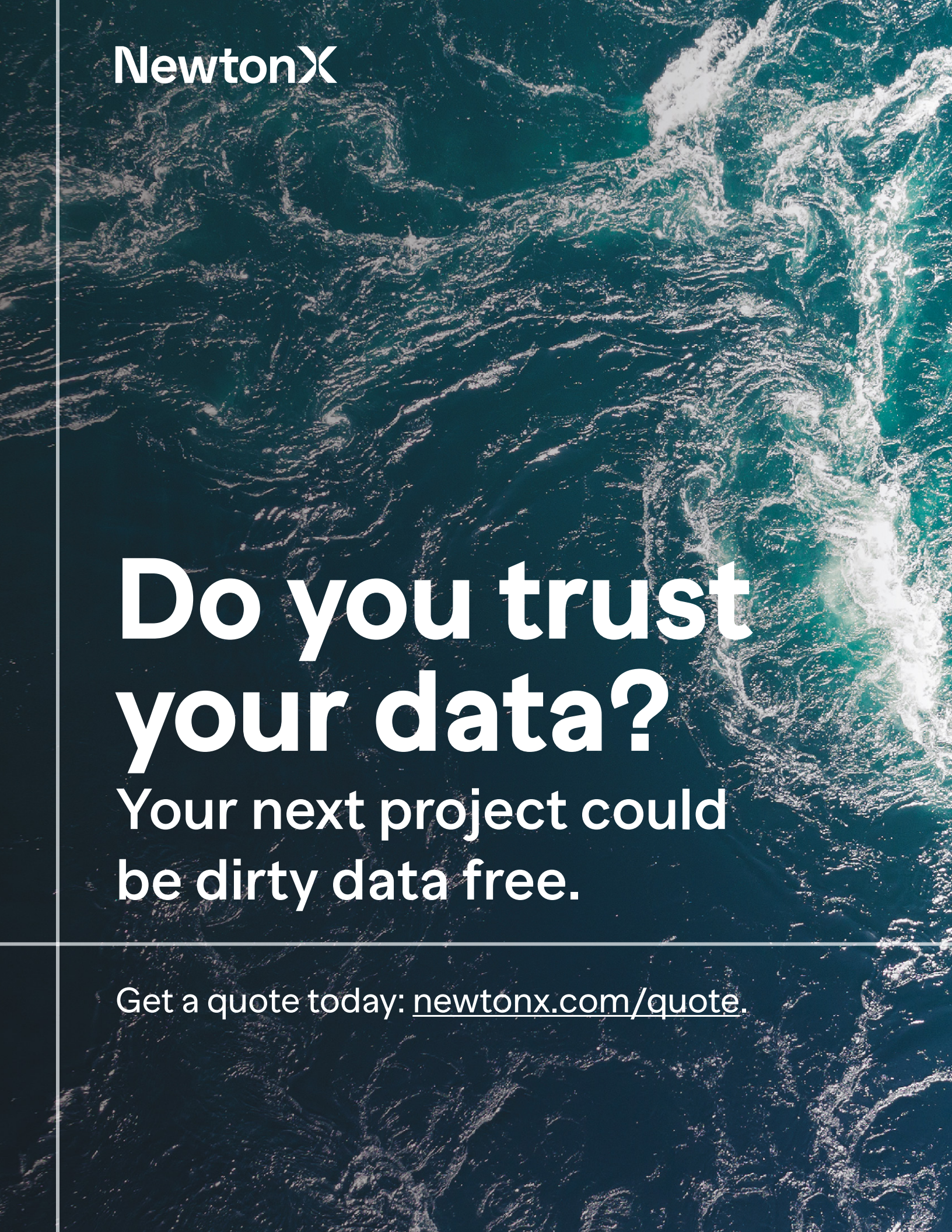
Greenbook

REPORT

2024 GRIT Insights Practice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FOREWORD

Welcome to the 32nd edition of the *Greenbook Research Industry Trends Report,* using data collected in Q4 of 2023. This edition is the annual *Insights Practice Report;* we dive in to the "nuts and bolts" of the industry, with a focus on understanding the fundamentals of how the industry is changing, why it is, and who it is impacting. However, we also think this one is very special, for a few reasons.

First, for the first time, GRIT examines two kinds of buyer-side insights professionals, one that focuses more on primary research and one that focuses more on data and analytics. Each emphasizes different kinds of research, works with suppliers differently, and has different expectations for how they will leverage AI. This is a whole new category of buyer (i.e., "brand" or "client") that has largely been disconnected from and not understood by the traditional industry, but we have reached them and profiled them deeply, giving clear direction for this rich new expansion of the insights and analytics industry stakeholder ecosystem. The entire report looks at differences between these two segments.

Secondly, we know sample quality is a big deal, but what are buyers doing about it? In this edition we discover that buyers are taking serious steps to address sample quality and availability, and detail what those steps are. This is critical for suppliers to understand so they can adapt to these changing behaviors.

Next, we have been tracking how technology is impacting how both buyer and supplier staff spend their time, allocate resources, and prioritize tasks. Then came AI, introducing a whole new set of potential disruptions. How is that playing out? We have the answer.

Speaking of AI, exactly how and why are insights and analytics organizations utilizing it? Is there a difference by segment or role? What does the future seem to hold as this technology matures and is adopted widely, and what does that mean for your organization? We dive deep to provide clarity.

Finally, what methods are being used (and by whom), where is there room to grow for emerging ones and which standard toolbox approaches may be declining? This is one of the hallmarks of the *Insights Practice Report* and we have expanded our discussion to explore these issues from many angles. Most importantly, we have identified that when selecting methodologies, minimizing total cost and time to results can be top priorities, but those concerns may be moot if results cannot be interpreted and communicated easily. That is a new prioritization on the "cheaper, faster, better" trope, and it has significant implications for research and technology suppliers.

We've revamped the design with a focus on readability and clarity, we dive deep in every section to look at all questions through our segmentation schema, and as always our focus is not just communicating the findings, but giving you our perspective on implications and recommendations.

No matter your role or experience level, there is sure to be something of importance to you in this report. Remember: you don't have to read it cover-to-cover. Although each topic is related to others, the sections stand alone.

Although we continue to insource much of GRIT production (the vast majority of the design and analysis is now done only 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 Forsta, Gen2 Advisors, Idea Highway, NewtonX, Q Research Software and Yabble. As always, without their generous contributions of time, energy, and expertise we simply wouldn't be able produce this report.

Enjoy!

Leonard F. Murphy

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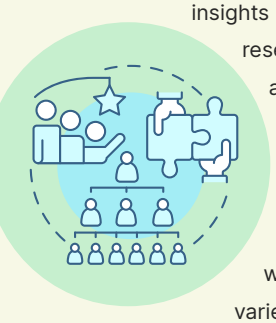
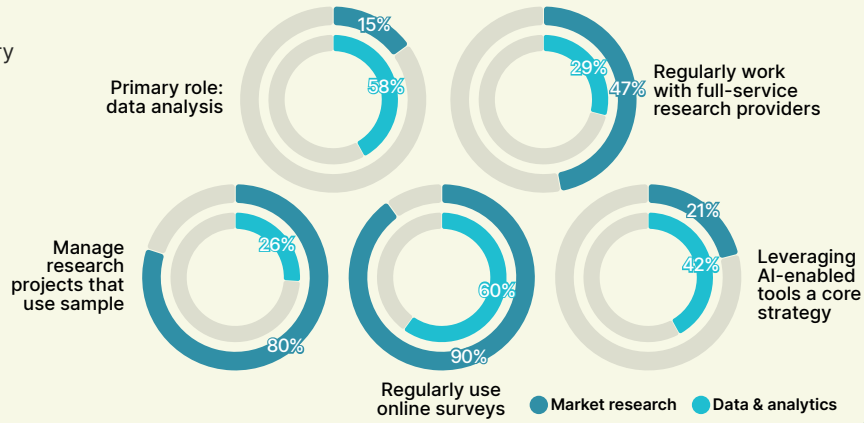
2024 GRIT INSIGHTS PRACTICE REPORT

EXECUTIVE HIGHLIGHTS

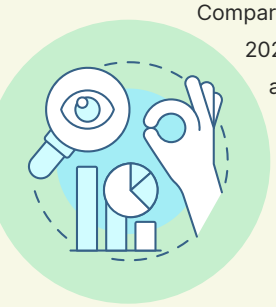
GRIT EXAMINES TWO KINDS OF BUYER-SIDE INSIGHTS PROFESSIONAL



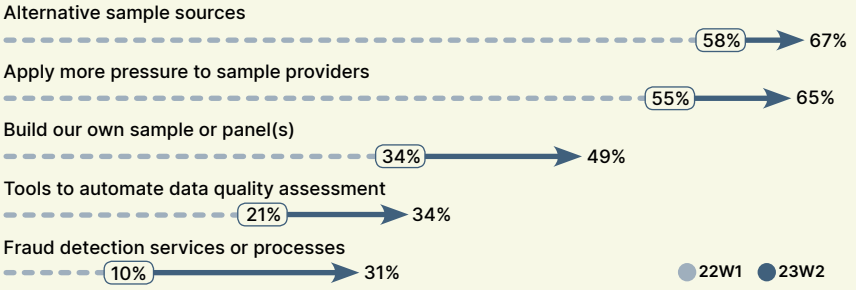
For the first time, GRIT examines two kinds of buyer-side insights professional, one that focuses more on primary research and one that focuses more on data and analytics. Each emphasizes different kinds of research, works with suppliers differently, and has different expectations for how they will leverage AI. They are not completely independent of each other, and the extent to which they collaborate with each other likely varies from company to company.



BUYERS ARE ADDRESSING SAMPLE QUALITY MORE AGGRESSIVELY



Compared to the last GRIT benchmark in 2022, buyers are taking more steps to address sample quality and availability, especially building their own sample or panels, investing in fraud detection processes and services, and automating quality assessment.



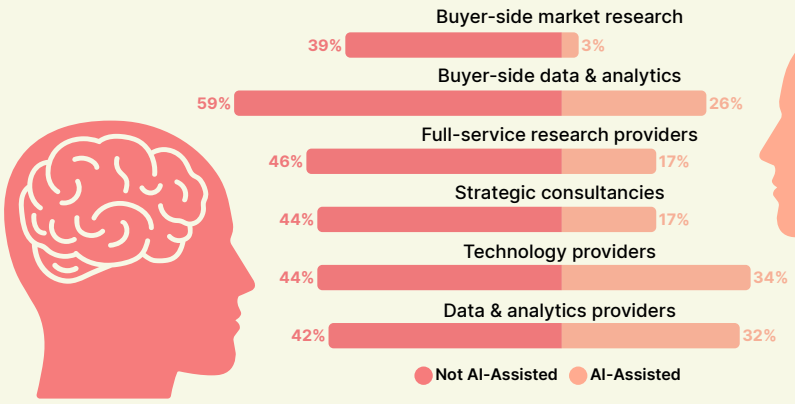
IS TIME SPENT "IN THE BUSINESS" VERSUS "ON THE BUSINESS" OPTIMAL?

Industry segments differ by purpose and how they structure staff, and how they allocate time across activities differs accordingly. Processing and analyzing data is fundamental to any kind of insights work, but how much time the average professional spends working "in the business" versus "on the business" varies. Are these allocations optimal?

SPEND AT LEAST 10% OF TIME

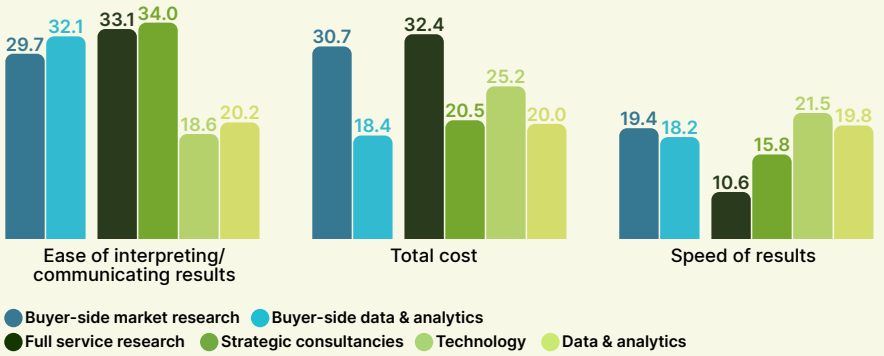
	Buyer Segment		Supplier Type			
	Market research	Data & analytics	Full-service research	Strategic consultancies	Technology	Data & analytics
"In the Business"						
Analyzing/processing data	73%	71%	60%	52%	73%	72%
Managing research projects	72%	32%	59%	59%	49%	61%
Consulting on business implications	67%	65%	56%	70%	62%	64%
"On the Business"						
Business/operations planning	39%	64%	54%	53%	76%	68%
Managing or developing staff	43%	84%	57%	57%	79%	49%

AUTOMATION IN REPORT WRITING IS COMMON; USE OF AI VARIES



Report writing is one of the more controversial applications of Generative AI, and insights professionals who are more inclined toward analytics and technology are more likely to embrace it. Is their higher acceptance a function of individual background and experience or differences across the types of reports they write?

METHODOLOGIES MUST MAKE IT EASY TO COMMUNICATE RESULTS



When selecting methodologies, minimizing total cost and time to results can be top priorities, but those concerns may be moot if results cannot be interpreted and communicated easily.

MARKETPLACES ARE IN VOGUE; SYNTHETIC SAMPLE CAPTURES IMAGINATION

		Marketplaces	Synthetic sample	Sensory research or testing	Big Data analytics	Chatbots
Buyer Segment	Market research	↑				
	Data & analytics	↑	↑↑↑	↑		
Supplier Type	Full-service research	↑↑	↑	↓		
	Field services	↑		↑↑	↑	↑
	Qualitative research	↑↑	↑↑	↑	↑	↑
	Strategic consultants	↑	↑			
	Technology		↑	↑	↑↑	
	Data & analytics	↑↑	↑			↑

Use of marketplaces (for sample, talent, software, etc.) increased in every segment except technology, where they were already common. GRIT didn't measure synthetic sample last year, but it's quickly gaining attention if we assume no or low use previously. Today's qualitative research providers seem to be expanding their repertoires.

INDUSTRY BUZZ TOPICS

Buzz topics are too numerous to list, but, in terms of themes, AI overshadows them all, and combinations of methodologies, analytics, and automation turbo-charge conversations about qualitative research, survey research, data quality, and privacy.

OVERVIEW

Somewhere between the full daylight of ongoing conversations and the flashes of off-hand remarks, "buzz topics" wax and wane. These are the burning issues that could become bonfires that blaze all night, forest fires that rage for weeks, or, occasionally, eternal flames. They could also flicker, fade, and extinguish and may or may not smolder for a while or eventually reignite.

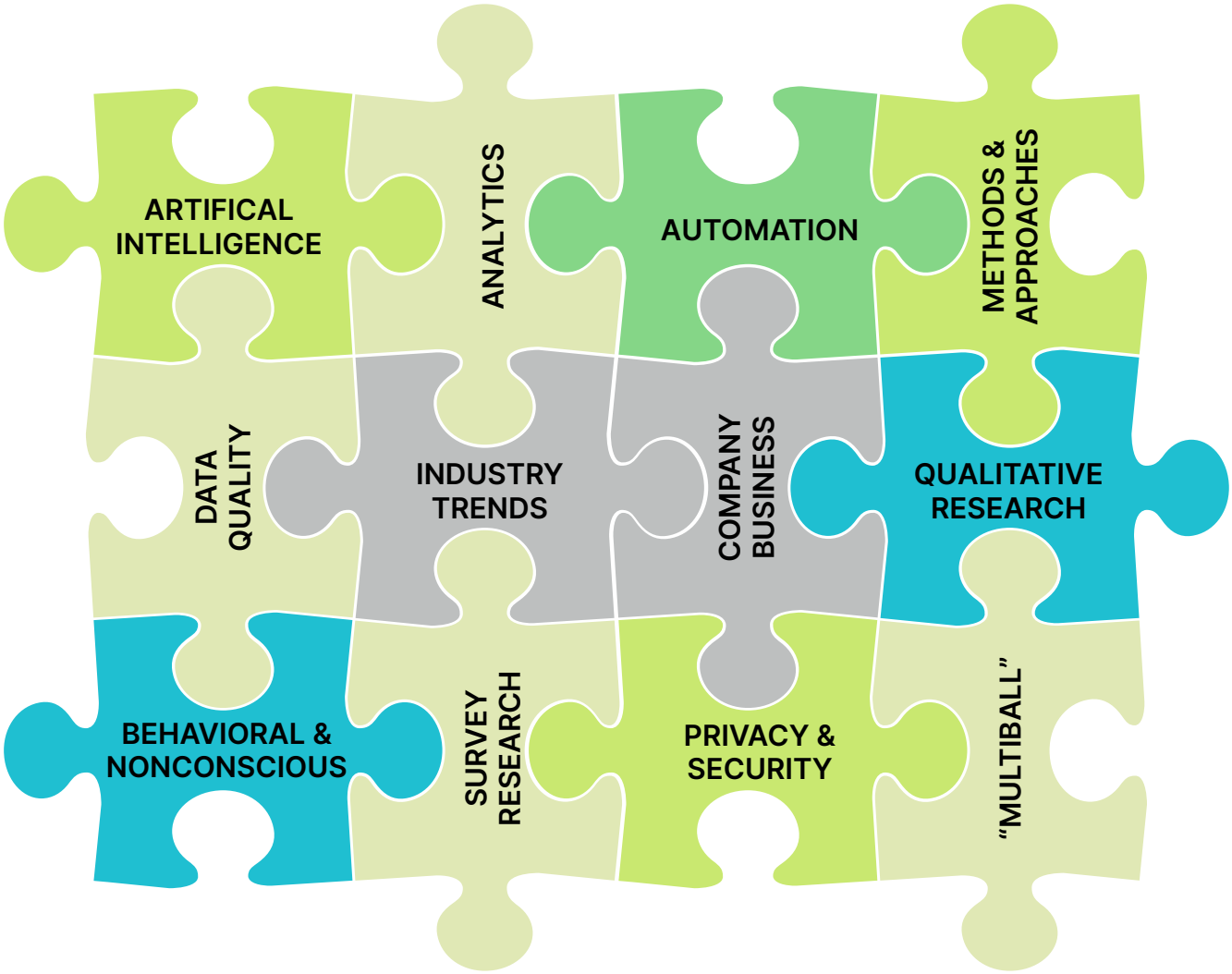
AI, ChatGPT, data quality, analytics, and automation are not buzz topics; they more like weeks-long forest fires. Everybody's talking about them – or would be if they weren't already burned out on them.

GRIT has reported buzz topics since 2016, originally probing with a list we brainstormed, but deciding later that if we knew about them already, they weren't really "buzz topics." Currently, we ask GRIT participants to tell us which topics they follow most closely related to insights, research, or analytics. Granted, that doesn't mean they actually *talk* about them, but it's close enough for our purposes.

Currently, the topics that insights professionals follow closely are generally driven by twelve overlapping themes. Two of these apply to pretty much everyone: industry trends and your company's business. For example, someone working for a construction equipment manufacturer is likely to follow competitor actions, new technology that can be applied to product updates, housing or commercial real estate trends, and so on. They'd also be likely to pay close attention to company issues, such as what management and their peers are doing.

These two themes might give rise to buzz within the construction equipment industry or within their company, but they are not the source of buzz topics for the insights, analytics, and research industry. However, their industry and company realities drive how they think about, manage, and execute the work of insights. In our context, industry trends and company business might be "eternal flames."

TOPICS MOST CLOSELY FOLLOW RELATED TO INSIGHTS, RESEARCH, & ANALYTICS: MAJOR THEMES



Four themes are in the "weeks-long forest fire" category, drawing so much attention you might forget that they were not always so top-of-mind for so many while burning so brightly they change how you perceive lesser lights. These are insights methodologies and approaches; automation, tools, and platforms; general and applied analytics; and, of course, artificial intelligence. They are so highly interconnected that it's hard to identify buzz topics that only apply to one and only one of these themes.

Six others are more similar to "all-night bonfires," at least at the moment, and the most prominent of these are data quality and qualitative research. Especially due to the opportunities and challenges posed by developments in AI, automation, methodologies, and analytics, challenges in data quality and opportunities for qualitative research are top-of-mind for more people than ever, it seems, and more meaningful.

Data privacy and security might be another theme that burns all night and spreads. It's a concern – or set of concerns – with far-reaching impact and implications, but relatively localized to particular situations and embraces a more limited set of topics than data quality or qualitative research. Failures in privacy protection or security lapses are powerful enough to bring down entire businesses, but the breadth of the topic is narrower than for the six themes mentioned earlier.

Survey research is another theme that touches a wide swath of the insights industry, but the issues insights professionals follow closely are on the less seismic end of the spectrum. Behavioral and nonconscious research are top-of-mind for many, but the people who follow them closely might not group them into a theme the way we have. GRIT sees these as linked together by analysis of observed behavior, but interests range from biometric studies of individual research participants to web or purchase analytics to macroeconomic research.

What trends will define the years ahead? If we look back through GRIT over time, we see a clear through-line; it's all about technology, especially the transition from mechanical to AI-enabled automation. Inherently, that is how a service-based and process-driven industry is coming to grips with becoming a technology-based and outcomes-driven industry. There remains significant tension in this transformation, but it is inexorable and the scope of buzz topics we find here shows that industry stakeholders continue to pay attention to the signs ahead on the journey. – LM, ed.

Last but not least, many insights professionals closely follow a topic we refer to as "multiball," that thrilling moment when you can really run up the score because multiple balls are in play at once. In pinball, when you achieve a certain score or milestone, more balls are released, enabling you to accelerate your scoring according to how well you manage multiple balls as once. Many insights professionals are learning how to generate more powerful insights by simultaneously managing datasets, disciplines, and perspectives which may have been completely discrete until they put them together.

In a way, "multiball" summarizes the entire set of major themes. The themes are highly interconnected, and the real buzz topics emerge at the intersections.

Analytics, automation, and AI are buzzwords. Artificial intelligence, data quality, and qualitative research are buzz phrases. Protecting data quality by neutralizing AI-enabled bots is a buzz topic. AI-powered tools to analyze qualitative research is a buzz topic. Elevating respondent quality by improving the survey experience is a buzz topic. There are too many potential buzz topics to discuss them all in this section, so we'll focus on some of the ones that stood out most prominently to us.

THE BIG PICTURE

The industry is ablaze with buzz topics. Most of them include AI, and many of them include some combination of methodologies, analytics, and automation. If there is a common goal of these discussions, it's efficiency. Enabling and augmenting capabilities are important, as well as improving the impact of insights, but the need to do more faster is a constant companion.

Data quality is a top-of-mind concern, and privacy and security are, too, for those closest to them. In both cases, AI can be a problem and a solution. We didn't hear much concern about data quality that didn't involve sample or respondent quality, but that doesn't mean there are not issues; it just means that sample and respondent quality need more unusual attention than other kinds of data.

GRIT discussed qualitative research as a buzz topic in the last *Insights Practice Report*, and it is prominent again as the GenAI pandemic spreads. If AI has a lead benefit, it's making people imagine possibilities, and qualitative research has that in spades (a bridge idiom). Benefits include integrating it with quantitative data, more efficient and insightful (in theory) analysis of verbal/text data, and expanding the traditional understanding of qualitative to include video, image, and other kinds of non-text data. As you'll see in the various methodology sections of this report, qualitative research is breaking free of focus groups and IDIs to include more kinds of data sources.

Behavioral and nonconscious research and survey research are important themes, but we think multiball is the most important source of buzz topics. Integrating data, disciplines, and internal functions will launch the value of insights into the stratosphere. A subtle undercurrent is knowledge management, which AI can revolutionize. We know this sounds like a "duh" or "no duh" observation, but those who grasp AI's ability to synthesize different sources of information and deal with huge volumes and complexity quickly are looking beyond the stratosphere.

However, vision is not the barrier to achieving this success. Silos and their consequent lack of collaboration are, plus loud people who embrace AI because they are bored, lazy, or lack NI (natural intelligence). If the industry pays attention to those who are drunk on AI, it is doomed. If the industry soberly applies AI to the buzz topics discussed in this section and reads the rest of the report, the sky isn't the limit. No one knows the limit

You can complain about the use of the term "insights," but does it really confuse you more than it annoys you?

Vision is not the barrier to achieving this success. Silos and their consequent lack of collaboration are.

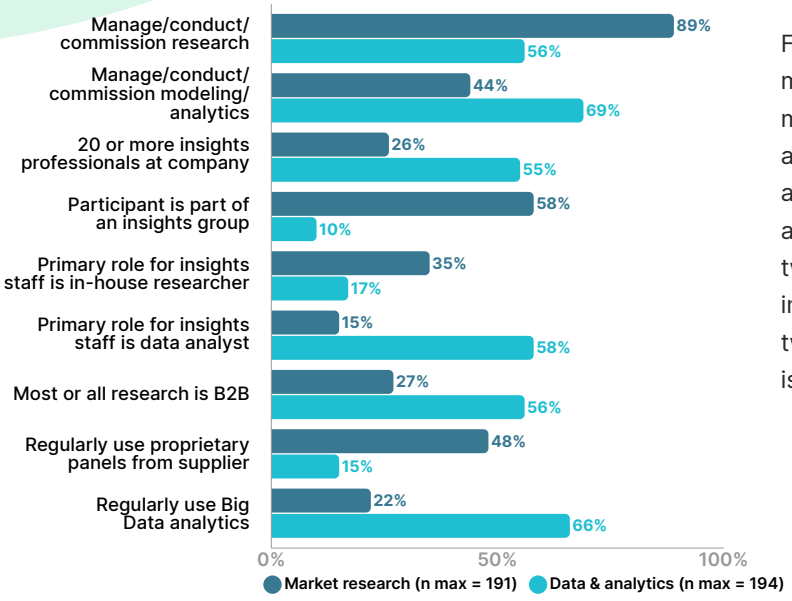
ROLES OF INSIGHTS PROFESSIONALS

GRIT casts as wider net across the buyer side of the insights industry and compares two major segments: those focused on primary market research and those focused on data and analytics. "How much do they compete and how much do they collaborate" is a question for all insights professionals to contemplate.

OVERVIEW

Since 2019, GRIT has tracked five potential buyer-side roles: strategic insights consultant, Voice of the Customer (or Consumer), in-house researcher, data analyst, and research outsourcer. However, having cast a wider net for buyers (see *Design, Methodology, and Sample)*, we've applied these roles and other data to identify two major segments: those who are more focused on market research and others who focus more on data and analytics.

KEY DEFINING CHARACTERISTICS OF NEW GRIT SEGMENTS (BUYER)



The "research" segment is more than twice as likely to manage research as to manage modeling and analytics and to say that the primary role for insights professionals at their organization is in-house researcher rather than data analyst. The most likely activity for the "analytics" segment is to manage analytics and modeling, but most of them also manage research. They are more than three times as likely to name data analysis as in-house research for their insights professionals' primary role. Each segment clearly has its own focus.

For example, the research segment is much more likely to conduct online surveys (although most in both segments do) while three times as many in the analytics segment use Big Data analytics regularly. Their work environments and market focus are also different: more than twice as many in analytics have 20 or more insights professionals on staff, and they are twice as likely to say that most of their research is B2B.

Expanding GRIT's scope to cover both segments creates challenges in reporting, as you will see. GRIT has always primarily been an industry tracking report, but the analytics segment is so different that we can't track it against most data we've reported before. The research segment is compatible with past waves, but not completely because we have not removed the analytics segment from older data.

If such an activity were feasible, we might be able to "purify" research segments from past waves, but there would not be very much in the analytics segment to analyze. So, we are going to leave older GRIT waves alone, label them as "aggregate," and compare them to the market research segment.

For the last *Insights Practice* report, we partnered with NewtonX and followed the same recruiting process as for this wave. As we did this year, we found that what was intended to be "supplementary data" was actually "complementary" instead, i.e. untrackable, so we did not include it in that report. It would have a required a restructuring of the report that we were not prepared to make because of timing and, mostly, because we wanted to be certain about what it meant.

We attempt that restructuring in this report, and it should facilitate matters if we use the complete set of data from last year so that we can at least have one wave of tracking for each segment. We have retrofitted last year's data to approximate the segmentation of the current dataset so we can compare them. Just keep in mind 1) we can't exactly replicate the new segments in last year's data because we asked some questions differently and 2) neither of the two segments exactly match the aggregate buyer data that has been reported earlier.

Democratization of insights is spreading throughout our industry, which also means the industry is increasingly fragmented. The size of the industry is increasing and use cases are increasing as a result, but how is that shaking out? We see a familiar theme here of a shift from prioritizing process to prioritizing outcomes in the expanding roles of key buyer stakeholder groups. It's not just that organizational structures are changing; roles, responsibilities and focus areas are diverging significantly. – LM, ed.

THE BIG PICTURE

To supplement buyer sample for last year's *Insights Practice Report*, GRIT worked with NewtonX to recruit additional participants. Although the screening process was exactly the same as for other buyer participants, the "supplemental" responses were so different that we could not aggregate them with the other sample and needed more time to mull over the implications.

When we were preparing the *Unmet Needs* section of the most recent *GRIT Business & Innovation Report*, we were struck by how some participants on the buyer side remarked on data and insights silos within their organizations, how these silos could produce conflicting views of reality, and how they might compete with each other for attention and resources. Of course, these responses were in the context of "unmet needs" rather than "success stories," so we did not hear much about situations in which these different perspectives worked together for the greater good.

In part motivated by this insight, GRIT committed to exploring these different realms within the next *Insights Practice Report,* understanding the additional buyer sample to be "complementary" rather than "supplementary." In this section, we've discussed the different roles two buyer-side segments play within their organizations, and we continue to compare them throughout this report. The segments have some roles in common, suggesting that they might be collaborative, but we've also commented on some warning signs of disconnects.

Although one segment focuses more on primary market research and the other focuses on data and analytics, data analysis is the most prominent role in both segments and has been growing, even in the market research segment. Year after year, the *GRIT Insights Practice Report* shows us that analytics is a significant if not primary area for tech investment and that data integration and use of multiple data sources are top-of-mind practices for most insights professionals. Expertise in data and analytics may be the domain of one segment, but the application of them to business challenges is a current that charges both.

These segments represent two major roles that insights professionals play in their organizations, and currently they do not appear to be easily defined by formal structures. Analytics is a key discipline for market research insights, marketing, R&D, product development, executive management, and just about anything else you can name. GRIT data suggest that these functional areas are being redefined and reorganized to best leverage expertise in data and analytics.

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SCOPE OF INSIGHTS IMPACT

Buyer-side insights professionals overall describe their functions as contributing to almost every type of insights work, but the market research and data and analytics segments appear much more targeted regarding areas they lead and directly impact. Even given the tendencies within each segment, buyer-side organizations are very diverse regarding the scope of their insights functions.

OVERVIEW

Related to the *Roles of Insights Professionals* section, GRIT has tracked how much of a leadership role insights professionals take in various research and analytics areas. As we look at the scope of their leadership and contributions, we also look at where in their organization they have the most direct impact.

The theme that pops out most frequently is that there is no rulebook for how insights impact an organization. The market research segment contributes to an average of 9.2 of the twelve areas tested, and the data and analytics segment contributes to 9.8. Most in each segment contribute to all twelve areas, so from a high level it doesn't look like either has a lot of structure to how they contribute other than to go where needed.

Even though 30% more in analytics contribute to Big Data analytics, 62% of the research segment contributes to it, too.

Focusing on just the top five areas to which each segment contributes, three of the top five overlap – consumer market insights, competitive intelligence, and business intelligence – and each includes at least 84% of each segment. The two areas in the top five for research that are not in the top five for analytics – customer experience and product development – do not differ by more than 6% across segments and at least 85% in each segment makes contributions to them.

The two top five areas with the largest cross-segment differences favor data and analytics: Big Data analytics (+30%) and Data Science (+17%). However, even though there is a 30% gap between segments for Big Data, 62% of the research segment contributes to it. Apparently, research and analytics contribute to every type of insights work and most companies need both for almost everything.

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

	Market research	Data & analytics	Research – Analytics
Consumer market insights	92%	87%	+5%
Customer experience	91%	85%	+6%
Product development	89%	85%	+3%
Competitive intelligence	87%	90%	-4%
Business intelligence	84%	94%	-11%
Data Science	72%	89%	-17%
Big Data analytics	62%	92%	-30%
n =	190	194	

Green shading indicates top five areas led or contributed to by segment.

However, if we look only at the areas that insights professionals lead, a different picture emerges. Consumer market insights and competitive intelligence are still among the top five in each segment, but now consumer market insights favors research by 29% and CI favors data and analytics by 8%.

In the areas where the top five don't overlap, the gaps across segments can be large.

The research segment is twice as likely to lead advertising research as the analytics segment (+19%) and much more likely to lead shopper research (+12%). The analytics segment is much, much more likely to lead Big Data analytics (+30%), Data Science (+25%), and business intelligence (+24%). This view suggests that each segment has a very well-defined role in the corporate insights pageant.

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

	Market research	Data & analytics	Research – Analytics
Consumer market insights	70%	41%	+29%
Advertising research	37%	18%	+19%
Customer experience	34%	27%	+7%
Competitive intelligence	32%	40%	-8%
Shopper research	31%	19%	+12%
Business intelligence	26%	51%	-24%
Data Science	23%	48%	-25%
Big Data analytics	21%	52%	-30%
n =	190	194	

Green shading indicates top five areas led by segment.

We are unlikely to find any two insights organizations that are exactly alike.

However, this view also tells us we are unlikely to find any two insights organizations that are exactly alike. While we can be sure that those in the research segment are likely to lead consumer market insights, 30% of them don't, and that's the highest percentage of leadership for any area in either segment. No other area is led by more than 37% of the market research segment, meaning that areas of leadership differ greatly across organizations or there are a lot of buyer-side organizations for which the marker research segment doesn't lead anything.

In the data and analytics two areas are led by a majority – Big Data analytics (52%) and business intelligence (51%) – and one other is close (Data Science, 48%), but those are hardly decisive margins. In many organizations, data and analytics do not lead these areas or perhaps these areas don't exist at all for many buyer-side companies. Compared to the market research segment, the data and analytics segments may have more consistency across the industry, but it seems that buyer-side organizations differ in how they organize insights work at least as much as they are similar.

As the industry continues to shift, we capture how the who, what, when and how of the evolving role of insights & analytics professionals and functions is playing out. The topline is that a big bucket definition of "insights & analytics" plays an important, perhaps even a central, role in organizations. However, the subtext is that the variety of insights subsectors such as CX, CI, BI, UX, MR, etc… are all over the place. It's a messy Venn diagram of specialization, and perhaps that is to be expected in the era of AI as the synthesis engine, with each specialty area feeding the LLMs. – LM, ed.

TOMORROW'S BUSINESS TODAY WITH AN INTELLIGENT DATA STRATEGY

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Insights professionals wield significant influence over their organization's future. Understanding brand dynamics, customer satisfaction, and product development is vital. But in a rapidly evolving landscape, how can the insights you're delivering be leveraged alongside advancing and emerging technology to ensure lasting impact and business resilience? It's crucial to avoid data fragmentation and dependency on third-party sources of aggregated data. Essentially, to truly harness the potential of information, ownership of data is key.

Imagine having complete control over your data, from collection to analysis. This level of ownership empowers your adaptation to evolving business needs and the integration of emerging technologies like AI. Whether you choose to conduct research in-house or collaborate with external experts, having a centralized repository of data facilitates seamless collaboration and knowledge transfer. Crucially, consolidating and managing your data in-house both ensures flexibility and also sets the stage for future innovations.

To get it right, choosing the right technology platform is crucial. It should offer flexibility for in-house use or seamless collaboration with external partners. More importantly, it should facilitate easy access and manipulation of data, as well as innovative ways to report, drive insights, and inform decision-making across your organization.

However, ownership isn't just about control; it's about future readiness. As AI integration grows, high-quality, accessible data becomes essential. Owning your data positions you at the forefront of innovation, ready to train AI models and seize new opportunities. It streamlines processes, eliminating partner transitions and ensuring insights continuity.

Whether conducting research in-house or collaborating externally, a centralized data repository enables smooth collaboration and knowledge transfer. In today's complex business landscape, adaptability is paramount. Making sure you have an informed data strategy that emphasizes ownership, flexibility, and future-readiness enhances the impact of your insights and drives tangible business outcomes.

As you navigate shaping tomorrow's business, remember: Success lies in owning your data, crafting an agile strategy, and powering it with technology as forward-thinking as your organization.

THE BIG PICTURE

Insights professionals in both the market research and data and analytics segments contribute to a wide array of insights work, but they are much more focused in terms of areas they lead and have direct impact. However, while the market research segment may lean more strongly toward areas like consumer market insights and attitudes and opinions and the data and analytics segment may be clearly be more engaged with topics like Big Data analytics and business intelligence, there is a lot of diversity across buyer-side organizations regarding how these tendencies play out.

While acknowledging that the data and analytics segment is new to GRIT and we have only two years of data to compare, we suspect that the segment is becoming even more focused on core competencies and undergoing a lot of change. In *Roles of Insights Professionals*, we suggest that the ascendancy of Data Science as a discipline and its broad applicability to business issues is causing buyers to rethink whether it's better to centralize data and analytics or to embed them within functions such as marketing or product development.

The ascendancy of Data Science and its broad applicability is causing buyers to rethink whether to centralize data and analytics or to embed them within functions.

The market research side seems to be much more mature and less vulnerable to change, but that doesn't mean it's not changing. For example, it's less likely to directly impact product development, and that may be part of the same trend we suspect on the data and analytics side in which organizations seem to be reshuffling the decks across dedicated insights functions and embedded experts in business functions.

Of course, the market research segment might also be impacted by environmental changes such as the turbulence in offline shopping. That's another area that declined as an area of direct impact, but the decline may be due to environmental factors rather than pure shifts in strategy.

It's also interesting to see several indications that the market research segment is becoming more estranged from brand management. One hypothesis is that brand managers are turning to other sources of information, such as social media, but other hypotheses may also be worth considering.

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 even if it appears that the data and analytics segment is becoming less engaged with primary research.

Prelaunch.com

WHY INSIGHTS IMPROVE WHEN SURVEY RESPONDENTS PAY YOU

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Do you really trust survey responses?
We ran a study recently trying to compare all of the most popular survey tools and methodologies. What we found surprised us.

Identify Your Audience Before Your Launch
How do you gather insights about an innovative hardware product concept *before* the launch?

We wanted to understand who the product's ideal customer was, how much they were willing to pay, how they would use the product, and how they would improve it. And we needed to be sure the insights we gathered were trustworthy and valuable.

Paying $5 vs Charging $5
We gave the same instructions to each survey tool, identified similar niche audiences, and asked them the same questions.

The only difference was that while all survey platforms required us to pay respondents $5 to participate, on Prelaunch.com people paid us $5 to participate.

This $5 deposit 'reserves' respondents the right to purchase the product at launch and is the most reliable indicator of future purchase intent.

Valuable Responses Only Come From Those Who Understand the Value
All paid surveys followed a similar pattern. Respondents gave the bare minimum that was required of them — short, vanilla responses.

On Prelaunch.com, the opposite was true.

People had strong, varied opinions — going to great lengths to explain their needs in detail.

And while paid respondents rarely deviated from the mean — 55% chose neutral answers, only 7% chose extreme options — those who paid were more inclined to be themselves — with over 60% choosing either 'extremely important' or 'not important at all' — indicating more direct feedback and their investment in developing a better product.

Skin in the Game — the Prelaunch.com Framework
When respondents have skin in the game, they're incentivized to provide more detailed, personal, and insightful feedback.

When there's a clear link between the feedback they give and the quality of the product they'll soon own, why not make it as valuable as possible?

Using AI to Turn Qualitative Responses into Actionable Insights
This deposit is the first step to understanding customers. It validates customer responses and is also a great way to discover new audiences that brands weren't originally targeting.

Brands then use Prelaunch.com's AI to analyze and cluster thousands of responses, discovering hidden patterns and unexpected insights. And follow up with additional surveys, focus groups, and in-depth interviews — iterating through product development together with their customers to guarantee a successful product launch.

SAMPLE QUALITY & AVAILABILITY

GRIT takes its first detailed look at sample-related issues since early 2022, including opinions of the quality of different kinds of data, common sample-related problems, and steps each segment is taking to address these problems.

OVERVIEW

In 2022, the *GRIT Report* explored the burgeoning crisis in sample quality and availability and found that it was plaguing the industry, but not killing it. Many were taking steps such as building their own panels or investing in fraud detection to address multiple recurring problems and bolster confidence in primary research. Notably, 34% of buyer-side insights professionals said that sample-related issues led to a poor business decision *at least once* in the most recent six months.

Revisiting this issue, GRIT finds that insights professionals continue to step up their actions to address sample deficiencies, and they may be seeing better results. The percentage of buyer-side market researchers reporting poor business decisions due to sample issues has declined.

SAMPLE-RELATED PROBLEM OCCURRED MORE THAN ONCE IN P6M: GRIT SEGMENT

	Buyer (Research)	Buyer (Analytics)	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Fell short of planned sample size	48%	41%	46%	43%	40%	35%	62%	34%
Had to address doubts about quality	45%	53%	40%	62%	29%	43%	61%	50%
Did not get desired sample composition	44%	57%	47%	47%	20%	39%	40%	49%
Had serious doubts about research quality	44%	43%	39%	39%	23%	22%	57%	43%
Missed important deadlines	29%	30%	24%	31%	29%	16%	35%	26%
Made a poor business decision	9%	27%	7%	3%	5%	10%	17%	32%
Average number of types of problems	2.2	2.5	2.0	2.3	1.6	1.7	2.7	2.4
n =	79	48	98	25	16	25	17	27

Green indicates relatively higher percentage; red indicates relatively lower percentage. Color scale applies across segments.

CONTINUOUS IMPROVEMENT AND A HOLISTIC APPROACH TO DATA QUALITY

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Respondent-level fraud has become a massive issue in survey research, and the research here confirms that every part of the research ecosystem has serious concerns about it. Bad actors are actually building literal businesses based on fake responses for incentives through the use of bots, survey farms, and other illicit practices. Fraudulent data leads to incorrect insights, which leads to the loss of time, competitiveness, revenue, and reputation. Our industry has a vital need to detect and eliminate these respondents from the data, ideally before they have even entered the survey.

Not raised as clearly in this report is that respondent disengagement in surveys is an even bigger issue. Actual human respondents who are not intentionally trying to game the survey may be so poorly engaged that it reaches the point that their data should not be used. Respondents might be distracted, multitasking, or sick but sometimes the survey experience itself drives poor engagement. Badly written surveys, complicated design, a failure to optimize for mobile devices with their small screens, and overly long instruments are common causes. The challenge is determining where the line in the sand on engagement should be drawn and only removing respondents who are not providing sufficiently faithful responses.

To combat these concerns, it is vital to take a holistic approach to respondent data quality. For example, Dynata's solution includes using a machine learning tool of our own design to review all behavioral data available about our panelists - from signing up to the panel to taking surveys to receiving awards. The tool, QualityScore™ uses over 175 data points which are fed into our ML in real-time based on in-survey behaviors and passive data to provide a score that determines whether the survey being produced is valid for use. This includes the more typical checks like speeding, strange open-ends, and straight-lining, but also detects more nuanced behaviors such as slowing down and speeding up, unusual keyboard behaviors, illogical within survey behavior, the presence of cutting/pasting of text, and many others.

Fraudsters don't sit still and neither can our industry. That is why it is so important to have dynamic learning systems that continuously improve. By feeding new data into the models, we can refine their ability to identify high-quality respondents and adapt to evolving threats as fraudsters also evolve.

Data and analytics on buyer (27%) and supplier (32%) sides report more instances of poor business decisions related to sample, which may be a cause or an outcome of how much they use sample.

On the other hand, data and analytics professionals on the buyer (27%) and supplier (32%) sides report alarming frequencies of multiple poor business decisions related to sample, which may be a cause or an outcome of their relative lack of emphasis on sample-based research. It's lower in other segments, but one has to ask what frequency of poor business decisions is acceptable and wonder how many poor business decisions are made that *aren't* related to sample.

Falling short of the planned sample size and not achieving the desired sample composition are frequent problems, but one could argue that these may result from targets that are intentionally very aggressive. Note that qualitative research providers are least likely to miss on sample composition, and that's the segment that can least afford to fall short.

The need to address doubts occurs about as frequently as missing targets, and it might be surprising that addressing someone else's doubts about quality isn't close to 100%. After all, questioning research quality is part of the due diligence before accepting and acting on it.

More telling, however, is the frequency with which having your own doubts about research quality matches the need to address someone else's. In most segments, it's more common to have to address someone else's doubts than to harbor your own. However, among buyer-side market researchers and full-service research and technology providers, the frequency of doubt is nearly equal across the GRIT participant and others.

Keep in mind that these problems all concern sample. Sample quality and availability have huge impacts on the value of primary research and, consequently, faith in it.

Quality sample is the bedrock of good primary research, and insights pros continue to struggle and adapt to meet the demand. What does that mean for the industry? It's not an academic question. The old caveat of "garbage in, garbage out" has never been more timely than now when research data is an increasingly important source for AI training. It's debilitating enough when a project is infected by bad data, but its disease could be siloed and amplified. In the era of LLMs, such contamination could cripple foundational technology infrastructure. It's no wonder insights and analytics professionals of all types are exploring many different solutions; the stakes grow by the day and ensuring data quality is front and center as a priority. – LM, ed.

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THE BIG PICTURE

Insights professionals of all kinds continue to express concern about sample quality. While it is normal to have to address someone else's concerns about research quality related to sample, in some segments researchers have to confront their own doubts about research quality just as often. Although not the most common problem, it is eye-opening that just under one-third of the buyer-side and supplier-side data and analytics segments report that a poor business decision resulted *multiple times* in the past six months from sample-related problems.

Perhaps insights professionals in those segments have a higher threshold for quality or perhaps they are more detail-oriented than their peers in other segments and are more likely to notice problems. Either way, insights professionals are becoming more aggressive about addressing these sample concerns rather than backing away.

In both buyer segments, most are expending effort to make the most of existing solutions, either by looking for alternative sources or putting more pressure on their suppliers. However, more are taking control of their situation by building their own panels (up 17% among the market research segment) or investing in tools to automate data quality assessment (60% of the buyer-side data and analytics segment and a big increase on the market research side since 2022). Investment in fraud detection services or processes has tripled among market researchers since GRIT's last measurement.

Similar activity is taking place across supplier segments. Some seem to be looking to internal solutions (like building proprietary panels) while others seem to be going the opposite way and outsourcing, but most segments have increased their investment in fraud detection and are keeping up with or increasing investment in automating data quality assessment. If the industry is looking to technology providers for fraud detection and quality assessment solutions, it's reassuring to know that most technology providers are working on them now and many more than in 2022.

On the other hand, there are those who are paying more attention to methodologies that do not depend on sample, and these may include familiar alternatives like Big Data analytics or newer ones that make use of generative AI, such as synthetic sample. As in 2022, about one-in-six in the buyer-side market research segment are looking for non-sample alternatives, but twice as many are looking that way among their data and analytics counterparts.

We also see evidence of growing interest in non-sample alternatives among field services, technology, and data and analytics suppliers. Maybe interest in these alternatives will grow with the advent of synthetic sample and the expansion of other kinds of data and analytics, but for now the industry still seems committed to making sample-based methodologies work.

More are taking control of their situation by building their own panels or investing in tools to automate data quality assessment.

NewtonX

RECLAIM YOUR PEACE OF MIND—B2B'S ENTERING ITS NEW STANDARD OF TRUTH

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Sick of bad data? Uncertain that what you have is true? Good news: B2B is entering its new standard of truth, starting with sample.

According to the latest GRIT findings, 44% of market research buyers had serious doubts about research quality more than once in the past six months, and 45% had to address someone's doubts about quality. The numbers are just as strong for data and analytics professionals, 43% and 53% respectively. Are half of business decisions backed by uncertainty?

There has to be a better way. Rationalizing away bad data isn't it.

Rather, we're seeing the industry turn to quality data they can trust, changing the narratives told as a result. NewtonX is proud to back these transformations. We partner with Greenbook on fielding buyer-side sample for the GRIT Report, entering our third consecutive year in 2024.

Greenbook's Managing Director Lukas Pospichal notes: "Last year, we found unexpected findings with the complementary sample. Instead of tossing out data that wasn't immediately actionable, we were able to rethink the stories we could tell because we had total confidence in the validity of the data. It was this work that led to developing a clearer and stronger picture of the industry."

We hear this parallel with our clients as well, from Microsoft to MBB to leading market research firms. Uncertainty is in places it shouldn't be, driven by rampant fraud in the industry.

As told by a Senior Insights Manager at a global payments company: "NewtonX's Custom Recruiting has genuinely been a game changer for us. Not only do I have much greater trust in the data, but the variation in the data means I can more easily provide actionable direction for our product and marketing teams."

How does Custom Recruiting work? Rather than pulling from closed panels, NewtonX uses our Knowledge Graph to scan 1.1 billion professionals across 140 industries, verify their identities, and compensate them fairly for their expertise. And it doesn't just end with the data. Good data is the basis of true thought partnership with our clients, where we sharpen hypotheses and deliver reliable analyses.

Making more confident decisions also means avoiding the consequences of bad decisions. Data that's inaccurate is not only worthless but can cost companies millions—and cost you your peace of mind.

We're overdue for a new truth in B2B. Come join us.

A DAY IN THE LIFE

It's difficult for an outsider to tell any business how their staff should allocate their time, but GRIT can say that each buyer and supplier segment has a unique profile regarding how they do spend their time currently. When reviewing these results, ask yourself if these allocations look ideal for your business, and if automation can help achieve a more ideal balance.

OVERVIEW

Since 2018, GRIT has tracked how insights professionals allocate their time across designing and managing research; developing, reporting, and presenting results; other research activities; and other non-research activities. This time, we decided to be more specific about certain activities, pay more attention to activities outside of primary research, and simplify the answers choices by asking for perceptions of time spent instead of asking people to make several activities add up to 100%. Consequently, we can't directly compare these results to previous waves, but maybe we can assume the same results as last year because the results have seldom changed in any of the previous five years.

Focusing on activities upon which insights professionals spend at least 10% of their time, GRIT finds the most common activity within both buyer-side segments is interacting with internal stakeholders. Processing or analyzing data of any kind is also a top five activity for each, as well as for all supplier types except for field services and strategic consulting.

However, the similarities between the buyer-side market research and data and analytics segments end there. Market researchers are more likely to spend time planning and designing research, managing research projects, and delivering research results. Those in data and analytics are more likely to allocate time to business activities: consulting on implications, business operations and planning, and managing or developing staff. This suggests that while both groups spend significant time with internal stakeholders, those in data and analytics may be spending less time "in the business" and more time "on the business."

The most common buyer-side activity is interacting with internal stakeholders, and analyzing data of any kind is also a top five activity for each segment.

RANK BY SPEND AT LEAST 10% OF TIME ON ACTIVITY: GRIT SEGMENT

	Buyer (Research)	Buyer (Analytics)	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data & analytics
Interacting with internal stakeholders	1	1	–	–	–	–	–	–
Account management or sales	–	–	6	3	10	9	5	10
Delivering research results	2	6	8	6	6	3	10	7
Planning/designing research	3	7	2	7	1	1	7	2
Analyzing/processing data of any kind	4	3	3	8	5	8	3	1
Managing research projects	5	10	4	11	4	5	9	6
Preparing research deliverables	6	9	1	10	2	4	8	5
Consulting on business implications	7	4	7	5	7	2	4	4
Managing external resources	8	8	11	4	9	10	6	9
Collecting primary data	9	11	10	9	3	11	11	8
Managing/developing staff	10	2	5	1	8	6	1	11
Business/operations planning	11	5	9	2	11	7	2	3

Green shading indicates top five within segment.

Each type of supplier has a different business model, and consequently the average employee of each allocates time differently. Intuitively, the main activity for those at a data and analytics supplier is processing or analyzing data. For qualitative researchers and strategic consultants, it's planning and designing research. Full-service research staff are most likely to spend time preparing deliverables, while technology and field services providers are most likely to manage or develop staff.

These patterns may reflect the nature of the work each segment conducts or they may reflect typical managers-to-staff ratios that could characterize different segments.

DIY, automation and now AI have been redefining the roles and functions of researchers, fundamentally disrupting how insights professionals spend their time. We've been tracking this transformation for years but have seen very little change in how time is allocated to various activities. On the surface, the story seemed to be that technology was simply increasing bandwidth to do more of the same as time spent on each task did not shift much. However, with our expansion of buyer segments, we now see a reallocation of time from research process to research outputs and activation of learnings, a key theme that reverberates throughout this report. This shift in priority has a big impact on how insights pros spend their days, and we can only assume AI adoption will accelerate it.
– LM, ed.

THE BIG PICTURE

Successful insights work is related to spending more time on research activities that ensure the quality of the results and meet timelines.

In a sense, we've drastically revised how GRIT approaches *A Day In The Life Of An Insights Professional* only to end up in the same place. The advances the insights and analytics industry makes in process efficiency and automation don't seem to change *where* insights professionals spend their time as much as *how* they spend that time and how valuable that time ends up being.

Back in 2015, GRIT expected to see research automation enable insights professionals to spend more time with internal stakeholders, but over the years we've found that the time allocation doesn't seem to change much. Perhaps the lesson is that improving the efficiency and throughput of insights work doesn't mean that internal stakeholders have more time to spend interacting with *you*. Maybe they want to *decrease* that time and have time with you spent more productively, perhaps by spending less of it on problem resolution and more of it applying insights to make the business more successful.

Successful insights work seems to be related to being able to spend more time on research activities that ensure the quality of the results and meet timelines. In many ways, technology helps researchers focus on quality control by automating repetitive tasks, reducing the potential for error and elevating the researcher to focus on higher-level activities. Rather than reducing the total time they spend on project work, it enables them to do more projects.

However, we don't want to suggest that the revisions to GRIT's approach to *A Day in The Life* have simply dredged up more of the same. It has allowed us to uncover the unique activity profiles of each of the eight GRIT segments. These provide useful benchmarks for anyone working in a segment to critique how they spend their own time and ask questions like: "*Am I spending too much time on activity X and too little time on activity Y?*", "*Am I spending quality time on each activity or putting too much effort into putting out fires?*" and "*Should I be spending more time 'on the business' versus 'in the business'?*"

It's hard for GRIT to tell anyone how they *should* spend their time. If you read *Business Outlook*, you'll see that fewer insights organizations exceeded their goals this year than last year in almost every segment. *Management Strategies*, *Investment Trends*, and *Research Automation* each have an impact on success, and time allocation likely plays a role, too.

Each segment has a unique time allocation profile, yet most segments did not match last year's performance level. We hypothesize that these profiles may provide a general sketch of the typical structure within each segment, but every insights organization needs to draft its own individual blueprint for success. Reviewing your segment's profile and considering questions like the three suggested above may help with that.

These profiles provide a general sketch of the typical structure within segments, but every organization needs to draft its own individual blueprint for success.

DISPLAYR

A DAY IN THE LIFE OF THE FULL SERVICE RESEARCHER: A PERSONAL PERSPECTIVE

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It's clear from the 2024 GRIT Insights Practice survey that full-service researchers spend the most time preparing and analyzing research deliverables, a very "hands-on" segment. They are also the largest segment in the survey and the market and collectively (therefore) have the most to gain from DIY tech.

Before we consider the impact of tech on the day-in-the-life of the researcher today, we need to consider some context.

The first wave: the online research revolution.
Around 20 years ago, technologies like survey scripting, panel management, and electronic rewards schemes caused an upheaval. Data collection shifted from offline to online in what seemed like an instant. Turnaround times and costs were slashed, and demand for survey research surged. The supply of skilled researchers lagged, so the industry has had a full and unending pipeline of work since.

The current wave: the democratization of powerful preparation and analysis tools.
Full-service researchers are skilled "jugglers." They will have multiple projects to manage at any time, all at different stages. The current wave of DIY tech developments that support them where they spend the most time – data preparation and analysis - continues to evolve. Even a few short years ago, a typical day could look like this:

- Getting a research design finalized and immediate project management tasks done
- Immersing themselves in some data analysis and reporting … getting the data set up in SPSS, exporting tables to Excel, tidying them up, then pasting them as charts or tables into PowerPoint (and while tech was helping them here, still a very manual process)
- Helping deliver a report they had prepared the data and analysis for earlier …
- … then the client insists they want several filtered re-runs of the same report quickly!

So, it's back to the SPSS, Excel, and PowerPoint routine, which will most likely continue into the evening.

Today's integrated data analysis and reporting platforms allow researchers to quickly produce a reweighted or filtered report and build advanced analyses, exotic visualizations, and interactive dashboards—and in all cases, faster, more accurately, and more cost-effectively than ever.

The most compelling finding from this year's report is that DIY tech investment has made researchers more productive, putting through more of the same work. It's yet to cause a shift in how they spend their time, but we contend that their preparation and analysis quality is improving. Regardless, for the researcher dealing with that full and never-ending pipeline, getting through things quicker and easier will be a considerable comfort. And those that best utilize tech will no doubt eventually see their careers progress to more managerial roles.

The next wave: generative AI
The industry has high long-term expectations for the contribution of AI, and this wave is already underway. With examples of automated data cleaning, text coding, analysis, and even summary text generation already in the market, perhaps it won't be too long before we finally see a shift. The demand for research is unlikely to fade, but if time spent preparing and analyzing data plummets, like offline research did, there will be a new demand for research design and consulting skills to make the most of DIY tech.

THE LEARNING PROFESSIONAL

Among the familiar themes for desired skills we've seen in past reports, data and analytics take center stage. A familiar "buzz topic," artificial intelligence/machine learning has now gone mainstream from something you talk about to something you learn about.

OVERVIEW

In aggregate, the industry of insights is about gathering information, looking at it from different perspectives to learn something new and relevant, sharing it with others so that they understand what it means and why it's valuable, and, finally, acting on it. To make the whole thing go, professionals need methodologies to follow, tools to assist and enable them, and managers to set the course and remove obstacles.

Consequently and perhaps unsurprisingly, GRIT consistently finds that the most desired skills to learn go beyond collecting and selecting data to analyze and include identifying actionable insights that can help the business move forward and communicating them effectively. Insights professionals also want to learn about the methodologies, tools, and management skills they need to make it all happen and to advance in their careers.

STRONGEST THEMES FOR SKILL WOULD MOST LIKE TO LEARN: REPRESENTATIVE SUB-THEMES

Data & Analytics	AI/ML	Management	Automation, Tech, Tools
• Data and analytics (general) • Modelling • Advanced analytics • Data Science • Data visualization	• AI/ML (general) • Applications (general) • Research applications • Analysis • Generative AI • Benefits & risks	• Business strategy • Leadership • Internal goals • People management • General management	• Tools • Keeping current on tech Automation

In the last *GRIT Insights Practice Report*, we detected an undercurrent that was a little bit different from previous reports. On the surface, the skill-related themes were similar to previous reports, but the tone suggested stronger enthusiasm that acquiring these skills would lead to empowerment, as well as opportunities to make a positive impact not only on the business, but on the world at large.

As GRIT concluded fieldwork for last year's report, insights professionals had good reason to expect more from their careers. After the pandemic-induced debacle of 2020, more

suppliers than ever were reporting revenue increases for the second straight year, and lockdowns and quarantines were becoming distant memories. ChatGPT had just been released, and many heads were dizzy with the seemingly limitless possibilities of what they could accomplish with such a tool. When discussing what they wanted to learn, themes of empowerment, collaboration and teamwork, and making a positive impact seemed to bring the skills they mentioned to life.

A year later, supplier revenue trends are the worst they have been since 2020 and might even be worse than before the pandemic (see *Business Outlook*). Generative AI still inspires awe, but maybe it inspires shock now, too, as the realization sinks in that it might be a double-edged sword with respect to job security. At least parts of the industry seem to be feeling the sort of anxiety that refocuses individuals on the immediate future and away from lofty thoughts of changing the world and working in harmony with a broader team.

In the current climate, insights professionals seem to be more interested than before in practical, technical skills that are transferrable and can be applied immediately, and they are practically obsessed with learning anything they can about AI, machine learning, and Generative AI. From current experts who can build their own models to novices who want to know the risks and benefits, AI and its various associates are appearing on many guest lists.

After reading about AI and machine learning adoption so often in past GRIT reports, you may wonder what's so new about it now. AI and machine learning have always been very prominent "buzz topics" in GRIT reports, but they haven't been as salient as potential areas of study. It's one thing to chat casually about AI, and another to contemplate investing in learning about it.

We do not mean to imply that insights professionals are retreating into their shells and executing technology for technology's sake without regard to the business impact. Plenty have a passion to identify important insights that strongly align with business needs. We just get the impression insights professionals might need to focus more on their personal success at the moment and business impact and collaboration may not be the "loud part" right now.

Of course, even if suppliers were continuing to experience GRIT-record rates of revenue increases and no one felt like their job was threatened by technology (or by anything else), it would make perfect sense for insights professionals to want to learn more about data and analytics, AI/ML, and tools and automation solutions. All three are coming together to create news ways to collect and combine data, extract insights, and socialize them effectively. Practically anyone can benefit significantly from learning more about any of these.

If you prefer the "nothing to see here" story in which the growing interest in data, analytics, AI, and other technology is simply correlated with their growing relevance and value, that's fine.

Similar to every other topic in GRIT, reskilling and learning related to AI is the main story, but in this case GRIT participants seem to feel existential urgency, legitimately questioning whether skills related to process - perhaps even to experience - carry as much weight as they used to. Adapting to an AI-driven world is paramount. Intuition, creativity, context framing, influencing, communication and sense-making aren't just "soft skills;" they may be the non-disruptable foundation insights pros use to thrive in the future. – LM, ed.

We might be reading too much into these tea leaves or trying too hard to read between the lines, and we'll admit that is easy to over-interpret optional open-end responses contained in a broad survey. However, we think this scenario is worth considering even if it is hard to prove, and it either resonates with you are not. If not, we hope we have not created a distraction.

THE BIG PICTURE

While it seems like some skill priorities are evergreen – like interest in management to grow one's career and interest in business development to grow one's revenue – some skills increase in prominence over time, such as data and analytics, and some burst on the scene, like AI/ML.

After more than a year and a half of Generative AI hype and reality, it may be counterintuitive to think of artificial intelligence and machine learning as "bursting on the scene," but that what's happened on *The Learning Professional* scene. We're used to seeing it as a "buzz topic," and GRIT covered it extensively in the last *Business & Innovation Report*, but this is the first time it has popped up as a popular subject to actively learn about. Interest has gone mainstream and covers the gamut from specific skills and tasks to learning where it can be used and what are the measurable benefits and risks.

Even though this GRIT report features data and analytics specialists on both the buyer and supplier sides, it's a popular topic across every segment. It would have happened anyway, but the pandemic accelerated interest in different data sources and how to leverage them, and technological advances continue to make more analyses available to more people, from the most expert data scientists to the most casual dabbler.

These are very powerful and positive developments, but we have to speculate about any dark clouds that may lurk behind these silver linings. The interest in AI/ML and data and analytics, plus skill development in other technical areas, provides insights professionals with paths to marketability in these uncertain times. However, even if COVID accelerated the revolution in data and analytics, it also drove people out of offices and into cocoons. We don't hear as much about teamwork now as we did last year when the business outlook was more positive. Will the increased attention to learning technical skills further silo staff and reduce interest in collaboration?

Although the overall menu of desired skills looks familiar and intuitive to us, as we re-read this section, we're struck by what's *not* there, such as much to do with quality assurance. A few people mentioned having an interest in things like using AI to help with accurate coding and fraud detection, but not enough for us to consider it an independent theme in this context.

Maybe it's not a significant point, but considering the rest of this report, we're left wondering if there should be clearer alignment across the challenges the industry faces, like sample quality, and the skills people want to acquire. On the other hand, maybe we shouldn't expect the industry challenges to be directly reflected in what people want to learn, especially now. Themes like data and analytics and AI/ML provide general means to many possible ends, and those ends could include solutions to major industry challenges.

Many insights professionals are passionate about the opportunities the industry offers; are enough passionate about addressing its challenges?

Although the overall skill menu looks familiar to us, we're struck by what's not there, e.g., quality assurance.

Fuel Cycle

CAREER SUCCESS IN THE AI ERA

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The latest GRIT survey features a rapid intense interest in learning. This inflection seems to be related to rapid advancements in AI that will alter the way we create, analyze, and activate insights.

The sudden interest in learning is warranted. In March 2023, researchers from Wharton and OpenAI estimated that 75% of survey researchers' jobs are exposed to automation by AI. My own experience utilizing AI tracks with this estimate. With several important caveats, many of the day-to-day tasks of a researcher, including research design and analysis, can or will be completed by supervised AI agents within the year.

The AI models released over the past 18 months are incredible; their abilities to grow large amounts of information surpass human capability. In addition, firms (including Fuel Cycle) are developing agentic AI that handoff tasks to one another, enabling AI bots to complete well-defined tasks in an autonomous chain. This will reduce the need for much of the human work that happens today.

I've had sleepless nights when I've considered the implications of these coming changes. However, my concern has been alleviated as I've refocused my personal attention away from the minutiae of my role to the job-to-be-done (JTBD) or the outcome I intend to achieve. You may find this exercise similarly empowering.

Consider the JTBD of insights. Why are researchers hired? Is it for research design? Slide creation? Pivot tables? Or perhaps something else? While there are numerous motivations for hiring insights, I think we can reasonably summarize the job as: "Insights are hired by leaders to enable them to make confident decisions."

If you intend to stay a researcher, maintain clarity on the JTBD for insights. This may lead you to make different decisions about your growth path than you otherwise would. For instance, rather than focus purely on the mechanics of *how* to run a survey or summarize a diary study, you might be better served by understanding the impact of innovation on your organization's enterprise value. Or, how to influence a product roadmap based on research.

There are many reasons to feel anxious about the AI age. However, the attention shift from the processes of research toward the JTBD of research will enable researchers to gain influence within their organizations. This process requires constant learning but increases the likelihood of future success.

INSIGHTS' HOTTEST METHODS!

This section discusses which methodologies are used the most, have the most momentum, and have the strongest core of regular users in each GRIT segment. It can serve as either a prelude or summary of the next seven sections which focus on subsets of these. Methodologies like marketplaces, chatbots, and synthetic sample are on the rise, but the industry isn't quite ready to rip out its foundations yet.

OVERVIEW

Up until now, the *GRIT Insights Practice Report* has assigned the methodologies we track to two or three groups and published a section for each, most recently *Emerging Methodologies* and *Established Methodologies*. Covering fifty-plus across two sections in any detail is quite cumbersome for the writer and the reader, so we divided them into seven smaller sections based on rough similarities. The sections that follow are *Survey Research*, *Focus Groups and IDIs*, *Sample*, *Observational Research*, *Biometrics & Neuroscience*, *Data & Analytics*, and *Other Approaches*.

The current section provides context across the methodologies from the perspective of three metrics:

- ***Total usage*** – the total percentage who use it regularly or occasionally
- ***Momentum*** –increases or decreases in total usage of at least 10% since last year
- ***Intensity*** – the percentage who use it regularly versus all users

For twelve methodologies, total usage increased at least 10% since last year in multiple buyer or supplier segments. For five, total usage increased that much in three segments. Marketplaces for sample, talent, software, etc. grew substantially in every segment except technology, but it is one of the ten most-used in that segment. Synthetic sample also grew in all segments except market research buyers and field services, but its apparent growth is bolstered by the assumption that no one used it before this year, a convenient assumption because we didn't ask about it until this year.

Marketplaces grew in every segment except technology, where it was already among the ten most-used. Synthetic sample grew in all segments except two.

HOT OR NOT? UNMASKING THE TRENDIEST INSIGHTS METHODS

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The *2024 GRIT Insights Practice Report* offers an interesting take on "Insights Hottest Methods." A few things caught my eye as someone who works in this field.

The report shows a **64%** of full-service research suppliers use of online communities for qualitative data collection, indicating a change in gathering customer insights. While online research methods with AI are becoming more valuable, the report also highlights the continued importance of traditional approaches. Over **90%** of researchers still trust traditional surveys, over **65%** trust in-person qual, and over **60%** of buyer-side insights professionals use face-to-face interviewing.

80% of buyer-side data and analytics professionals now use innovative Big Data analytics to analyze their findings better, and all types of analytics have been growing overall. This includes big data analysis and text analytics, allowing researchers to move beyond numbers and understand patterns in customer behavior. Over the years, asynchronous & synchronous qualitative research has grown, offering flexibility and efficiency for participants and researchers. Combined with LLMs and GPTs, this approach innovates online qualitative research, showing a more significant movement towards unstructured data.

Mixing traditional & new methods is the most exciting part, as it helps researchers gather *valuable* insights.

Based on my chats with Entropik's prospects and customers, a lot of researchers are interested in using Emotion AI (facial coding & voice tonality), Behavior AI (eye and click-tracking), and Generative AI to get clear and unbiased information at scale for their research studies. You could understand a customer's true sentiment through facial expressions, even if their words portray something else. Voice AI can track speech metrics, showing hidden emotions in interviews. Click tracking tracks a participant's online behavior, providing context for surveys and usability testing. Generative AI helps researchers gather insights using prompts, which decreases the time to insights by 6x.

Hot insight methods, however, are not meant to replace human interaction. Instead, they enable researchers to gather richer, pin-pointed data without the potential bias as seen in traditional methods. For example, a participant might purposely downplay a negative experience during an interview, but facial coding could reveal the sarcasm unnoticed by a human.

Interestingly, the report shows a drop in ethnography, social media recruiting, and shopping observations. This could be because researchers are finding simulation-included research tools to gather similar data, or it might reflect challenges in conducting effective research through these channels.

The GRIT report portrays an industry accepting new technologies and methodologies while **valuing traditional approaches.** It's time for change, and I'm very interested in closely monitoring how these trends shape up in the near future.

GROWTH MOMENTUM SINCE 2022: GRIT SEGMENT (AT LEAST 10% INCREASE IN THREE OR MORE SEGMENTS)

	Buyer - research	Buyer - analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Marketplaces	+19%	+13%	+22%	+15%	+27%	+12%	+8%	+27%
Synthetic sample	–	+35%	+11%	+3%	+28%	+13%	+16%	+15%
Sensory research or testing	–	+16%	-11%	+20%	+12%	-3%	+11%	-9%
Big Data analytics	+3%	+6%	+2%	+16%	+12%	-1%	+26%	+7%
Chatbots	+3%	+7%	–	+17%	+11%	-4%	5%	+13%

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

On the flip side, seventeen methodologies declined by at least 10% in multiple segments, including seven which contracted in at least three. Growth in multiple segments likely indicates overall growth of a methodology, but contraction across multiple segments does not mean use of a methodology is shrinking.

For example, causal analysis contracted in three segments, but grew among data and analytics providers. Perhaps the industry thinks causal analysis is better left to specialists. On the other hand, the decline of social media and web-intercept recruiting in at least four segments might suggest that the industry is cooling to those techniques rather than consolidating them.

CONTRACTION SINCE 2022: GRIT SEGMENT (AT LEAST 10% DECREASE IN THREE OR MORE SEGMENTS)

	Buyer - research	Buyer - analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Social media recruiting	-6%	-10%	-14%	-1%	-15%	-13%	-17%	+8%
River or web-intercept sampling	+4%	-2%	-13%	-14%	+10%	+4%	-12%	-13%
Behavioral economics models	+4%	-2%	-6%	-6%	-8%	-11%	-15%	-10%
Online focus groups or IDIs with webcams	-5%	-16%	-4%	-2%	-14%	-1%	-5%	-15%
Mobile focus groups or IDIs	-2%	+1%	-1%	-11%	-14%	+1%	-16%	+1%
Text analytics	-2%	+7%	+6%	-5%	-17%	-11%	-10%	+15%
Causal analysis	-9%	-9%	-6%	-14%	-19%	-17%	-8%	+15%

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

EMBRACING INNOVATION: THE TRANSFORMATIVE IMPACT OF THE 'HOTTEST TECHNOLOGIES' IN MARKET RESEARCH

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In an industry often considered to be quite conservative, the showcased adoption of new technologies like synthetic samples and chatbots marks a significant evolution in the market research landscape. As a leading voice in this space, I see these changes as not only inevitable but also necessary, if the market research function is to stay relevant and favored in the new era of generative AI and insights we have entered.

The reliance on methods like online surveys, while still having a place in a well-rounded insights strategy, is seeing a gradual shift with the introduction of more dynamic and efficient tools. This shift towards new technology is helping researchers address longstanding challenges that the industry faces, such as sample quality, privacy concerns, and the escalating costs and time associated with data and analysis collection. The integration of chatbots, for example, revolutionizes data collection and analysis by allowing researchers to uncover richer insight through natural language. These AI-driven tools are not merely operational aids but are becoming core components in the strategic toolkit of market researchers, enabling real-time data gathering and richer, more nuanced insights.

While synthetic data is still very much in its infancy, its potential to enhance the quality and speed of research while reducing costs and ensuring privacy is unparalleled. By generating data that mimics real user behaviors and attributes without utilizing actual user data, researchers can overcome many of the privacy and ethical issues that plague traditional data collection methods. This approach also grants access to very niche and previously difficult-to-reach groups.

Currently, synthetic data products on the market can conduct research on market insights, trends, brand perceptions, written concept tests, and segmentations. These tools use synthetic data to answer research questions, and this is just the beginning of their potential impact on the industry. I absolutely say 'keep watching this space' as the growth in synthetic data products and adoption will continue to accelerate throughout 2024.

Of course, the shift towards these new methodologies is not without its challenges. Integrating cutting-edge technologies into established practices requires not only a shift in mindset but can also involve some adaptations in the operational process.

Despite these hurdles, the opportunities these innovations present are vast. They offer a chance to leapfrog traditional limitations and propel market research into a new world of effectiveness and efficiency. The adoption of generative AI technologies is not merely a trend but a critical evolution that will define the future landscape of market research.

THE BIG PICTURE

Despite what you may have heard, surveys, focus groups, and in-depth interviews remain the foundation of the insights industry, like it or not.

Despite what you may have heard to the contrary, surveys, focus groups, and in-depth interviews remain the foundation of the insights industry whether you like it or not. In all eight of our buyer and supplier segments, not only do most insights professionals use online surveys, most of them use them regularly. Mobile first surveys (and other mobile surveys) are used by most in each segment and are among the top ten most-used in five of eight segments.

Face-to-face interviews are used by most in each segment except technology, and the same is true for in-person focus groups and IDIs. Online focus groups and IDIs are used by most in each segment but two, the data and analytics segments on the buyers and supplier sides. However, nearly half in both these segments use online focus groups and IDIs, and most use online communities for qualitative research.

In the centerpiece of this GRIT Report and our longest running tracking section, we drill down on adoption and usage levels of every tool in the toolbox, with an emphasis on understanding growth areas and potential future interest. This is critical information for suppliers to optimize their own product and service roadmaps. What methods are growing in usage, what's declining, where are the growth opportunities and what's bound for niche specialization territory? In looking at where adoption acceleration is concentrated, a few broad themes emerge: quality data, experiential research, and AI-enabled data collection definitely drive adoption momentum. – LM, ed.

If you only look at the methodologies that have the most users, at first glance you might think you are looking at a pre-pandemic list. If you looked more carefully, however, you'd notice that text analytics is in the top ten for six segments and data integration is there for five, including both buyer segments. You'd also notice that marketplaces are in the top ten for half of the segments.

Speaking of marketplaces, if you look at changes in usage since last year, it is among the most-adopted methodologies for each segment except technology, where it was already well-established. Big Data analytics, sensory research, and chatbots each has momentum in multiple segments, and, although we don't have a measurement from last year, synthetic sample is also on most every segment's "to do" list.

Looking in the other direction, social media recruiting lost momentum in most segments, and web-intercept sampling declined in half of them. Use of behavioral economics models, online and mobile focus groups and IDIs, text analytics, and casual analysis each fell in three segments. In some cases, perhaps a decline may be due to a lack of faith in the methodology, but others may be the result of buyer or supplier segments realigning with their purpose, focusing on the methodologies that best serve those purposes, and leaving non-core activities to those who specialize in them.

Although this *Big Picture* summary began by pointing out how monolithic the industry can appear with respect to how it conducts its work, the eight segments are very distinct with respect to what they are using now, which methodologies have upward or downward momentum, and how intensively or casually they use each.

SAMPLE MARKETPLACES, PROGRAMMATIC SAMPLE AND THE ECONOMY OF FRAUD

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While under many guises, there can be little doubt that sample marketplaces and programmatic sampling are the backbone of the online industry. If we assume the results reported in *Insights' Hottest Methods!* for "marketplaces, such as for sample, talent, software, etc." apply only to sample marketplaces, then these are expanding their footprint further and further, continuing to replace direct-to-panel source relationships at pace.

The good and the bad of that paradigm shift, which has been happening for years, is subjective. The one thing that isn't, however, is the economy of fraud. On one side of the coin, the debate against sample marketplaces is the reverse auctioning of legitimate panel assets, creating an environment that allows fraudulent or poor-quality suppliers to compete on an apples-to-apples basis (where it's more like apples to rotten prunes). On the other hand, it creates a much broader market to sell one's panel 'wares'.

Sample marketplaces and programmatic samples are essential to the online research space, regardless of whether you like them or not. Yes, they absolutely 100% unequivocally created a sizeable conduit for fraud that has absolutely 100% unequivocally damaged our industry in ways that I don't think many people fully realize. But are the smartly built technical solutions and companies at fault? Absolutely not.

Is it the shady small aggregator who repackages panels known to be fraudulent as something of quality? Let's call him 'Bob' – the guy who finds 200 US cardiologists for a 30-minute survey for $15 who, by the way, happen to be members of a foreign panel? Yes, and well not really. 'Bob' is just an opportunist without a soul taking advantage of a system 'Bob' didn't actually create.

So, who's to blame for the economy of fraud? Well, simply put, all of us to a degree. Inflation has run amok post-COVID in most industries. It's hard to find any area that hasn't dramatically increased in cost for most of the 2020s. Except, of course, the cost of online data. Many of us, in one form or another, have been continuously pushing down the price of data acquisition. Amazingly, our industry believes that people, real people, are somehow willing to give their time for less post-Covid. With the simple tenet that 'someone' is going to sample it. Ultimately, our industry is normalizing poor-quality data.

Squeezing supply chains isn't exactly a novel idea. It ultimately runs its course with predictable results. Usually with an 'event'. The results are clear now – end clients simply do not trust data. Shocking, I know...

How do we reverse course? It's simple really.

Step one: Use tech (I'm biased there so I won't name-drop), but seriously, look for a great quality data platform and use it.

Step two: Demand transparency and ask questions. Where was this data that we are basing our research or decisions on collected? By whom and, maybe most importantly, how much did it cost?

By adopting smart technology, upping transparency, and stunting the economics of fraud, things can and will change for the better.... Well maybe not for 'Bob'.

SURVEY RESEARCH

From face-to-face interviews to chatbots, survey research methods have evolved and expanded over the decades, and while they may not be on the verge of becoming extinct, are they becoming less distinct from other sets of methodologies?

OVERVIEW

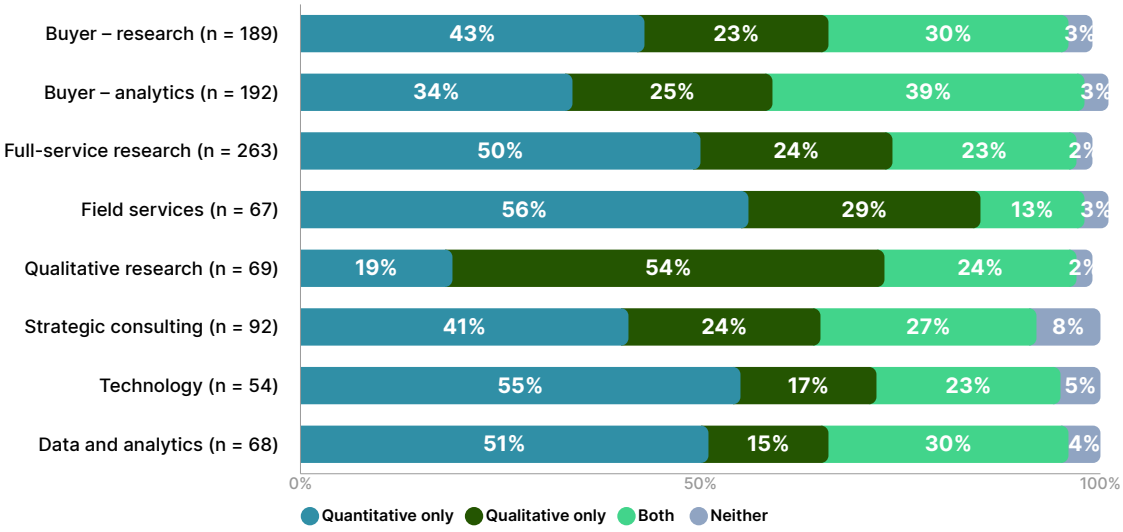
For the first time, GRIT reports methodology adoption by categories that are more descriptive than "emerging" or "established," but, of course, methodologies often transcend categories. For example, chatbots can be used for qualitative or qualitative research, but we have assigned them to "survey research" because GRIT had originally asked about them as a quantitative method and they have to go somewhere. Chat (text-based) focus groups and IDIs are covered in *Focus Groups & IDIs*.

Throughout these seven sections, you'll see some things that make you go "hmm," but our goal was to report each methodology once and only once. So, in this section, you'll see "face-to-face" and "CATI" as survey methods even though they could be used for qualitative interviews, at least from the perspective of a GRIT survey participant. It's ok if you want to flip to another section to compare a methodology to a different set.

GRIT asks how projects are allocated across quantitative and qualitative research without defining what's "quantitative," "qualitative," or a "project." For all segments but two, the largest category is "quantitative only," and it ranges from 41% (strategic consulting) to 56% (field services) for these six segments.

As one might expect, the largest category for qualitative researchers is "qualitative only" (54%), but "quantitative only" projects (19%) are also part of their portfolio. On the buyer side, the largest category for those in data and analytics is projects that include both quantitative and qualitative research (39%). This category is only 30% of projects for the next highest segments, buyer-side market research and data and analytics providers.

PROJECT ALLOCATION ACROSS QUANT AND QUAL: GRIT SEGMENT



Across methodologies which GRIT groups as "survey research," online surveys are among the three most-used in all segments and the most-used in all but qualitative research. Mobile first surveys are among the top three in all but qualitative research, and other mobile surveys are in the top three for buyer-side market research, field services, and data and analytics providers and are used by a majority in all eight segments.

Face-to-face interviews are used by majorities in each segment but technology and are among the three most-used for buyer-side analytics, full-service research, qualitative researchers, and strategic consulting. Until a couple of years ago, GRIT had asked about face-to-face surveys as a quantitative method before we removed most of the quantitative/qualitative designations from the survey.

Online communities for quant, which GRIT *does* classify as quant in the survey to distinguish it from qualitative community research, is used by most in all segments but buyer-side market research and strategic consulting. It is among the three most-used for qualitative researchers and technology. Although we have grouped it with survey methodologies, there might be other kinds of quantitative research for which online communities are used.

THREE MOST-USED SURVEY METHODS: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full -service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Online surveys	96%	91%	97%	95%	67%	90%	87%	93%
Mobile first surveys	69%	60%	73%	71%	42%	61%	59%	60%
Mobile surveys (NOT mobile first)	63%	54%	70%	67%	53%	53%	50%	58%
Face-to-face interviews	62%	73%	73%	55%	79%	65%	40%	55%
Online communities for quant	46%	55%	55%	60%	63%	38%	54%	55%

Green shading indicates top three methodologies for that GRIT segment.

Usage of chatbots increased by at least 5% in five segments, and use of IVR increased at least 5% in three.

Not only are these among the three most-used survey research methodologies in at least two segments, each of these five are used by most insights professionals in every segment with only four exceptions (42% use mobile first in qualitative research, 40% use face-to-face in technology, 46% use online communities for quant in buyer-side market research and 38% use it in strategic consulting). Usage of mobile surveys that are not mobile first declined at least 5% in three segments and only increased that much in one segment, and it may be getting replaced by mobile first. None of the other four most common methodologies changed much overall.

There were more interesting changes outside of the five most common methodologies. Use of microsurveys fell by at least 5% in five segments while rising in two (strategic consulting, +6%; data and analytics, +11%).

Usage of chatbots increased by at least 5% in five segments. Use of IVR increased at least 5% in three segments (qualitative research, +18%; data and analytics, +14%; and strategic consulting, +9%) while decreasing in two segments (field services, -8%; full-service research, -5%).

Looked at differently, five survey research methodologies gained at least 5% usage among buyer-side data and analytics and data and analytics providers, and six did among qualitative researchers. With three increases of at least 5%, technology was the only segment to have more than two such gains while also experiencing three decreases of at least 5%. Usage dropped at least 5% for three methodologies in buyer-side market research, field services, and strategic consulting, and for four among full-service research.

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consult-ing	Technol-ogy	Data and analytics
Microsurveys	-7%	-8%	-9%	-4%	-14%	+6%	-10%	+11%
Mobile surveys (NOT mobile first)	-4%	-3%	-8%	-1%	+7%	-18%	-10%	-3%
IVR	-2%	+4%	-5%	-8%	+18%	+9%	-1%	+14%
Chatbots	+3%	+7%	0%	+17%	+11%	-4%	+5%	+13%
Online communities for quant	-1%	+8%	-2%	4%	+20%	-11%	+5%	+5%
Face-to-face interviews	-6%	-1%	-4%	-17%	0%	+1%	+3%	+7%
CATI	-15%	+2%	-12%	0%	+2%	+2%	+14%	+1%
Mobile first surveys	+5%	+6%	+1%	+3%	-4%	+1%	-15%	-1%
CAPI	+1%	+5%	+2%	-9%	+16%	+3%	+1%	-3%
Online surveys	+2%	+5%	0%	0%	-19%	-5%	-1%	+1%
Mail surveys	-4%	+4%	-1%	-2%	+18%	+2%	0%	+2%

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

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THE BIG PICTURE

If you downloaded this *GRIT Report* in hopes of celebrating news of the long-anticipated death of survey research, we're sorry to disappoint you, and we encourage you to take advantage of the money-back guarantee that GRIT offers its readers.

Across GRIT's eight segments, at least two-thirds of insights professionals use online surveys, and in six segments more than 90% use them at least occasionally while more than 70% use them regularly. Of the eleven methodologies in this section, technology providers, on average, use 4.8, and every other segment uses at least five. Buyer-side market researchers use an average of 5.1, and their data and analytics counterparts go them one better by averaging 6.1 methodologies used. In both buyer segments, five methodologies are used regularly by a majority.

No trends emerge among the five most common survey methodologies – online surveys, mobile first surveys, other mobile surveys, face-to-face interview, and online communities for quant – that clearly indicate a major shake-up. Maybe mobile first surveys are supplanting non-mobile first. It's possible qualitative research providers are replacing online surveys with online communities and that field services providers are leaving face-to-face surveys to other segments, but nothing suggests a massive upending of these five common methods.

However, there are some interesting developments among the less common methodologies suggesting intriguing hypotheses. Usage of CATI fell more than 10% among buyer-side market research and full-service research, but rose 14% among technology providers. Are more tech providers looking into ways to modernize CATI? CAPI usage dropped 9% among field services providers, but increased 16% in qualitative research. Are in-person methods becoming the domain of qualitative researchers?

IVR is another methodology for which usage decreased among field services and full-service research while increasing for qualitative researchers and two other segments. Mail surveys also increased among qualitative researchers. Are these being used as standalone methodologies or are they being leveraged to recruit hard-to-reach segments for other kinds of research?

Perhaps the most intriguing trend is the rising use of chatbots, which may be displacing microsurveys in some segments and could replace other methodologies as the industry grows more familiar with them and capabilities improve and expand. Of course, chatbots can be used for other kinds of research besides surveys, and adoption is particularly strong among field services, qualitative researchers, and data and analytics professionals on the buyer and supplier sides. Arguably, these segments are the most engaged with acquiring and handling different kinds of data, and maybe some new kind of hybrid research will emerge from their efforts.

Some experts have been predicting the death of survey research for a long time, and maybe it will become obsolete sooner than non-experts expect. Or maybe, like an old soldier, it will never die but simply fade away and become indistinguishable from other primary research methods.

Perhaps the most intriguing trend is the rising use of chatbots, which could replace other methodologies as familiarity grows and capabilities expand.

SURVEYING THE FUTURE: THOUGHTS ON MARKET RESEARCH IN THE DIGITAL AGE

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Online surveys have been a mainstay in market research for the last 20 years—and they're definitely not going anywhere. According to the *2024 GRIT Insights Practice Report,* the use of online surveys has easily reached or exceeded 90% among buyers of market research since 2019[1], with the only decline overlapping COVID. 90% of buyers said they use online surveys regularly[2]. No other quantitative methodology comes close.

At the same time, we live in a world of transformation. The potent combination of technology, intelligence (both human and artificial), and the endless pressure to succeed quickly and cost-efficiently has led to an era of progress without patience. Products are created and adopted at unprecedented speeds. Consider that it took roughly 15 years from the launch of microwave ovens to achieve 50% household penetration. Smartphones got there in 7 years[3].The COVID vaccine was developed in just 12 months to widespread adoption.

For some reason, advancements in survey research haven't grown as quickly. That doesn't mean that there isn't an opportunity. After all, surveys are increasingly mobile-first; per buyers, the use of mobile-first surveys has grown from 52% in 2019 to 69% in 2024[4]. But as researchers, are we prepared to display survey content on a small portrait screen instead of a 15" or larger landscape monitor? Are we appropriately capturing and making use of respondent time and attention in an era when TikTok feeds its users content in 34-second increments? Have we considered the impact that AR or VR might have on the survey-taking experience?

Instead of studying the implications of screen size, video, and stimuli, most of the mindpower in this space has been devoted to solving problems. Survey research providers devote hours to data quality, specifically fighting to evict scammers who use bot technology to accumulate valuable incentive dollars and points quickly. It's understandable—every completed response from a fraudulent participant is another bite at profit margins for research providers. Combine that with the omnipresent pressure on buy-side research budgets, and the tension builds.

As stretched as we all are, we cannot let the data quality battle derail progress within survey research. Without progress, we will not be able to meet consumers where they are and deliver the kinds of insights brands need to keep up with them. The sun is shining brightly on our industry with survey research remaining so prevalent. As JFK said, the time to fix the roof is when the sun is shining.

1. 2024 GRIT Insights Practice Report
2. 2024 GRIT Insights Practice Report
3. https://www.asymco.com/2012/04/11/when-will-smartphones-reach-saturation-in-the-us/
4. 2024 GRIT Insights Practice Report

FOCUS GROUPS & IDI'S

Back in late 2020, selecting a methodology for focus groups or IDIs was dominated by limitations: people couldn't congregate, contacting them continued to grow more challenging, and money was scarce. Now, insights professionals have more opportunities: complementary methodologies they adopted during the pandemic, continued advances in technology, and different disciplines converging to create fresh perspectives.

OVERVIEW

GRIT asks about seven methodologies which we group together as focus groups and IDIs for reporting purposes. In the survey, "focus groups and IDIs" were part of the label for online, in-person, mobile, chat, and telephone qual. They were not specified for "online communities for qual" (which has "qual" in the label) and "automated interviewing via AI systems" which had been treated as a qualitative method in earlier GRIT surveys.

Of these methodologies, online focus groups and IDIs are the most-used in five of the eight GRIT segments. They are just behind in-person qualitative for qualitative researchers (84% to 82%), and tied for third among data and analytics providers (48%). They're last for buyer-side data and analytics, the only one of the seven used by a minority (46%).

After some shaky pandemic years, in-person qualitative is among the three most-used methods in each segment except technology, the segment least likely to use any of these methods. At least two-thirds use it in buyer-side market research (69%), buyer-side data and analytics (68%), full-service research (75%), qualitative research (84%), and strategic consulting (67%). A slight majority use it in field services and data analytics providers (52% each).

Online communities for qual are among the three most-used methodologies in buyer-side market research (56%), buyer-side data and analytics (64%), field services (57%), technology (39%), and data and analytics providers (52%).

Online focus groups and IDIs are the most-used in five of the eight segments, just behind in-person among qualitative researchers, and third among data and analytics providers.

THREE MOST-USED FOCUS GROUP & IDI METHODS: GRIT SEGMENTS

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consult-ing	Technol-ogy	Data and analytics
Online qual with webcams	73%	46%	82%	70%	82%	74%	52%	48%
In-person qual	69%	68%	75%	52%	84%	67%	38%	52%
Online communities for qual	56%	64%	64%	57%	68%	56%	39%	52%
Mobile qual	54%	54%	68%	49%	70%	59%	34%	47%
Chat (text-based) online qual	44%	56%	44%	43%	56%	31%	39%	45%
Telephone qual	32%	50%	58%	48%	78%	53%	30%	48%

Green shading indicates top three methodologies for that GRIT segment.

Mobile qualitative is a top three method for full-service research (68%) and strategic consulting (59%), and majorities use it in both buyer-side segments (54% each) and qualitative research (70%). For qualitative researchers, mobile is surpassed by telephone qual (78%), but mobile is more likely or equally likely to be used in each other segment. Telephone qual is also a top three methodology among data and analytics providers (48%).

Chat is a top three methodology for data and analytics professionals on the buyer-side (56%) and technology providers (39%). It's also used by a majority of qualitative researchers (56%) and more than 40% of buyer-side market researchers (44%), full-service research providers (44%), field service providers (43%), and data and analytics providers (45%).

Although in-person is among the top three in all but one segment, usage declined at least 5% in six segments, including a 17% drop in field services. Usage increased 6% in technology, but only up to 38% and well behind every other segment. Usage of online focus and IDIs, the most common method overall, had no increases and declined at least 5% in four segments, including more than 10% among qualitative researchers and data and analytics providers and buyer staff. As revealed in *Survey Research*, these segments increased their use of chatbots, which may be a related development.

With respect to using chatbots for focus groups and IDIs, three segments increased: data and analytics providers (+15%), qualitative researchers (+6%), and buyer-side market researchers (+9%). Compared with results in *Survey Research*, it looks like both buyer-side segments are increasing their use of chatbots, but the market researchers may see it more as a qualitative tool while the analytics segment may see it more as a survey tool. Instead of using chatbots for qual, they may prefer online communities (+13%) at the moment.

Usage of automated interviewing via AI systems increased among qualitative researchers (+10%), field services providers (+6%), and strategic consultancies (+5%) and did not decrease in any segment. GRIT has tracked this as a qualitative method since well before the pandemic, but how it's different from "chat (text-based) online qual" may not be completely clear. However, in every segment, usage of chatbots for qual is nearly two to more than three times greater, so GRIT participants see a difference between them.

Mobile focus groups and IDIs declined in three segments and telephone qual declined in four, but the latter also increased at least 5% among qualitative researchers (+8%) and data and analytics providers (+12%).

Chat is top three for buyer-side data and analytics and technology providers and used by a majority of qualitative researchers.

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
In-person qual	-6%	-6%	-7%	-17%	+2%	-6%	+6%	-5%
Telephone qual	-19%	-4%	-13%	-8%	+8%	-7%	-1%	+12%
Online qual with webcams	-5%	-16%	-4%	-2%	-14%	-1%	-5%	-15%
Chat (text-based) online qual	+9%	+4%	+3%	+4%	+6%	-8%	-1%	+15%
Online communities for qual	0%	+13%	-4%	+1%	-13%	-3%	-6%	-3%
Mobile qual	-2%	+1%	-1%	-11%	-14%	+1%	-16%	+1%
Automated interviewing via AI systems	+3%	-3%	+3%	+6%	+10%	+5%	-4%	-2%

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

In every segment, two to three methods declined by at least 5%. However, in qualitative research, automated interviewing (+10%), telephone (+8%), and chat (+6%) increased, and telephone qual (+12%) and chat (+15%) also increased among data and analytics providers.

THE BIG PICTURE

As a result of a variety of pressures and developments, insights professionals are consolidating the types of qualitative interviewing methodologies they employ. Each segment GRIT tracked before the pandemic is now using fewer: buyer-side market researchers are using 0.5 fewer; full-service research providers, -0.4; field services providers, -1.2; strategic consultancies, -0.8; technology providers, -1.3; and data and analytics providers, -0.8.

Before the pandemic, in-person was the clear preference for focus groups and IDIs, but lock-downs made it a luxury few could afford. Those who had been reluctant to try the online version finally took the plunge, either for themselves or on behalf of clients, and those who were already using online communities were probably among the adopters.

As buyers and suppliers became more familiar and comfortable with online focus groups and IDIs, they may have become less inclined to use online communities. As the pandemic waned, in-person came back, but those who discovered the joys of online focus groups and IDIs did not come all the way back. Online communities have not come all the way back, either, but their journey has been less traumatic because they still seem to be a good alternative for those who haven't had the need, time, or resources to adopt other methodologies.

Chat-based qual may have also been a victim of the accelerated adoption of online focus groups and IDIs. Even before the pandemic, chat-based qual was used by about half of buyer-side market researchers and strategic consultants, and by most full-service, technology, and data and analytics providers. In each segment, usage is now well below the pre-pandemic levels even though one might have expected chat to benefit from the lock-downs.

In-person qual was preferred before the pandemic and it came back later because it allows you to immerse yourself in the market and you can influence the research real-time. When that wasn't an option, online focus groups and IDIs at least enabled you to connect with the market and still let you influence the research real-time. When in-person was an option again, the industry could make more informed trade-offs between immersiveness, cost, and other differentiators to select the most appropriate methodology for a given scenario.

By comparison, online communities and chat – particularly rule-based chat – probably weren't as immersive and did not provide the same sense of control, leaving in-person as the ideal and online events as competitive alternatives. With Generative AI, however, chatbots could take a big step forward and narrow the gaps to become another viable alternative.

However, these methodologies don't have to cannibalize each other in order to grow their user bases. For example, in the early days of the pandemic, online qual *had* to replace in-person, but the GRIT data continues to suggest that they complement each other and enable insights professionals to do more research than they were able to handle before the pandemic.

The next generation of chat tools for qual could replace some of the work currently done via in-person and online qual, but it could also open up new opportunities to conduct qualitative research that these methods can't address. If that happens, we might see the average number of methods used increase again and all three of these methods maintain consistently high user bases in future GRIT reports

Before the pandemic, in-person was clearly preferred, but lock-downs made it a luxury. Those who had been reluctant to try online qual finally took the plunge.

SAMPLE

The most commonly used sample-related methodologies are panels from suppliers and in-house panels, fraud detection tools from suppliers and in-house, and social media recruiting. For each of these, usage changed since last year in at least five segments, and not always in the same direction. The industry seems in the process of aggressively sorting out how to deal with sample challenges.

OVERVIEW

GRIT asks about nine methodologies that concern sample sourcing and fraud detection. Sources include the GRIT participant's own panels or panels from an external supplier, sourcing via Mechanical Turk, programmatic sampling, and social media or web-intercept recruiting. We also ask about fraud detection tools they develop in-house or use via an external supplier, and blockchain is grouped with sampling because of its potential role in helping research participants control their own information.

Instead of including synthetic sample as a sampling methodology, it's grouped with data and analytics because it's primarily a modeling process. It might be used to complement or replace sampling, but it's not a sampling methodology. Think in terms of René Magritte's *The Treachery of Images*:

> *The famous pipe. How people reproached me for it! And yet, could you stuff my pipe? No, it's just a representation, is it not? So if I had written on my picture "This is a pipe," I'd have been lying!*
> *—René Magritte*

If Magritte was to be reproached for anything, it should have been for implying that treachery is a property of images instead of uncritical minds that process them. In other words, regardless of how useful synthetic sample might be in the right hands, it shouldn't be presented as a "sampling" methodology.

On average, field services providers use 4.3 of these nine methods, most of any segment, and technology providers use exactly 4. Buyer-side market researchers use the fewest, 2.7 on average, but it's possible that more are used on their projects by external providers. Each other segment uses about 3.5 sample-related methods.

Proprietary panels from a supplier are the most-used sampling methodology, used by more than two-thirds among strategic consulting (80%), full-service research (79%), technology (76%), field services (71%), and buyer-side market researchers (69%). It's used by most qualitative researchers (58%) and data and analytics providers (55%), and nearly half of buyer-side data and analytics (47%). Except for buyer-side analytics, proprietary panels from a supplier are among the three most-used in each segment.

For each of the most commonly used sample-related methodologies, usage changed in at least five segments, and not always in the same direction.

THREE MOST-USED SAMPLE METHODS: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Proprietary panels from external supplier	69%	47%	79%	71%	58%	80%	76%	55%
Proprietary panels you own	47%	51%	39%	69%	43%	40%	56%	35%
Tools to detect sample fraud from supplier	40%	50%	62%	59%	54%	59%	55%	56%
In-house tools to detect sample fraud	26%	41%	63%	66%	46%	60%	65%	56%
Social media recruiting	35%	49%	42%	62%	60%	39%	31%	50%

Green shading indicates top three methodologies for that GRIT segment.

Suppliers are also critical to the next most frequently used sample-related methodology: tools to detect sample fraud. Supplier-provided fraud detection tools are among the three most-used in each segment except field services (59%) and technology (55%) where they still command a majority. Half or more also use them in full-service research (62%), strategic consulting (59%), data and analytics providers (56%), qualitative researchers (54%), and buyer-side data and analytics (50%). Only 40% of buyer-side market researchers use them, although it is among their three most-used.

In-house tools to detect sample fraud are among the three most-used and used by a majority in field services (66%), technology (65%), full-service research (63%), strategic consulting (60%), and data and analytics providers (56%). Usage of in-house fraud detection tools is equivalent to or less than supplier-provided tools in all segments except field services where they are used by 7% more and technology where they are used by 10% more.

A majority use their own proprietary panels among field services (69%), technology (56%), and buyer-side data and analytics (51%), and nearly half do among buyer-side market researchers (47%). They are among the three most-used in each of these four segments, but not in any of the other four.

Social media recruiting is a top three method for buyer-side data and analytics (49%) and qualitative researchers (62%) and is used by a majority of field services (62%) and half of data and analytics providers (50%). Usage increased 8% among data and analytics providers, but declined by at least 5% in six other segments, including both buyer segments. In five segments, usage fell by double digits: technology (-17%), qualitative research (-15%), full-service (-14%), strategic consulting (-13%), and buyer-side data and analytics (-10%).

Usage of web-intercept sampling also decreased in more segments than increased. It increased 10% among qualitative researchers, but declined in four other supplier segments: field services (-14%), full-service (-13%), data and analytics providers (-13%), and technology (-12%).

Similarly, usage of panels from suppliers increased in one segment (strategic consulting, +8%), but decreased in four other segments: data and analytics providers (-12%), qualitative researchers (-10%), full-service (-8%), and buyer-side data and analytics (-7%). Strategic consultancies also increased use of in-house panels (+12%), as did buyer-side data and analytics (+9%) and technology providers (+17%).

Social media recruiting is among the three most-used in two segments and used by most in two others, but declined in six segments, including both buyer segments.

For six of nine sample-related methods, usage changed in at least five segments.

While decreasing use of external panels, data and analytics providers (-14%), qualitative researchers (-11%), and full-service (-9%) also decreased use of their own panels. Perhaps some are eschewing panels altogether and relying more on alternative sampling methods, or perhaps those who are reducing use of external panels are distinct form those who are reducing use of their own.

Usage of in-house tools to detect sample fraud also increased in three segments while decreasing in another three. It increased for technology (+10%), strategic consulting (+8%), and qualitative research (+6%). It decreased among data and analytics providers (-11%), full-service research (-9%), and field services (-8%).

Usage of sample fraud detection tools from external suppliers increased in four segments. Usage increased 7% in each buyer segment and 6% among qualitative researchers and strategic consultants. It decreased 5% among technology and field services providers.

For six of nine methods, usage changed in at least five segments. For the last three, programmatic sampling and blockchain changed in three segments and Mechanical Turk changed in only two. The largest changes were a 14% increase in use of programmatic sampling in field services and a 10% drop in technology; an 11% drop for blockchain in technology; and increases of 13% for qualitative research and 11% for technology in use of Mechanical Turk.

Looking by segment, buyer-side market researchers had only one increase and one decrease of at least 5%, and the data and analytics segment had only two of each. For each other segment at least five of the nine methodologies saw changes in usage. In full-service research, usage of five methodologies decreased and none increased. Strategic consultants went the opposite way: five increased and one decreased.

For data and analytics providers, four decreased and two increased, and decreases also outnumbered increases for technology providers, five to three. Field services providers decreased usage of three methodologies and increased two, while qualitative researchers ramped up on four methodologies and put the brakes on three.

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

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

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

THE BIG PICTURE

Although usage of sample-related methodologies across segments might appear to be more similar than different on the surface, changes since last year suggest they might look very different from each other soon. The most commonly used sample-related methodologies are panels from suppliers and in-house panels, fraud detection tools from suppliers and in-house, and social media recruiting. For each of these, usage changed since last year in at least five segments, and not always in the same direction.

The waning popularity of social media recruiting is the most consistent trend across segments. Nearly half or more currently use it among buyer-side data and analytics, data and analytics providers, quantitative researchers, and field services providers, but usage fell by double-digits in five segments. Usage fell 5% in a sixth segment and rose by that much in only one, easily the highest ratio of decreases to increases of any methodology, although four segments decreased use of web-intercept sampling while only one increased usage.

The other methods of alternative sampling, programmatic sampling and Mechanical Turk, were stable by comparison, suggesting the apparent growing disillusionment with social media and web-intercept recruiting does not extend to all alternative sampling methodologies. Of the four methodologies, only social media declined among field services while programmatic sampling grew by a similar amount, so perhaps usage of certain methodologies are becoming concentrated within certain segments.

Trends in usage of internal and external panels varied across segments. Buyer-side market researchers did not change their use much while their data and analytics counterparts increased usage of internal panels and decreased usage of external. Fewer full-service research, qualitative researchers, and data and analytics suppliers used either, but strategic consultancies increased usage of both. Technology providers shifted focus to their own panels, and field services did not change much.

Some of the panel trends could be due to a growing fondness in certain segments for some kinds of alternative sampling, and some may represent decisions to use one or the other but not both, with some choosing supplier-sourced and some choosing their own. In the case of technology providers, the trend toward their own panels could be a sign that more of them are working on panel solutions, and the same goes for buyer-side data and analytics.

Both buyer-side segments were more likely to increase use of supplier-sourced fraud detection tools than their own, and fewer data and analytics suppliers used their own while maintaining their level of use of external tools. Fewer in full-service research and field services used either, possibly reflecting diverse decisions to choose one or the other. Usage of both increased among qualitative researchers and strategic consultancies, while the technology provider trend was similar to their usage of panels: increased usage of their own tools while decreasing usage of external.

Overall, the trends in sample-related methodologies look more like stories in the process of being written than finished works, with the possible exception of social media recruiting. There is a lot of movement, some of it related to segment trends and some related to individual company or organization preferences. Mostly, they give the impression of the industry aggressively trying to sort out how to address a recognized problem.

Overall, the trends in sample-related methodologies look like stories in the process of being written rather than finished works.

OBSERVATIONAL RESEARCH

Some of the more established observational methods, like non-mobile ethnography, in-store observations, mobile diaries, and bulletin board studies, are slipping, but not disappearing. Data and analytics professionals are adopting these methods, expanding the perspectives they can apply in their work.

OVERVIEW

GRIT asks about ten methodologies which we group together for the first time as observational research methods. Generally speaking, what these ten methods have in common is that direct stimuli from the researcher to the participant are minimal, at least relative to survey methods, focus groups and IDIs, biometric and neurological research, and so on. The main task of the researcher is to observe and interpret how the participant reacts to real-world stimuli or other participants.

Of course, bulletin board studies allow for researcher involvement, in-store studies can be built to test stimuli that the researcher planted, and so on, but GRIT considers these to have considerably less researcher interference than methodologies we placed in other categories. If you believe that a certain methodology belongs in a different category, you can always make those comparisons yourself.

With respect to observational research, the GRIT segments seem to be more different than similar, and it's hard to say which methodologies are most-used overall. The one most commonly used seems to be mobile diaries and journaling because it's among the top three for six of the eight GRIT segments. It misses the top three among buyer-side market researchers by only the slightest of margins, and it's fifth among their data and analytics counterparts.

The two buyer segments share only one methodology in their three most-used: monitoring blogs, used by only 33% of researchers but 56% of analysts. The most-used methodology among buyer-side market researchers is non-mobile ethnography (39%), but it is sixth among data and analytics, even though they are only separated by 7%. Mobile ethnography is third for the researchers (32%), but seventh among their counterparts although only 2% lower (30%).

Buyer-side data and analytics' second most-used methodology is in-store/shopping observations (53%), and it is also in the top three for full-service research (50%), field services (43%), and qualitative research (65%) providers. It is the only one of the eight segments to have automated measures or people meters in their top three (53%), and no segment comes with 30% use of it.

With respect to observational research, the GRIT segments seem to be more different than similar, and it's hard to say which methodologies are most-used overall.

THREE MOST-USED OBSERVATIONAL RESEARCH METHODS: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Ethnography (NOT mobile)	39%	32%	46%	42%	70%	39%	17%	26%
Monitoring blogs	33%	56%	28%	32%	26%	40%	29%	22%
Mobile ethnography	32%	30%	40%	35%	60%	41%	14%	38%
In-store/shopping observations	31%	53%	50%	43%	65%	35%	20%	30%
Mobile diaries/journaling	31%	37%	56%	60%	68%	46%	32%	38%
Bulletin board studies	25%	28%	50%	52%	61%	38%	32%	29%
Automated measures/people meters	20%	53%	16%	21%	17%	22%	22%	18%
Sensor/usage/telemetry	18%	42%	14%	17%	21%	16%	15%	33%

Green shading indicates top three methodologies for that GRIT segment.

Buyer-side data and analytics use 6.3 of these methodologies, on average, and qualitative research providers are a distant second at 5.7. Technology providers use the fewest (3.3), and buyer-side market researchers use the second-fewest (4.6). All other segments average between 5.2 and 5.5 methodologies. Moreso than the methodology groupings discussed so far – survey research, focus groups and IDIs, and sampling – observational research methodologies seem to bring out differences across the GRIT segments.

Across segments, there was a lot of movement with respect to usage of observational research methods since last year. Usage of non-mobile ethnography and in-store observations declined at least 5% in five segments, mobile diaries/journaling and bulletin board studies declined in four, and mobile ethnography declined in three. The only methodology for which usage did not decline in any segment was sensor/usage/telemetry measurements.

Declining usage for these methodologies was not offset by increases in other segments. Each of the methodologies that declined in at least three segments only increased in one or two other segments. Non-mobile ethnography increased in buyer-side data and analytics (+6%) and field services (+8%). Buyer-side data and analytics also increased usage of in-store observations (+12%), and mobile ethnography increased among data and analytics providers (+7%).

In addition to non-mobile ethnography, field services increased usage of mobile diaries (+14%) and bulletin board studies (+7%), as well as monitoring blogs (+15%), wearables (+10%), and people meters (+5%). It's possible that suppliers in segments where usage of these declined are outsourcing some of this research to field services providers. In total, usage of six methodologies increased among field services providers, and none declined.

Data and analytics providers, field services, and buyer-side analytics were the only segments to increase use of more methodologies than they decreased.

Going them one better, the buyer-side data and analytics segment increased usage of seven methodologies. In addition to non-mobile ethnography and in-store, usage of people meters (+11%), sensors et al (+15%), IoT (+13%), monitoring blogs (+7%), and wearables (+5%) also increased. The only methodology for which they decreased usage was bulletin board studies (-8%).

Data and analytics providers were the only segment aside from field services and buyer-side data and analytics to increase use of more methodologies than they decreased. They increased usage of three methodologies in addition to mobile ethnography: IoT, +14%; sensors et al, +14%; and wearables, +6%.

However, they also decreased usage of non-mobile ethnography (-6%), in-store (-5%), and people meters (-5%).

Consistent with what we've seen in other sets of methodologies, full-service research decreased usage of five and did not increase use of any other methodology. Technology providers were more extreme, decreasing use of six. Qualitative researchers decreased use of three and didn't increase any. Strategic consultancies and buyer-side market researchers each decreased usage of four methodologies, and consultancies increased usage of one (sensors et al, +5%) while market researchers increased usage of two (people meters, +5%; sensors et al, +5%).

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technol-ogy	Data and analytics
Ethnography (NOT mobile)	-5%	+6%	-13%	+8%	-2%	-7%	-13%	-6%
In-store/shopping observations	-10%	+12%	-11%	+2%	-2%	-7%	-13%	-5%
Mobile diaries/journaling	-10%	+4%	-7%	+14%	-6%	-1%	-21%	-3%
Bulletin board studies	-12%	-8%	-8%	+7%	-2%	-5%	+1%	+4%
Automated measures/people meters	+5%	+11%	0%	+5%	-3%	+4%	-9%	-5%
Mobile ethnography	-3%	+1%	-13%	-3%	-9%	-1%	-25%	+7%
Wearables	0%	+5%	-3%	+10%	-4%	-4%	-7%	+6%
Sensor/usage/telemetry	+5%	+15%	+3%	0%	+4%	+5%	-2%	+14%
Monitoring blogs	-2%	+7%	+1%	+15%	-5%	-2%	-1%	+1%
Internet of Things (IoT)	+1%	+13%	+4%	+1%	-2%	-8%	+4%	+14%

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

THE BIG PICTURE

The ten methodologies GRIT groups as "observational research" tend to have little in common aside from the fact that they collect data on behavior that is typically unprompted or at least prompted more subtly than a survey or focus group. Analysis and interpretation of these data might require a bit more effort and finesse than your typical cross-tabs analysis.

These methodologies are characterized by how they collect and analyze data, so it's interesting that the three segments that most consistently increased use of them are concerned with data collection (field services) and analytics (buyer- and supplier-side data and analytics). It seems intuitive that these methodologies should be related to these particular segments, except these segments don't increase their usage of these methodologies every year.

In the last *GRIT Insights Practice Report*, the average field services provider offered 10.9 services, and now they offer... 10.9. That's because while they are increasingly involved with methodologies like monitoring blogs and wearables, they are decreasingly involved with methodologies like face-to-face interviews and CAPI. We speculated in *Survey Research* that field services providers who excelled at in-person research might have migrated to another segment, such as qualitative research, and those remaining seem to be exploring other sources of data.

Buyer-side data and analytics is another segment aggressively adopting observational research methods, and they are also adding methodologies in our other categories. Their most sluggish category, however, is *Data and Analytics* because they already use them. It looks like they are taking advantage of the dawning industry-wide understanding of the power of leveraging multiple data sources and are pursuing whatever sources can help them tell a more complete story.

The third segment with notable increases in usage of observational methodologies, data and analytics providers, use an average of 2.9 of these ten methodologies, 1.2 fewer than their buyer-side counterparts and less than any segment except buyer-side marketing research and technology providers. None of these methodologies are used by as much as 40% of the segment, although the majority are interested in nine of them. These methodologies seem to be building on that interest, and data and analytics providers might be diversifying their data alternatives, similar to their buyer-side counterparts.

On the other side of the coin, usage of more traditional observational methodologies like non-mobile ethnography, in-store observations, mobile diaries, and bulletin board studies declined in at least half the segments. In particular, full-service research and technology providers have started to bail on these methods. However, each of these are among the three most-used in multiple segments, so they are by no means disappearing.

Overall, it seems like segments and individual decision-makers within segments are focusing on subsets of observational research methodologies, except for the segments that are focused on data collection and data and analytics. Field services may be diversifying their data portfolios, and those who focus on data and analytics may be stretching boundaries by accessing new (to them) types of data, perhaps to expand their experience with these types and perhaps to see how they can integrate with them with other types.

Filed services are increasingly involved with methods like monitoring blogs and wearables; decreasingly with methods like face-to-face and CAPI.

BIOMETRICS AND NEUROSCIENCE

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.

OVERVIEW

Of the 50+ methodologies that GRIT tracks, five are unique because they directly measure primarily non-conscious 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.

They 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.

The industry may or may not underestimate the opportunities and overestimate the barriers to using such methodologies, but none of the five are currently used by a majority of any GRIT segment. Half of field services suppliers use eye tracking (50%), but no more than one-third of other segment use it outside of technology providers, and only 38% of them use it. Facial coding and analysis are used by 44% of field services providers, but by only 27% of the next highest segment (data and analytics providers).

The average buyer-side market researcher and full-service research provider uses 0.8 of the five methods, least of any segment. However, the technology segment has the highest average number of these methodologies, and it's only 1.2. In every segment, eye tracking and facial coding and analysis are the two most-used of these methodologies.

Except for qualitative research which uses galvanic skin response slightly more than neuroscience and heart rate variability (HRV), each segment use neuroscience more than the two biometric methodologies. Typical ranking in terms of usage in any segment is 1) eye tracking, 2) facial coding, and 3) neuroscience. We mentioned the qualitative research exception, and strategic consultants and data and analytics providers also deviate from this order. Strategic consultants are nearly twice as likely to use neuroscience (25%) as facial coding (13%), and data and analytics providers use facial coding (27%) slightly more than eye tracking (25%).

The industry may or may not underestimate the opportunities and overestimate the barriers, but none are currently used by a majority of any segment.

THREE MOST USED BIOMETRIC & NEUROSCIENCE METHODS: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Eye tracking	27%	30%	30%	50%	32%	28%	38%	25%
Facial coding and analysis	22%	23%	24%	44%	26%	13%	26%	27%
Neuroscience (measures of neural activity)	15%	20%	16%	10%	17%	25%	24%	21%
Heart rate variability (HRV)	9%	10%	5%	6%	16%	8%	19%	12%
Galvanic skin response (GSR)	3%	10%	3%	0%	21%	12%	9%	19%

Green shading indicates top three methodologies for that GRIT segment.

Eye tracking was the most volatile of these five methodologies, decreasing by at least 5% in three segments while increasing in two. Neuroscience increased and decreased in two segments. Facial coding increased in two segments and decreased on one, and GSR and HRV each increased in three segments but didn't decrease in any.

The technology segment increased usage of neuroscience (+15%), HRV (+9%), and eye tracking (+6%). Strategic consultants also increased usage of three methodologies (GSR, +8%; neuroscience, +7%; and HRV, +6%), but decreased facial coding and analysis (-13%). Qualitative researchers also had four changes: increases in usage both biometric methodologies, HRV (+7%) and GSR (+5%), and decreases in neuroscience (-8%) and eye tracking (-6%).

No other segment had more than two changes. Most significant among these, full-service research decreased eye tracking by 13%, and field services increased eye tracking (+16%) and facial coding and analytics (+11%).

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Eye tracking	-2%	+4%	-13%	+16%	-6%	-1%	+6%	-9%
Neuroscience (measures of neural activity)	-2%	+3%	-7%	+1%	-8%	+7%	+15%	+1%
Facial coding and analysis	-2%	+5%	-2%	+11%	+4%	-13%	+4%	+3%
Galvanic skin response (GSR)	-4%	+4%	-4%	-4%	+5%	+8%	-1%	+5%
Heart rate variability (HRV)	+2%	-2%	-3%	0%	+7%	+6%	+9%	-3%

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

They may be coming back as innovators find new ways to integrate methodologies and data and technology providers continue to attack barriers.

THE BIG PICTURE

In 2019, eye tracking was used by 36% of buyer-side market researchers, the high-water mark among either buyer segment for any of these biometric or neuroscience methodologies. Although these methodologies offer unique insights into how people react to stimuli, they are burdened with significant barriers to adoption. Compared to surveys and focus groups or IDIs, these address a more limited scope of issues, require more expertise to set up, measure and interpret, require special equipment, and require the measuring device and research participant to be co-located.

Some of these barriers can be lessened by education and technology, and more solutions may be on the way. Use of eye tracking has more than doubled among technology providers since 2019, increasing at least 5% each year. Usage of facial coding and analysis also more than doubled with almost all of that occurring in the first year of the pandemic. Neuroscience usage had declined each year before bouncing back this year, and usage of biometric response, particularly HRV, has also increased over the last four years.

Good technology solutions can mitigate barriers by delivering devices to participants and flattening the learning curve.

Good technology solutions can mitigate barriers by delivering devices to research participants and reducing the need or flattening the learning curve for expertise in data collection, analysis, and interpretation. Among buyer-side market researchers, usage of neuroscience has declined dramatically since the start of the pandemic, eye tracking has declined moderately, and facial coding and biometrics have stayed about the same. So who will use new solutions?

One source of future users could be interested buyer-side market researchers. Neuroscience, eye tracking, and facial coding have untapped interest: more than 40% of the interest in these methods come from those who “probably will use” them. Among their analytics counterparts, 44% of those interested in eye tracking are intenders, but intenders contribute a majority of the interest in the other methods. Plus, overall interest runs 10%-20% higher in the analytics segment than in market research.

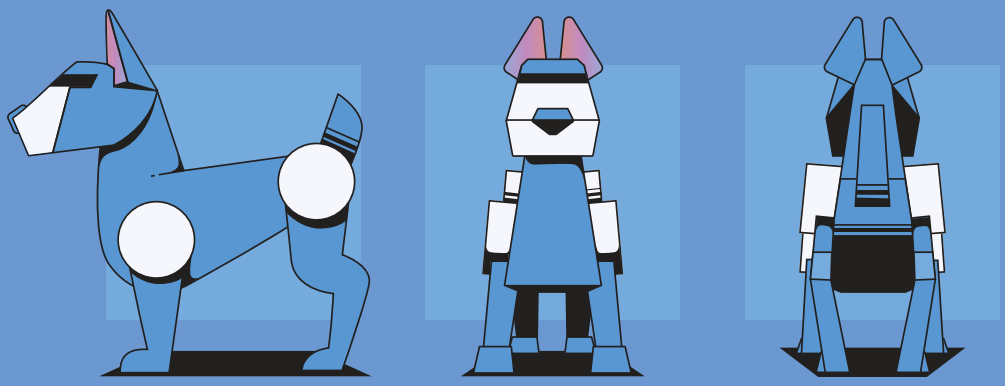
In *Observational Research*, we hypothesized that data and analytics professionals from buyers and suppliers are actively expanding the types of data they consider and field service providers are exploring new sources of data that don’t require in-person methodologies. Buyer-side analytics professionals are looking into biometrics and neuroscience methodologies, and a similar, but more moderate, case can be made for data and analytics providers. For field services providers, use of each of these methods plunged at the start of the pandemic, but eye tracking and facial coding have come back up to pre-pandemic levels.

Fewer full-service research providers are offering these, similar to patterns we’ve seen for each of the previously discussed categories. Qualitative researchers are moderately increasing use of biometrics, which could be used during qualitative events, and moderately reducing use of eye tracking and neuroscience, two that might be less useful during focus groups and IDIs. Strategic consultancies are also moderately increasing usage of neuroscience and biometrics. It could be that more suppliers are finding more success by focusing on hybrid approaches instead of more general kinds of research.

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.

Greenbook

INSIGHTS TECH SHOWCASES



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DATA AND ANALYTICS

As awareness of how various data can be applied grows, the adoption of methodologies to acquire and interpret these data spreads. Usage of some may be declining because segments are refocusing their efforts or perhaps they are replaced by methodologies that are growing. In addition, synthetic sample raises new possibilities.

OVERVIEW

Of the 50+ methodologies that GRIT tracks, eight have been grouped as "data and analytics" methodologies. Six of these focus on how data are analyzed and may or may not be associated with a particular type of data or how it is collected: text analytics, social media analytics, Big Data analytics, attribution analytics/single source data, causal analysis, and meta-analysis. A seventh, data integration, involves manipulating data but not necessarily collecting it.

The eighth methodology was just added to GRIT this year: synthetic sample. It's included in the data and analytics category because it is essentially a modeling and simulation process.

Across all segments, data integration and text analytics are used by the majority, except in the case of qualitative research.

Across all eight GRIT segments, data integration and text analytics are among the three most-used methodologies and used by the majority, except in the case of qualitative research where 48% use each. In four segments, use of data integration exceeds 70%: buyer-side data and analytics (87%), data and analytics providers (82%), strategic consultants (80%), and technology providers (72%). Text analytics are used by more than 70% of buyer-side data and analytics (74%), data and analytics providers (73%), and full-service research providers (72%).

The most common methodology to complete the top three is Big Data analytics. It's second among buyer-side data and analytics (80%) and third among field services (41%), qualitative research (45%), and technology providers (66%). Attribution analytics is third for buyer-side market researchers (58%) and data and analytics providers (66%). Social media analytics is third for strategic consultancies (65%), and causal analysis is third for full-service research providers (48%).

THREE MOST-USED DATA & ANALYTICS METHODS: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Data integration	63%	87%	56%	54%	48%	80%	72%	82%
Text analytics	60%	74%	72%	51%	48%	67%	68%	73%
Attribution analytics/single source data	58%	68%	41%	36%	36%	48%	44%	66%
Social media analytics	57%	67%	43%	35%	31%	65%	41%	59%
Big Data analytics	49%	80%	43%	41%	45%	60%	66%	64%
Causal analysis	44%	58%	48%	26%	30%	46%	33%	59%

Green shading indicates top three methodologies for that GRIT segment.

Usage of each of these seven methodologies increased at least 5% among data and analytics providers, led by meta-analysis (+16%), text analytics (+15%), and social media analytics (+15%). Causal analysis increased 10%, but declined by more than 5% in every other segment, most extremely among qualitative researchers (-19%), strategic consulting (-17%), and field services (-14%).

Big Data analytics increased at least 5% in five segments and did not decrease in any. The largest increases were among technology providers (+26%), field services (+16%), and qualitative researchers (+12%).

Usage of social media analytics declined in four segments and only increased among data and analytics providers. It plummeted among qualitative researchers (-20%) and fell less dramatically among buyer-side market researchers (-8%) and full-service research (-8%) and technology providers (-5%).

Text analytics usage changed in seven segments: three increases and four decreases. In addition to data and analytics providers, it increased moderately among buyer-side data and analytics (+7%) and full-service research providers (+6%). It declined moderately among field services providers (-5%), but sharply among qualitative researchers (-17%), strategic consultancies (-11%), and technology providers (-10%).

Although usage increased among data and analytics providers and moderately among strategic consultancies (+5%), data integration experienced a sharp decline in field services (-13%) and full-service research (-12%) and a moderate one in technology (-7%). Meta-analysis usage increased substantially for data and analytics and technology providers (+12%), increased moderately for buyer-side market research (+7%), and declined moderately for full-service research (-7%) and field services (-7%).

Attribution analytics changed the least. Usage increased among buyer-side market research (+16%) and data and analytics providers (+9%) and only decreased among full-service research (-7%), the segment with the most decreases (5).

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Causal analysis	-9%	-9%	-6%	-14%	-19%	-17%	-8%	+10%
Text analytics	-2%	+7%	+6%	-5%	-17%	-11%	-10%	+15%
Social media analytics	-8%	0%	-8%	-4%	-20%	-1%	-5%	+15%
Data integration	-4%	-1%	-12%	-13%	-2%	+5%	-7%	+10%
Meta-analysis	+7%	+4%	-7%	-7%	-1%	+1%	+12%	+16%
Big Data analytics	+3%	+6%	+2%	+16%	+12%	-1%	+26%	+7%
Attribution analytics/single source data	+16%	-1%	-7%	-1%	+4%	-4%	-2%	+9%

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

THE BIG PICTURE

Throughout this and recent GRIT reports we note the growing awareness of how various kinds of data can be applied to different business challenges and the spreading adoption of methodologies to acquire, integrate, analyze, and interpret these data. We also see evidence of how these capabilities are reshaping buyer-side organizations and continually reformulating supplier value propositions and redefining supplier segments.

Among our eight methodologies, data integration is historically the most widely-used, perhaps because it is not bounded by specific types of data or types of analyses. Despite the breadth of its user base, the proportions who say that investing in technology for data integration is much smaller. This suggests that much of the execution of what professionals consider to be "data integration" either does not need more sophisticated technology than what is currently available or the technology that would trigger investment does not yet exist. Data integration usage among technology suppliers is lower than last year, but much higher than 2020-21, so maybe they recognize a need to fill.

Big Data analytics usage increased in five segments, especially among technology providers, but also substantially among field services and qualitative researchers. In each of these three segments, usage of some other analytics methods declined, especially causal analysis, text analytics, and social media analytics. This doesn't prove anything, but it suggests that a methodology like Big Data analytics might either replace other types of analytics or else be considered a much more worthwhile investment.

Data and analytics providers increased usage of all methodologies that were tracked last year, and most of them are interested in synthetic sample. This may seem like a "duh" or "no duh" observation, but it doesn't happen every year. In past reports, we've commented on the apparent cross-migration of suppliers between data and analytics and field services and other segments, and it looks like the increase in use of these methodologies may be driven by suppliers of other services developing these into major revenue streams for themselves. Most of the increases are between 10% and 16%, and none stand out prominently, so this may be a phenomenon driven by different suppliers pursuing particular methodologies rather than by a few of them prioritizing several methodologies at once.

In other segments, full-service research suppliers reduced their usage of five methodologies, field services and technology providers reduced usage of four, and qualitative researchers reduced their usage of three. This could mean that some of those who used these methods were successful enough to become data and analytics providers, or it could mean that some suppliers in these segments decided to focus in other areas. Either way, it looks like suppliers are reconsidering the recent trend to add methodologies to try to be "everything to everybody."

Usage of causal analysis fell in seven segments after roaring into prominence last year. Though not as strong as last year, its usage this year is still healthy. It could be that the bloom came off the rose quickly for some, or perhaps something better came along. We speculated earlier that greater adoption of Big Data analytics may have usurped it, but we also have to consider whether adoption of Generative

AI has supplanted interest in particular methodologies. Whether it has supplanted them in purpose or supplanted them in attention, Generative AI may be impacting usage of some of these methodologies.

Speaking of which, advances in AI have enabled synthetic sample to step into the breach created by the sample quality and availability crises (see *Sample Quality and Availability*) and the ongoing drive for speed and cost-effectiveness. Across segments, usage ranges from 3% (field services) to 35% (buyer-side data and analytics), and interest ranges from 27% (buyer-side market research) to 63% (buyer-side data and analytics). It's clearly coming onto everyone's radar, though closer for some segments than others.

Buyer-side data and analytics are the early adopters, and this may set up an interesting dynamic for diffusion to other segments. On the one hand, they are likely among the most expert in the techniques that enable synthetic sample to be simulated so they are in a strong to position to "kick the tires." On the other hand, they are among the least experienced with the primary research synthetic sample is expected to replace or complement, so they might not be in the best position to evaluate whether the car is heading to the right destination.

It seems counter-intuitive that qualitative researchers are among the early adopters of synthetic sample because some solutions might be expected to replace the work they do. However, they've also increased use of seemingly competitive technologies, like chatbots for qual, and are heavy users of online qual. It raises the question of how much of today's qualitative research segment is composed of those who are good at interviewing and consulting versus those who are good with technology.

The impact that synthetic sample can have on the insights industry is incalculable, positive or negative. If there is strong collaboration between those who understand the mechanics and those who understand the application, it could supplement a lot of research, fill in gaps that can't be filled otherwise, and provide reasonable substitutes for research that would not be done without it. Plus, it would be very time-efficient and cost-effective.

On the other hand, if it is popularized based on time and cost savings without adequate scrutiny of the results, it could cannibalize primary research as it excretes misleading findings in its wake. Collaboration across disciplines, though it requires effort and restraint, can ensure that synthetic sample revolutionizes the business value of insights – in a good way.

Greater adoption of Big Data analytics may have usurped some methodologies, but adoption of GenAI may also be doing that.

PRINCIPLES TO FOLLOW FOR SUCCESS WITH SYNTHETIC SAMPLE

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It's difficult to escape the often contentious debates about the value of "synthetic sample" or "digital twin" capabilities in market research these days.

Broadly speaking, synthetic sample relies on generative AI to create realistic responses to questions, based on the training data available to Large Models (LLMs).

In theory there are important benefits associated with the use of synthetic sample:

- Cost
- Time and efficiency
- Sample consistency
- Access to hard-to-reach or expensive audiences
- Privacy protections
- Real-time interactivity

Yet lots of people are skeptical about the wholesale replacement of human respondents with synthetic sample.

So am I!

You might reasonably ask, then, why the company I founded, Glimpse, is investing so much time and money in our synthetic capabilities (or what we call "Enriched Data").

It's because we believe that the debate about synthetic sample is based on a false choice between more traditional research techniques, on one hand, and newer gen AI-enabled approaches, on the other hand.

We see a third path emerging instead: using reliable synthetic sample (or Enriched Data) to extend and scale the value of human research and insights.

In practice, we think that the most successful approaches to synthetic sample across the industry are already starting to follow the same basic set of principles:

1. Building AI-generated data on a foundational layer of traditional, real-world, first-party data, including inputs like behavioral and demographic data and lots of rich human language data. (In a much-cited Kantar blog about synthetic sample, it's noteworthy that the experiment did not draw on first-party data at all to generate synthetic sample.)
2. Leveraging all the proprietary datasets your organization has available to create synthetic sample--rather than relying exclusively on commercially-available LLMs. (This is how organizations will use synthetic sample to achieve insights unavailable to competitors.)
3. Using synthetic sample to supplement (rather than replace) human sample, especially when it comes to hard-to-reach groups of respondents.
4. Aligning the creation and use of synthetic sample with specific marketing, innovation, content, and research goals. For instance, synthetic sample might be a valuable supplement to traditional sample when it comes to exploring broadly-held beliefs about brands but less reliable when it comes to eliciting reactions to truly innovative products.
5. Seeing the creation of synthetic sample as an opportunity to address bias by focusing on the representation of previously excluded groups of people in the foundational data.
6. Testing, testing, testing and embracing controlled experimentation.

Regardless, one thing is clear: You may not be interested in synthetic sample but synthetic sample is interested in you!

Increasing numbers of research firms and brands will incorporate synthetic sample into their market research toolboxes over the next year.

I recommend refusing to play the "pro/anti synthetic sample" game and instead establishing durable, foundational principles to guide the path forward.

OTHER METHODOLOGIES

As one might expect from a section with "Other" in the title, it's difficult to pick out consistent themes across methodologies. However, there are clear trends for individual methodologies, and the overall patterns within segments reinforce what we've seen in other categories.

OVERVIEW

GRIT isn't crazy about labelling anything as "other" or "miscellaneous" because it can seem demeaning to them, but in this case we have to choose between that and adding eight more sections to this report. Even if referring to methodologies as "other" seems to genericize them, the methodologies in this section are just the opposite of generic. None of them fit well in the "other" sections because they either transcend them or defy easy categorization.

Usage of these methodologies vary widely by segment. Of the eight methodologies covered in this section, seven are among the three most-used in at least one segment. However, the one that is not strictly research-related is most-used in every segment: marketplaces for sample, talent, software, etc. In fact, it is used by a majority in each segment, especially buyer-side data and analytics (71%), field services (69%), data and analytics providers (69%), technology (68%), and qualitative research (65%).

Prediction markets are among the three most-used in each segment except buyer-side data and analytics (46%) and qualitative research (36%). Behavioral economics models are among the top three for buyer-side data and analytics (67%), strategic consulting (49%), full-service research (42%), and buyer-side market research (40%).

Research gamification is among the three most-used in buyer-side data and analytics (53%), qualitative research (40%), and data and analytics providers (37%). Sensory research or testing is among the top three in qualitative research (40%), AI or VR/AR/XR for CX/UX design in field services (39%), and crowdsourcing in technology (29%).

Of the eight methodologies in this group, seven are among the three most-used in at least one segment.

THREE MOST-USED "OTHER" METHODOLOGIES: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Marketplaces	54%	71%	57%	69%	65%	57%	68%	69%
Behavioral economics models	40%	67%	42%	21%	40%	49%	22%	36%
Prediction markets	31%	46%	30%	36%	36%	40%	36%	43%
Sensory research or testing	28%	44%	23%	14%	40%	17%	25%	17%
AI or VR/AR/XR for CX/UX design	26%	31%	24%	39%	30%	31%	28%	34%
Crowdsourcing	22%	43%	17%	18%	24%	26%	29%	25%
Research gamification	20%	53%	29%	25%	40%	32%	28%	37%

Green shading indicates top three methodologies for that GRIT segment.

Usage of marketplaces increased at least 8% in every segment, including more than 20% in three and more than 10% in four others. On the flip-side, usage of behavioral economics models fell at least 5% in six segments and did not increase in any.

Usage AI or VR/AR/XR for CX/UX design also saw more declines (4) than increases (1). Usage increased 5% among data and analytics providers, but declined 18% among buyer-side data and analytics; 14% among technology providers; 8% among qualitative researchers; and 6% among strategic consultancies.

After marketplaces, VE/VR had the most changes: four increases of at least 5% and three decreases. The biggest increases were among buyer-side data and analytics (+17%) and qualitative researchers (+10%). The decreases were moderate: field services (-8%), technology (-7%), and full-service research providers (-6%).

Sensory research or testing saw almost as much activity as usage increased in four segments and decreased in two. Field services providers (+20%), buyer-side data and analytics (+16%), qualitative researchers (+12%), and technology providers (+11%) increased usage. It decreased for full-service research (-11%) and data and analytics providers (-9%).

Prediction market usage increased in three segments and decreased in two. The largest changes were among qualitative researchers (+13%) and field services providers (-16%). Research gamification usage decreased in three segments and increased in two, most sharply among technology providers (-24%), full-service research providers (-11%), and buyer-side data and analytics and field services providers (+9% each).

Prediction market usage increased in three segments and decreased in two; qualitative researchers grew the most, and field services fell the most.

CHANGE IN USE OF METHODS/APPROACHES SINCE 2022: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Marketplaces	+19%	+13%	+22%	+15%	+27%	+12%	+8%	+27%
VE/VR	+1%	+17%	-6%	-8%	+10%	+6%	-7%	+5%
Behavioral economics models	+4%	-2%	-6%	-6%	-8%	-11%	-15%	-10%
Sensory research or testing	0%	+16%	-11%	+20%	+12%	-3%	+11%	-9%
AI or VR/AR/XR for CX/UX design	-3%	-18%	-1%	0%	-8%	-6%	-14%	+5%
Research gamification	-3%	+9%	-11%	+9%	+4%	-7%	-24%	-2%
Prediction markets	-5%	+7%	-1%	-16%	+13%	+2%	+6%	+3%
Crowdsourcing	0%	+4%	-5%	+5%	0%	+3%	+3%	+6%

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

Buyer-side data and analytics increased usage of five methodologies and only decreased usage of one. Full-service research, as we've seen for other methodology groups, went the opposite way with five decreases to one increase. Qualitative researchers also had six changes, and increases outnumbered decreases, four to two.

The most volatile, however, were field services and technology providers, each with seven changes. Field services providers increased usage of four methodologies while decreasing usage of three, and technology providers increased usage of three while decreasing usage of four.

Strategic consultancies had three increases to two decreases, and buyer-side market researchers were the quietest with only two increases to one decrease.

THE BIG PICTURE

As one might expect from a section with "Other" in the title, it's difficult to pick out consistent themes across methodologies. However, there are clear trends for individual methodologies, and the overall patterns within segments reinforce what we've seen in other categories.

Increased usage of marketplaces is the clearest trend among these eight methodologies. The only one not strictly related to research and the most-used in each segment, usage increased by at least 8% in each. At the other end of the spectrum, usage of behavioral economics models fell in all six supplier segments while holding its own among buyers. It remains among the most-used in four segments, so the changes may reflect a reshuffling of responsibilities rather than an overall decline.

Usage of sensory research increased among buyer-side data and analytics and field services providers, two of the three segments that seem to be looking for new types of data to collect and analyze. It also increased among qualitative researchers and might be consistent with their expertise in in-person research and the theory that some are developing hybrid research approaches. Sensory research usage also increased among technology providers, although it is still not very widely used.

Data and analytics providers, the third segment interested in expanding the kinds of data they use, decreased usage of sensory research. They moderately increased use of VE/VR and new methodologies for CX/UX, suggesting that some are more focused on experience design, but only for a subset of senses.

Although the buyer-side data and analytics segment increased use of VE/VR, they decreased use of new methodologies for CX/UX. Compared to last year, their involvement with early stage product development didn't change much, but their direct impact on later stage product development fell by a similar magnitude as usage of new CX/UX methodologies, although most are still interested in it (see *Scope of Insights Impact*). This may be another indication of how changes in responsibilities impact changes in methodology usage.

At a more general level, 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. We suspect field services are expanding their portfolio of data types, qualitative researchers are integrating methodologies, technology providers are focusing on certain kinds of new solutions, and data and analytics providers are focusing on their core value propositions.

Compared to last year, their direct impact on later stage product development fell by a similar magnitude as usage of new CX/UX methodologies.

MANAGEMENT STRATEGIES

Although strength of agreement varies, almost all segments prioritize engaging stakeholders, integrating work and data, storytelling, and agile research. They disagree on the priority of leveraging DIY tools and AI-enabled tools, and they are taking different directions regarding how they work with each supplier type.

OVERVIEW

For this report, GRIT took several different concepts tracked in earlier reports, augmented them, and grouped them together as "insights management strategies." Generally, they concern how the work gets done and how the work and results are shared. "How the work gets done" includes agile approaches, DIY tools, AI-enabled tools, and integrating different kinds of data or insights work. The "sharing" dimension includes engaging stakeholders, storytelling, and DIY that enables others to do their own analyses.

An aspect of insights management that is important to the health of the insights and analytics industry is how much work is outsourced to external suppliers and how much is kept or taken in-house. In each GRIT survey, we ask whether outsourcing has increased stayed the same, or decreased relative to the past year.

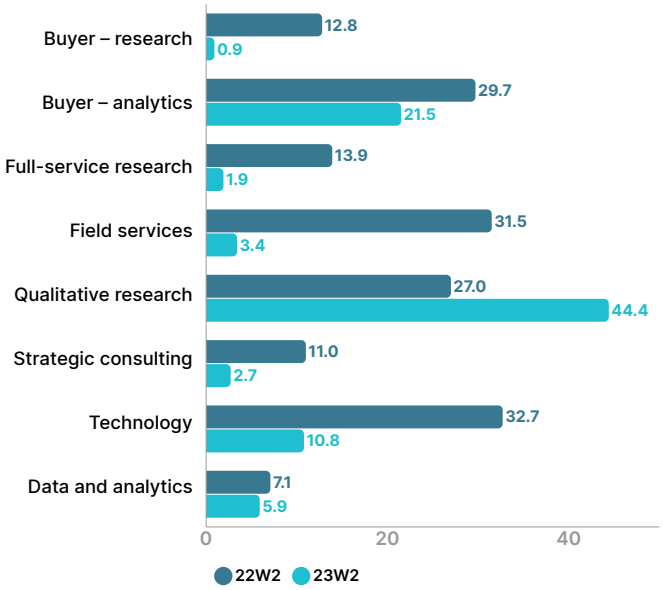
Trend scores indicate buyers and suppliers in every segment except qualitative research are less inclined to outsource than last year.

For the chart in this overview, we have collapsed this to a score: a positive score means outsourcing increased, on average, and a negative score means that it decreased. A score of 200 means that the entire segment increased outsourcing significantly, a score of 100 means the segment increased outsourcing slightly, on average, and a score of 0 means outsourcing was unchanged, on average. Negative scores have the same interpretation as positive, but apply to decreased outsourcing.

Outsourcing trend scores indicate that buyers and suppliers in every segment except qualitative research are less inclined to outsource work than they were last year. None of them are more inclined to take work in-house than to continue outsourcing, but buyer-side market researchers (0.9), full-service research suppliers (1.9), strategic consultancies (2.7), field services suppliers (3.4), and data and analytics suppliers (5.9) are evenly split, on average, between increasing outsourcing and taking more work in-house.

Another way to look at outsourcing is changes in how often each segment works regularly with each supplier type. On the positive side, regular work with strategic consultancies increased 9% among buyer-side data and analytics professionals and more moderately among data and analytics providers (+6%) and full-service research suppliers (+5%). Field services providers increased regular work with technology providers (+13%), and technology providers increased with full-service research (+10%) and field services providers (+11%).

OUTSOURCING TREND SCORE: GRIT WAVE



CHANGE IN SUPPLIER TYPES WORK WITH "REGULARLY" IN P12M: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Technology providers	+4%	-3%	+3%	+13%	0%	0%	-8%	-4%
Full-service research providers	-1%	-1%	+1%	-5%	-2%	+2%	+10%	-10%
Data & analytics providers	-3%	-5%	+3%	-1%	0%	-12%	-13%	-5%
Field services providers	-5%	-7%	-4%	-17%	+2%	-2%	+11%	-9%
Strategic consultants	-7%	+9%	+5%	+3%	-13%	-6%	-11%	+6%
Qualitative research providers	-12%	0%	+3%	-1%	-4%	-6%	-11%	+4%

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

On the other hand, regular work with qualitative researchers fell 12% among buyer-side market researchers and 11% among technology providers. Regular work with field services providers dropped 17% with others of their type and 9% with data and analytics providers. Regular work with qualitative researchers dropped 12% among strategic consultancies, and regular work with full-service research providers fell 10% among data and analytics providers.

Although technology providers increased regular work with full-service research and field services providers, they decreased it with data and analytics providers (-13%), strategic consultants (-11%), qualitative research providers (-11%), and other technology providers (-8%).

The changes in trend scores indicate less enthusiasm for outsourcing than last year, and these changes in who works with whom tend to reflect a similar dampening.

THE BIG PICTURE

In nearly every segment, a majority says applying agile methods and approaches is a core strategy, and a majority in almost every segment says the same about engaging stakeholders and applying storytelling skills. Integrating different kinds of insights work and data is a core strategy for about two-thirds of both buyer segments, as well as for majorities of strategic consulting, full-service research, data and analytics, and technology providers.

Segments also agree that leveraging DIY tools to enable others to conduct analyses is a low priority, but there is less consensus on the importance of DIY tools for their own use and AI-enabled tools. The buyer-side segments are polarized: more researchers prioritize DIY tools and more in the analytics segment prioritize AI-enabled tools. On the supplier-side, DIY tools are a higher priority for field services and technology providers, and AI-enabled tools are a core strategy for most technology and data and analytics suppliers but only for one-third or fewer in other segments.

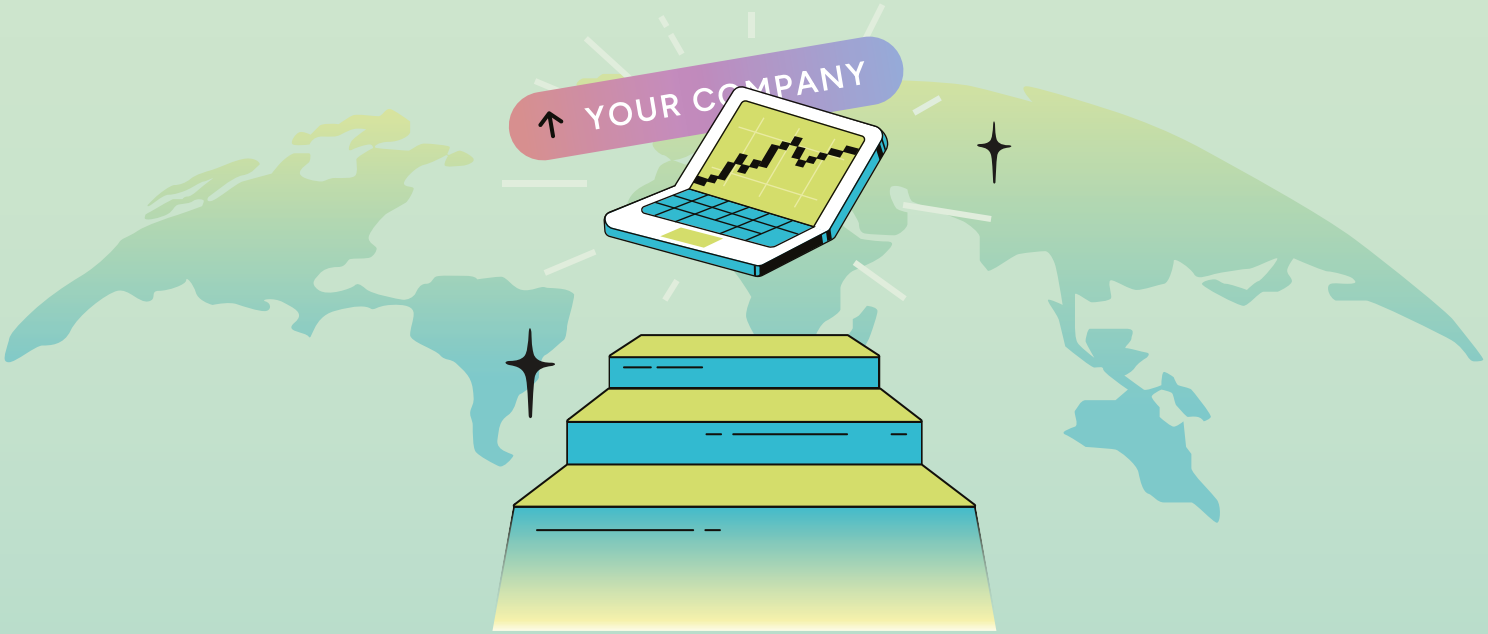
How are insights organization leaders changing and adapting to the dynamism in the industry? Compared to the rest of this GRIT Report, this section most clearly highlights how tried-and-true wisdom and best practices are still critical to management strategies. One of those reliable strategies is outsourcing, and despite the ubiquity of self-service tools, knowing when to insource vs. outsource to accomplish objectives is straight out of Good Management 101. The big question is whether that need will decline or grow due to technology disruption. The verdict is out, but this is no time for complacency among firms that deliver outsourced services. – LM, ed.

Outsourcing was flat except for a slight increase among qualitative researchers, but the trends don't seem strongly related to DIY strategies. Buyer-side market researchers decreased regular work with qualitative researchers substantially and with strategic consultancies and field services providers moderately. The buyer-side analytics segment moderately decreased regular work with field services and data and analytics providers, but increased regular work with strategic consultancies. Regular work with strategic consultancies, field services, and data and analytics suppliers decreased in four segments, and regular work with qualitative researchers decreased in three.

Although the overall amount of outsourcing may not be changing at the moment, the patterns of working with suppliers are morphing. Taking the longer view from before the pandemic, fewer buyer-side market researchers work regularly with full-service research (-15%), qualitative researchers (-13%), and data and analytics providers (-7%). More of them work regularly with technology providers (+25%). Technology providers are the only segment in which most say leveraging DIY tools is a core strategy, and it seems like buyer-side market researchers are gradually taking more work in-house and away from suppliers.

Although majorities in each segment say leveraging AI-enabled tools is at least a secondary strategy, only technology and data and analytics providers consider it a core strategy. These solutions are true wild cards with respect to managing insights work, and these two segments are dealing. As we discuss in *Research Automation*, buyer-side data and analytics professionals have lower barriers to adopting AI-enabled tools, and the near future will tell more about the nature and strength of these barriers throughout the industry

Greenbook



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INVESTMENT TRENDS

After two years of recovery, insights organizations have hit the "pause" button on increases in technology, staff, and outsourcing spending. An investment slowdown doesn't mean businesses are standing still, and even if tech investment is more sluggish than we're used to seeing, that doesn't keep priorities from evolving.

OVERVIEW

GRIT tracks trends in insights staff size and technology spend as well as which technologies are priorities for investment. Over the years, we've been intrigued by the question of whether increases in automation lead to decreases in staff size, and the answer is seldom straightforward or universal.

Increased automation is sometimes related to decreases in staff size, but sometimes tech spend, staff size, and even outsourcing grow together. (For more detail on outsourcing trends. see *Management Strategies*.) When insights work is valued by the organization and budget is available, all three can increase in response to demand that can never be satiated, and tasks tend to flow to technology, internal human, and external resources that are best suited to each need.

If we compare these three trends for buyer-side market researchers, we see that they have the fifth highest scores for staff size and technology spend trends and the lowest for outsourcing. This suggests that market researchers are prioritizing internal investment, but that staff size and technology spend are not exactly growing like weeds.

For buyer-side data and analytics, all three trends are the second-highest across segments. This suggests that their insights work is growing enough to support increases in staff, technology, and outsourcing.

In *Business Outlook*, we'll see that the research budgets trends are similar across market research and analytics. These budgets exclude staff and technology, but would include outsourcing. At the risk of over-interpreting, if both segments have the same budget score but analytics is more bullish on outsourcing, it implies that analytics are paying less per "outsourcing unit," if there were such a thing. Of course, there are other factors to consider, but consider this hypothesis as you note differences across the two buyer segments throughout this report.

For the charts in this overview, we have collapsed each trend to a score: a positive score means an increase, on average, and a negative score means a decrease. A score of 200 means that the entire segment increased significantly, a score of 100 means the segment increased slightly, on average, and a score of 0 means the segment did not change, on average. Negative scores have the same interpretation as positive, but apply to decreases.

Patterns across the three trends differ by supplier segment. Qualitative researchers are first in staff size and outsourcing, but near the bottom in technology spend. It doesn't mean that they aren't spending on technology – it seems nearly everyone always spends on technology these days – but that their near-term growth depends more on people and partners.

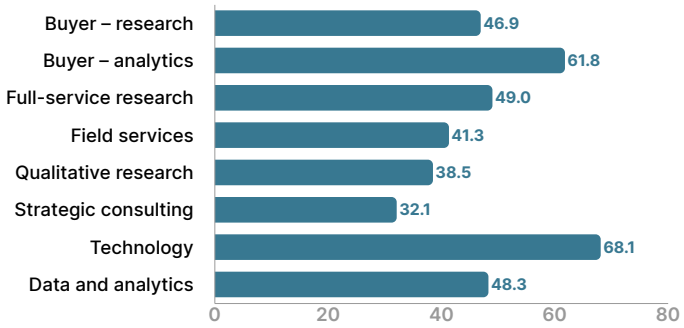
Full-service research providers are in the middle with respect to staff size and technology spend trends, but near the bottom in outsourcing. They look very much like their buyer-side market research counterparts: focusing on internal capabilities, but not expanding them.

The technology and data and analytics provider segments have the lowest staff size trend and middle-of-the-road outsourcing trend scores. As one might expect, technology providers have the strongest technology spend trend score, and data and analytics providers are among the stronger segments in tech spending.

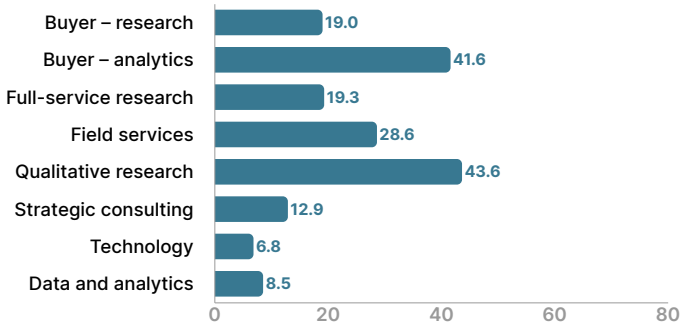
Field services look a bit like qualitative researchers, with stronger staff size scores and weaker (but not weak) technology spend. Strategic consultancies are near the bottom on each trend, somewhat similar to full-service research providers and buyer-side market researchers and may not view any of these three investment areas as central to their strategies.

Technology investment priorities can increase even if the technology budget doesn't. The changes in priorities since last year echo the movement we saw throughout the methodology sections. Buyer-side market researchers haven't made dramatic changes to how they conduct their work, and changes in their tech investment priorities are moderate. Full-service research providers are scaling back their methodologies and focusing on core offerings and investing in internal capabilities.

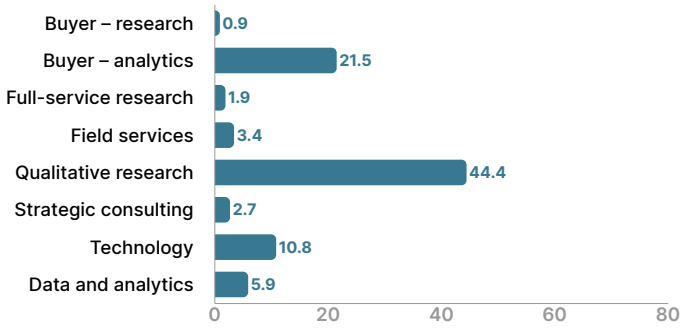
TECHNOLOGY SPEND TREND SCORES: GRIT SEGMENT



STAFF SIZE TREND SCORES: GRIT SEGMENT



OUTSOURCING TREND SCORES: GRIT SEGMENT



The changes in tech investment priorities since last year echo the movement we saw throughout the methodology sections.

Other segments are diversifying the kinds of data they collect, which may not require much technology investment, but also de-emphasizing sample-based research. Technology providers seem to be pursuing analytics solutions and de-emphasizing other areas, and other segments are looking to reinvent offerings and reposition themselves by leveraging analytics and different primary research approaches.

In general, the tech investment trends seem to recall the methodology trends discussed earlier in the report.

CHANGE IN KEY PRIORITIES FOR TECH SPENDING: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
DIY solutions	-2%	+2%	+14%	+41%	+42%	+14%	-12%	+13%
Analytics	+7%	-3%	+7%	-2%	+23%	+9%	+13%	+14%
Sample quality and/or management	+4%	-18%	+5%	+3%	+15%	-1%	-14%	-17%
Data collection techniques	-7%	+4%	+7%	+3%	+1%	+23%	-7%	+17%
New data types	-1%	+3%	+1%	+10%	+18%	+13%	-16%	+31%
Data integration	+1%	+2%	+2%	+12%	+49%	+3%	-16%	+23%

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

THE BIG PICTURE

If we were to characterize the insights industry as a whole based on investment trends, it looks like after two years of recovery from the pandemic, insights organizations have hit the "pause" button on increases in technology, staff, and outsourcing spending. Of course, this only describes the general tendency, not every buyer and supplier organization out there, some of whom are thriving and others of whom are struggling.

After two years of recovery, insights organizations have hit the "pause" button on increases in technology, staff, and outsourcing spending

An investment slowdown doesn't mean businesses are standing still. As we've seen in the methodology sections of this report, buyers, especially in the analytics segment, are adopting new methodologies and discarding others that may have run their course, and suppliers are reinventing offerings and repositioning themselves. We also know that even if tech investment is more sluggish than we're used to seeing, that doesn't keep priorities from proliferating.

With respect to methodologies, buyer-side market researchers have decreased usage of certain ones, like CATI, but are mostly standing pat. Similarly, their tech investment priorities have not change dramatically.

Full-service research providers are reducing usage of more methodologies than they are adopting. Combined with the investment trend scores, they appear to be focusing on improving performance on core offerings rather than growing more capabilities. Their tech investment priorities are increasing greatly for DIY tools and moderately for analytics, sample quality, and data collection, reinforcing this perception.

Compared to how they are embracing various kinds of analytics, technology providers are less engaged with various kinds of research methodologies, especially mobile solutions. Similarly, their tech investment priorities

suggest an almost single-minded focus on analytics, at least in terms of what's trending.

Strategic consultancies and qualitative research, field services, and data and analytics providers are each evolving their own portfolios of data collection and analytical methodologies. Field services providers are attempting to reach beyond surveys and focus groups, and their tech spend priorities are trending heavily toward DIY tools and also toward new types of data and data integration.

Strategic consultancies and qualitative researchers each seem to be exploring ways to augment their research methodologies or create new hybrid approaches. Already expert in data collection, qualitative researcher tech spending trends strongly favor DIY tools and data integration, and also prioritize analytics, sample quality, and new types of data. Strategic consultancies share at least a moderate trend toward DIY tools, new data types, and analytics, but, unlike qualitative researchers, their tech spending is pivoting most strongly toward data collection techniques.

Data and analytics professionals on the buyer and supplier sides are diversifying the kinds of primary research they pursue, increasing use of various analytical methods, and taking strong interest in synthetic sample. Both are de-emphasizing tech spending on sample quality and management, and those on the supplier side are increasing their emphasis on each other area of tech investment, especially new data types and data integration.

Taking a step back, it's clear that analytics and DIY solutions continue to be priorities for tech spending. As a key priority, analytics increased in six segments without declining in any, and DIY solutions increased in five and only decreased among technology providers (who by now may have more than they can use).

Also, the priority on new data types increased in four segments and only declined among technology providers.

Finally, we decoupled dashboards and data visualization, and found that dashboards by themselves outrank both kinds of visualization tools among data and analytics providers, buyer-side market researchers, and field services providers. Visualization tools are a higher priority than dashboards among qualitative researchers, and their priorities are equivalent in other segments.

In all but two segments, data visualization tools for expert analysts are a higher priority than tools for novices. Technology providers prioritize novices somewhat higher, and full-service research providers place equivalent priority on each, but their overall priority for data visualization tools is not very high. In general, the industry seems more committed to giving more power to power users than to "democratizing data.

As a key priority, analytics increased in six segments without declining in any, and DIY solutions increased in five, only decreasing among technology.

"Follow the money" has never been smarter advice than now, and in this section we look at investment priorities for both buyers and suppliers. Technology, staffing, and outsourcing are three areas we consider together due to their synergies. Think of them as a graphic equalizer, and each business adjusts them to get the optimal experience based on their preferences. One size doesn't fit all for sure, but the trends are clear: technology seems to be the variable that defines what happens to the other two, and continues to be the first indicator of investment trends. – LM, ed.

RESEARCH AUTOMATION

Automation has settled comfortably into everyday research life. Although automation is widely used across a great many tasks, adoption of AI-assisted versions has been uneven. Technology providers and data and analytics professionals on the buyer and supplier sides are blazing trails, and we'll see how the scenario unfolds as more solutions become available and mature.

OVERVIEW

GRIT has tracked adoption of research automation and the reasons for it since 2018. This time, we've distinguished between automation that is AI-enabled and automation that is not.

In each GRIT segment, text data analysis is the task most likely to be currently automated with AI-assistance. Most have done this among data and analytics providers (65%) technology providers (61%), and full-service research providers (51%). Just under a majority have among buyer-side data and analytics (47%), slightly more than among their market research counterparts (44%) and strategic consultancies (41%). Field services providers have been slower to adopt AI-assisted text analysis (35%), and qualitative researchers have been the least likely (28%).

AI-assisted automation of image and video analysis is among the top three in four segments: data and analytics providers (53%), buyer-side data and analytics (43%) and market researchers (35%), and qualitative researchers (22%). Social media analysis is among the top three in three segments: buyer-side data and analytics (41%), strategic consultancies (23%), and buyer-side market researchers (18%).

Survey data analysis is also among the top three AI-assisted automation solutions for three segments: technology (47%), strategic consultancies (26%), and field services providers (25%). Audio analysis is another that three segments put in their top three: data and analytics providers (55%), full-service research providers (27%), and qualitative researchers (26%).

Using AI to automate charting and infographics is among the top three in two segments: field services (26%) and full-service research (25%). Survey design in the top three for technology providers (43%).

In each segment, text data analysis is the task most likely to be currently automated with AI-assistance.

recollective

THE AUTOMATION ERA: THE RISE OF AI IN QUALITATIVE RESEARCH

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In the ever-evolving landscape of qualitative market research, automation has emerged as a pivotal force, reshaping the way researchers conduct their work. At Recollective, we are steadfast in our commitment to refining and developing innovative technologies that help automate the research process, enhance efficiency, and elevate outcomes.

With automation now integrated into researchers' daily lives, we are able to accomplish more in less time, amplifying productivity without compromising quality. This transformative shift is not merely about speed; it's about redefining the research paradigm, enabling researchers to delve deeper, analyze more comprehensively, and unearth insights with unprecedented precision.

As automation advances, there's a discernible pivot towards the integration of AI which offers unparalleled capabilities, particularly in analysis where complexity and volume have always posed significant challenges in qualitative research.

As seen in the *2024 GRIT Insights Practice Report,* text data analysis stands at the forefront of AI automation adoption along with image and video analysis. However, the adoption of AI-assisted automation hinges upon accessibility and awareness along with educating researchers on how it can help transform their individual research practices.

At Recollective, our goal is to do just that – not only provide tools to help with automation but to make them accessible to everyone while also working with our customers to ensure they are leveraging the technology to best meet their needs.

Our platform boasts AI-powered features that streamline analysis and offer more accurate transcriptions, auto-generated key takeaways, and study-specific pattern recognition. By defining study objectives within Recollective, researchers can tailor AI algorithms to align with research goals, ensuring relevance and precision in insights generation. Paired with our suite of built-in tools, Recollective enables researchers to create custom study templates, quickly access automated chart generation, and extract insights on the fly.

Our commitment to innovation extends beyond technology; it's about fostering collaborative partnerships that drive ongoing evolution in research automation. Through collaboration and automation, we're not just saving time but reshaping how research is conducted—empowering researchers to unlock deeper insights and shape the future of the industry.

TOP THREE TASKS AUTOMATED WITH AI: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Text data analysis	44%	47%	51%	35%	28%	41%	61%	65%
Image and video data analysis	35%	43%	20%	20%	22%	21%	30%	53%
Social media data analysis	18%	41%	25%	15%	16%	23%	13%	43%
Survey data analysis	16%	38%	19%	25%	14%	26%	47%	32%
Audio analysis	14%	29%	27%	23%	26%	21%	12%	55%
Charting and infographics	3%	31%	25%	26%	17%	11%	27%	52%
Survey design	3%	28%	7%	21%	6%	14%	43%	37%
n =	41	99	92	32	24	45	17	21

Green shading represents top three in segment.

Adoption of AI-assisted automation solutions depends on many factors, including the availability of solutions, awareness of solutions, and frequency of certain tasks, so it's hard to assess the overall appeal of AI-assisted solutions based on adoption. For a better understanding of how important AI-enabled tools are expected to be in insights work, see the *Management Strategies* section.

AI is just the evolution of automation (albeit on steroids!), and the industry has been evolving for years to make use of these technological advances. What is the current state-of-play in this shift? Surprisingly, there is still plenty of room for adoption growth, and the low hanging fruit remains anything process-oriented. – LM, ed.

THE BIG PICTURE

For the past few years, GRIT asked about adoption of each automation technology in terms of regular use, occasional use, consideration, etc., but research automation is so mainstream that it's pointless to break it down so finely. Now, the advent of AI gives us an excuse to refocus our automation questions on a more compelling issue: whether the adoption of automation includes the adoption of AI.

For several reasons, rates of adoption are challenging to compare. What is a common task in one segment may not be in another, and the level of sophistication the task requires could differ across insights organizations as well. One task may currently have a wide variety of mature automation solutions from which to choose while solutions may be relatively new for other tasks. Especially for AI solutions, availability and awareness may be barriers to adoption that vary by task and segment.

Of the sixteen tasks, buyer-side market researchers have automated 7.0, on average, while their data and analytics counterparts have automated nearly twice as many (13.0), strategic consultancies and technology and data and analytics suppliers have automated at least ten, and the other three segments have automated at least nine. Market researchers are much more likely than other segments to work regularly with full-service research suppliers (see *Management Strategies*), so perhaps many of the tasks they could automate might be outsourced.

At the risk of over-simplifying, analysis seems to be the low hanging fruit of automation, possibly because of the expertise and computational capacity it requires and possibly because these solutions are more mature. If we look through the lens of the buyer-side market researcher, we see four tasks that are automated by a majority: text data analysis, image and video data analysis, social media data analysis, and survey data analysis. Each of these concern analysis, and each are also automated by the majority of at least six other segments.

Some of the biggest gaps in automation adoption between buyer-side market researchers and other segments concern more basic and common activities: report writing, charting and infographics, survey design, and sampling. A minority of market researchers have adopted these, although some are close to majority, while most in each other segment have automated all of them. In fact, in all but two cases, adoption of these four automations exceeds 60% in every other segment.

Perhaps buyer-side market researchers are less familiar with automation outside of analyses, or maybe they are less trusting that automating these processes can produce the level of customization they need. Although most of them believe that automation can enable them to complete projects and initiatives faster, do more with less, access new tools, and transform work processes, only 38% believe automation can improve the quality of the research. On the data and analytics side, exactly twice as many believe it will improve quality.

Buyer-side researchers have automated 7.0 tasks while their analytics counterparts have nearly twice that, and every supplier segment has automated at least nine.

When it comes to adopting automation powered by AI, buyer-side market researchers are about as likely as their analytics colleagues to have adopted it for text, image, and video data analysis and more likely than field services, qualitative researchers, and strategic consultancies. However, there is at least a 20% gap versus the buyer-side analytics segment in almost every other area. Although they seem to have accepted AI for what is arguably their most established kind of automation application, text analysis, leveraging AI-enabled tools is a core strategy for only 21% on the market research side, but double that for data and analytics (see *Management Strategies*).

On the supplier side, strategic consultants and full-service research, field services, and qualitative research providers have automated about 2.5 tasks, on average, that are AI-assisted. This is about one more than buyer-side market researchers (1.5) and just over half of those for buyer-side data and analytics (4.7). Meanwhile, technology providers are using AI to automate an average of 4.4 tasks, and data and analytics providers are doing the same for 5.5 activities. The latter stand out for their much higher adoption of AI-assisted automation for image, video, and audio analysis and charting and infographics.

Technology providers and both data and analytics segments strongly believe automation will enable them to lower costs, which may be the key to driving greater adoption.

Similar to the buyer-side data and analytics segment, technology and data and analytics providers are much more likely to name leveraging AI-enabled tools as a core strategy. These three segments are the only ones with more than 70% agreement that automation will enable them to lower their costs, so maybe that's the key factor that drives greater adoption. Interestingly, lowering costs might be more of a competitive strategy for technology providers but more of a margin strategy for data and analytics: two-thirds of the former say automation enables them to lower their prices, but there is much less agreement among the latter.

With widespread adoption of solutions for practically anything, research automation has settled comfortably into everyday research life. Although we can point to technology providers and data and analytics professionals on the buyer and supplier sides as the strongest advocates of AI-assisted solutions, adoption is not as uniform across tasks and segments as it is for automation generally. However, give the industry more time to develop and promote AI-assisted solutions, and we might eventually see a similar level of uniformity.

To get to that point, we'll need to better understand the barriers to adoption beyond availability and awareness. In particular, is a solution that meets all the needs of one segment complete enough to meet the needs of another or does the same task have different requirements? In order to conquer every segment, is the main barrier that the solutions need to be tailored or that the use cases and benefits need to be explained differently? Maybe Generative AI can answer these questions

THE AUTOMATION ERA: AI TOOLING AND THE MAGNIFICATION OF CONSEQUENCES

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One statistic stood out to me in the *2024 GRIT Insights Practice Report:* a 21% increase in the use of sample fraud detection services, greater than any other sample quality factor. This highlights our growing reliance on AI to improve tasks at scale. However, insight professionals need to examine key considerations when employing fraud detection or any AI tools for insights.

We appreciate the quantum leap these tools enable, but how often do we consider their potential to magnify objectionable traits? What responsibility do we have to minimize or avoid unintended consequences? Similar to flying a plane or handling a gun, improper use or lack of oversight of AI tools can have significant consequences, and we as professionals must thoughtfully examine the risks.

Transparency and Explainability in AI Tools
Start with understanding how an AI tool's predictions work. This requires transparency, and tool providers should share how their AI systems make decisions and which factors they consider. Ask for a transparency report, which should provide detailed statistics about the AI system's performance and effectiveness.

Also, consider obtaining certification or license verification for AI-enabled tools you might consider. Certification organizations, such as the OECD's Algorithmic Transparency Certification for Artificial Intelligence Systems, use comprehensive questionnaires to evaluate the explainability, fairness, and level of consumer protection offered by AI systems.

Creators of AI tools (or insights suppliers using them) must be willing and able to explain how the models are created, tuned, and trained, as well as to perform common-sense tests to evaluate their predictions. An ideal fraud detection and remediation service should prioritize transparency and accountability so customers can fully evaluate the benefits and risks.

Bias Awareness in AI Tools
The root magic of AI is the human-generated data it is trained on. In 2024, the UNESCO International Research Center on Artificial Intelligence published a report on gender bias in Large Language Models (LLMs). They found pervasive bias, reinforcing stereotypes against women in areas such as loan approvals, psychiatric diagnosis, and educational biases.

If you want your research insights to represent diverse populations accurately, it's responsible to ensure that models are transparent and capable of self-examination. They should be able to identify and measure biases to provide fair and accurate results for all population cohorts.

Privacy and AI Tools
With data protection regulations like GDPR in Europe and CCPA in California in place, researchers must ensure strict compliance to avoid fines and reputational damage. These dictate how personal data is processed and govern complex and varied international data transfers.

It's not just about safeguarding insights at one point of use but ensuring confidentiality throughout the process. For any AI tool that captures personal data, it's mandatory to obtain consent from each participant for each new analysis. Provide a clear privacy notice and an easy-to-access way for participants to opt-out at any time.

Ask how the tool provider anonymizes data and ensures confidentiality. Have them explain their protocol in the event of a material breach and how you would be notified. AI tools should be continuously monitored, retrained, and improved to ensure ongoing compliance and user trust, and participants must be able to manage their settings or opt out.

CRITERIA FOR METHODS AND SUPPLIERS

Total cost and speed are important when choosing between methodologies, but the ease of interpreting and communicating results is a strong consideration as well. Data quality, service quality, and pricing are important when choosing between suppliers, but what else makes a difference?

OVERVIEW

In each *Insights Practice* report, GRIT looks at the top criteria insight professionals use to choose methodologies and suppliers or partners. This year, we've presented the methodology criteria as a trade-off and removed the no-brainer "quality of insights generated" as a criterion. We've added ease of interpreting and communicating results, how labor-intensive the methodology is, and the expertise required to use it.

Total cost is a top-three priority for all segments but strategic consulting, and ease of interpreting and communicating results is in the top three for all except field services and technology providers. Innovative approach is in the top three for every supplier segment, and speed of results is there for both buyer segments as well as field services and technology. There is a lot of overlap, except that strategic consultancies also prioritize expertise required to produce results.

TOP THREE PRIORITIES FOR METHOD SELECTION: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Quali-tative research	Strategic consulting	Technol-ogy	Data and analytics
Total cost	30.7	18.4	32.4	42.9	19.0	20.5	25.2	20.0
Ease of interpreting/communicating results	29.7	32.1	33.1	13.1	24.5	34.0	18.6	20.2
Speed of results	19.4	18.2	10.6	23.0	17.6	15.8	21.5	19.8
Innovative approach	12.2	15.3	16.9	18.4	21.3	25.6	22.9	26.8
Expertise required to produce results	11.1	16.3	14.8	16.3	14.7	20.7	6.1	13.5
n =	105	97	109	26	26	37	29	32

Green shading represents top three in segment.

Focusing on the top three criteria for suppliers or partners, the picture is very clear. Data quality and service quality are must-haves in every segment. General pricing seems to be as important as total cost is to methodology selection. In addition to these, buyer-side data and analytics professionals, qualitative researchers, and strategic consultancies tend to prioritize reputation instead of general pricing.

This is, of course, the tip of the ice berg, and there are eleven more supplier criteria to explore later in this section.

TOP THREE FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT SEGMENT

	Buyer – research	Buyer – analytics	Full-service research	Field services	Qualitative research	Strategic consulting	Technology	Data and analytics
Data quality	80%	69%	87%	97%	85%	94%	77%	66%
Service quality	73%	63%	76%	88%	85%	82%	59%	67%
General pricing	51%	61%	55%	62%	58%	55%	55%	66%
Reputation	39%	62%	46%	39%	74%	56%	40%	63%
n =	105	97	109	26	26	37	29	32

Green shading indicates top three within segment.

What drives selection of suppliers and methodologies? We've been tracking this for years, and it always comes down to "cheaper, faster and better", with "better" having many meanings. In this wave, "better" takes first place, defined as both data and service quality. Pricing is next in the decision priority list. The emphasis on quality is a common theme throughout this wave of GRIT because it directly affects the impact of research and insights. Cheap and poor quality isn't a winning combination for any organization, nor a strategy for career success. – LM, ed.

THE BIG PICTURE

One of the major themes raised in this section over the years is how the old "faster, better, or cheaper" has irreversibly become "faster, better, AND cheaper." This was a dominant idea in the *Unmet Needs* section of the last *GRIT Business & Innovation Report* as insights and research groups described the pressure they are under to generate more insights more quickly and for less money, and suppliers expressed frustration having to choose between promising to deliver quality research and insights and getting the work in the first place.

GRIT has hypothesized that "faster" and "cheaper" are objective, easily measured outcomes, but "better" can be difficult to assess and explain to others. Consequently, "better" gets squeezed by the other two, a dynamic that can result in a vicious cycle as more and more value bleeds out over successive iterations.

Total cost and speed are important when choosing between methodologies, but the ease of interpreting and communicating results is a strong consideration as well. It's something of a surrogate for quality of insights, but it also impacts speed and, possibly cost. It wins or ties trade-offs with cost and beats out speed in every segment except field services and technology.

Throughout this report, we see the seemingly insatiable craving for more data and more ways to analyze, visualize, and act on it. In *Investment Trends*, we find that the industry is more concerned with getting data visualization tools into the hands of experts than it is with giving more power to novices, and that suggests that even experts are challenged to easily interpret and communicate results. It's one thing to realize how much data is out there and dream about how it can help, but it's another to be able to turn it into valuable insights and stories.

Innovation is also an important consideration in every supplier segment, although less so to buyer segments. For buyers, innovation is a means to an end, and they care more about the end. Suppliers care about the end, too, but innovation helps their end stand out against everyone else's so they can get noticed, differentiate, and make sales.

As far as criteria for selecting suppliers, the top considerations are data quality, service quality, and general pricing. Reputation, relationship, innovation, and thought leadership are also common criteria, and some segments look for how technology is used for communication, sharing, research, and analytics.

Even experts are challenged - it's one thing to realize how much data is out there and dream about how it can help, but it's another to be able to turn it into valuable insights.

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BUSINESS OUTLOOK

Although research spending seems as strong if not stronger than ever, suppliers, on average, are not reaping the benefits. As we've seen throughout this report, each supplier segment is experiencing more turbulence than stability as they try to match capabilities to changing market needs. Their stories are being written.

OVERVIEW

One of the metrics GRIT tracks is the insights organization's performance against goals: did they exceed, meet, or fall short of the goals they set. While it's no crime to meet goals instead of exceeding them, past GRIT reports have demonstrated that there are often financial rewards for exceeding goals.

Last year's *GRIT Insights Practice* data showed fewer insights professionals reporting that their insights organization exceeded its goals than in 2021. Buyer-side market researchers exceeded goals about as much as in the previous year (+1%), as did field services providers (-2%). Full-service research suppliers (-5%) and strategic consultancies (-6%) were directionally less likely to exceed their goals, but technology (-20%) and data and analytics providers (-12%) were much farther off the 2021 mark.

Possibly, it was easier to exceed goals during the pandemic because they had been set lower, then the bar was raised as the pandemic abated.

Budget size and revenue trends did not tend to follow performance. Buyer-side market researchers saw moderate more budget increases in 2022 (+6%) in line with their steady performance. Full-service researchers were punished for their moderate performance slide as fewer of them increased revenue (-10%), and field services suffered even more (-19%) despite stable performance.

Strategic consultants saw more revenue increases (+4%) despite fewer instances of exceeding goals. Despite their more severe performance drop-off, data and analytics providers increased revenue in similar proportions to 2021 (+2%) while technology providers were seemingly rewarded for their poorer performance in 2022 (+19%).

Possibly, it was easier to exceed goals deep into the pandemic because goals may have been set lower in the context of historic challenges. Perhaps the bar was raised as the pandemic abated, creating a disconnect between goal performance and revenue.

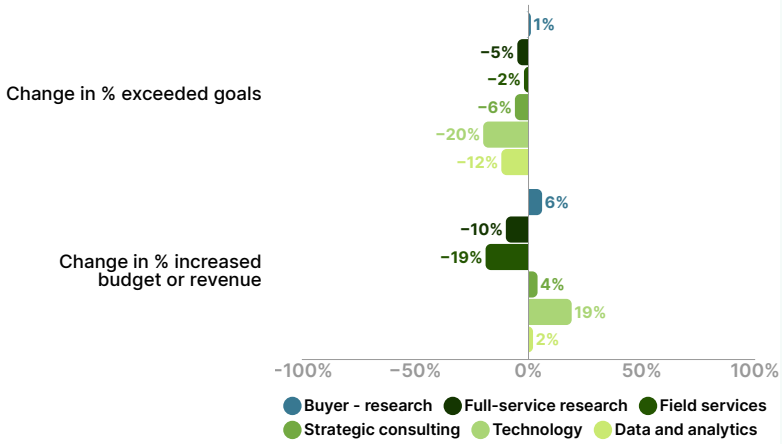
Now, however, we see even more instances of fewer insights professionals reporting that goals were exceeded, and the penalties seem to be catching up. Full-service research, field services, and data and analytics providers saw double-digit drop-offs in exceeding expectations from 2022, and at least 20% fewer reported revenue increases in each of those segments.

Strategic consultancies saw a moderate falling off in performance (-2%) and a somewhat larger one in revenue increases (-8%). The only segment to move in the opposite direction was qualitative research. More of them exceeded goals in 2023 (+10%), and they enjoyed a few more revenue increases (+5%). [*Note: qualitative research was not a GRIT segment before 2022.]*

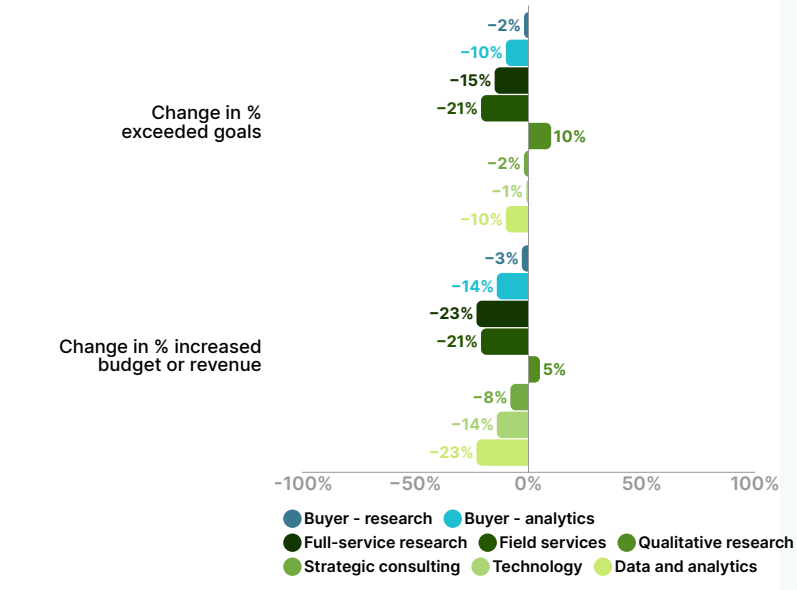
Buyer-side market researchers were fairly steady on the performance side (-2%), and their difference in budget increases reflects that (-3%). Data and analytics professionals on the buyer side reported 10% fewer instances of exceeding goals and a similar reduction in budget increases (-14%). [*Note: buyer-side data and analytics was not a GRIT segment before 2022.]*

It seems that we have two consecutive years of lukewarm performances, and they can't all be blamed on setting more challenging goals. Consequently, the industry isn't exactly hitting it out of the park (or knocking it for six, if you prefer) as far as budget and revenue growth are concerned. Just as we are putting the recession that didn't happen behind us, Generative AI is seriously upsetting the status quo. While not the sole source of industry disruption, it's a good example of the kinds of challenges (and opportunities) the industry continues to encounter.

22W2 V. 21W2 CHANGE IN PERFORMANCE AND BUDGET OR REVENUE TREND: GRIT SEGMENT



23W2 V. 22W2 CHANGE IN PERFORMANCE AND BUDGET OR REVENUE TREND: GRIT SEGMENT



THE BIG PICTURE

Buyers are building their own capabilities and acquiring capabilities via technology. Suppliers have to calibrate their offerings to the changing demand.

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.

For example, full-service research suppliers are reducing their portfolios of methodologies, fewer buyers than ever work with them regularly, and their revenue, staff size, and technology spending indexes are lower than any point except for the start of the pandemic. Plus, more of them are falling short of goals and fewer than ever are exceeding them except for 2020.

This is where the rubber hits the road, and we have been tracking all aspects of the financial health of the industry down to the segment level for years. It's critical for leaders to assess where things are now and what that means for their organization, and this is the only report of its kind that focuses on the "current" vs. "backward-looking" view. The outlook? There is turbulence for sure, and GRIT participants are feeling it. The key metric here is goal achievement, and it seems everyone is struggling to a greater or lesser degree. Perhaps it's unsurprising since we live in such disruptive times and organizations are retooling and reprioritizing to remain relevant. However, one major symptom of industry disruption is the restructuring of supplier segments, including stalwarts repositioning into new markets and lines between buyers and suppliers blurring. That's surely a factor in the frothiness we detect, and leaders need to adopt a very broad perspective if they are to navigate forward successfully.
– LM, ed.

Technology suppliers, usually impervious to any industry challenges, are struggling, too, though still among the leaders in revenue index. Unlike other segments, their usage of methodologies may be more related to developing solutions for others than to doing research for themselves.

If so, their trends in methodology usage may indicate strong pivots in direction which could be related to the industry's accelerating interest in data and analytics solutions, the migration to other segments by suppliers who grew other revenue streams or joined with other companies, or, more likely, both. For different reasons, the technology and full-service research segments do not seem to be in states of equilibrium.

The other supplier segments seem to be experiencing similar turbulence. The buyer segments, however, seem relatively stable. Their spending seems as strong, if not slightly stronger, than ever, but this may not be benefitting suppliers as much as one would expect. On the buyer and supplier sides we see evidence of buyers taking more work in-house and some indication that cut-rate suppliers are eating into margins. We have evidence, but not proof, and this potential dynamic is worth contemplating.

Buyers are building their own capabilities, such as panels, and acquiring capabilities via technology. Suppliers have to calibrate their offerings to the changing demand, and this is especially challenging because they are simultaneously redefining their capabilities and are likely to be a step behind. All supplier segments seem to be in transition, and trend indexes and performance against goals tend to be lower than any time except the first year of the pandemic.

The demand for insights seems strong as ever. The optimal formula for suppliers to earn money from it is TBD.

MARKET RESEARCH MERRY-GO-ROUND: NOT SO MERRY

Gen2 Advisors
Website: www.gen2advisors.com

In the merry-go-round of market research metrics, the *GRIT Report* serves as a conscientious scorekeeper, giving us the lowdown on who's up, who's down, and who's spinning their wheels. Last year's *GRIT Insights Practice* data took us on a bit of a roller coaster, showcasing a notable dip in the number of insights organizations who managed to exceed their organizational goals—a metric that feels like it's measured with optimism as its foundation.

Buyer-side market researchers and field services providers seemed to stick to their guns, with changes in goal achievement that could easily be statistical noise. Full-service research suppliers and strategic consultancies, who evidently found themselves a bit more bogged down, missing their overachievement badges by 5% and 6%, respectively.

The real head-turners are the technology and data analytics providers. They seemed to have left their compass at home, veering off by 20% and 12% (often their goals are very much stretch goals because they are capable of both substantial growth as well as substantial contraction). Yet, in a twist worthy of a daytime soap opera, budget sizes and revenue trends didn't always tag along with performance, hinting at a disconnect that even the savviest of financial analysts might furrow their brows at.

The real plot thickener comes with the curious case of financial rewards seemingly divorced from exceeding goals. Take technology providers, who despite their poorer show in 2022, saw a revenue increase of 19%. This definitely suggests that goals are not always in alignment with revenue.

It's possible that the pandemic years—with their changing bars and adjusted expectations—gave many a false sense of security or achievement, which the post-pandemic reality is now correcting. As we emerge blinking into the harsh light of a post-COVID world/pre-AI (at least, fully implemented), it seems that not only are the goalposts shifting, but they might be on different playing fields altogether.

So, what do we make of all this? GRIT's data paints a picture of an industry in flux, grappling with new normal, old habits, and changing needs. The insight sector has proven its resilience and ability to navigate change. But as we move forward, the challenge will be in aligning the feel-good factor of exceeding goals with the cold hard cash of financial metrics. After all, in the market research merry-go-round, the ride never really stops—we just have to get on a different horse.

Looking ahead, the biggest shifts in the insights industry could revolve around the integration of emerging technologies and evolving market dynamics. As GenerativeAI matures, we're likely to a shift in both efficiency and efficacy. Additionally, the increasing emphasis on real-time data and predictive analytics could redefine benchmarks for success in the industry. Market research is on the cusp of a transformative evolution, driven by technological innovation, massive data (public and proprietary) and the pursuit of deeper insights.

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Your weekly exchange of the latest market research and insights industry news

Lenny Murphy
Chief Advisor, Insights & Development

Karen Lynch
Head of Content

LIVE every Friday at 12 pm Eastern Time

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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 has transformed from its origins as a business directory into a leading marketing, content, and community platform serving 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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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.

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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.

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