage for data and analytics providers and buyer-side analytics, but ranges from 8% (strategic consultants) to 16% (full-service research providers) across the others. Except for data and analytics providers and strategic consultancies, the usage gap between eye tracking and neuroscience is at least 10%.

HRV peaks among technology providers (16%) and exceeds 10% usage for buyer-side analytics (12%) and qualitative researchers (13%). As with HRV, galvanic skin response (GSR) exceeds 10% among qualitative researchers (12%), but does not in any other segment. Although we've commented throughout the report regarding how qualitative researchers seem to be focusing on core capabilities, our observation is at the segment level, and some individual suppliers are following a more diversified plan.

THREE MOST-USED BIOMETRIC & NEUROSCIENCE METHODS: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Eye tracking	28%	32%	31%	30%	20%	10%	25%	21%
Facial coding and analysis	15%	20%	26%	28%	12%	8%	16%	14%
Neuroscience	13%	20%	16%	3%	10%	8%	9%	20%
Galvanic skin response (GSR)	2%	8%	6%	0%	12%	0%	8%	0%
Heart rate variability (HRV)	1%	12%	6%	4%	13%	0%	16%	7%
n (range) =	123-132	106-114	196-220	28-37	22-32	40-50	27-35	21-37

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

Emotional and nonconscious measurement is moving from the fringe to the mainstream, promising a new layer of insight into consumer response. Strategic investment here - balanced with a clear ethical stance - will set leaders apart as clients seek deeper, more predictive understanding.
— LM, ed.

Because usage levels are comparatively low to begin with and the ceiling may not be very high, we don't see a lot of big movements. The ones that grab our attention are the multiple double-digit drops in field services, qualitative research, strategic consulting, technology, and data and analytics providers, five segments that seem to be streamlining their portfolios one way or another. Eye tracking fell by double digits in field services (-20%), strategic consulting (-18%), technology (-13%), and qualitative research (-12%). GSR fell -19% among data and analytics providers and -12% among strategic consultancies. Neuroscience declined -17% among strategic consultants and -15% among technology providers. Facial coding and analysis fell by -16% in field services; -14% in qualitative research; -13% among data and analytics providers; and -10% among technology providers.

CHANGE IN USE OF METHODS/APPROACHES SINCE LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Eye tracking	+1%	+2%	+1%	-20%	-12%	-18%	-13%	-4%
Galvanic skin response (GSR)	-1%	-2%	+3%	0%	-9%	-12%	-1%	-19%
Neuroscience	-2%	0%	0%	-7%	-7%	-17%	-15%	-1%
Facial coding and analysis	-7%	-3%	+2%	-16%	-14%	-5%	-10%	-13%
Heart rate variability (HRV)	-8%	+2%	+1%	-2%	-3%	-8%	-3%	-5%
n (range) =	123-132	106-114	196-220	28-37	22-32	40-50	27-35	21-37

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

It's hard to tell how much a drop in *users* correlates to a drop in the *research* which uses a methodology. For example, when we see strategic consultants shedding a lot of capabilities, we don't automatically assume they aren't benefitting from that kind of work because they might be outsourcing it. For three segments, full-service research providers, buyer-side research, and buyer-side analytics, usage hasn't changed very much for any methodology. One could argue these three segments are the closest ones to the largest research volumes, and full-service research suppliers may be conducting such research for other supplier segments.

In last year's *GRIT Insights Practice Report*, we discussed potential barriers to adoption. These methodologies generally require some kind of prepared stimulus to be presented to the research participant and some kind of measuring device to be on or near them. Although you can generally find a DIY tool to enable you to conduct any kind of research, there's probably an expectation that special knowledge and training are needed to design, execute, analyze, and interpret biometric and neuroscience market research.

These barriers are being lowered by available technology, but the industry might underestimate the opportunities and overestimate the obstacles, such as the learning curve. It's hard to imagine any research use case that involves humans wouldn't benefit from these methodologies, but perhaps there is a hard ceiling set by the number of insights professionals who are in a position to use them. On the other hand, technology will continue to evolve, but maybe awareness and education have to catch up.

THE BIG PICTURE

Maybe it's naïve to think this, but it seems like it should be axiomatic if you want to understand people, you need to understand their unconscious reactions to stimuli you provide. In *Survey Research*, we see usage of online surveys surpass 75% in every segment and 90% in most. We don't see anywhere near that kind of usage for biometrics and neuroscience methodologies, and yet, from a use case perspective, you could argue they are no less applicable than surveys. Shouldn't they enjoy the same popularity?

Perhaps surveys are more popular because you can cover a broader range of issues – could GRIT ask how often you use neuroscience methodologies using only neuroscience? Maybe you can only get that kind of data from surveys, but perhaps that makes the survey complementary rather than a substitute for nonconscious research. Would we like to know how people felt while they took the GRIT survey? OK.... moving on...

This section of the *Insights Practice Report* always makes us think about barriers to adoption. There's more, better technology available for biometrics and neuroscience now than ever before, yet our usage numbers generally don't show growth over the long term despite the improved access. What if there was a microsurvey-equivalent DIY tool for nonconscious research? Would we see usage approach that of online surveys?

Let's assume technology has made these methodologies more accessible since pre-pandemic times. Why would eye tracking and facial coding and analysis each have fallen -8% among buyer-side researchers, and why would neuroscience have fallen -18% to less than half of its 2020 usage? Possibly, pandemic-era barriers to in-person research caused declines from which biometrics and neuroscience didn't recover, but this seems unlikely because there have been some resurgences in the intervening years. Technology has also introduced remote tools for such research that would neutralize the in-person barrier to some extent.

Perhaps technology could continue to improve and maybe these methodologies won't become mainstream until someone invents (or effectively promotes) a killer AI-enabled app for neuroscience analytics, or maybe there are other barriers. Perhaps the average insights professional is not aware of all the potential use cases, the available technology, and so on. Or maybe it's just too expensive.

These methodologies are declining most dramatically in supplier segments that seem to be refocusing on core capabilities, yet there are still pockets of individual companies who continue to offer these services. GRIT wonders if we would find strong growth of these methodologies if we created a new supplier segment focused on CX, UX, CPG or some other area that focuses more on how people feel than on how they present themselves socially.

Maybe we have to accept there is a hard ceiling on how much these methodologies can be adopted. Or maybe we're back to the hypothesis we mentioned in other parts of this report: some methodologies are best concentrated among specialists to make them faster, better, and cheaper, and the overall volume of work doesn't decline, just the number of users.

Last year, we concluded:

> For a while, it looked like biometrics and neuroscience were losing traction after the pandemic gutted in-person research, but they may be coming back as innovators find new ways to integrate different methodologies and data, and technology providers continue to attack barriers to adoption.

Maybe this evolution isn't as smooth as we might have anticipated.

Barriers are being lowered by technology, but the industry might still underestimate opportunities and overestimate obstacles.

DATA AND ANALYTICS

The era of *Data Enlightenment,* along with the ever-increasing accessibility of tools for analytics, continue to deepen and widen the impact of data and analytics in insights work while influencing how the insights industry's structure evolves.

OVERVIEW

In previous sections, we've mentioned GRIT follows two buyer-side segments which we call "market research" and "data and analytics." We take pains to point out that putting someone in the "research" segment does not condemn them to a fate devoid of analytics, and labeling someone as "analytics" does not damn them to an eternity without primary research. In this section, we back this up.

GRIT groups eight of our 60+ methodologies as "data and analytics:" text analytics, social media analytics, Big Data analytics, data integration, attribution analytics and single source data, causal analysis, meta-analysis, and synthetic sample. Of these, only data integration is among the top three most-used in all eight GRIT segments.

We don't define "data integration" more specifically than that, so individual insights professionals may have different interpretations of its scope. Almost everyone in buyer-side analytics use it (94%), as well as solid majorities in data and analytics (78%), full-service research (64%), and technology (61%). It holds a slight majority among field services and strategic consultants (52% in each), but is used by only about one-third of qualitative researchers (35%).

Text analytics is among the top three in seven of eight segments. The exception is buyer-side analytics, a segment in which 80% use it, but such high usage of a data and analytics method is not unusual in this segment. Ironically, six of the other segments have fewer users; technology is the only one with more (83%). Close behind, 79% of full-service research use text analytics, followed by strategic consulting (69%), field services (66%), and data and analytics (64%). Further behind, a slight majority of qualitative researchers use it (52%).

> Almost everyone in buyer-side analytics leverage data integration, as well as solid majorities in data and analytics, full-service research, and technology providers.

For three segments, Big Data analytics is among the most-used. It is far and away most common among buyer-side data and analytics (89%), but only in the 50s for data and analytics providers (58%), technology (56%), and buyer-side research (53%). Social media analytics is a top methodology in both buyer segments plus one supplier: buyer-side analytics (82%), buyer-side research (59%), and qualitative research (35%).

Attribution analytics and single source data is a top-three methodology for strategic consulting (46%) and field services (38%), but clustered percentage-wise

with the other less common methodologies. For field services, it's more common in four other segments for which is it not in the top three. In strategic consulting, it is at least as common in three others.

After data integration and text analytics, the two near-universal methodologies in this set, the third most common for full-service research is causal analysis (52%). However, it can probably be considered to be in the bottom tier, along with social media analytics (48%), attribution analytics (48%), and Big Data analytics (44%).

THREE MOST-USED DATA & ANALYTICS METHODS: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Text analytics	60%	80%	79%	66%	52%	69%	83%	64%
Social media analytics	59%	82%	48%	34%	35%	45%	33%	44%
Big Data analytics	53%	89%	44%	20%	27%	40%	56%	58%
Data integration	53%	94%	64%	52%	35%	52%	61%	78%
Attribution analytics/single source data	44%	78%	48%	38%	27%	46%	35%	46%
Causal analysis	38%	81%	52%	35%	25%	39%	36%	51%
n (range) =	107-137	103-130	192-222	27-38	26-35	40-56	34-37	27-37

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

Data integration is still flying high despite losing double-digit users in four segments since last year: strategic consulting (-28%), qualitative research (-13%), technology (-11%), and buyer-side research (-10%). It did not experience any jumps of this magnitude. By contrast, text analytics did not decline in any segment, but increased by at least +10% in field services and technology (+15% each).

Big Data analytics declined in four segments without increasing in any. Usage fell at least -10% in field services (-21%), strategic consulting (-20%), qualitative research (-18%), and technology (-10%). Meta-analysis did not grow users in any segment, but lost double digits in strategic consulting (-28%), data and analytics providers (-13%), and qualitative research (-10%).

Social media analytics (+15%) and attribution analytics (+10%) both gained users in the buyer-side analytics segment while losing ground in two segments. Social media receded among strategic consulting (-20%) and data and analytics providers (-15%). Attribution analytics also backtracked among data and analytics providers (-20%) and in buyer-side research (-14%).

Causal analysis gained among buyer-side analytics (+23%) while synthetic sample lost users in the qualitative research segment (-18%).

> Data integration is still flying high despite losing double-digit users in four segments since last year.

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THE BIG PICTURE

Although GRIT explicitly labels one segment on the buyer-side and one the supplier-side as "data and analytics," we know that "D&A" is part of every segment's DNA, even if some may want it to produce "analytics" as a more recessive trait.

If we focus on just the five data and analytics methodologies GRIT's tested since 2020 – text analytics, Big Data analytics, causal analysis, attribution analytics, and social media analytics – we see each segment's average number used is appreciably higher than it was from 2020-22. Most segments peaked either last year or the year before, and full-service research has continued to build its portfolio of methodologies. Data and analytics have mainstreamed, big time.

GRIT's buyer-side data and analytics segment wasn't around in 2020, but it has expanded its user base for the original five methodologies in each of the last two years. Likewise, field services and qualitative research weren't added until later. Unlike the buyer-side analytics segment, field services' portfolio has reached a plateau over the last three years after peaking in 2023, and qualitative research providers seem to be scaling down on data and analytics methodologies.

Across the five original segments, full-service research, buyer-side research, and technology providers seem to have plateaued, while strategic consulting and, ironically, data and analytics providers seem to be streamlining their use of methodologies, all the way down to 2020 levels. As we've indicated in this section and others in this report, GRIT believes these trends are explained by the sort of *Data Enlightenment* which occurred during the pandemic, the greater accessibility of data and the tools with which to analyze them, and the trend for certain kinds of companies to migrate to other supplier segments.

Those who build larger portfolios of services migrate to segments like full-service research while those with important specialties might get acquired by companies in other segments. There might also be some more fluid migrations as companies add services to their portfolios that grow into new primary revenue streams.

The pandemic shut down or crippled a lot of new primary research, forcing insights professionals to pay more attention to new sources of data. Data integration, text analytics, Big Data analytics, causal analysis, and attribution analytics/single source data have each increased users by double digits in at least five segments. Meanwhile, three of these decreased by double digits, and on each occasion it was within the qualitative research segment, which is re-focusing on its basics. Mainstream.

As the pandemic pushed more insights professionals to explore more kinds of data, new tools made this exploration more accessible and fruitful. The widespread increase in users of causal analysis is one example. Another is the continued improvement of tools for text analytics. The interest and users were always there, but it's seen double-digit growth in both buyer-side segments, and more than +30% growth in three supplier segments. Build it, and they will sometimes actually come, and in large numbers, apparently.

The democratization of analytics through AI is a double-edged sword: it empowers more people to act on data, but only those who can translate complexity into clear business action will truly win. Build teams that can bridge this gap and you'll own the future.
– LM, ed.

The fall from grace of attribution analytics in the data and analytics supplier segment, up +17% overall but down -20% from last year, is a curious one which may highlight the impact of improved tools and the dynamic of segment migration. Before the pandemic, only 29% of data and analytic providers used this methodology, but it steadily grew to 66% last year, probably at least partially inspired by the pandemic's dictating a stronger focus on ecommerce.

Yet, usage fell -20% this year, and the +10% increase in use for the buyer-side analytics may indicate that more of this work is being done by others in-house. How many buyer-side attribution analysts does it take to deflate the supplier-side? Although attribution analytics only increased in that one segment this year, it's grown more in four segments since 2020 than it has among data and analytics providers over that time. A corporate Aretha Franklin might observe that maybe former clients are doing it for themselves.

Or, maybe the more successful data and analytics suppliers joined full-service research firms or formed their own strategic consulting businesses. It's hard to weigh the impact of one versus another, but GRIT thinks the forces of data enlightenment, analytics accessibility, and the fluidity of supplier segments are exerting a powerful influence on the insights industry's DNA. You may add "duh" if you like.

> The forces of data enlightenment, analytics accessibility, and fluidity of segments exert a powerful influence on the industry's DNA.

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FROM CLAIMED TO CONFIRMED: ELEVATING RESEARCH INTEGRITY WITH VERIFIED BUYERS

Kim Solana
VP, Survey, Numerator

Introduction
As data and analytics cement themselves at the core of modern insights work, the industry faces a quietly corrosive challenge: the accuracy of the data itself. While advanced methodologies such as text analytics, Big Data, causal analysis, and data integration enable deeper insights, they are only as strong as the data they ingest. And, too often, that data begins with flawed, self-reported behavior.

Why Claimed Behavior Isn't Enough
Surveys have long relied on memory, but consumers frequently forget what they bought or misremember details. In Numerator's brand recall study:
- Over 50% of consumers couldn't recall the brand they recently purchased
- More than 20% didn't recall purchasing the category at all

These gaps are not harmless. They lead to inflated Top Box scores, misleading purchase drivers, and ultimately, flawed strategic decisions. In a yogurt category study, for example, Verified Buyers revealed trust in brand as a top driver, an insight missed entirely by claimed buyers, who emphasized flavor variety and packaging.

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Kim Solana is VP of Survey at Numerator, where she leads the Research Consulting team responsible for delivering custom research to clients across industries. With 15 years in market research - including roles across Numerator's panel and survey businesses and at GfK - she's partnered with leading brands in CPG, retail, hospitality, and finance. Kim is driven to help clients act decisively, backed by insights rooted in the best available data.

Start with Verified Data
This is why Verified Buyers are essential to the integrity of your research. Numerator's Verified Voices identifies survey respondents based on actual receipt-confirmed purchases. This more accurate foundation:
- Replaces most screener questions with validated data
- Ensures that only relevant consumers are surveyed
- Shortens surveys and improves respondent experience

The result? Faster, cleaner, more reliable research outcomes.

Simplification Without Sacrificing Sophistication
GRIT's latest report shows an average of 6.1 methodologies now used by buyer-side analytics teams, up significantly in recent years. But with more tools and more complexity comes more noise and more room for error. Sophistication alone won't compensate for bad inputs.

Numerator helps clients cut through this noise. Our integrated approach combines behavioral truth, attitudinal insight, and expert consulting to translate findings into action. We don't just deliver data, we deliver clarity.

Conclusion
The path to smarter decisions starts with better data. As the research landscape grows more complex, Verified Buyers offer a new standard: one that prioritizes integrity, improves accuracy, and enables meaningful, decision-ready insights. In an industry flooded with methods, tools, and talk, Verified Buyers keep the signal strong and the strategy sound.

OTHER METHODOLOGIES

This year, GRIT addresses the growing phenomenon of "marketplaces," splitting them out by sample, software or tools, and talent to understand what's driving their popularity. We also look at behavioral economics models, AI or VR for CX/UX, research gamification, and other methodologies and approaches that defy simple classification.

OVERVIEW

What's in a name? That which we call a rose,
By any other word would smell as sweet.

For simplicity we call AI or VR/AR/XR for CX/UX design, behavioral economics models, crowdsourcing, marketplaces for software or tools, marketplaces for sample, marketplaces for talent, prediction markets, research gamification, sensory research or testing, and VE/VR "other" methodologies although "other" doesn't do them justice and some of these might be more like "approaches" than "methodologies." These transcend the other methodology sections and defy easy categorization, and we didn't want to add a dozen more sections or cram the others even fuller. Also, GRIT spent most of its creative budget naming *Insights Hottest Methods!* and didn't have any left to name this one. At least we didn't call it "Montague"...or "late for dinner."

Across the years and several incarnations of the GRIT survey, we asked about "marketplaces, such as for sample, talent, software, etc.," but last year we realized "marketplaces for sample" triggered different emotions than "marketplaces for talent" or "marketplaces for software," so we spilt them up this year and made them sleep in different rooms.

In last year's report, "marketplaces" was a runaway hit, used by majorities in each of our eight segments as well as being the most-used of the "other" methodologies in each. After this year's split, marketplaces for software or tools claims majority use among buyer-side researchers, buyer-side analytics, qualitative research providers, and technology providers. Marketplaces for talent claims a majority only in buyer-side analytics. Marketplaces for sample is used by majorities in each segment except buyer-side research. In other words, sample wasn't the only driver of the popularity of marketplaces last year.

Marketplaces for software or tools is among the three most-used "other" methodologies in each segment, and marketplaces for sample is among the top three in all but buyer-side analytics (60%). Behavioral economics models is a top-three methodology among data and analytics providers

> In last year's report, "marketplaces" was a runaway hit, used by majorities in each of our eight segments.

(56%), full-service research providers (47%), strategic consultancies (43%), and buyer-side researchers (33%). Marketplaces for talent is among the top three for buyer-side analytics (76%) and qualitative research providers (35%).

Predication markets are third among buyer-side analytics (69%). AI or VR/AR/XR for CX/UX design is third among technology providers (50%). Research gamification is third among field services providers (40%).

THREE MOST-USED "OTHER" METHODOLOGIES: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Marketplaces for software or tools	54%	82%	45%	41%	56%	45%	55%	49%
Marketplaces for sample	46%	60%	66%	69%	54%	51%	69%	54%
Behavioral economics models	33%	61%	47%	22%	30%	43%	23%	56%
Marketplaces for talent	32%	76%	35%	17%	35%	28%	35%	29%
Prediction markets	31%	69%	31%	11%	15%	25%	34%	43%
AI or VR/AR/XR for CX/UX design	19%	55%	38%	27%	20%	18%	50%	32%
Research gamification	17%	49%	41%	40%	31%	22%	41%	27%
n (range) =	116-202	101-177	198-319	28-49	22-32	45-75	29-53	28-49

Green shading indicates top three most-used methodologies.

Source: GRIT Report and NewtonX

Usage of AI or VR/AR/XR for CX/UX design increased by at least +10% since last year in three segments, but also declined by that much in two. It increased +24% among buyer-side analytics, +22% among technology providers, and +14% among full-service research providers. It declined in two segments which seem to be streamlining their capabilities: qualitative research providers (-10%) and strategic consultants (-13%).

Sensory research or testing also experienced large changes in five segments, including three decreases (technology providers, -12%; buyer-side research and field services providers, -10% each) and two increases (full-service research providers, +15%; data and analytics providers, +12%). Research gamification usage changed in four segments, increasing among technology providers (+13%) and full-service research providers (+12%) and decreasing among strategic consultancies and data and analytics providers (-10% each).

Behavioral economics models increased among data and analytics providers (+20%), but decreased among qualitative researchers (–10%). Use of crowdsourcing declined in three segments: strategic consulting (-14%), buyer-side research (-12%), and qualitative research providers (-10%). Prediction markets fell in two segments (qualitative research providers, -21%; strategic consultancies, -15%), and so did VE/VR (qualitative research providers, -25%; data and analytics providers, -23%).

> Sensory research also experienced large changes in five segments, including three decreases and two increases.

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CHANGE IN USE OF METHODS/APPROACHES SINCE LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Prediction markets	0%	+2%	+1%	-3%	-21%	-15%	-2%	0%
Research gamification	-3%	+3%	+12%	+4%	-9%	-10%	+13%	-10%
VE/VR	-3%	-9%	+9%	+3%	-25%	-7%	0%	-23%
AI or VR/AR/XR for CX/UX design	-7%	+24%	+14%	+2%	-10%	-13%	+22%	-2%
Behavioral economics models	-7%	+8%	+5%	+1%	-10%	-6%	+1%	+20%
Sensory research or testing	-10%	-7%	+15%	-10%	-6%	-7%	-12%	+12%
Crowdsourcing	-12%	+1%	-1%	-8%	-10%	-14%	-6%	-2%
n (range) =	116-202	101-177	198-319	28-49	22-32	45-75	29-53	28-49

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

Overall, we see our persistent patterns of buyer-side researchers standing relatively pat while buyer-side analytics continue to add methodologies, and qualitative research providers and strategic consultancies divesting.

THE BIG PICTURE

A rose by any other name may smell just as sweet, but do marketplaces? While not exactly the Montagues and the Capulets, marketplaces for sample and marketplaces for software or tools rival each other for support across segments, and usage of "marketplaces" in aggregate does not imply use of any particular kind.

Use of sample marketplaces ranges from 46% of buyer-side researchers, the only segment where users are a minority, to 69% of technology and field services providers. Is your average technology or field services provider more likely to use sample than your average buyer-side researcher? The *Sample* section of this report says 67% of buyer-side researchers use external panels compared to 91% of field services and 69% of technology providers. Each of these segments uses sample frequently, so why aren't they using sample marketplaces to the same degree?

Among field services providers, 33% use sample marketplaces "regularly;" among technology providers, 58% do. Among buyer-side researchers, only 19% use sample marketplaces regularly. Do the gaps in usage reflect differences in research volume, differences in experience with and knowledge of the methodology, or different trade-offs across faster, better, and cheaper?

Looking to the other methodologies in this section, GRIT always likes to call out trends in the technology segment because today's adopted methodologies could become tomorrow's DIY solutions. This year, we see increased usage of AI or VR/AR/XR for CX/UX design and research gamification, and this seems to mirror the untapped potential we see in other segments. Maybe more solutions are coming soon, or maybe technology providers just have greater need to test their own UX.

Behavioral economics models continue to appeal to majorities in most segments, and usage shot up among data and analytics providers this year despite their general tendency to shed methodologies. Perhaps they are aware of the untapped potential and are prioritizing it as a capability in which they can excel and which might be hard for potential clients to duplicate.

Agility is everything. Piloting new methods and scaling what works is the only way to stay ahead as client needs and technologies evolve - complacency is a recipe for irrelevance.
— LM, ed.

Last year we concluded:

> *...we see patterns in how segments are changing their usage of methodologies that are similar to the other methodology categories. Full-service research suppliers are using fewer methodologies, buyer-side data and analytics are using more, buyer-side market researchers are relatively stable, and other supplier segments are shuffling the deck.*

These statements are still generally true, but the specifics regarding each supplier segment have evolved further.

MARKET RESEARCH IN THE AGE OF AI: TRENDS, CHALLENGES, AND OPPORTUNITIES

Alain Briancon, PhD

VP of Research and Data Science, Dynata

Artificial Intelligence (AI) is transforming how market research is conducted. It assists companies in understanding consumer behavior, anticipating trends, and devising strategies with an unprecedented level of sophistication. Unlike traditional analytics, AI uncovers hidden patterns, facilitates better segmentation, and improves targeting using advanced predictive models. AI excels at detecting nonlinear behaviors and subtle signals that conventional methods might overlook.

AI transforms insights from introspective (classification, clustering) to prescriptive (recommendations, routing respondents) and generative (the newest addition to the scene). Generative AI now synthesizes campaign concepts and drives mass-scale personalization. "Traditional" AI enhances the quality of surveys, prevents fraud, and accelerates campaign creation, often without the need for extensive data integration. Whether traditional or not, AI innovations are not just operational upgrades—they're reshaping how strategic decisions are conceived and executed.

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Alain is a serial inventor (90 issued patents, 29 on AI) with a zeal to challenge the status quo, solving real business problems rather than applying technology for technology's sake. He's into LLM, graph database, and, of course, intervention logic. Alain leads Dynata's global Data Science and Research team and is a change agent in how Dynata leverages this critical technology. Alain recently served at Amida Technology Solutions, as well as Kyndryl, Kantar Profiles, Cerebri AI, and many others.

Adoption patterns vary among stakeholder groups, as they should. Buyer-side analytics teams readily embrace new technologies due to demands for performance and efficiency. In contrast, traditional buyer-side researchers—constrained by regulatory and brand compliance—approach AI with caution, emphasizing methodological continuity and auditability.

Technology providers are in a prime position to lead. For them, adopting AI serves as both a unique selling point and a strategy for platform development. Their motivation extends beyond enhancing internal efficiency; they also seek external recognition and opportunities for feature growth. Full-service research companies integrate AI to improve delivery efficiency or lower costs, yet they stay focused on their consultative functions. They leverage AI to enhance human insight rather than replace it. Qualitative researchers experience the greatest challenges: while some utilize GenAI for automation and synthesis, others perceive it as oversimplifying, particularly in contexts where empathy, nuance, or cultural interpretation are vital.

Throughout these roles, one constant remains: AI's utility is directly tied to the quality of the underlying data. No model—regardless of its architecture—can outlast poor inputs. Some argue that data or AI quality is in the "eye of the beholder," which explains the recent emphasis on synthetic data. The true measure of quality must align with the research purpose, the context of interpretation, and the significance of downstream interventions. Clean data pipelines, context-aware preprocessing, validation routines, and rigorous governance are essential; they form the foundation upon which AI-driven insights rest. Model choice and evaluation must begin with a clear understanding of the decision-making objectives, rather than merely considering the latest AI technology.

INVESTMENT TRENDS

Considering technology spending and priorities, staff size changes, and trends in outsourcing versus taking work in-house, GRIT is nagged by an unexpected question: what's "normal" these days?

OVERVIEW

GRIT tracks momentum trends for insights staff sizes, outsourcing versus taking work in-house, and spending on technology. By momentum, we mean how much of the industry is increasing, decreasing, or staying about the same. In addition, we examine priorities for technology spending across nine categories.

Starting with key priorities for tech investments and focusing on changes from last year of 10% or more, we find similar patterns among qualitative research and data and analytics providers as we've seen elsewhere in this report: they are refocusing and consolidating their businesses.

Tech and talent dominate investment priorities, but every dollar is under scrutiny. The organizations that thrive will be those that make strategic bets on scalable technology and high-impact people, relentlessly measuring ROI and adjusting fast.
— LM, ed.

Eight of the nine potential tech investment areas were de-prioritized among today's qualitative researchers, and DIY solutions (-52%) and data integration (-50%) fell most dramatically. In last year's *Insights Practice Report*, the segment showed a lot of data, analytics, and technology-related activity, and we suspect some of the most active among them have migrated to other segments.

Although nothing fell as dramatically among data and analytics providers, six areas declined at least -10% as key priorities, especially DIY solutions (-18%). While those whose main revenue stream is qualitative research always seem to have a clear migration path to the full-service research and strategic consulting segments, data and analytics providers who migrate could end up anywhere. Based on other sections in this report, however, we expect data and analytics providers may also be focusing on work that cannot easily be executed by end users via DIY tools.

While neither of these segments experienced a double-digit increase in any key priority area, each other segment except full-service research had at least two. Eight of the nine areas increased in at least one segment, and three increased in at least two: dashboards increased among field services (+18%), buyer-side analytics (+16%), and buyer-side research (+10%); data integration among buyer-side researchers (+14%) and strategic consultancies (+12%); and analytics among buyer-side analytics (+11%) and buyer-side research (+10%). While full-service research didn't elevate any areas as key tech priorities, they didn't deflate any either.

CHANGE IN KEY PRIORITIES FOR TECH SPENDING FROM LAST YEAR: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Data integration	+14%	-2%	+3%	-7%	-50%	+12%	+6%	-12%
Dashboards	+10%	+16%	+7%	+19%	-21%	+4%	+4%	-12%
Analytics	+10%	+11%	+1%	+7%	-33%	+6%	-3%	-2%
Data collection techniques	+7%	+7%	0%	+4%	-8%	-8%	+23%	-14%
Data visualization for novice analysts	+4%	+2%	-3%	+1%	-27%	-14%	-10%	-9%
Data visualization for expert analysts	+2%	+7%	0%	+18%	-31%	-18%	+9%	-10%
Sample quality/management	+1%	+6%	0%	-14%	-20%	+13%	+6%	0%
New data types	-1%	-6%	+8%	0%	-22%	-7%	+13%	-10%
DIY solutions	-2%	+8%	+1%	-29%	-52%	-5%	+10%	-18%

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Source: GRIT Report and NewtonX

Overall, the patterns suggest a pockets of equilibrium (e.g., full-service research), some overlap of increasing priorities, but mostly that segments are pursuing independent strategies particular to their specialties.

THE BIG PICTURE

Considering technology spending and priorities, staff size changes, and trends in outsourcing versus taking work in-house, GRIT has a feeling that it can't let go: what's "normal"?

"Normal" could mean what's common to all segments or what's common across the largest ones. It could mean what's normal today, or it could mean what's normal for a segment in terms of historical equilibrium. That's the part that haunts GRIT: what's "normal" historically?

Part of the challenge comes from the fact that many of our measurements began after the pandemic did. None of them provide much of a look back before the pandemic. Several of them show a boomerang effect coming out of the pandemic where things look *more* normal, but not *really* normal.

It's easy to say spending slowed, hiring suffered, etc. because of the pandemic, but the pandemic doesn't account for everything. In the *2022 GRIT Insights Practice Report*, we commented about how *Business Outlook* metrics had rebounded, but concerns about the future economy persisted. Last year, we said:

Throughout this report, it's apparent that the trials of the pandemic, the impact of technology, the changing character of research participants, supplier mergers/ acquisitions/attrition, and other factors are churning the industry, and none of the supplier segments seem to be experiencing any kind of state of equilibrium.

The metrics reported in this section and *Business Outlook* look similar to pre-pandemic levels, but haven't really come all the way back. In 2025, with another year of tracking in the books, a lot of our *Investment Trends* metrics look more like 2024 than 2020, and we have to wonder if we'll ever get back to "normal."

In some ways, the effects of the pandemic are easy to sort: businesses suffered. But the pandemic didn't just come and go; it produced a *Data Enlightenment* which led to widespread interest in data and analytics, and it coincided with technological breakthroughs that made analysis tools more available. And concerns about global economic recession multiplied despite the pandemic's recession.

Since then, we have an AI/GPT revolution which has nothing in common with historical equilibriums. And, of course, the recent NFL draft will go down as the last one with COVID-era players entering the pros, and those in less glamourous industries can probably relate. If you want "normal," you might have to wait for the *2028 GRIT Reports*, assuming nothing changes between now and then. They're coming to take me away, ha ha.

For now, we see technology spending back, but not all the way back, and it's farther away in some segments than others. For example, qualitative researchers seem to be coming out of a period of supernatural possession (we won't say "demonic" because it's not accurate, although as a modifier it might better express what we mean by "possession") by technology to return to basics. Even technology suppliers aren't increasing tech spending the way they used to.

> It's easy to say spending slowed, hiring suffered, etc. because of the pandemic, but the pandemic doesn't account for everything.

Whereas the reduction in tech priorities among qualitative researchers seems more like a case of "Elvis has left the building," among data and analytics providers, it seems more a case of different companies focusing on different areas of technology spending. Based on what we've found throughout this *GRIT Report*, it's hard to characterize those in the data and analytics provider segment other than their main revenue stream is data and analytics, and they are committed to spending on technology for analytics.

Particularly regarding staff size trends, GRIT gets the impression there are two kinds of entities: those for which success is correlated with staff expansion and those for which staff reduction may be part of their strategy. We get this idea from the resilience of high levels of staff size decreases over the last two years in some segments despite the strong levels of staff increases from others in the segment. Supplier segments seem to be becoming more diverse internally with respect to business models.

The evolution of key priorities for technology spending raises some interesting hypotheses. Investment in technology for sample quality has taken off since 2022-23 among buyer-side researchers, full-service research providers, strategic consultancies, data and analytics providers, and, to a more moderate extent, technology providers. Field services providers have always had it as a high key priority.

Interest seems to have spiked when sample quality issues became the bull in the china shop (or the "silent but deadly" problem), and those with the most primary research expertise seem to be the ones pursuing technology solutions most aggressively. In the *Sample* section of this report, we see some trends away from in-house solutions, and it will be important to see if some supplier-side experts become the custodians of data and sample quality in the future.

We're also interested to see what happened when we split "data visualization and dashboards" technology into "dashboards' and "visualization tools for expert analysts" and "visualization tools for novice analysts." Although close in some segments, the priority placed on dashboards is usually much higher than the priority for data visualization. The more important goal seems to be to share real-time information as opposed to DIY analytical capabilities.

Further, there seems to be a greater importance placed on visualization tools for expert analysts than for novices. Maybe insights professionals would rather send their bills to Congress than out for a popular referendum. There is a market for analytical tools for novices, but if suppliers had to make a choice, more of them would choose expert users. Perhaps there is skepticism about the so-called "democratization of data."

Finally, another issue that occurs to us is the relative threat posed to suppliers when other suppliers take more work in-house than when end clients take it in-house. For example, many suppliers seem to have full-service research companies as clients, but full-service research suppliers can build their own capabilities or acquire them, then hire staff to do-it-themselves. Further, they seem to offer tools to end clients to keep them engaged.

How great is the threat of brand-side clients taking work in-house versus suppler-side clients doing the same? Some of our data suggest it is more trouble than it is worth for end clients to take too much work in house. For suppliers, however, the aggregate volume of work they can do may represent new revenue opportunities.

> Investment in tech for sample quality has taken off since 2022-23 among buyer-side researchers, full-service providers, strategic consultancies, and data and analytics providers.

FROM TECH HYPE TO INSIGHT VALUE: WHAT 2025 DEMANDS

Ruchika Gupta

CEO, Borderless Access

The insights industry stands at a transformative crossroads today. The latest *GRIT Report* confirms a crucial evolution: We have moved beyond the era of technology hype of automation, dashboards, and AI as standalone tools, toward a mature, purposeful era defined by actionable insight and authentic understanding.

Today's landscape is not just about speed or quantity; it is about smarter ecosystems that translate complexity into strategic clarity. While investments in analytics, dashboards, and data integration continue rising, GRIT25 clearly shows that buyers now prioritize solutions delivering real human insights, not just faster data.

At Borderless Access, we are strategically positioned as an insights and panel access provider powered by human and AI innovations, a unique identity validated by GRIT's findings. Our clients today do not just seek access to consumers, they demand authentic, deeply profiled audiences whose genuine opinions can inform strategic actions. Our global, highly engaged B2B, B2C, and specialized healthcare panels meet this critical need by providing trustworthy, real-world respondent insights at scale.

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Ruchika Gupta is the Founder & CEO of Borderless Access, leading its rise as a global tech-driven insights provider since 2008. A serial entrepreneur and advocate for women in leadership, she blends AI innovation with human intelligence to transform market research. With 30+ years in the industry, Ruchika is a recognized speaker and award-winning leader shaping the future of data-driven decision-making and authentic, impactful research.

Moreover, our clients increasingly value the nuanced intelligence we deliver through our sophisticated combination of human expertise and AI technology. For instance, we designed a multi-modal research program blending derivative quant, immersive qual, social listening techniques and AI for a global CPG brand seeking to understand consumer engagement around live events and social connection. Supported by AI tools for emotion and voice tonality analysis, and delivered through a cloud-based management system, we transformed rich cultural insights into localized brand decisions, delivering dashboard-ready results in days, not weeks.

These client successes underline precisely the industry evolution GRIT identifies moving from simple data access and automation to smarter insights, grounded in genuine human opinions and driven by innovative human plus AI frameworks.

As DIY solutions recede, reflecting market maturity, organizations are rethinking internal capabilities and turning increasingly to specialized insights partners. We see this recalibration not as a retreat but as market recognition of the value partners like Borderless Access bring via authenticity, clarity, and strategic impact.

As stakeholders rethink their insight investments, one notion is clear: The future belongs to companies that integrate technology with human understanding, automation with authenticity, and speed with accuracy. At Borderless Access, we embrace 2025 as a pivotal moment for recalibration and redefining what sustainable, impactful insights innovation truly means.

This is the future we create daily with our clients: real insights, genuine people, smarter decisions powered by human and AI innovations.

RESEARCH AUTOMATION

Automation has settled comfortably into everyday research and insights life, and adoption of AI-enabled automation has moved well beyond text analysis into other kinds of unstructured data analysis as well as core research and project functions.

OVERVIEW

GRIT has tracked adoption of research automation and the reasons for it since 2018. Last year, we changed the approach to distinguish between automation that is AI-enabled and automation that is not.

For lack of a more descriptive analogy, text analytics is AI's "gateway drug." In each of the eight GRIT segments, most insights professionals use an AI-enabled version of it, from 57% of buyer-side research

to 79% of qualitative research. For survey analytics, the next most common use case for AI, usage describes a majority in four of the eight segments: technology providers (65%), data and analytics providers (54%), buyer-side analytics (53%), and strategic consulting (51%). In three segments where it does not have a majority, it is among the top three most common applications of AI: field services providers (44%), full-service research providers (43%), and buyer-side researchers (35%).

Qualitative research (35%) is the only segment in which AI-enabled survey analytics is not either in use by a majority or among the three most common. These numbers are impressive because they are not percentages of those who use a methodology and have automated it with AI; they are percentages of the total segment. For example, the 65% in the qualitative research segment who have not automated survey data analytics with AI are a mix of those who analyze survey data and those who don't.

Automation is reshaping workflows, but it's not a silver bullet - integrate it thoughtfully to boost efficiency without losing the nuance and quality that set you apart. The right balance will keep you competitive as expectations rise.
*— LM, ed.*

TOP THREE AUTOMATED WITH AI: GRIT SEGMENTS

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Text data analysis	57%	71%	71%	63%	79%	76%	78%	68%
Survey data analysis	35%	53%	43%	44%	35%	51%	65%	54%
Social media data analysis	30%	50%	31%	20%	31%	43%	35%	50%
Image and video data analysis	28%	51%	40%	23%	62%	31%	40%	41%
Report writing	28%	55%	38%	37%	40%	48%	50%	69%
Audio analysis	21%	42%	39%	42%	49%	42%	41%	50%
Charting and infographics	21%	44%	21%	33%	41%	47%	38%	58%
Survey design	19%	54%	30%	47%	20%	35%	48%	45%
Average number automated with AI	3.1	6.5	4.3	4.4	5.0	5.2	5.9	6.0
n =	101	94	154	27	20	35	20	21

Green shading represents top three in each segment.

Source: GRIT Report and NewtonX

Only two other AI use cases claim a majority in more than one segment. AI is used in image and video data analysis by 62% of qualitative research providers and 51% of buyer-side analytics. For report writing, a majority in each of the two analytics segments leverage AI: 69% on the provider side and 55% on the buyer side. In addition, 50% of technology providers use AI for report writing, followed closely by strategic consulting (48%).

Adoption of AI-assisted automation depends on many factors, including the availability of solutions, awareness of solutions, and frequency of certain tasks, so it's hard to assess the absolute appeal of AI-assisted solutions based on adoption because use cases don't apply universally. As we explore in more detail, we'll see there are many instances in which use of AI for an application increased since last year and very few where it declined.
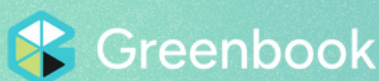
THE BIG PICTURE

GRIT had been tracking adoption and intended adoption of research automation since 2018, but automation has become so commonplace that last year we switched our focus to whether automation of certain tasks leverages AI or not.

In the *2024 GRIT Insight Practice Report*, in each of the eight GRIT segments we found text analytics was the task most frequently automated with AI. Adoption ranged from 28% among qualitative research providers to 65% among data and analytics providers. Although most data and analytics providers were also using AI-enabled automation for audio, image, and video analysis and charting and infographics, in other no segment did a majority leverage AI to automate any task other than text analysis.

Just one year later, text analytics is still the task most frequently automated with AI in seven of eight segments, but adoption has sky-rocketed, ranging from 57% among buyer-side researchers to 79% of qualitative research providers. For the latter, this represents just under triple the use compared to last year. In the lone segment where text analytics is not the leader, data and analytics providers, it's nudged out of that honor by report writing, 69% to 68%.

Last year, half as many data and analytics providers used AI for report writing (34%), and so did a similar amount of technology providers (32%), plus somewhat fewer buyer-side analytics (26%). In each other segment, fewer than 20% used AI for writing reports. Now, 50% of technology providers and 55% of buyer-side analytics leverage AI for report writing, and at least 20% do so in each segment. Buyer-side researchers are least likely to leverage AI for report writing (28%), but this represents a nine-fold increase over last year.

Perhaps now it's more obvious why we referred to text analysis as a "gateway drug" and that we did not mean it as a criticism. Last year, it was easy for anyone to try AI-enabled text analytics because those tools were more established and, frankly, it is one of the most onerous tasks to do manually. Plus, to be honest, it's hard to recognize whether or not it has been done optimally. Having taken this harmless trial last year, insights professionals are much more avidly adopting AI not just for other kinds of analytics, but for core project functions such as report writing and primary research.

Last year, adoption of AI-enabled automation for survey data analysis was less than 30% in five of eight segments. Now, it's used by majorities of technology providers, data and analytics providers, buyer-side analytics, and strategic consultants, plus more than 40% of full-service research and field services providers. Last year, use of AI-enabled automation for survey design hit 43% for technology providers and 37% for data and analytics providers, but ranged from 3% (buyer-side research) to 28% (buyer-side analytics) for the other six segments. Now, it's been adopted by at least 30% in each segment except buyer-side research (19%, a six-fold increase) and qualitative research providers (20%, a three-fold increase). AI has made inroads not only in analysis of primary research, but into its processes.

> Perhaps now it's more obvious why we referred to text analysis as a "gateway drug" and that we did not mean it as a criticism.

Regarding the overall adoption rates for of AI-enabled tools, we *might* speculate that buyer-side analytics and technology and data and analytics providers are more predisposed to adoption, but we have a harder time making broad statements about buyer-side researchers, full-service research providers, or others who, on the surface, are less inclined to adopt AI solutions. Staff at technology providers and data and analytics professionals might be jacks-(or janes- or just-people-)of-all trades who perform many different tasks and have a need to automate the less frequent ones. Buyer-side researchers and full-service research providers may be less likely to be generalists or more likely to outsource tasks which may, in turn, be performed with AI-enabled tools by partners.

We tend to see overall automation decreasing for some tasks in some segments more than we see any backtracking for AI-enabled automation. Our interpretation, based on other sections in this report, is that segments like qualitative research providers are streamlining their business to core services. From that perspective, fewer would be conducting survey research, and, therefore, fewer would automate it. Because we don't see corresponding drops in AI-enabled automation of those tasks, we suspect those who want to keep them as part of the business are leveraging AI to reduce the burden they represent.

GRIT cannot answer the question of whether AI-enabled automation is more heavily used by experts to ease a bigger project load or by relative novices who use the tools only occasionally and can't invest much in the learning curve. Observing how AI-enabled tools for all kinds of unstructured data from text to video have exploded, we suspect anyone who has a need for analytics can benefit from AI-enabled tools regardless of level of expertise. For other tasks, it's not as clear whether adoption is more common among experts or novices, or if it is equivalent.

Last year, we mentioned that adoption of any kind of automation could be limited by the number of insights professionals who actually perform (or could perform) each task and the availability and accessibility of automation solutions. We'll go out on a limb and suggest that availability and accessibility of AI-enabled automation tools is less of an issue today.

GRIT cannot answer whether AI-enabled automation is more heavily used by experts to ease a bigger project load or by relative novices.

Qualtrics | EDGE

SMARTER INSIGHTS, FASTER PACE: AI'S BREAKTHROUGH IN MARKET RESEARCH

Ali Henriques
Executive Director, Qualtrics Edge

The latest *GRIT report* confirms what many of us have observed: AI is advancing market research workflows. What began as a cautious exploration has rapidly accelerated, bringing AI squarely from the periphery into the core of our research processes. Just a year ago, AI's primary application was often quality related (data scrubs or text analytics); today, we're seeing its adoption skyrocket across nearly every research function, from survey creation to the nuances of report writing. The data reveals remarkable year-over-year growth as buyer-side researchers have increased 9x their use of AI for report writing. This signifies a fundamental rewiring of how our industry operates.

What this rapid adoption has also brought is a healthy degree of skepticism of any predictions about the timeline for innovation. Agentic AI, once a far-off concept, is already influencing our workflows. At Qualtrics, we see this acceleration not just as a validation but as a call to build what's next. We are moving beyond simple task automation to true researcher augmentation. Tools like conversational

feedback and video summarization leverage AI to unlock qualitative insights at a quantitative scale, meeting the growing demand for analyzing unstructured data like video and audio.

The next frontier of data collection is already here. Most of us are pioneering the development and application of synthetic data. This technology, which 6 months ago may have seemed futuristic, is seeing rapid uptake; a 2025 Qualtrics study found 62% of market researchers have used synthetic data in the past 6 months.

With clear validation that our industry genuinely craves both greater efficiency and deeper understanding, we bear a collective responsibility to actively build and educate for this AI-powered future. The pace of change is truly staggering, clearly demonstrating that the future of insights isn't about replacing human expertise, but rather powering it with tools that were once considered science fiction. The key challenge now is how effectively we adapt and accelerate.

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Ali, a market research practitioner, leads research innovation for Qualtrics Edge, which comprises of AI-powered tools and solutions, wrapped in human-powered services. With nearly 2 decades of market research experience, Ali spearheads thought leadership for Edge, guiding innovation pipeline for transformative research tools and supporting our legacy services business to deliver 10,000 projects per year.

SELECTION CRITERIA

Overall, there are universal selection criteria – like data quality, service quality, and possibly general pricing – but also a tier of factors such as reputation, innovation, use of technology, and thought leadership which could be more segmented.

OVERVIEW

The mantra "faster/better/cheaper <fill-in-the-blank>" echoes throughout the halls of GRIT, and we probe the data as much as possible regarding whether it's a three-part harmony or if "better" is drowned out by the other two. The annual discussion of selection criteria for methodologies, partners, and suppliers is a prime forum for such debate.

Regarding methodology selection, total cost, including services, data, or tools, is a top-three concern for most – but not all segments. In the five segments that prioritize it in the top three, only one of them ranks it first, and not by much (buyer-side data and analytics). Buyer-side researchers and full-service research providers place ease of interpreting and communicating results higher than cost, and buyer-side analytics have them almost equal.

Although in the the top three for field services, the segment places more emphasis on innovation and the expertise required to produce results. For qualitative researchers, it is second behind innovation. In fact, innovative approach is a top-three priority in every supplier segment but neither buyer segment. On the buyer-side, they need results whether the means to that end are innovative or not. Suppliers, however, not only need to produce results but stand out from other suppliers. Innovation helps them stand out and can provide additional confidence in the results.

Buyers are raising the bar, demanding quality, transparency, and flexibility over price alone. Suppliers who can consistently deliver on these fronts will build lasting partnerships and outpace those still competing on cost.
— LM, ed.

One criterion is top-three in six segments and number one in three of them: ease of interpreting and communicating results. If you've read *Investment Trends* in this report, you might notice the obvious connection between the importance of ease of communicating results and the popularity of technology investment in dashboards. As told in that section, the ability to share results via dashboards tends to be more important than empowering others to analyze data, and we see a bit of that here.

"Cheaper" is a popular concern for methodologies, and "better" is a priority associated with communicating results and innovation. For four segments, "better" also seems to be related to how much expertise one needs to have in order to produce a result. "Faster" is only top-three for buyer-side research and data and analytics providers. From what insights professionals say about how they select methodologies, "better" seems like a sturdy third leg of the stool and directly connected to making their work impactful.

TOP THREE PRIORITIES FOR METHOD SELECTION: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Ease of interpreting/ communicating results	38.2	28.9	31.3	17.7	20.7	21.2	21.5	31.9
Total cost	31.0	30.5	26.9	21.9	25.9	18.2	13.9	18.2
Speed of results	18.5	13.3	16.2	7.0	6.3	14.0	16.7	21.8
Expertise required to produce results	13.3	16.0	13.9	27.3	21.8	19.8	8.7	15.3
Innovative approach	10.6	12.2	23.8	25.6	28.6	25.0	40.4	21.7
Scalability	4.3	13.9	9.2	14.9	5.9	5.6	20.4	11.8
n =	129	121	142	18	17	31	27	26

Green shading represents top three in segment.

Source: GRIT Report and NewtonX

Regarding selectin criteria for partners or suppliers, virtually everyone says data quality and service quality make a difference in their decisions. Not just every segment – *everybody*. This may be a "duh" or "no duh" moment, but shouldn't buyers and potential partners have their choice of excellent data sources and good treatment and decide based on some other factor? Maybe we're making too much of how we'd like GRIT participants to have interpreted the question, but maybe service and data quality aren't the "no-brainers" they appear to be; maybe these are silent screams from a market tired of being treated like an involuntary blood donor.

Reputation is a top three key criterion named by a majority of buyer-side analytics (54%), full-service research (54%), and field services (71%). General pricing is a top-three concern for buyer-side researchers (59%) and qualitative research providers (62%), two segments who said cost was second-most important for methodology selection. However, pricing is a key factor for a majority of every segment except technology. Relationship is top-three for strategic consulting (68%) and data and analytics providers (61%); innovative approaches is top-three for technology (66%).

TOP THREE KEY FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT SEGMENT

	Buyer: research	Buyer: analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Service quality	87%	63%	85%	83%	76%	79%	82%	72%
Data quality	86%	86%	89%	96%	74%	83%	94%	80%
General pricing	59%	52%	54%	60%	62%	64%	44%	56%
Reputation	46%	54%	54%	71%	52%	52%	38%	41%
Relationship with me/ organization	45%	25%	54%	55%	48%	68%	59%	61%
Innovative approach or tools	40%	37%	33%	35%	33%	24%	66%	31%
n =	129	121	142	18	17	31	27	26

Green shading indicates top three within segment.

Source: GRIT Report and NewtonX

Undeniably, "cheaper" is top-of-mind. "Better" is top-of-mind in the sense of data and service quality, but those seem more like table stakes than deal-winners, or they should be. As a difference-maker, "better" seems best represented by the promise that can be communicated via reputation or relationship, two criteria with heavy loads to carry.

As you read this section, consider how "reputation" is what you rely on when you don't have a "relationship," and it's harder for newer, likely innovative, suppliers to have formed relationships. Forming these requires time and a track record of good service over that time.

THE BIG PICTURE

What good is a genie in a bottle if you can't open the bottle? Echoing what we heard in *Investment Trends* about dashboards, insights professionals are uncorking the bottle with methodologies that streamline the process of interpreting and communicating results, and technology providers seem to be on board with solutions. Once the genie is released, it can also deliver other benefits such as speed.

After ease of communicating results and, of course, total cost, other factors come into play when choosing methodologies. Some insights professionals might focus on the learning curve, some on labor-intensity, and some on scalability. Every supplier segment, however, has to pay attention to how innovative the approach is, especially technology providers. Focusing on innovation helps them produce offerings that are better than the current ones as well as to differentiate from less innovative suppliers.
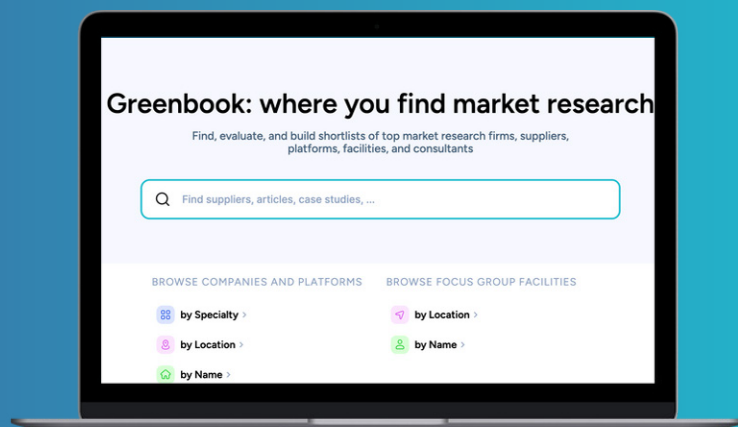
In every segment, data and service quality are clearly must-haves for everyone. After six years of seeing this, we have to wonder if this is just an eternal no-brainer or if these would become less important factors if they didn't differentiate between suppliers or partners. If high quality data and good service were commonly available, would these become less top-of-mind?

In some segments, data quality has actually increased as a key factor when it seemed there was little headroom for growth, possibly due to the current and ongoing crises. Service quality has also elevated its profile in some segments, possibly as a reaction to more tech-based offerings.

Especially via the pandemic but also because of a constant stream of new and improved offerings, more insights work became tech-based. As GRIT reported during the pandemic, many had to leave the comfort of familiar relationships if they wanted to adopt new technology to get them through. Consequently, reputation became a more important factor, especially relative to relationship. However, all else equal, a good relationship is an advantage, and the way to build them is through good service.

Across segments and over time, we see innovation wax and wane only to wax again as a key factor, as well as technology for research and analysis or for communication and sharing. We suspect there is a strong core of insights professionals who consistently value these – such as buyer-side analytics – but then others whose interest is piqued when new needs surface or new capabilities command attention. When the need is met, the interest subsides. Because these trends are technology-driven, they might also impact the fluctuations we see in the relative importance of reputation and relationship.

Overall, there are some universal decision criteria – like data quality, service quality, and, to a lesser extent, general pricing – but also a tier of factors such as reputation, innovation, use of technology, and thought leadership which may follow trends and may be stronger in some segments than others.

And the three-legged stool of "cheaper/faster/better" supports it all, and it seems more balanced these days. But we still put "better" last because it always seems the most vulnerable

> If high quality data and good service were commonly available, would they become less top-of-mind?

LEVELING THE THREE-LEGGED STOOL OF FASTER, CHEAPER AND BETTER

Jeff Claypoole

Managing Director, North America, Toluna

A s economic headwinds influence price sensitivity, it's no surprise that price has become a more prominent selection criterion for buyers (up 8 points since last year). It's easy to see why: price is a clear, quantifiable metric. As is speed – you can measure how much something costs and how fast it delivers. Yet price and speed alone aren't enough.

With data quality holding steady as a top priority among over 80% of buyers, it's clear that even in a cost-conscious environment, quality – both of service and data -- remains a core requirement. Buyers aren't just seeking to maintain quality, but rather to improve it.

For buyers open to new technologies – particularly AI-based solutions – a strong case can be made for how innovation can elevate quality of both data and service. AI also brings greater speed and efficiency to the research process, enabling faster turnarounds and smarter decision making. At Toluna, we've seen this first-hand with our own insights platform, Toluna Start, as well as our tools. One example is SmartCloud, which instantaneously analyses open-end survey responses for deeper meaning while reducing human error in coding. Another testament is QProbe, our generative probing feature that limits insufficient open-ended survey responses and brings greater depth to insights. These are just a few examples of how AI technologies are improving data and service quality and making insights better (and they're cost-effective too!)

Another increasingly important criterion to note is the relationship buyers have with the vendors they select. With AI booming across the board and a growing pool of vendors and data, buyers are navigating an increasingly complex landscape. In such an environment, a trusted partnership and reliable point of contact becomes more valuable than ever.

The bottom line is that buyers are in a strong position to choose partners that fit their specific needs. This might mean choosing vendors who can deliver on speed and cost-effectiveness when these are the priority and opting for vendors offering strategic guidance and consultation when the stakes are higher. It also opens avenues for increased collaboration by leading buyers to bring together the best of both worlds: partnering a small, innovative player with their longstanding vendors to benefit from the agility of one and the proven expertise of the other.

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Jeff Claypoole is Managing Director of Toluna's North America enterprise business, which recently unified Toluna, MetrixLab, and GutCheck under the Toluna brand. With a proven track record in market research and innovation, Jeff previously held successive commercial leadership roles at Nielsen, Affinnova, and BASES. His career reflects a deep expertise in guiding Fortune 500 clients through data-driven brand, product, and communication decisions across evolving consumer landscapes.

BUSINESS OUTLOOK

This year's results seem to demonstrate one sobering point: "someday" finally came, whether AI ushered it in or not. Last year's turmoil looks like it's being sorted out, but not with "traditional" solutions.

OVERVIEW

In *Business Outlook*, GRIT covers research spending trends, supplier revenue trends, performance against goals, and optimism, but research spending may drive all the others. When spending is up, revenues go up, insights professionals exceed their goals, and joy rings out across the land.

Disruption is the new normal, and only the agile will survive. Leaders must embrace change, invest in innovation, and constantly reassess their strategies to navigate uncertainty and turn volatility into opportunity.
— LM, ed.

Currently, spending increases by buyer-side researchers are tied for second-lowest ever after two relatively robust years. Spending decreases are the highest they've been since the pandemic, and the budget size category of $15mm or more fell from 19% to 13%. On the analytics side, spending increases and decreases are about normal, and budget sizes are stable. Overall, the numbers don't suggest a dramatic slowdown, but one number caught GRIT's eye when looking at the ways buyers who had a budget decrease will respond to it.
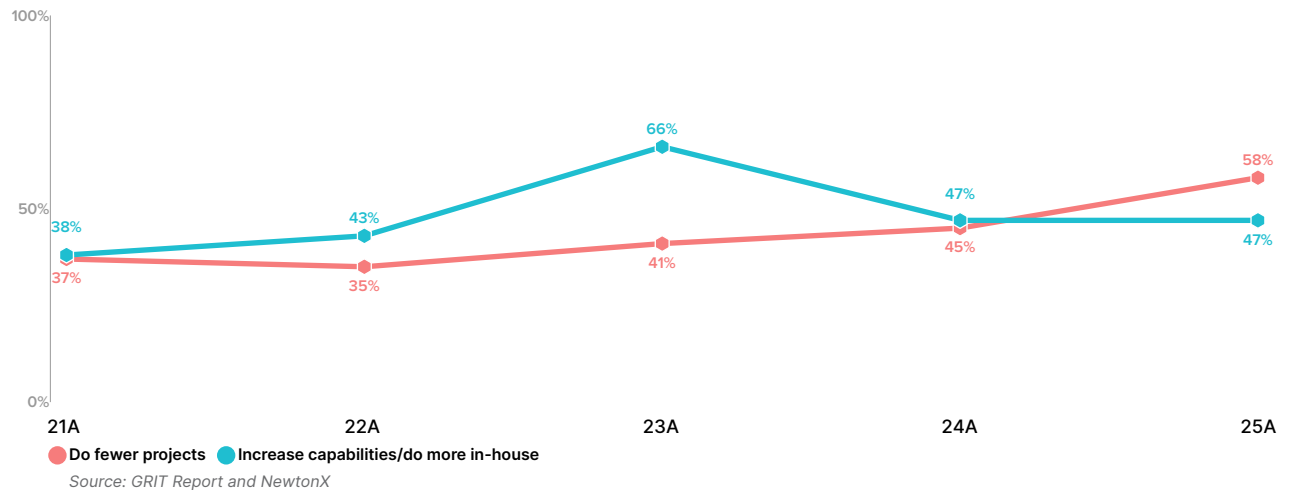
Most buyers who experienced a budget decrease will respond by doing fewer projects (58%), the first time a majority have said this. That's up +13% from last year and more than +20% since during the pandemic. It's possible they'll bundle smaller projects into larger ones, but in the context of all the trends we see, it looks like some buyers are planning to do less research rather than the same amount more cost-effectively.

Nearly half say they will respond to decreased budgets by increasing their capabilities to bring more work in-house (47%). This is down from the peak of 66% two years ago, but still higher than our initial measurement of 38% in the first year of the pandemic. We only ask this question of those whose budgets decreased, and it could be most of the 66% who took more work in-house two years ago met their budget targets and didn't have to decrease any further. However, in *Investment Trends*, we haven't seen much change in the percentages of buyers who are taking more work in-house verses outsourcing.

HOW INSIGHTS FUNCTION WILL RESPOND TO BUDGET DECREASE: GRIT WAVE (BUYER)

● Do fewer projects ● Increase capabilities/do more in-house
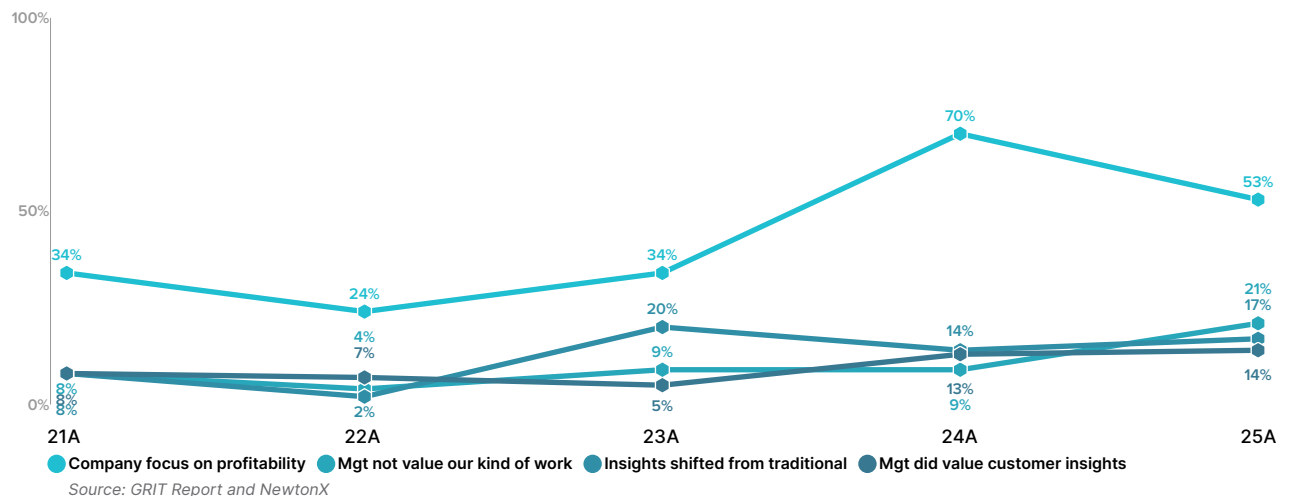
Source: GRIT Report and NewtonX

The factors behind the budget decreases add a little color to the picture. We'll see later that company-wide pressure to reduce costs continue to be the clear leading factor behind research budget cuts. During the pandemic, it seemed this pressure was mostly due to external factors because only about one-third said it was also due to their company's focus on profitability. Last year, however, this doubled from 34% to 70% and still describes most budget decreases this year (53%). Coming out of the pandemic, it seems like company-wide pressure to reduce research budgets is more internally driven by profit than externally driven by threats to survival.

Although not as dramatic, there are other creeping indications more buyer-side companies are losing interest in primary research. The number of budget decreases attributed to management not seeing the work as valuable more than doubled this year from 9% to 21%. During the pandemic, insights work shifting away from traditional methodologies was in the single-digit percentages; now it's in its third year in double digits. The percentage saying management did not value customer feedback or insights more than doubled two years ago from 5% to 13% and has remained at 14%.

The percentages who suggest management doesn't value traditional insights work or customer insights regardless of source are not huge, and they only represent the opinions of those who lost budget. On the other hand, perhaps these trends would be even more disturbing it we asked them of everyone; they might become more predictive than descriptive.

SIGNIFICANT FACTORS BEHIND BUDGET DECREASE: GRIT WAVE (BUYER)

● Company focus on profitability ● Mgt not value our kind of work ● Insights shifted from traditional ● Mgt did value customer insights

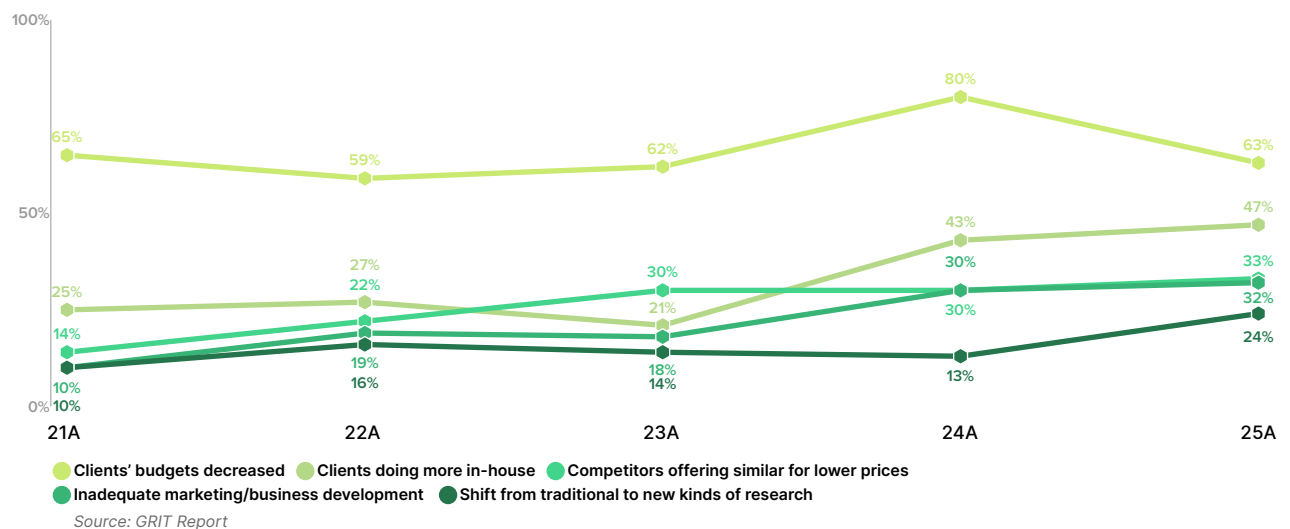*Source: GRIT Report and NewtonX*

On the supplier-side, reduced client budgets has always been a leading factor behind revenue decreases. However, nearly half attribute it to clients doing more work in-house (47%), the second year in the 40s after three years in the 20s. The impact of competitors who offer similar services for lower costs is now more than double (33%) what it was in 2021 (14%), as is the shift away from traditional methodologies (10% in 2021 to 24% now). The percentage blaming poor marketing and business development efforts has more than tripled in that time from 10% to 32%.

From the point of view of suppliers who are losing revenue, it looks like DIY tools for clients, cut-rate competition, and pivots to new methodologies are challenges they have not been able to counter. GRIT also needs to point out these factors only represent the opinions of suppliers who lost revenue and stayed in business long enough to take the survey; we don't know what those who suffered the most might think.

SIGNIFICANT FACTORS BEHIND REVENUE DECREASE: GRIT WAVE (SUPPLIER)

Legend:
- ● Clients' budgets decreased
- ● Clients doing more in-house
- ● Competitors offering similar for lower prices
- ● Inadequate marketing/business development
- ● Shift from traditional to new kinds of research

Source: GRIT Report

On the flip-side, when suppliers have increased revenue, about two-thirds attribute it to their strong focus on clients' needs (68%). This has always been a strong factor, it's up +14% since 2021. Perhaps the needs they focus on include meeting lower price points and offering DIY tools to share work.

However, in 2021, the suppliers who attributed revenue increases to a rising tide of client needs such as new markets or segments were nearly as many (51%) as those citing their focus on client needs (54%). Now, however, the gap is +30% in favor of focusing on clients' needs; only 38% said increasing client needs was a factor on revenue increases. Are client needs not increasing as much as they once were, or is it client needs for supplier work which are not increasing?

FACTORS BEHIND THE REVENUE INCREASE: GRIT WAVE (SUPPLIER)

Legend:
- ● Strong focus on client
- ● Clients' needs increased

Source: GRIT Report
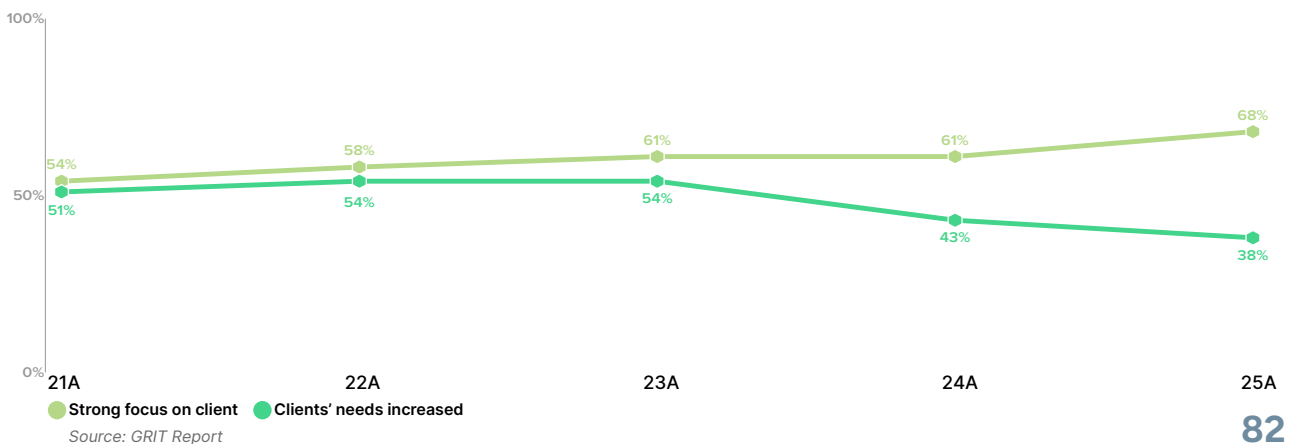
THE BIG PICTURE

In the *2024 GRIT Insights Practice Report*, we reported on how supplier segments were in flux, and new stories were being written. Now, it looks like the full-service research segment continues to assimilate suppliers one way or another, leaving more hard core adherents to their chosen specialties. As we've seen in *Supplier Profiles*, field services suppliers seem more focused on technical solutions to sampling problems; qualitative researchers more focused on leveraging technology to make the best use of their unique skills; and data and analytics providers more focused on services that can't be easily replicated on the client side.

Strategic consultancies seem to be focusing on partnering for research services rather keeping them in-house, and technology suppliers seem to have moved on to the next great challenges, like automating analysis of unstructured data. Suppliers are sorting out last year's difficulties, and some have already moved on successfully.

Similar to the first year of the pandemic, GRIT trend scores fell last year, and the uncertainty in the industry may have seemed like "COVID-lite." Maybe AI *was* the new pandemic, as we joked, but this year's results seem to demonstrate one sobering point: "someday" finally came, whether AI ushered it in or not. The industry has quickly moved towards zero, in which seemingly independent events result in the murder of traditional insights work.

Maybe that's too dramatic and maybe the *GRIT Report* isn't an Agatha Christie novel, but research project spending took a step back, and we are clearly seeing the cumulative impact of clients taking more work in-house, management not seeing as much value in "traditional" insights work, and work shifting away from traditional insights methodologies. We hear these reports not just from those who lost budget or revenue, but they echo in what's no longer said by those whose budgets and revenue *increased*.

OK, fine. Hearing "echoes" doesn't mean traditional insights work has been murdered (or, as some might suggest, committed suicide). On the other hand, we saw a lot of turmoil last year, and this year, in sections like *Research Automation*, we see evidence of a flood of new solutions enabling all kinds of DIY activity. Throughout this report, we continue to see instances of stakeholders favoring analytics over primary research. Last year, +17% more researchers than those in the analytics segment said their budget increases were a result of management championing the work; this year, it's +15% the other way around.

If this summary seems a bit grim, one might want to remind GRIT of the words of former US President George H.W. Bush: "*Please just don't look at the part of the glass, the part that is only less than half full.*" In each segment, *at least* two-thirds of insights professionals are optimistic about their jobs or their company. For two of our five pre-pandemic segments, optimism is higher now than it was in 2020. So there's that.

> Spending took a step back, and clients are taking more work in-house while management isn't seeing as much value in "traditional" insights work.

THE SEA CHANGE IS HERE: ADAPT OR GET LEFT BEHIND

Gen2 Advisors

Oaklins | DeSilva+Phillips

The insights industry faces its most pivotal inflection point since the internet era. Budgets are tightening, technology is rewriting rules, and client expectations are evolving at breakneck speed. Buyer-side research spending hits historic lows, while analytics and tech budgets hold firm-clients now prioritize *tech-driven insights* over traditional methods. This isn't a downturn; it's a seismic recalibration. Here are the key points and implications.

M&A: Consolidate Strategically

Smaller firms clinging to outdated models are vulnerable. Target acquisitions with **tech prowess** (AI, automation) or **sticky client relationships** to future-proof your portfolio. Move swiftly-undervalued assets won't stay cheap.

Tech Investments: Survival Demands Integration

Tech isn't optional. Leaders thrive by embedding AI and automation into workflows-think sentiment analysis, synthetic data, and real-time analytics. But buying tools isn't enough: train teams to wield them strategically, ensuring tech amplifies (not replaces) human expertise.

Website: gen2advisors.com
Website: oaklins.com

Oaklins DeSilva+Phillips is an investment bank for clients that operate at the intersection of content, technology and services. This includes enterprises operating within the media, advertising & marketing, education, healthcare, information services and technology sectors.

Gen2 Advisors tracks the latest technology for managing insights and predicts the impact on the future before it's here. Via syndicated reports, advisory services, and consulting engagements, we deliver systematic overviews of emerging best practices and explain how to apply them to your business.

Growth: Client Obsession & Diversification

Only 34% of buyers cite management valuing traditional research (down from 65% in 2024). Winners diversify into analytics, consulting, and tech-enabled solutions while forging **strategic partnerships**, not transactional relationships. Deliver ROI that's impossible to ignore.

Efficiency: Innovate to Do More With Less

With 58% of buyers cutting project counts, streamline ruthlessly. Automate grunt work, adopt value-based pricing, and optimize operations. Efficiency isn't just cost-cutting-it's freeing resources for high-impact work.

Talent: Bridge the Skills Gap

Staff growth stagnates in research but surges in analytics. Upskill teams in **AI, data science, and hybrid methodologies** to stay relevant. Invest in training programs and hire talent that blends technical prowess with business acumen.

The Bottom Line

This isn't about survival-it's about dominance. Leaders will:

1. **Acquire or merge** to bolster tech and client depth.
2. **Embed AI/automation** to deliver faster, smarter insights.
3. **Pivot to client-centric, diversified offerings** that prove tangible value.
4. **Optimize operations** to thrive in a budget-squeezed market.
5. **Build future-ready teams** equipped for hybrid roles.

The industry's tectonic plates are shifting. Agility, innovation, and strategic boldness separate winners from the obsolete. The time to act is *now*.

ACKNOWLEDGEMENTS

VISIT
WWW.GREENBOOK.ORG/GRIT

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With over 20 years of high-visibility leadership roles in the Market Research industry, Leonard "Lenny" Murphy is widely considered one of the most influential insights & analytics industry thought leaders and advisors in the world. As the CEO of several successful companies, most notably full-service agency Rockhopper Research, tech-driven start-up BrandScan360, CSO of data-privacy platform Veriglif, Board Member at Savio RXC, and Founding Partner of strategic consultancy Gen2 Advisors, his experience is vast and sought after. In 2010, he leveraged that experience into building the world's leading platform for content and marketing support for the research industry as Chief Advisor for Insights and Development at Greenbook.

Lukas Pospichal – Greenbook
Lukas leads Greenbook toward its goal of providing insights professionals with engaging, useful, and forward-looking resources. During Lukas's tenure as managing director, Greenbook transformed from its origins as a business directory into a leading marketing, content, and community platform that serves the global insights industry. Lukas received his graduate degree in management from the University of Economics in Prague and he also completed a marketing program at HEC in Paris.

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Jasmine has specialized in integrated marketing, brand strategy, and content development for more than 10 years. She is passionate about telling compelling stories fueled by extensive research that uncovers the needs, interests, and complexities of diverse audiences. She has worked in a variety of specialties in B2B and B2C marketing (including entertainment, med-tech, higher education, and now - market research), obtaining an MA in New Media & Journalism.

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Dana is responsible for Greenbook's client relationships and revenue across all lines of business. He's been a research practitioner, speaker, marketer, and business developer for companies like Greenfield Online, Research Now, and Survey Analytics. He studied Psychology at Bowdoin College, and he works from home just outside Portland, Maine.works from home just outside Portland, Maine.

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Nancy brings over two decades of experience to her role as a dedicated member of the Greenbook team. With a keen eye for detail, she delves into every aspect of the Greenbook Directory and the GRIT Report. When not immersed in her work for AMA New York or Greenbook, you'll find Nancy fully embracing her dog mom era.
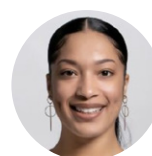
Mariah Read – Greenbook
Mariah Read is a Business Development Manager at Greenbook, where she is responsible for identifying new opportunities and driving revenue growth. She has a background in the market research industry from her previous roles at Veridata Insights and Offerwise, where she focused on data collection with niche and diverse audiences. Mariah works remotely from Charleston, South Carolina, and, in her free time, she enjoys spending time at the beach.

RESEARCH AND PRODUCTION PARTNERS

Idea Highway

Idea Highway is a strategic design studio with offices in Bucharest, Romania and Lisbon, Portugal.

Displayr

Displayr is the AI-powered platform built for market researchers who need to move fast without compromising quality. It combines data, analysis, visualization, and reporting in one end-to-end tool—eliminating manual grunt work and accelerating insight. Trusted by insights teams in over 80 countries, Displayr streamlines reporting and helps uncover what truly matters.

Forsta

Forsta powers the HX (Human Experience) Platform – a comprehensive experience and research technology platform that breaks down the silos between CX (Customer Experience), Employee Experience (EX), and Market Research – so that companies can get a deeper, more complete understanding of their audiences. Forsta's technology, combined with its team of expert consultants, helps thousands of organizations across a variety of industries. Forsta is recognized as a Leader in the 2024 Gartner® Magic Quadrant™ for Voice of the Customer.

Gen2 Advisors

Gen2 Advisors constantly scan and track ways to manage insights, keep up with the latest tools and technology, and predict the impact of all this information on the future before it's here. Through syndicated reports, advisory services, and consulting engagements, we present emerging management, applications, and technology in a systematic overview, and tell you how to apply it to your individual business.

NewtonX

NewtonX is the research and insights platform that empowers businesses to solve their toughest challenges with confidence. Trusted by Fortune 500 companies, NewtonX provides custom-recruited experts, tailored surveys, and in-depth interviews with end-to-end research support.

Q Research Software

Q is for the analysis and reporting of survey data. It radically improves user efficiency via task automation and intuitive user interfaces, coupled with the latest analysis techniques.

COMMENTARY PROVIDERS

BoltChatAI

BoltChatAI is a fully automated, AI-moderated research platform that enables businesses to engage hundreds of participants across multiple markets and languages globally.

Through AI-led moderation and real-time smart probing, BoltChatAI challenges assumptions, reveals hidden insights and avoids predictable answers. It revolutionizes traditional market research methods by delivering a deeper understanding of mindsets and behaviors...with the speed, depth and scalability required by today's fast-moving global businesses.

Borderless Access Panels

Borderless Access empowers brands with validated, high-impact customer insights through digital-first research solutions. With 16 years of experience serving Fortune 100 companies and global clients, we deliver qualitative and quantitative intelligence using proprietary AI-ML frameworks and rigorous fraud detection. Our expertise spans industries, offering competitive intelligence, niche audience access, and advanced analytics. Trusted by MR firms, consultancies, and enterprises alike, we connect businesses to real customer voices, driving informed decisions and measurable outcomes.

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Dynata

Dynata is uniquely equipped to deliver the high-quality data you need to power informed decision-making With the industry's largest first-party panel of more than 70 million people, Dynata combines unmatched respondent access, an unrivalled approach to delivering the highest quality data available in our industry, and end-to-end solutions to support your projects at every stage. Trusted by over 80% of the Fortune 500, including top companies like Google, Meta, McKinsey, P&G, Starbucks, and WSJ, Dynata is the most reliable partner for first-party data, media measurement, and activation solutions.

Fuel Cycle

Fuel Cycle accelerates decision intelligence for legendary brands by enabling organizations to capture, analyze, and act on insights required to launch new products, acquire customers, and sustain growth. By leveraging the Research Engine, brands forge connections with their key audiences and harness actionable insights that drive confident business decisions.

Our technology enables decision-makers to maintain constant connections with their customers, prospects, and users to uncover real-world actionable intelligence and insights. By integrating human insight with critical business data, and through automated quantitative and qualitative research solutions, the Fuel Cycle Research Engine powers product innovation, brand durability and sustainable growth.

COMMENTARY PROVIDERS

HUMAN8

Human8

We're next-generation marketing consultants, helping brands uncover what matters. Powered by bold thinking, communities and AI, we supercharge brands and spark action.

Human8 is the coming-together of 10 game-changing agencies from around the world: InSites Consulting, Direction First, Columinate, eÿeka, Join the Dots, ABN Impact, Answer Global, Space Doctors, Gongos, and Happy Thinking People.

We unite a creative, smart and ambitious group of 700 people across 23 locations under one vision: making brands more human by better understanding people and culture, empowering brands to take action, and enhancing the lives of the people they serve.

NewtonX

NewtonX

NewtonX is the research and insights platform that empowers businesses to solve their toughest challenges with confidence. Trusted by Fortune 500 companies, NewtonX provides custom-recruited experts, tailored surveys, and in-depth interviews with end-to-end research support.

Numerator Verified Voices

Numerator

Numerator is a data and tech company bringing speed and scale to market research. Numerator blends first-party data from over 1 million US households with advanced technology to provide 360-degree consumer understanding for the market research industry that has been slow to change. Headquartered in Chicago, IL, Numerator has 5,800 employees worldwide; 80 of the top 100 CPG brands' manufacturers are Numerator clients.

Oaklins DESILVA+PHILLIPS

Oaklins DeSilva+Phillips

Oaklins DeSilva+Phillips is an investment bank for clients that operate at the intersection of content, technology, and services. This includes enterprises operating within the media, advertising & marketing, education, healthcare, information services, and technology sectors.

Ola Surveys

Ola Surveys believes that better data leads to more profitable insights. With our ID-verified Survey Diem survey app, we are leading the way in harnessing technology and community engagement practices to cultivate insights from US consumers of all types. We're passionate about data quality and impact. Join us to transform the market research ecosystem today!

Qualtrics | EDGE

Qualtrics Edge

Qualtrics Edge helps companies make the right call through insights subscriptions and bespoke engagements. We empower you with insights to make confident and intelligent decisions. Our industry-leading research expertise, run on a world-class experience platform, enhanced with unique data, leads to faster, richer, and more reliable outcomes.

COMMENTARY PROVIDERS

recollective

Recollective

Recollective is the leading guided discovery platform with a simple mission: to help global brands and agencies bring the research they imagine, at any scale or duration, to life faster than ever. The broadly featured and robust qualitative and insight community platform covers everything from participant engagement and onboarding to asynchronous and live qualitative activities and AI-powered analysis.

Suzy

Suzy

Smarter insights, faster decisions. With Suzy's AI-powered, connected research platform, test more and guess less. In other words: assume nothing.

teenvoice™

TeenVoice

TeenVoice is reinventing how the research industry hears from Gen Z. Through our teen-powered insights platform and EvolveMe community, we engage real teens in real time— gathering dynamic perspectives on brands, culture, media, and the future. With tools built for teens, not retrofitted from adult-focused platforms and traditional panels, our surveys, syndicated reports, and custom research unlock deeper, more authentic understanding of this influential generation.

toluna

Toluna

Toluna is a leading global research and insights provider that empowers clients to make smarter data-driven decisions. For 25 years, we've partnered with our clients to deliver greater business impact through our advanced platform, end-to-end solution portfolio, deep industry expertise, and expansive global first-party panel. With over 40 offices across the globe, we deliver research in 70+ countries to the world's leading brands.

That concludes episode #34. "The GRIT Report" will be back.

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