GreenBook
REPORTS

2022 EDITION

INSIGHTS PRACTICE

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT

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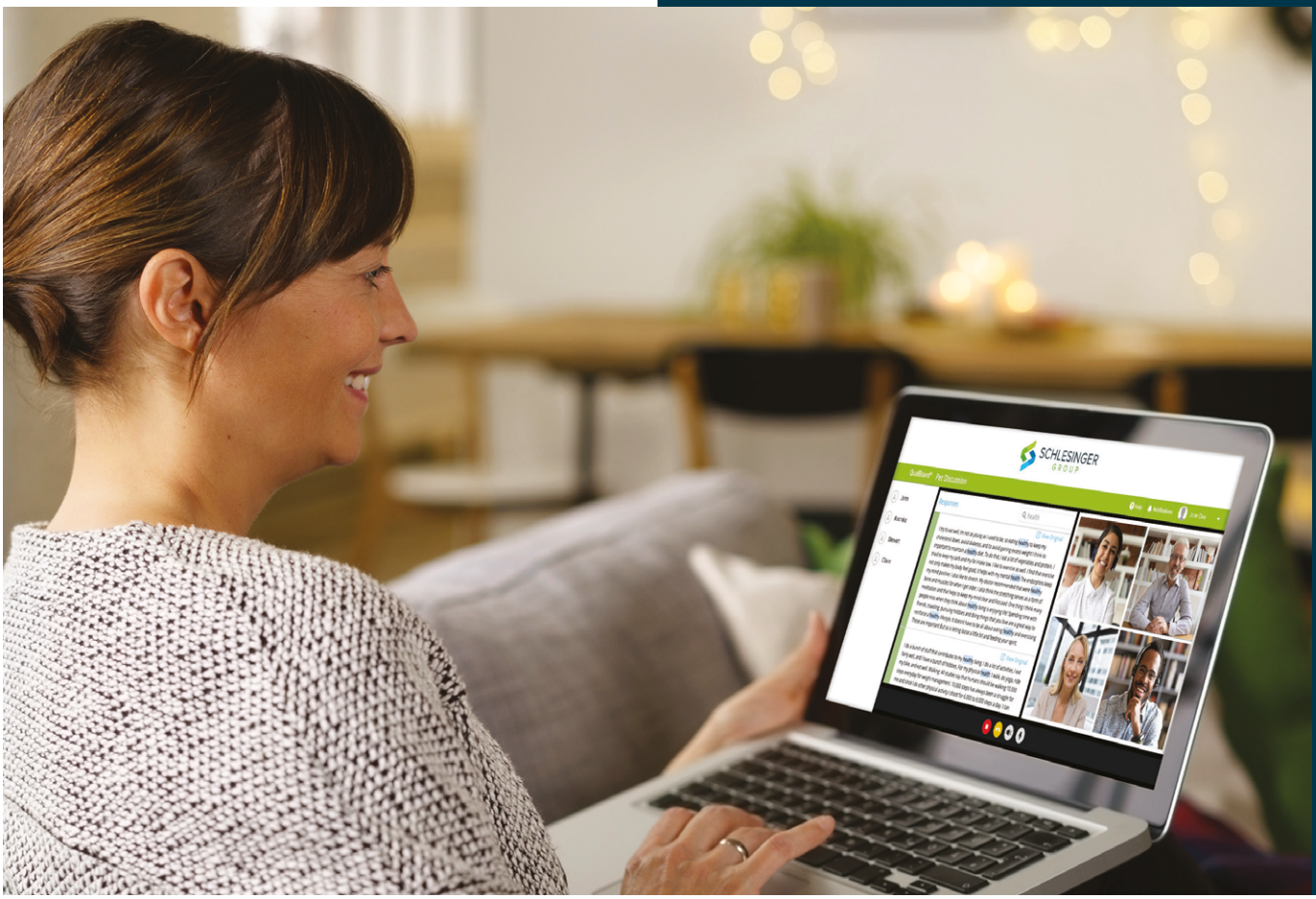

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FOREWORD

Welcome to the 30th edition of the GreenBook Research Industry Trends Report, using data collected toward the end of 2021. Two GRIT reports are published each year, the Business & Innovation Report, which is based on data collected in the spring, and this report, Insights Practice, which focuses on topics related to the "nuts and bolts" of the functions of insight practitioners and organizations. During a period of rapid change such as we are experiencing now, understanding these more pragmatic impacts are vitally important.

To that end we explore a variety of topics, some new to this edition and some that our readers have come to depend on GRIT to cover. These include adoption of emerging methods, the use of traditional methods, satisfaction levels with suppliers, the drivers of supplier selection, investment priorities for researchers, the business outlook and projected spending, the evolving role and activities of researchers, buzz topics such as automation or AI, and in-demand skill sets. All are focused on fundamental issues related to the practice of research that the industry can use to help provide strategic direction in the year ahead.

GRIT continues to evolve the structure of the report, how we display information, and even how we deliver the report itself in both online and traditional publication formats. This evolution is driven by the desire to ensure the insights contained herein reach the largest possible audience in the most relevant format, delivering optimal value for the insights and analytics industry.

To provide context to enrich your understanding of the report, we begin with a discussion of the GRIT methodology and the structure of the current sample. If you require further detail, more is provided in the appendix at the end of the report.

Now, all of that said, what does this report actually tell us? Well, revealing that in the Foreword would be a bit of a spoiler, wouldn't it? However, you can find some of the key findings in our infographic summary, and we begin each section with a topline overview and conclude each with a "Big Picture" summary of that section's critical learnings. However, each section contains deep and nuanced explorations in which our readers can think through insights that are relevant and actionable for them.

With that in mind, we can tell you that the speed of transformation has increased across almost every aspect of the industry, largely accelerated by the disruptive force of the pandemic. No segment has been untouched, and now we can see what the calamities of 2020 have meant for the past year and will mean for the future. We do our best to highlight our take on what that means throughout this report. One important note; these data were collected in Q4 2021 before the onset of the Omicron wave. As of this writing, it appears that this latest iteration of the pandemic is mild and will not materially impact where we see the industry going. That said, some caution is called for as this situation continues to evolve.

Finally, as always thanks must be given. GRIT is a massive community effort and our authors, commentary providers, sample partners, advertisers, and most especially research partners make it all possible. Special thanks go out to the organizations who helped with data collection and analysis: AYTM – Ask Your Target Market, CANVS, Gen2 Advisors, Infotools and Q Research Software. We couldn't make GRIT happen without their generous time, energy, and expertise.

If we have done our job well you'll find this report both useful and enjoyable; we hope you'll experience it that way.

Best wishes,

LEONARD F. MURPHY
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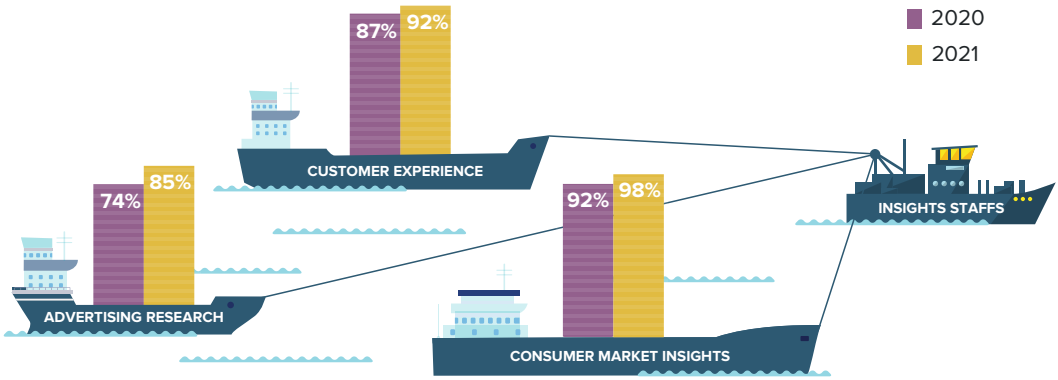
Infographic by aytm

EXECUTIVE SUMMARY

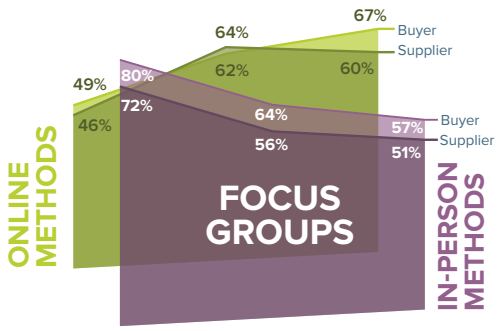
AREAS INSIGHTS GROUP LEAD OR CONTRIBUTE (BUYER)

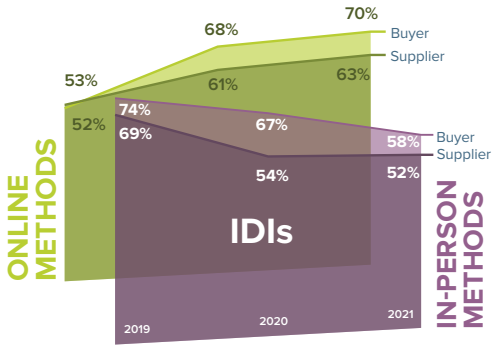
A year ago, insights staffs were having the most impact on immediate issues such as advertising, brand positioning, and new product development. A year later, insights groups are having the most impact on customer satisfaction and loyalty, attitudes and opinions, and brand tracking, and that sounds more like a return to managing the business rather than saving it.



IN-PERSON VS ONLINE METHODS

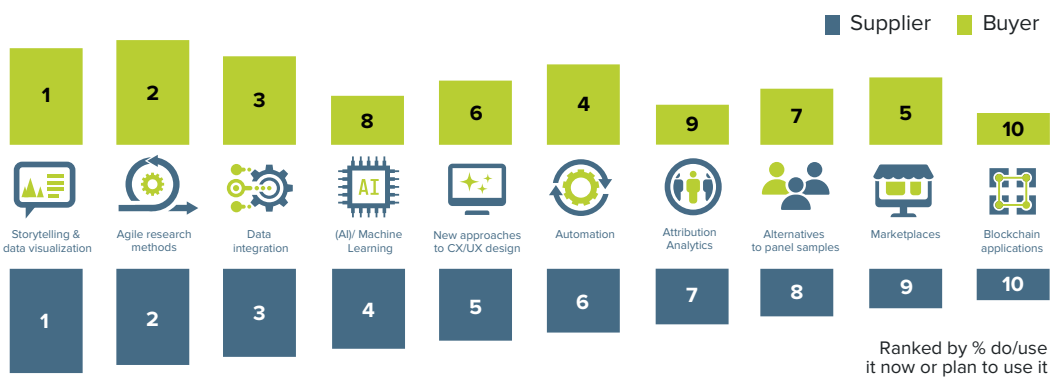
The 2020 GRIT Insights Practice report documented the sudden migration from in-person to online methods, and now, a year later, it seems that online methods have not only met the immediate needs but have proven to be capable replacements for traditional methods. In-person is definitely in-use and will remain to be, but online continues to grow and will continue to do so as well.





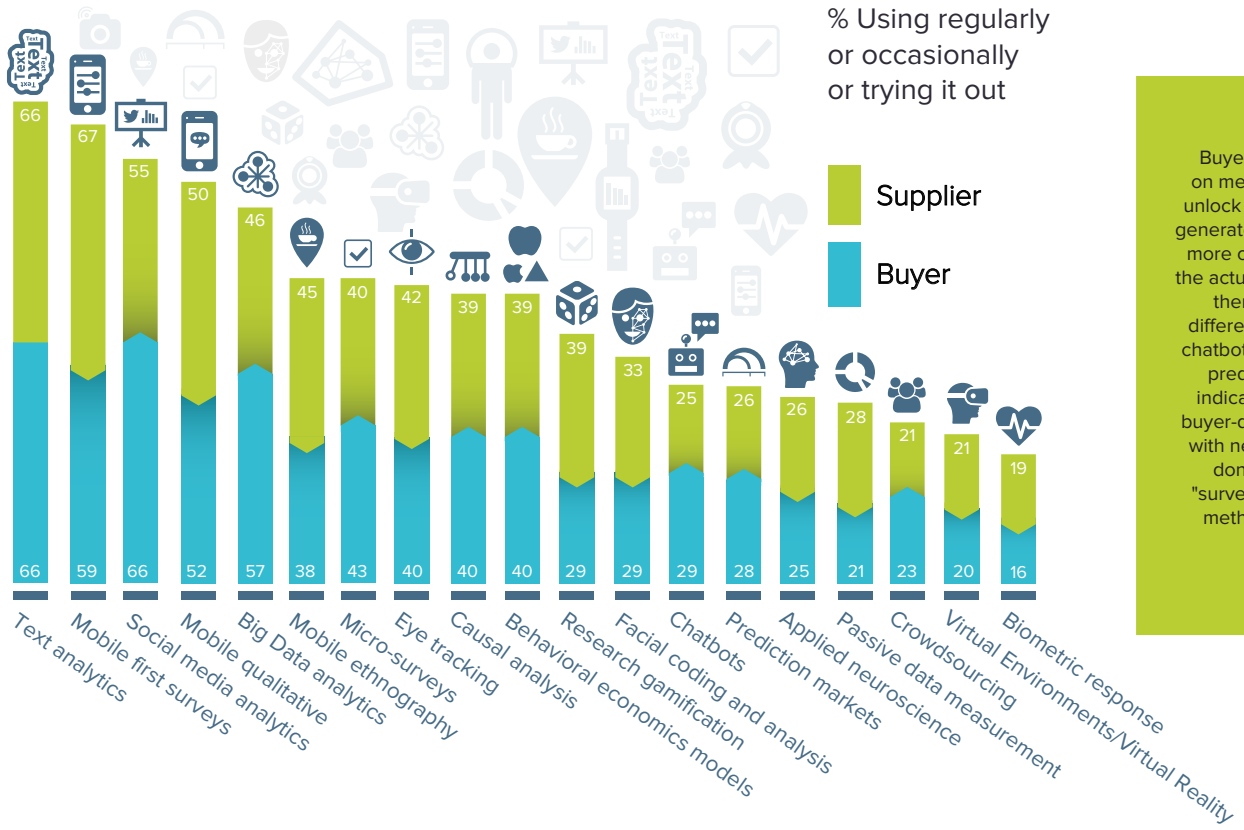
TOPIC "BUZZINESS": BUYER AND SUPPLIER RANKS

Overall, buyers and suppliers are surprisingly aligned in the prioritization of adoption of buzz topics, with most differences being explained by supplier segments focus on topics more related to "how" insights are gathered, whereas buyers prioritize things that help drive business understanding and action.



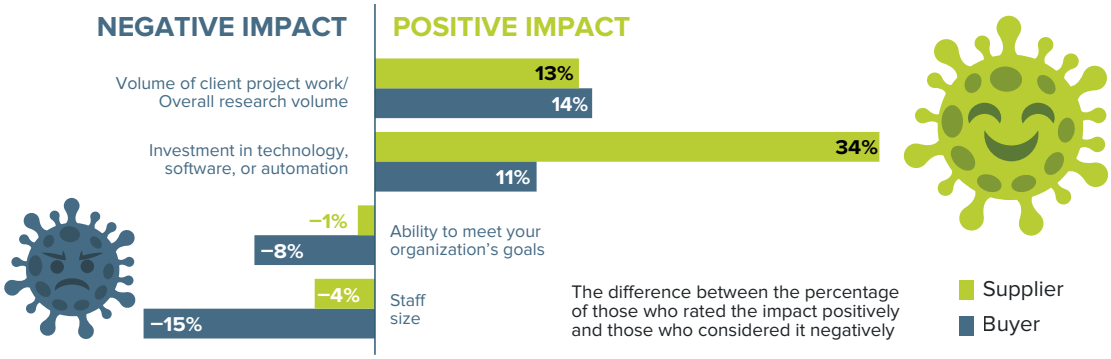
Ranked by % do/use it now or plan to use it

USING OR TRYING EMERGING METHODS



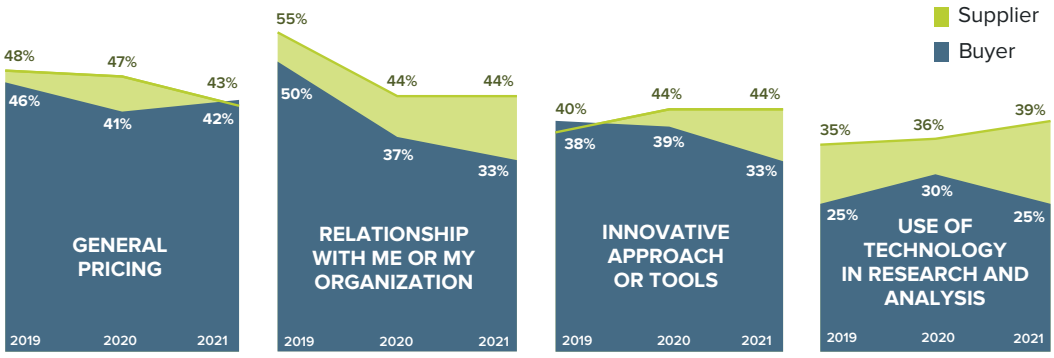
Buyers continue to focus on methods that potentially unlock more value in insights generated, and suppliers focus more on methods aligned to the actual collection of insights themselves. However, differences in microsurveys, chatbots, crowdsourcing, and prediction markets may indicate a slight degree of buyer-driven experimentation with newer approaches that don't fit neatly into the "surveys and focus groups" methodological buckets.

NEGATIVE AND POSITIVE IMPACT OF COVID-19



The pandemic has not had uniform impact across the insights and analytics industry as some players have benefited from it while others have suffered. For all the apparent "net positive impact", the other side of the coin is that a large chunk of the industry on both sides of the table had negative effects. Only time will tell what the long-term impact will be, and who will be impacted by it.

PRIORITIES FOR TOP PARTNER/SUPPLIER SELECTION



Data quality continues to be the dominant consideration for both buyers and suppliers, when selecting partners and service level is a decisive number two. Both buyers and suppliers are willing to trade off relationship and pricing to get these, but innovation or the use of technology are still key ingredients to meeting buyer needs

METHODOLOGY AND SAMPLE

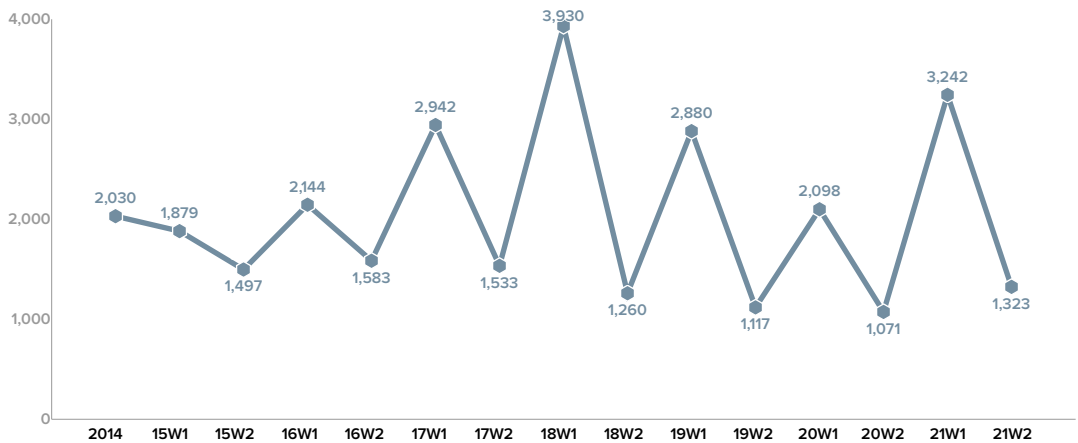
The respondent sample for this GRIT Insights Practice Report, as always, draws from the global population of professionals who primarily buy or supply insights research, analytics, services, or platforms. Our sample of 1,323 supports deep dives into important segments, and the size and distribution of respondent types is consistent with previous Insights Practice Reports.

GRIT respondents are recruited via GDPR compliant, opt-in email lists and a variety of social media channels by GreenBook and GRIT partners. These lists are comprised of both research suppliers and buyers. More respondents come directly through GreenBook email invitations than all other sources combined. As in previous GRIT waves, respondents from the United States comprise the majority of all responses, and results are broken out by global region where relevant.

For this report, the analysis is based on 1,323 completed interviews after rigorous data cleaning. For some questions, base sizes may be lower due to skip patterns, rotations, routing, and other factors. Also in this edition, in an effort to shorten the average LOI, we created multiple "block rotation" schemes so many questions were only displayed to a randomized subset of respondents; we have noted these smaller base sizes when applicable.

Throughout this report, we compare the current GRIT "wave" to previous "waves." These are labeled according the year the data was collected (e.g., "16" for data collected in "2016") plus the "wave' (e.g., "W1" for the first wave of that year). For example, for the two reports for which data was collected in 2020, the data in the first report, Business & Innovation, is referred to as "20W1," and the data for the second report, Insights Practice, is referred to as "20W2." The Insights Practice reports are generally published at the beginning of the following year, but the labeling refers to the data. While this report is titled "Insights Practice 2022," the data is referred to as "21W2." In general, the sample sizes for W2's are consistent with each other across years, and the sizes across W1's are similarly consistent.

GRIT SAMPLE SIZE TREND YEAR-ON-YEAR



We also remove duplicates, surveys that show a distinct lack of true effort, and any other type of response that we determine to be less than a clear and honest opinion from someone legitimately in the insights industry

For a detailed breakdown of the sample composition, including regional representation, demographic and firmographics, please see the Methodology and Sample section in the Appendix.

We use a rigorous data QA/QC process once field is completed. We remove surveys that are partially completed and delete ones that are clearly poor quality. We also remove duplicates, surveys that show a distinct lack of true effort, and any other type of response that we determine to be less than a clear and honest opinion from someone legitimately in the insights industry. Out of respect and appreciation for the people who make the effort to complete the survey, we take an "innocent until proven guilty" approach so that we do not systematically exclude legitimate opinions that may not be perfectly expressed.

The sample size and consistent composition of this GRIT sample increases confidence in the results

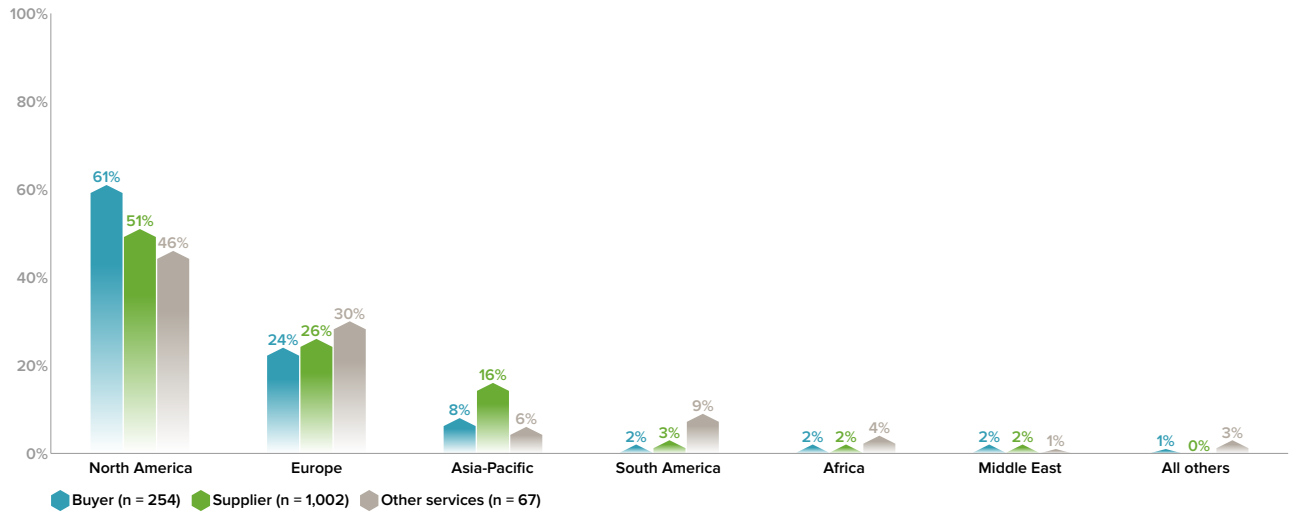
Per usual for GRIT, the mix of respondents varies slightly wave on wave, but within narrow bands. For this edition, 76% of respondents identified themselves as suppliers (n = 1,002) and 19% identified themselves as buyers (n = 254). Another 5% identified themselves as providing "other services" to insights professionals, neither buying insights-related research, services, analytics, or platforms, nor selling them. Throughout this report, each of these three types of professionals is broken out separately. In general, these proportions are in line with previous waves.

GRIT 21W2 SAMPLE SIZE

	Sample Size
Buyer	254
Supplier	1,002
Other services	67
n = 1,323	

The sample size and consistent composition of this GRIT sample increases confidence in the results, although as always we consider them to be "highly directional". As the industry continues to transform and the definitions of key stakeholder groups expand, we will keep a keen eye out for opportunities to ensure the GRIT sample universe is as reflective of the entire industry as possible.

PARTICIPANTS BY GLOBAL REGION: PARTICIPANT TYPE



THE EVOLVING INSIGHTS FUNCTION

INDUSTRY BUZZ TOPICS

Buzz topics are the "cutting edge" ideas that are leading indicators of areas of future innovation buyers and suppliers are focusing on today. As we track adoption and interest levels across a battery of these topics we begin to see what is gaining mainstream traction and what is still niche or nascent. These signals become core strategic planning inputs as organizations prioritize where they will be allocating resources in the year ahead to continue to provide more business impact.

For many years now we have been measuring sentiment around new concepts and topics as they enter the insights and analytics industry; this "buzz topics" measure has continued to be an effective tool in predicting the traction and adoption of the next wave of potentially disruptive trends. We have seen early stage "buzz topics" move from interesting ideas to growing parts of the industry toolkit and whole companies developing based on them (automation, agile methods, and data visualization come to mind), while others remain interesting but with little widespread adoption (talent marketplaces and blockchain, for example).

We have seen early stage "buzz topics" move from interesting ideas to growing parts of the industry toolkit and whole companies developing based on them

In recent waves, we have modified the measurement to better capture adoption – in use, plan to use, probably will use, will be adopted by others (not us) and will not be significantly adopted. The aggregation of those results determines what is a "buzzy" topic. Understanding those who plan to use it, think they'll probably use it, or think others will adopt it, determines whether it is "buzzy." In the future, as some of these topics reach significant adoption "in use", they will migrate to our emerging or traditional methods battery.

As you'll see throughout this report, we'll be looking at these topics across our standard views of supplier vs. buyer and the subsegments within each group in order to give readers an opportunity to "find themselves" more easily within the results.

BUYER PERSPECTIVE

Comparing levels of adoption and interest across insights buyers and insights suppliers may identify topics on which they are in sync or may identify gaps. Topics upon which adoption or interest is higher among buyers may indicate unmet needs, but may also indicate topics that are more characteristic of certain supplier specializations. Where supplier levels are higher, they may be anticipating future demand, but they might also be over-estimating it. Regardless of the drivers, we continue to see strong buyer interest in several buzz topics that clearly represent important focus areas for them.

TOPIC "BUZZINESS": GRIT WAVE (BUYER)

% Do/use it now or plan to use it	Top 2 Box Score						Rank					
	16W2	17W2	18W2	19W2	20W2	21W2	16W2	17W2	18W2	19W2	20W2	21W2
Storytelling & data visualization	79%	86%	88%	82%	81%	85%	1	1	1	1	1	1
Agile research/methods/approaches	N/A	N/A	N/A	70%	67%	76%	N/A	N/A	N/A	3	3	2
Data integration	N/A	N/A	N/A	N/A	69%	75%	N/A	N/A	N/A	N/A	2	3
Artificial Intelligence (AI)/Machine Learning	45%	49%	73%	43%	47%	51%	4	3	3	4	5	4
New approaches to CX/UX design	N/A	N/A	N/A	74%	49%	46%	N/A	N/A	N/A	2	4	5
Automation/research automation	69%	63%	76%	39%	45%	45%	2	2	2	5	6	6
Attribution Analytics and Single Source data	51%	43%	47%	37%	43%	40%	3	4	4	6	7	7
Alternatives to panel samples (e.g., social media, Mechanical Turk)	N/A	N/A	N/A	N/A	38%	38%	N/A	N/A	N/A	N/A	8	8
Marketplaces (such as for sample, talent, software, etc.)	45%	31%	36%	29%	29%	29%	5	5	5	7	9	9
Blockchain applications	N/A	N/A	29%	8%	8%	7%	N/A	N/A	6	8	10	10
n =	302	343	329	298	207	182						

Clearly storytelling and data visualization, agile, data integration and AI are the topics that are most followed and experiencing significant practical implementation (all over 50% use/plan to use) among GRIT respondents. These seem very much aligned with the priority to unlock more value in data (AI) in order to drive business impact (delivering key insights in a digestible way via data visualization) at the "speed of business" (agile).

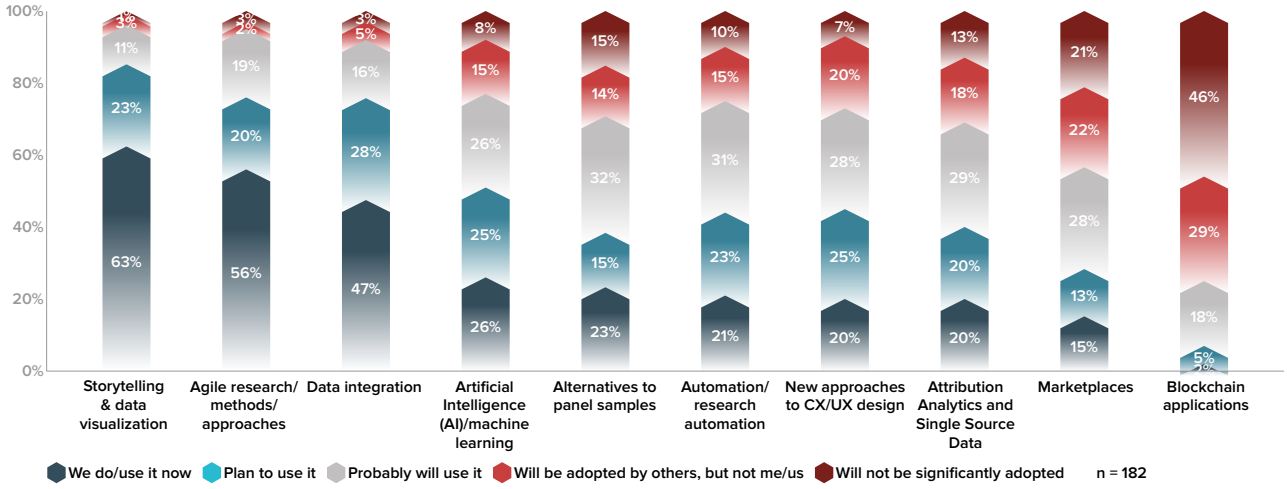
CX/UX Design, Automation and Attribution have sizable interest but still have much room to grow (between 40% – 49% Use/Plan to use), while alternative sample sources and marketplaces have held steady under 40% interest. These could all be categorized as "how" topics, related to evolving approaches to conduct research more efficiently.

Blockchain applications have the lowest rankings, although we suspect that this simply reflects the scarcity of available solutions in the market than anything else.

Considering the extent to which some of these are in use today, we may want to regard them as "established methods" rather than as "buzz topics." If we look at just the proportions who "do/use it now" instead of including those who plan to use them, we find that storytelling and data visualization, agile research methods, and data integration have become relatively mainstream. All other "buzz topics" are currently niche at best, although these could change. For example, we hypothesize that blockchain is still at the beginning of its adoption curve and that it will become widely adopted once compelling solutions are introduced to the insights industry. However, significant skepticism exists today, with 46% of buyers predicting it won't ever reach significant adoption. As "Web 3.0" technology models unfold and strive for scale in other industries, we'll see if that changes.

Clearly storytelling and data visualization, agile, data integration and AI are the topics that are most followed and experiencing significant practical implementation

INTENTION/ATTITUDE TOWARD BUZZ TOPIC (BUYER)



DO OR USE IT NOW: INSIGHTS GROUP SIZE (BUYER)

%Do it or use it now	All Buyers	Insights Staff	Group Diff.
Storytelling & data visualization	63%	10 or more staff	+12%
		5 to 9 staff	-4%
		Fewer than 5 staff	-14%
Agile research/methods/ approaches	57%	10 or more staff	+11%
		5 to 9 staff	-7%
		Fewer than 5 staff	-11%
Artificial Intelligence (AI)/ Machine Learning	27%	10 or more staff	+21%
		5 to 9 staff	-14%
		Fewer than 5 staff	-19%
Marketplaces (such as for sample, talent, software, etc.)	16%	5 to 9 staff	+11%
		10 or more staff	–
		Fewer than 5 staff	-10%
New approaches to CX/ UX design	20%	10 or more staff	+9%
		Fewer than 5 staff	-3%
		Fewer than 5 staff	-10%
Attribution Analytics and Single Source Data	20%	10 or more staff	+10%
		Fewer than 5 staff	-7%
		Fewer than 5 staff	-10%

All buyers (n = 179); Fewer than 5 (n = 52); 5 to 9 (n = 48); 10 or more (n = 79)

When looking at the buyer population by their insights group size, we do see some interesting differences by, at least directionally. It's not surprising that the largest insights groups (10 or more staff) have the highest adoption levels while the smallest ones (5 or fewer staff) have below average rates of adoption. After all, they have more people available to try new methods, and they are likely to be at larger companies that have more complex needs to address. The widest gap between the largest and smallest groups is for adoption of AI/machine learning, a difference of 40%. If the largest groups are more likely to be at the largest businesses, they are also more likely to have access to large data sets for which such techniques are well-suited.

A hypothesis for this disparity is that perhaps larger organizations have more resources and therefore are focused on innovation aspirationally, while smaller organizations are also focused on innovative topics for the opposite reason; they have fewer resources and therefor are looking at this topics as necessities in order to do more with less. The medium-sized buyer organizations may be in a "between state" and don't yet feel the pressure on either end of the spectrum.

SUPPLIER PERSPECTIVE

If buyer adoption is a leading indicator of where the industry is going, then understanding what suppliers are focusing on is a pragmatic proof point of how the industry supply and demand dynamic is aligned (or not, as the case may be!). Although some differences have traditionally been present in adoption levels, in this case there is a surprising amount of consilience between the two groups in terms of priority ranking, but not necessarily overall adoption levels, of each topic. However, overall we are seeing slight differences of degree in the rankings between the two groups rather than a significant disconnect in overall views on where each topic is in the adoption curve.

Understanding what suppliers are focusing on is a pragmatic proof point of how the industry supply and demand dynamic is aligned

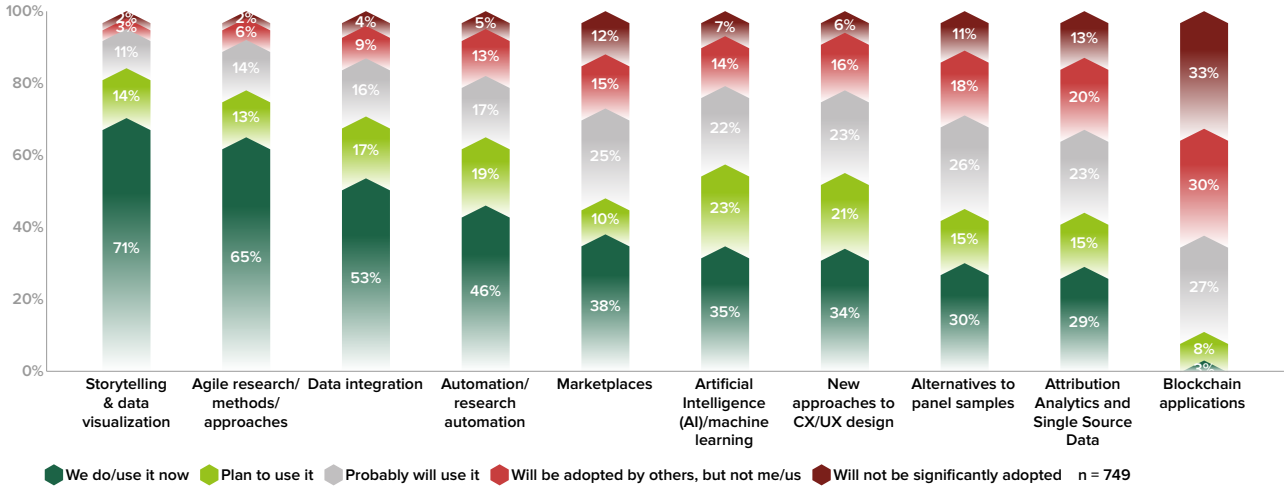
TOPIC "BUZZINESS": GRIT WAVE (SUPPLIER)

% Do/use it now or plan to use it	Top 2 Box Score						Rank					
	16W2	17W2	18W2	19W2	20W2	21W2	16W2	17W2	18W2	19W2	20W2	21W2
Storytelling & data visualization	77%	82%	83%	82%	85%	84%	1	1	1	1	1	1
Agile research/methods/ approaches	N/A	N/A	N/A	66%	74%	78%	N/A	N/A	N/A	3	3	2
Data integration	N/A	N/A	N/A	N/A	63%	70%	N/A	N/A	N/A	N/A	2	3
Automation/research automation	75%	67%	76%	55%	57%	65%	2	2	2	4	5	4
Artificial Intelligence (AI)/Machine Learning	48%	52%	71%	50%	50%	58%	4	3	3	5	4	5
New approaches to CX/UX design	N/A	N/A	N/A	71%	50%	55%	N/A	N/A	N/A	2	6	6
Marketplaces (such as for sample, talent, software, etc.)	51%	38%	44%	35%	39%	48%	5	5	5	7	7	7
Alternatives to panel samples (e.g., social media, Mechanical Turk)	N/A	N/A	N/A	N/A	45%	46%	N/A	N/A	N/A	N/A	8	8
Attribution Analytics and Single Source data	53%	34%	39%	36%	38%	44%	3	4	4	6	9	9
Blockchain applications	N/A	N/A	28%	11%	10%	11%	N/A	N/A	6	8	10	10
n =	1,150	1,190	931	790	578	749						

The alignment between buyer and supplier is even more starkly evident when looking at the breakout for each topic, and the few differences suppliers report make sense since they seem to be more aligned to "how" topics relevant to the process of conducting research compared to buyers, who seem more focused on "what" topics that are aligned to the outcomes of research. This lens of "how" for suppliers versus "what" for buyers is a useful framework for looking at all of the results within GRIT as a proxy for motivational drivers of the results we report.

The alignment between buyer and supplier is even more starkly evident when looking at the breakout for each topic

INTENTION/ATTITUDE TOWARD BUZZ TOPIC (SUPPLIER)



DO OR USE IT NOW: PROFESSIONAL FOCUS (SUPPLIER)

%Do it or use it now	All Suppliers	Professional Focus	Group Diff.
Storytelling & data visualization	71%	Full service	+7%
		Field services	-39%
Automation/research automation	46%	Technology	+25%
		Full service	-6%
		Strategic consulting	-13%
Artificial Intelligence (AI)/ Machine Learning	35%	Technology	+17%
Marketplaces (such as for sample, talent, software, etc.)	38%	Field services	+18%
		Full service	-5%
New approaches to CX/ UX design	34%	Technology	+11%
Attribution Analytics and Single Source Data	29%	Data & analytics	+15%
Blockchain applications	3%	Data & analytics	+5%
All suppliers (n = 749); Full service (n = 361); Field services (n = 69); Strategic consultancy (n = 100); Data & analytics (n = 91); Technology (n = 122)			

When we look at the supplier segments, we continue to see differences in prioritization of adoption of specific topics based upon the business focus of each type of supplier. We see significant differences by segment between those who are currently actively deploying these various ideas, and even more differences when we include planning to use it. Unsurprisingly, suppliers who classify themselves as technology providers lead in adoption of areas such as automation (+25%) and new approaches to CX/UX (+11%), whereas data and analytics drive many of the rest. Full service research and field services companies seem to be lagging behind in overall adoption, perhaps denoting a "wait and see" approach, or even simply giving ground to the often better funded tech and data companies to drive adoption as they work to find their place within the changing ecosystem.

DO/USE IT NOW OR PLAN TO USE IT: PROFESIONAL FOCUS (SUPPLIER)

%Do it/use it now or plan to use it	All Suppliers	Professional Focus	Group Diff.
Storytelling & data visualization	84%	Full service	+5%
		Field services	-24%
Agile research/methods/approaches	78%	Technology	+9%
Automation/research automation	65%	Technology	+21%
		Full service	-6%
Artificial Intelligence (AI)/Machine Learning	58%	Technology	+18%
		Full service	-5%
New approaches to CX/UX design	55%	Technology	+14%
Alternatives to panel samples (e.g., social media, Mechanical Turk)	46%	Technology	-14%
Marketplaces (such as for sample, talent, software, etc.)	48%	Field services	+20%
		Data & analytics	+12%
		Full service	-6%
		Strategic consulting	-13%
Attribution Analytics and Single Source Data	44%	Data & analytics	+22%
Blockchain applications	11%	Data & analytics	+8%
All suppliers (n = 749); Full service (n = 361); Field services (n = 69); Strategic consultancy (n = 100); Data & analytics (n = 91); Technology (n = 122)			

AROUND THE WORLD BUZZ

In general, we do not see differences in buyers' attitudes toward buzz topics between global regions. In general regions outside North America and Europe tend to be less focused on adoption of buzz topics, perhaps reflective of an imperative to simply adapt to current business realities in those markets that experienced greater disruptions due to the ongoing pandemic.

However, on the supplier side, there are more indications of growing level of usage and interest in some of the buzz topics globally, indicative of a growing wave of thinking on "what's next" in insights as the urgency of pandemic mitigation begins to recede. Traditionally, North America has been the "early adopter" market for innovation with global markets being follow-ons after new approaches are proven and hit some level of critical mass in usage, and we expect to see adoption levels increase outside of North America in future GRIT reports.

DO/USE IT NOW OR PLAN TO USE IT: GLOBAL REGIONS (SUPPLIER)

%Do it/use it now or plan to use it	All Suppliers	Global Regions	Group Diff.
Automation/research automation	65%	North America	-7%
Alternatives to panel samples (e.g., social media, Mechanical Turk)	46%	Asia-Pacific	+16%
Marketplaces (such as for sample, talent, software, etc.)	48%	Asia-Pacific	+12%
Attribution Analytics and Single Source Data	44%	Asia-Pacific	+19%
		Europe	-10%
Blockchain applications	11%	Asia-Pacific	+10%
All suppliers (n = 749); North America (n = 381); Europe (n = 191); Asia-Pacific (n = 128); All others (n = 49)			

BUYERS AND SUPPLIERS

As we have already captured, in general between buyers and suppliers we see a significant degree of agreement on prioritization of the battery of buzz topics, and when broken out further by supplier segment the differences may be more substantial, but are also aligned to the business focus of the supplier types with field services perhaps being one of the clearest outliers due to the specialized nature of their role within the market. We see the strongest alignment between buyers and suppliers within the strategic consultancy segment, followed by full service research, which is surely indicative of their broader remit and closeness to buyer organizations. By comparison, suppliers in specialist categories such as technology and data and analytics, "stay in their lanes" by focusing on those buzz areas aligned to their core business.

The one area everyone agrees on is the lowest ranking of blockchain applications across all segments. However, this seems to be true across almost all businesses since that area of technology is still nascent and has far to go to achieve real scale and business impact. While we remain bullish on the promise of all aspects of decentralization and consensus-building technology, only time will tell if they can live up to their potential and what the best uses cases will be within the realm of insights and analytics.

The one area everyone agrees on is the lowest ranking of blockchain applications across all segments

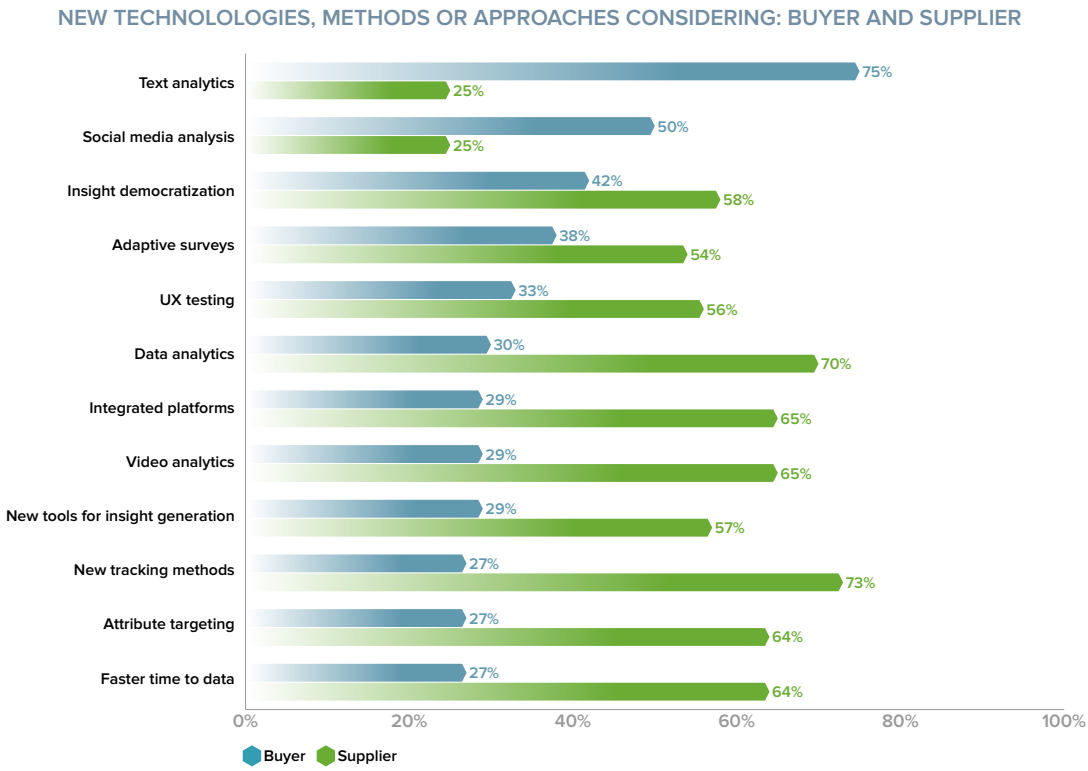
TOPIC "BUZZINESS": BUYER AND SUPPLIER RANKS

Ranked by % do/use it now or plan to use it	Suppliers					
	Buyers	Full service research	Field services	Strategic consulting	Data & analytics	Technology
Storytelling & data visualization	1	1	6	1	1	3
Agile research/methods/approaches	2	2	1	2	2	1
Data integration	3	3	4	3	3	4
Automation/research automation	6	4	3	4	4	2
Artificial Intelligence (AI)/Machine Learning	4	8	7	4	7	5
New approaches to CX/UX design	5	6	9	4	7	6
Alternatives to panel samples (e.g., social media, Mechanical Turk)	8	7	5	7	9	9
Marketplaces (such as for sample, talent, software, etc.)	9	5	1	8	5	7
Attribution Analytics and Single Source data	7	9	7	9	6	8
Blockchain applications	10	10	10	10	10	10
n =	182	361	69	100	91	122

OTHER BUZZ TOPICS

We asked GRIT respondents "what new technologies, methods, or approaches are you considering, if any?" When looking at the responses by buyer and supplier we see trends echoed in other findings in this report, namely a greater interest by buyers in technologies that are more aligned to unlocking or augmenting value creation in data-driven insights (text analytics and social media analysis). We also see suppliers are more focused on solutions that seem to promise operational efficiencies and the collection and usage of data such as new approaches to tracking, various forms of analytics and platforms to enable them. We'll utilize these responses in future iterations of GRIT to evolve the buzz topics list and emerging methods questions.

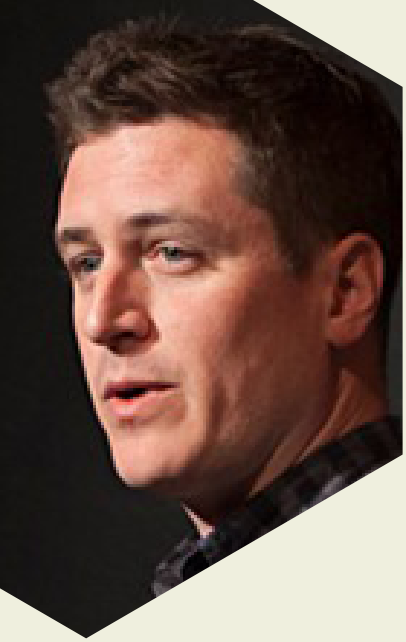
We see trends echoed in other findings in this report, namely a greater interest by buyers in technologies that are more aligned to unlocking or augmenting value creation in data-driven insights



THE BIG PICTURE

As we have observed for the past several waves of this report, if these results are directional guidance for potential areas to focus on investing time and resources in the year ahead, clearly Automation, AI, Agile Approaches, and Storytelling & Visualization should be at the top of the list for consideration. Multiple data points in this wave of GRIT reinforce this conclusion, and we continue to see growing usage and planned usage. More importantly, understanding the interrelationship of these data to other insights we have captured, trends, especially in the areas aligned with buyer needs and priorities, enables suppliers to evolve their strategies and make more informed choices regarding new offerings, talent, skills, training, and technology investments.

Clearly automation, AI, agile approaches, and storytelling & visualization should be at the top of the list for consideration



ILLUSTRATING IMPACT: VISUALIZING DATA TO TELL BETTER STORIES

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Research professionals are valued according to their ability to consistently deliver impactful insights within their organizations in a way which facilitates strategic decision, and action: so it's no surprise that interest in communicating insight through **"Data Visualization and Storytelling"** is given top billing in this survey.

We see it every day in the conversations we have with our customers and partners at Pulsar. Whether they subscribe to our self-serve insights tool, or team up with our insights consultancy, (or both!) researchers are consistently on the hunt for smart ways to visually illustrate insights in ways which will resonate with their own audiences, customers, colleagues, or other stakeholders: from the performance of campaigns to the impact of brand initiatives, or how trends spread and grow.

In our ongoing research partnership with Twitter, for instance, our teams are collaborating in finding new ways to map and illustrate how ideas spread and how content travels online: from the invisible social structures of the enormous public conversations happening on Twitter, to sketching out the "shape of an audience" along with its social ties and affinity networks. These kinds of visualizations require not only the right data sources and network analysis capabilities, but also a willingness to invest in sophisticated data visualization tools and methods.

This trend towards more effective insight communication is evident even within our own teams: throughout Pulsar's parent company Access Intelligence, our research and marketing team has made significant investments to facilitate our researchers and marketers' ability to tell stories through social, news, audience and search data.

In the survey, the fact that 75% of buyers spontaneously said that they are considering **"Text Analytics"** and 50% said "**Social Media Analysis"** when asked "what new technologies, methods, or approaches" they are considering, suggests there are huge opportunities to tell (and visualize) audience-first stories about how the public and the news media engage with topics on social media and the web.

Moving one step further up the research "stack," respondents' focus on technical and innovations topics like **Agile, Data Integration, and AI** reflects our experience, and the increasingly messy nature of the research buyers world. As they sit on ever increasing mountains of data, buyers are looking for technologies able to bring structure and order to the data. But integrations create challenges themselves, especially around speed and scale – this is likely what's behind the almost equal importance given to automation as integration.

Main trends aside, the relatively low scores for blockchain are unsurprising. Technology is a means to an end and will start to become seriously attractive for GRIT readers once it's application for our industry specifically is understood. It could, for example, be a means for delivering data integration in the future.

EMERGING METHODS

Tracking the adoption of emerging methods is a useful view on how innovation is achieving "fit for purpose" status within insights organizations as well as providing direction on where suppliers should be focusing resources to meet buyer opportunities. In this wave we see significant differences from pre-pandemic levels indicating that the industry has moved into a new era of tool usage to reflect our digital-first world.

For many years now we have been tracking the adoption of methods and technologies that have primarily emerged in the last decade as new ways to collect and/or analyze disparate types of data for insight generation. Over time, some of migrated from the "emerging" category into well-established researcher tools such as communities while others seem to still be limited in their adoption. However, due to changes driven largely by the pandemic, since 2020, we have seen significant growth of several of these emerging methods , and it's likely that some of these will migrate to our list of "established methods" in the future.

BUYER PERSPECTIVE

From the insights buyer perspective, analytics and mobile methods dominate the top tier of "emerging" methods used by most buyers: text analytics (66%), social media analytics (66%), mobile first surveys (59%), Big Data analytics (57%), and mobile qualitative (52%). Text analytics (+4%), Big Data analytics (+6%), and mobile qualitative (+5%) have each increased in the last year.

The next tier of methods with at least a strong plurality of usage don't exhibit the same growth, but are relatively stable in overall usage. These include micro-surveys (43%), eye tracking (40%), causal analysis (40%), behavioral economics models (40%), and mobile ethnography (38%).

Two of the biggest movers, facial coding (+6%) and chatbots (+8%), however are the "ones to watch". Last year, they were used or tried by less than a quarter of buyers, but now they are on the verge of breaking the 30% mark.

Text analytics (+4%), Big Data analytics (+6%), and mobile qualitative (+5%) have each increased in the last year

USING OR TRYING EMERGING METHODS: GRIT WAVE (BUYER)

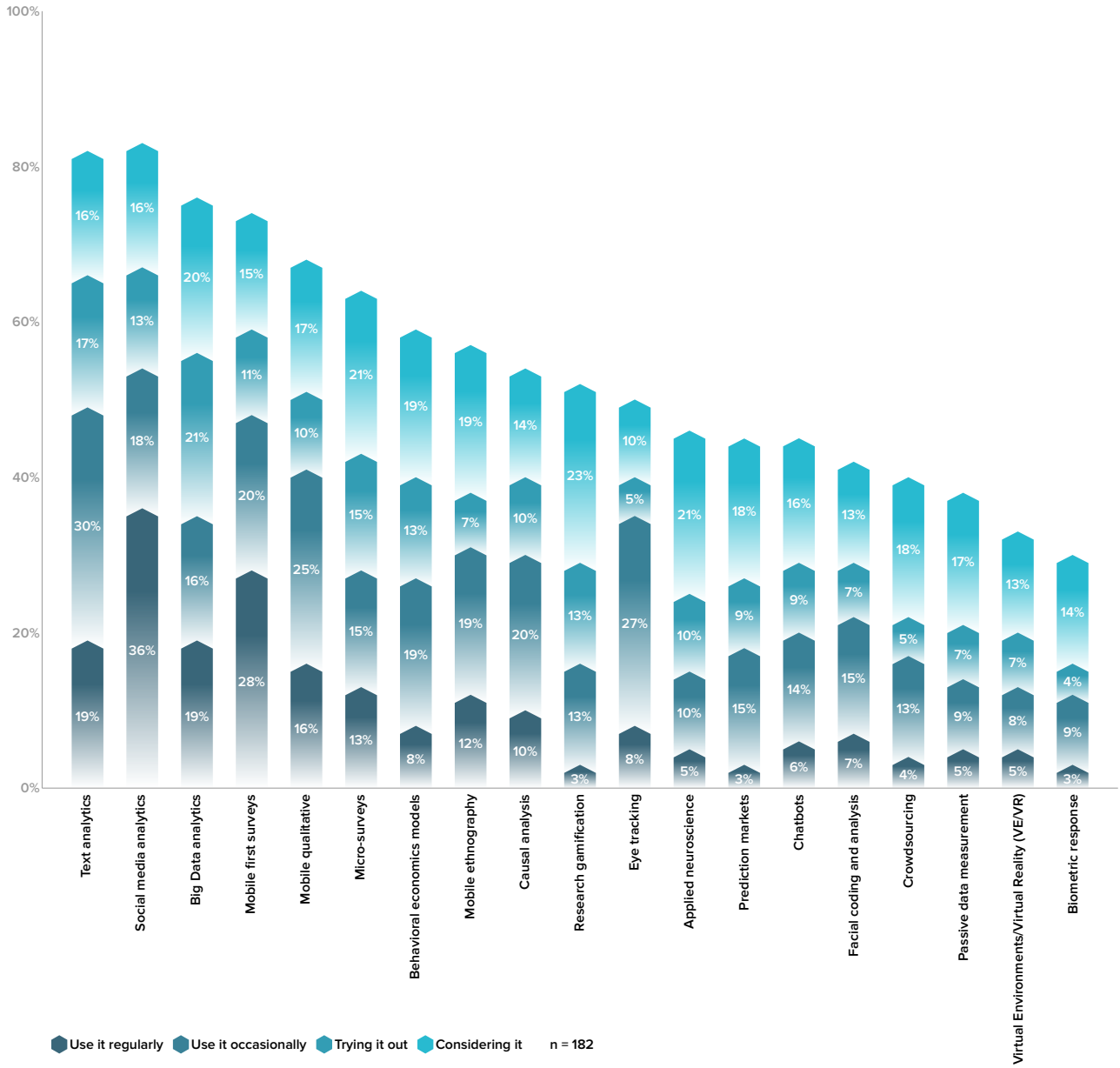
% Using regularly or occasionally or trying it out	2014	15W1	15W2	16W1	Y16W2	Y17W2	Y18W2	Y19W2	20W2	21W2	21W2 – 20W2
Text analytics	41%	38%	38%	40%	42%	50%	52%	53%	62%	66%	+4%
Social media analytics	58%	55%	53%	60%	64%	60%	63%	68%	69%	66%	-3%
Mobile first surveys	46%	46%	54%	66%	65%	43%	48%	52%	59%	59%	–
Big Data analytics	37%	39%	40%	52%	47%	50%	55%	58%	51%	57%	+6%
Mobile qualitative	24%	26%	26%	29%	31%	34%	35%	44%	46%	52%	+5%
Micro-surveys	20%	22%	17%	31%	37%	35%	33%	39%	44%	43%	-2%
Eye tracking	33%	20%	28%	34%	37%	34%	39%	36%	39%	40%	+1%
Causal analysis	N/A	N/A	N/A	N/A	N/A	N/A	N/A	33%	43%	40%	-2%
Behavioral economics models	15%	18%	17%	28%	24%	25%	31%	26%	42%	40%	-2%
Mobile ethnography	25%	22%	25%	24%	26%	31%	33%	36%	39%	38%	–
Facial coding and analysis	11%	12%	14%	17%	21%	17%	25%	23%	23%	29%	+6%
Chatbots	N/A	N/A	N/A	N/A	N/A	N/A	N/A	17%	21%	29%	+8%
Research gamification	18%	7%	12%	18%	17%	15%	17%	21%	29%	29%	–
Prediction markets	19%	19%	22%	24%	26%	18%	24%	22%	26%	28%	+2%
Applied neuroscience	8%	10%	15%	14%	16%	22%	20%	31%	28%	25%	-2%
Crowdsourcing	12%	16%	16%	15%	18%	16%	20%	18%	25%	23%	-3%
Passive data measurement	16%	14%	16%	24%	27%	22%	30%	14%	26%	21%	-5%
Virtual Environments/ Virtual Reality (VE/VR)	9%	11%	9%	8%	11%	8%	16%	17%	19%	20%	+1%
Biometric response	14%	12%	11%	9%	14%	11%	15%	14%	23%	16%	-7%
n =	93	188	206	471	322	343	329	298	207	182	

Looking more closely, two methods stand out as the ones most often used on a regular basis: social media analytics (36%) and mobile first surveys (28%). These levels of regular use place these leading "emerging methods" well behind the leading "established" quantitative methods. Historically, social media analytics have come from non-traditional suppliers.

Mobile first continues to challenge researchers due to the frustrating trade-off between survey length and form factor. As the industry continues to chip away at these barriers, regular use of these methods should climb.

Looking more closely, two methods stand out as the ones most often used on a regular basis: social media analytics (36%) and mobile first surveys (28%)

INTENTION/ATTITUDE TOWARD EMERGING METHODS (BUYER)



When looking at differences by buyer insights group size we see a similar pattern as in the buzz topics section, with larger organizations leading across the board, presumably due to a resource advantage compared to their smaller peers.

DIFFERENCES IN USAGE OF EMERGING METHODS: INSIGHTS GROUP SIZE (BUYER)

% Use regularly or occasionally or trying it out	All Buyers	Insights Staff	Group Diff.
Text analytics	65%	10 or more staff	+8%
		5 to 9 staff	+5%
		Fewer than 5 staff	-17%
Mobile first surveys	59%	10 or more staff	+12%
		5 to 9 staff	-9%
		Fewer than 5 staff	-9%
Mobile qualitative	51%	10 or more staff	+15%
		5 to 9 staff	-5%
		Fewer than 5 staff	-18%
Big Data analytics	57%	10 or more staff	+15%
		5 to 9 staff	-5%
		Fewer than 5 staff	-19%
Mobile ethnography	37%	10 or more staff	+17%
		5 to 9 staff	-12%
		Fewer than 5 staff	-14%
Eye tracking	40%	10 or more staff	+13%
		5 to 9 staff	-2%
		Fewer than 5 staff	-19%
Behavioral economics models	40%	10 or more staff	+15%
		5 to 9 staff	-2%
		Fewer than 5 staff	-20%
Research gamification	28%	10 or more staff	+15%
		5 to 9 staff	-3%
		Fewer than 5 staff	-20%
Facial coding and analysis	29%	10 or more staff	+11%
		5 to 9 staff	-4%
		Fewer than 5 staff	-14%
Applied neuroscience	26%	10 or more staff	+12%
		5 to 9 staff	-1%
		Fewer than 5 staff	-18%
Virtual Environments/Virtual Reality (VE/VR)	20%	10 or more staff	+10%
		5 to 9 staff	-6%
		Fewer than 5 staff	-10%
Biometric response	16%	10 or more staff	+5%
		5 to 9 staff	+5%
		Fewer than 5 staff	-12%

All buyers (n = 182); Fewer than 5 staff (n = 52); 5 to 9 staff (n = 48); 10 or more staff (n = 79)

SUPPLIER PERSPECTIVE

The four methods that comprise the top tier for suppliers are also in the buyer top tier. These are mobile first surveys (67% using or trying), text analytics (66%), mobile qualitative (58%), and social media analytics (50%)

On the supplier side of the industry, we see similar adoption level bands, with a large degree of consilience with buyer levels. This level of commonality in adoption levels is a trend we have been anticipating for years and it appears that it has finally occurred. We had noted in many previous editions that buyer adoption of solutions like text analytics, social media analytics, and Big Data analytics was far higher than supplier usage and assumed that buyers were using suppliers from outside of the insights industry for those solutions. That does not seem to be the case now: the four methods that comprise the top tier for suppliers are also in the buyer top tier. These are mobile first surveys (67% using or trying), text analytics (66%), mobile qualitative (58%), and social media analytics (50%).

USING OR TRYING EMERGING METHODS: GRIT WAVE (SUPPLIER)

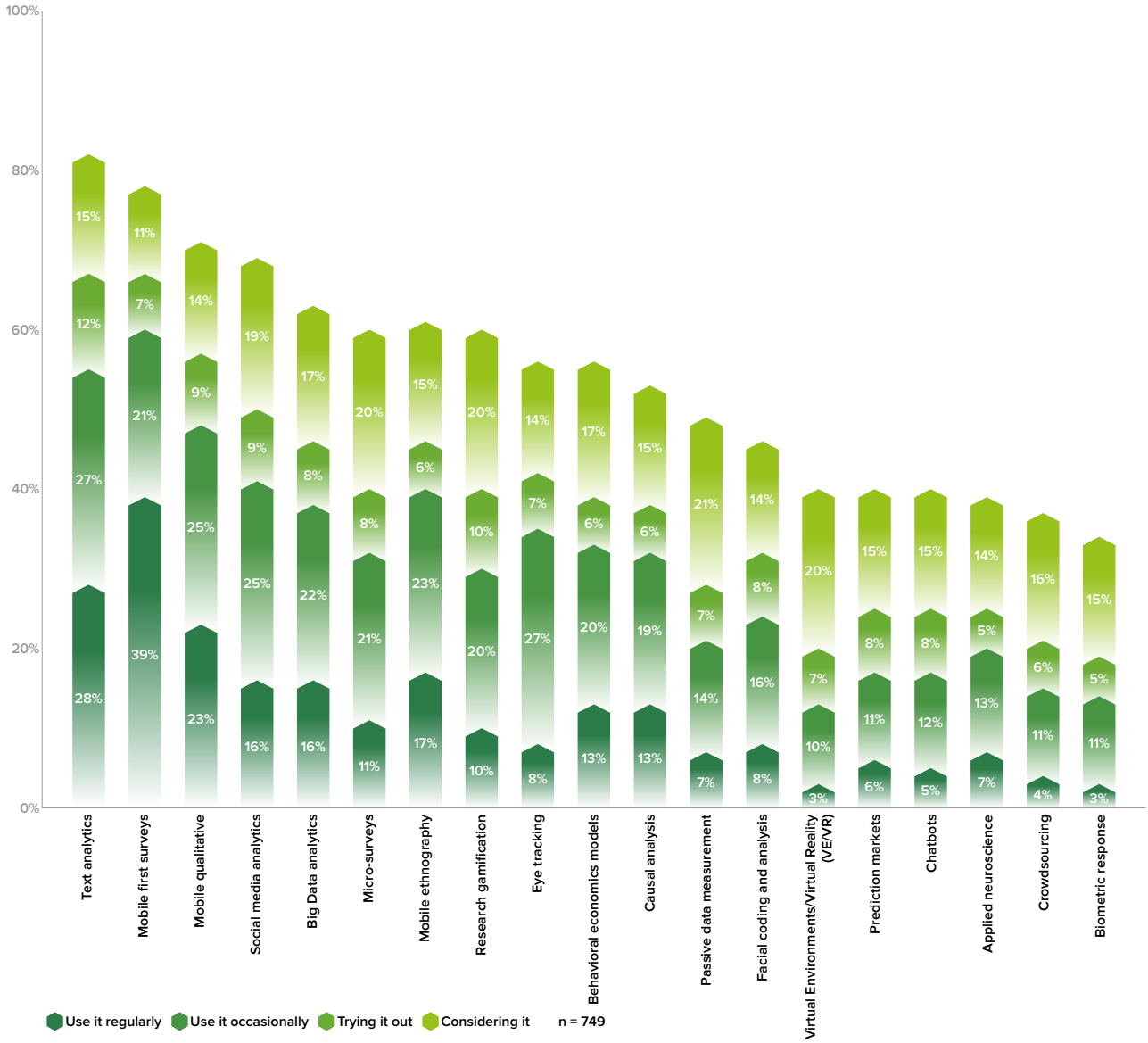
% Using regularly or occasionally or trying it out	2014	15W1	15W2	16W1	Y16W2	Y17W2	Y18W2	Y19W2	20W2	21W2	21W2–20W2
Mobile first surveys	69%	72%	72%	77%	77%	52%	56%	58%	65%	67%	+2%
Text analytics	40%	38%	38%	46%	47%	45%	51%	49%	61%	66%	+5%
Mobile qualitative	41%	47%	36%	48%	45%	46%	46%	49%	57%	58%	+1%
Social media analytics	43%	42%	41%	45%	49%	38%	45%	43%	53%	50%	-3%
Big Data analytics	31%	30%	32%	35%	35%	35%	41%	39%	45%	46%	+1%
Mobile ethnography	31%	39%	33%	37%	35%	36%	40%	43%	48%	45%	-2%
Eye tracking	34%	30%	28%	36%	35%	34%	38%	34%	39%	42%	+3%
Micro-surveys	27%	32%	27%	37%	35%	33%	33%	35%	39%	40%	+1%
Research gamification	25%	25%	21%	30%	27%	28%	29%	27%	38%	39%	+1%
Behavioral economics models	28%	29%	23%	32%	30%	30%	32%	32%	36%	39%	+3%
Causal analysis	N/A	N/A	N/A	N/A	N/A	N/A	N/A	29%	39%	39%	–
Facial coding and analysis	20%	19%	19%	23%	24%	21%	24%	19%	27%	33%	+6%
Passive data measurement	15%	14%	18%	27%	26%	24%	27%	21%	24%	28%	+4%
Applied neuroscience	14%	15%	15%	19%	16%	21%	21%	28%	24%	26%	+2%
Prediction markets	19%	21%	16%	22%	24%	19%	20%	17%	27%	26%	-1%
Chatbots	N/A	N/A	N/A	N/A	N/A	N/A	N/A	12%	20%	25%	+5%
Crowdsourcing	18%	19%	11%	21%	16%	15%	17%	18%	20%	21%	+1%
Virtual Environments/ Virtual Reality (VE/VR)	20%	16%	10%	16%	15%	12%	17%	17%	18%	21%	+3%
Biometric response	13%	10%	10%	11%	11%	13%	16%	12%	17%	19%	+2%
n =	361	764	816	1,673	1,255	1,190	931	790	578	749	

The second tier of methods suppliers are using or trying out includes Big Data analytics (46%), mobile ethnography (45%), eye tracking (42%), micro-surveys (40%), research gamification (39%), behavioral economics models (39%), and causal analysis (39%). However, none of these methods changed by more than 3% over the past year.

In contrast to the rather static second tier, the third tier includes almost all of the largest changes since last year. Facial coding and analysis increased by 6%, chatbots by 5%, and passive data measurement by 4%.

Among suppliers, the top three "emerging" methods in use regularly are mobile first surveys (39%), text analytics (28%), and mobile qualitative (23%). Of these only mobile first is also among the methods most used regularly by buyers.

INTENTION/ATTITUDE TOWARD EMERGING METHOD (SUPPLIER)



Looking at significant differences in usage by supplier segment, we see that generalists are more likely to have above average usage because they do more different tasks. Specialists, like field services providers, are generally below average in usage of methods because some methods don't apply to their work. However, we also see some above-average usage that deviates from this general finding: strategic consultancies using behavior economics models (+22%) and crowdsourcing (+21%), and technology providers using chatbots (+9%).

DIFFERENCES IN USAGE OF EMERGING METHODS: PROFESSIONAL FOCUS (SUPPLIER)

% Use regularly or occasionally or trying it out	All Suppliers	Professional Focus	Group Diff.
Mobile first surveys	67%	Full service	+5%
		Data & analytics	-18%
Text analytics	66%	Field services	-14%
Mobile qualitative	58%	Full service	+7%
		Data & analytics	-17%
Social media analytics	50%	Field services	-18%
Big Data analytics	46%	Field services	-17%
Mobile ethnography	45%	Full service	+10%
		Technology	-16%
		Data & analytics	-20%
Eye tracking	42%	Full service	+10%
		Technology	-14%
Behavioral economics models	39%	Strategic consulting	+22%
		Field services	-30%
Causal analysis	39%	Field services	-17%
Applied neuroscience	26%	Field services	-17%
Chatbots	25%	Technology	+9%
Crowdsourcing	21%	Strategic consulting	+12%
Virtual Environments/Virtual Reality (VE/VR)	21%	Technology	-12%

All suppliers (n = 749); Full service (n = 361); Field services (n = 69); Strategic consultancy (n = 100); Data & analytics (n = 91); Technology (n = 122)

Generalists are more likely to have above average usage because they do more different tasks. Specialists, like field services providers, are generally below average in usage of methods because some methods don't apply to their work

AROUND THE WORLD WITH EMERGING METHODS

Among buyers, usage of "emerging" methods does not vary across global regions. There are two differences among suppliers: European suppliers are more likely to be using research gamification while those in North America are less likely to be using facial coding and analysis.

DIFFERENCES IN USAGE OF EMERGING METHODS: GLOBAL REGION (SUPPLIER)

% Use regularly or occasionally or trying it out	All Suppliers	Global Region	Group Diff.
Research gamification	39%	Europe	+10%
Facial coding and analysis	33%	North America	-6%

All suppliers (n = 749); North America (n = 381); Europe (n = 191); Asia-Pacific (n = 128); All others (n = 49)

BUYERS AND SUPPLIERS

Perhaps the best summary of the story of adoption of emerging methods becomes clear when we convert each method into a ranking for each. It seem that buyers focus on methods that potentially unlock more value in insights generated, and suppliers focus more on methods that enable the research process. This finding is similar to a key takeaway from the buzz topics section, and we see no reason why it wouldn't apply to emerging methods as well. However, differences in micro-surveys, chatbots, crowdsourcing, and prediction markets may indicate a slight degree of buyer-driven experimentation with newer approaches that are more appropriate for specialist suppliers to offer than for generalists.

Buyers focus on methods that potentially unlock more value in insights generated, and suppliers focus more on methods that enable the research process

USING OR TRYING EMERGING METHODS: BUYER AND SUPPLIER

% Using regularly or occasionally or trying it out	21W2 Rank	
	Buyer	Supplier
Text analytics	1	2
Social media analytics	1	4
Mobile first surveys	3	1
Big Data analytics	4	5
Mobile qualitative	5	3
Micro-surveys	6	8
Eye tracking	7	7
Causal analysis	7	11
Behavioral economics models	9	10
Mobile ethnography	10	6
Facial coding and analysis	11	12
Chatbots	11	16
Research gamification	13	9
Prediction markets	14	15
Applied neuroscience	15	14
Crowdsourcing	16	17
Passive data measurement	17	13
Virtual Environments/Virtual Reality (VE/VR)	18	18
Biometric response	19	19
n =	182	749

THE BIG PICTURE

Over the years we have bemoaned the apparent disconnect between buyers and suppliers, however we surmise that as it has been in so many things, the pandemic has been the great equalizer and forced closer alignment between the two sides of the value exchange in our industry. Suppliers have clearly moved to adopt new methods that can deliver on the demands from buyers, creating a more synergistic dynamic that is accelerating multiple approaches into majority adoption and driving growing experimentation with many more that continue to show real traction.

The name of the game for emerging methods has always been "fit for purpose", and the pandemic appears to have been the perfect stimuli to explore what that means for many approaches that have been available but perhaps often passed over before the Covid-era because more established tools were available. After two years of pandemic-driven pressure, the GRIT data clearly shows that insights professionals have migrated to a different comfort-zone.

In 2022 and beyond, our perceptions of which methods are "established," "emerging," or merely "buzz-worthy" will no doubt continue to evolve. It is unlikely that even if Covid is wiped from the face of the earth, method usage will not snap back to previous levels. The horses have left the barn (so to speak!), and there is no putting them back in now..

The name of the game for emerging methods has always been "fit for purpose"

THE HISTORICAL TRADE-OFF BETWEEN EFFICIENCY AND VALIDITY IN MARKETING RESEARCH IS OVER

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The quantification of human emotion is no longer an oxymoron. The most advanced researchers in the Insights industry are now regularly using reliable measures of scaled access to human emotion, attention and non-conscious processes in the consumer mind. This demand for emotional insight will continue to grow as marketers struggle to understand Consumer emotion at scale at a time when global uncertainty and anxiety is at an all-time high.

Not surprisingly, given this demand for understanding human emotion and its true triggers, automated behavioral science solutions are rapidly replacing traditional explicit survey methods. Facial action coding was the second fastest advanced method adopted in 2021. Eye-tracking now has the seventh highest usage penetration among emerging methods, indicating that savvy researchers have found novel ways to incorporate the behavioral technique into the foundation of their Insights work. This trend will continue within Insights over the next five years as researchers understand **there is no longer a need to compromise validity for efficiency.**

The incredible advancement of human knowledge on the quantification of emotion makes this an exciting time to be leading the automation of behavioral science.

It is clear that the rise in the use of non-conscious measures is due to the limitations of traditional research methods. The industry is not getting an accurate read on how people feel, and *why,* with explicit opinion polls. Because consumer attitudes and marketing platforms are changing so frequently our industry is forced to innovate and find new ways to capture consumer sentiment. We cannot rely on surveys alone, especially when bots are taking the explicit surveys!

To get a sense of how behavioral science is now democratized for any research seeking to understand human behavior consider the rate of scientific evidence now emerging from applied behavioral science firms. At Sentient Decision Science, we run hundreds of scientific studies for brands every month. 95% of the studies we run include eye-tracking, implicit association testing of the non-conscious mind, derived preference from "irrational" quantitative choice modes, and automated human affect analysis (AHAA) to predict and understand behavior.

In the past six months alone, we have used AHAA to predict and understand changes in brand preference, advertising success and likelihood to get a vaccine, by optimizing creative content for greater emotional influence.

With the adoption of new methods accelerating, we should feel confident as an Industry that we are practicing on the true frontier of behavioral science. The evidence from this latest GRIT report indicates that our Industry is systematically democratizing access to scientific insight on the drivers of human behavior. An impact at that level holds the potential to increase empathy for the human condition.

At Sentient, our purpose motivates our behavior. As we seek to increase empathy for the human condition, we see a bright future for quantifying the human emotional experience and understanding the whys behind it. I'm excited to see how our industry builds on this momentum and makes its unique impact on the world.

USAGE OF ESTABLISHED METHODOLOGIES

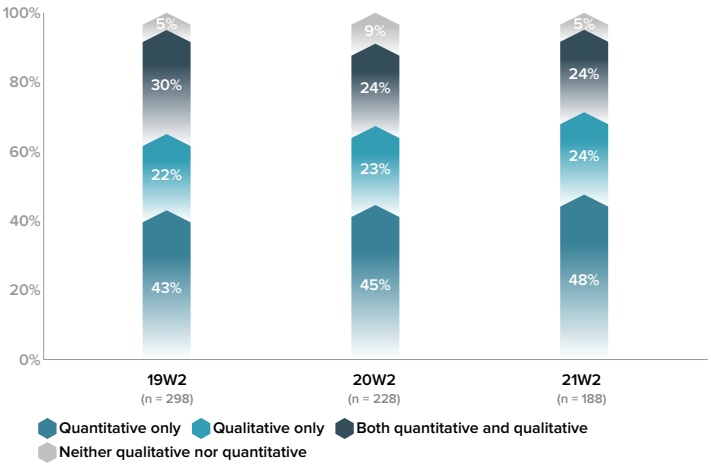
The COVID-19 pandemic has challenged researchers to investigate novel issues without risking the health of their target audiences while navigating tight budget constraints. Online methods have not only met these needs, they have established themselves as viable alternatives to in-person and telephone research.

BUYER PERSPECTIVE

Overall, buyer emphasis on quantitative versus qualitative research has been consistent over the past two years even as the choice of specific methods has changed

Overall, buyer emphasis on quantitative versus qualitative research has been consistent over the past two years even as the choice of specific methods has changed, at least directionally. As the pandemic created novel challenges and barriers to in-person research, some may have turned to quant-only projects for quick reads instead of waiting for longer, multi-phase projects to complete.

PROJECT ALLOCATION ACROSS QUANT AND QUAL: GRIT WAVE (BUYER)



The percentage of research projects that use neither qualitative nor quantitative methods nearly doubled at the height of the pandemic to 9% but is now back to historical levels. Typically, these projects involve secondary or desk research and may include analysis of existing data sets, and it makes sense that these approaches would have peaked last year.

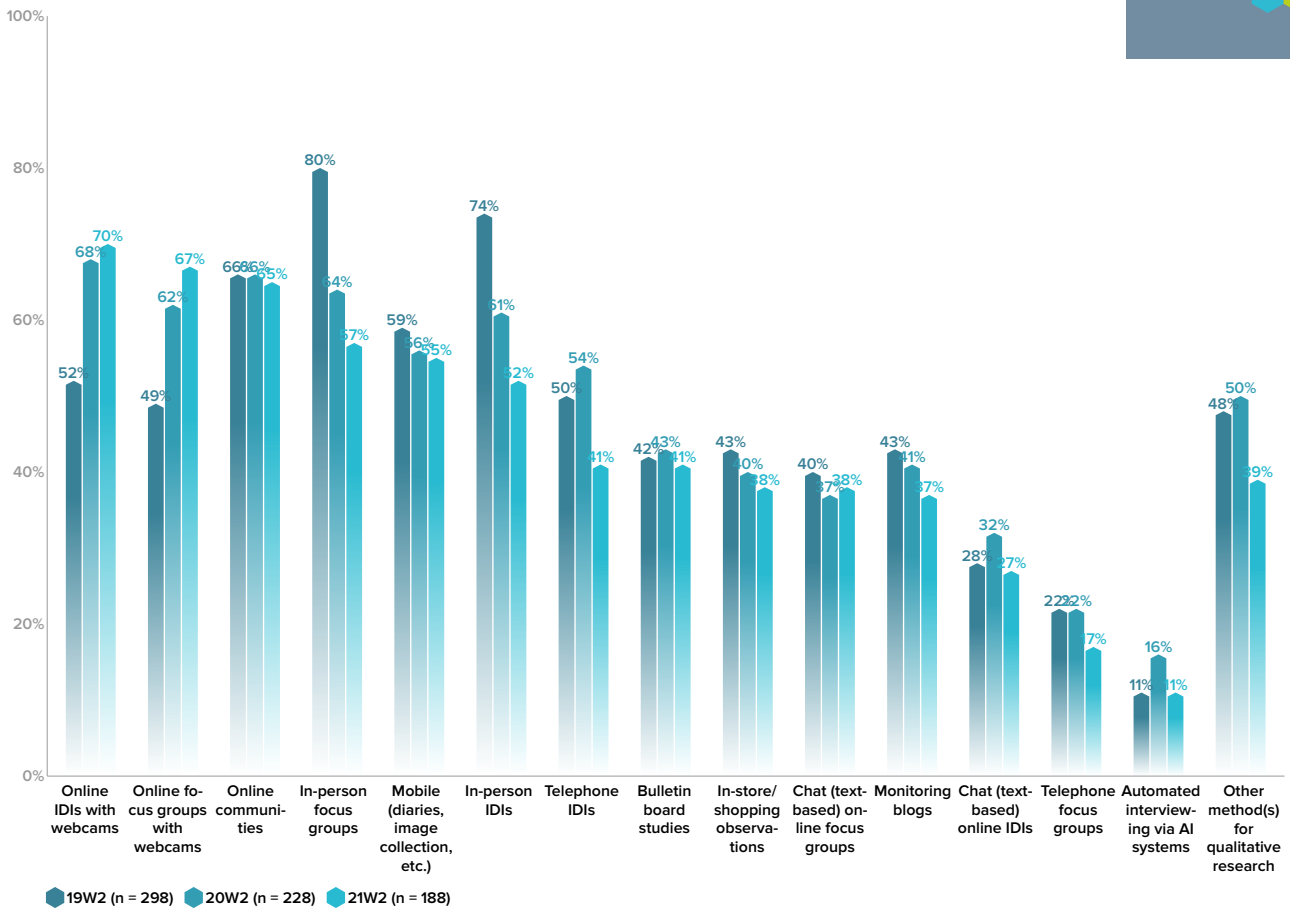
Although most buyers still use in-person qualitative methods at least occasionally, use of online methods continues to grow, and currently two-thirds of buyers conduct online IDIs and focus groups or employ communities for qualitative research. Since 19W2, online IDIs and online focus groups have each increased 18% among buyers while in-person versions have each decreased by more than 20%. Although growth of online methods has slowed since last year, the sharp decline of in-person methods continues today. From 19W2 to 20W2, use of online IDIs increased 16% and use of online focus groups increased 13% while growth over the last year was only 2% and 5%, respectively. In contrast, in-person IDIs decreased 13% and in-person focus groups decreased 16% from 19W2 to 20W2, and their decline continued over the past year by 9% and 7%, respectively.

The other major decline occurred for use of telephone IDIs which dropped below pre-pandemic levels, to 41%, over the past year despite increasing slightly from 50% to 54% the year before. Since last year, four other methods declined by 5%: monitoring

blogs, chat for online IDIs, telephone focus groups, and automated interviewing via AI systems. These four were already among the less common methods, as only monitoring blogs had achieved more than 30% usage. The decline of these methods may be less strongly driven by their limitations and more strongly driven by greater comfort with online IDIs, focus groups, and communities. This comfort may have reduced their need to explore other methods.

The decline of these methods may be less strongly driven by their limitations and more strongly driven by greater comfort with online IDIs, focus groups, and communities

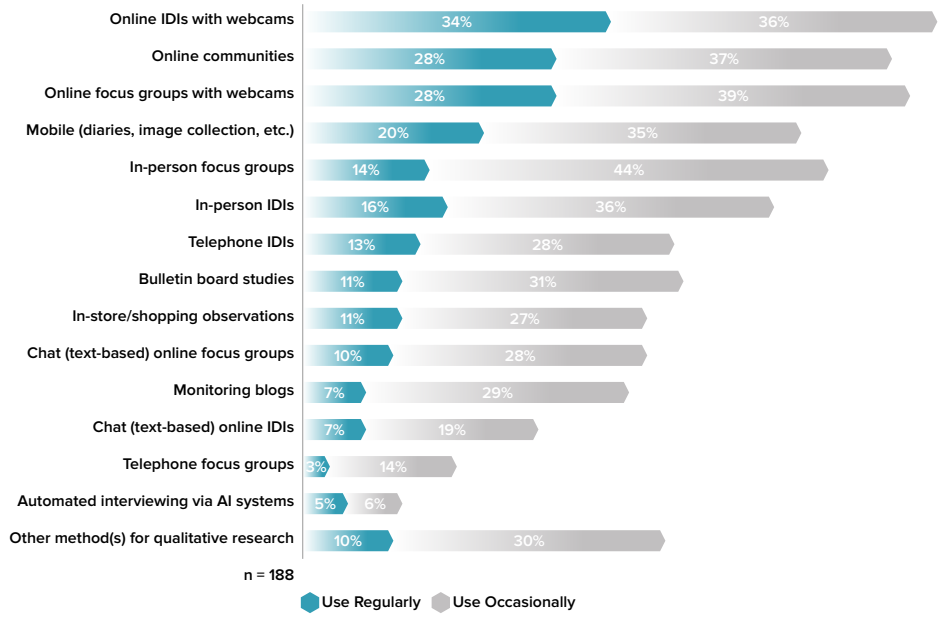
QUALITATIVE METHODS USED REGULARLY OR OCCASIONALLY: GRIT WAVE (BUYER)



The percentage of regular users of each method versus occasional users is another indication of the prominence of online methods. Of buyers who use online IDIs, focus groups, or communities, more than 40% use them regularly. Of buyers who use in-person IDIs, just 31% use them regularly. For in-person focus groups, the percentage falls to 24%. Online methods are not only used more widely than in-person methods, they are used more deeply.

Of buyers who use online IDIs, focus groups, or communities, more than 40% use them regularly

QUALITITATIVE METHODS USED REGULARLY OR OCCASIONALLY (BUYER)

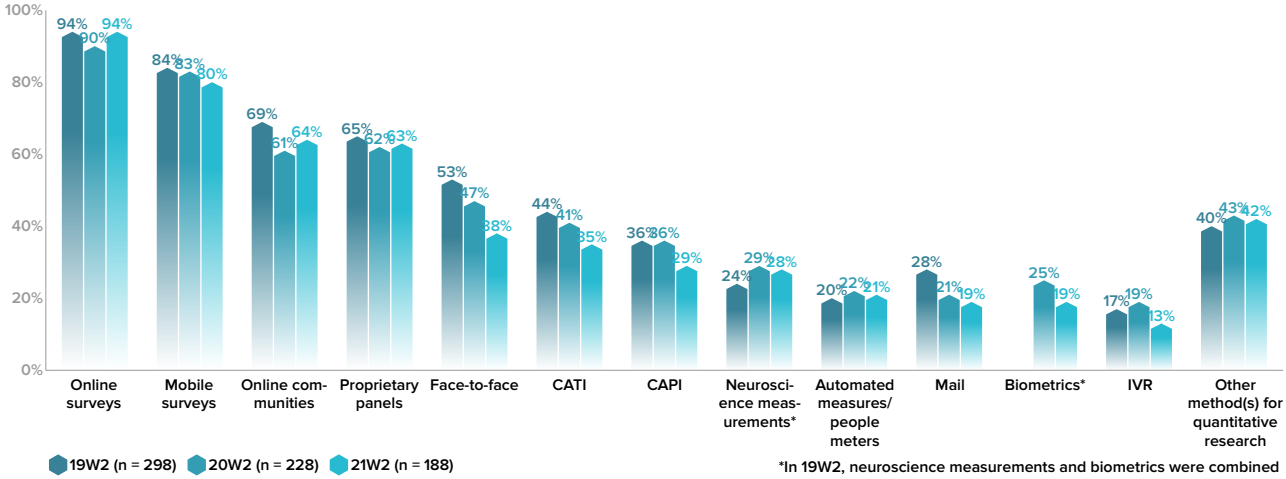


Paralleling the trend in qualitative, use of low tech methods dropped for quantitative research

Quantitative methods show a similar trend away from in-person methods. In 19W2, most buyers used face-to-face at least occasionally (53%), but usage has dropped 15%, including a 6% drop in the first year of the pandemic and an even greater 9% in the most recent year. Computer-assisted personal interviewing (CAPI) has also dropped since the pandemic began, by 7%.

Paralleling the trend in qualitative, use of low tech methods dropped for quantitative research. As we saw with telephone IDIs, computer-assisted telephone interviewing (CATI) dropped (9%), and use of mail also dropped (9%). Even interactive voice response (IVR), which was not used much to begin with, dropped noticeably from 17% to 13% after hitting 19% last year. It could be that more buyers are experiencing success with online or other modern remote methods and abandoning methods that are more costly to use or have a lower chance of connecting with a real person.

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY: GRIT WAVE (BUYER)



*In 19W2, neuroscience measurements and biometrics were combined

MOVING BEYOND TRADITIONAL COMMUNITIES AND PANELS

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The past couple of years were certainly tumultuous! In response to the pandemic, we have seen technology expand the way research is conducted and better serve customers and stakeholders.

From advances in Storytelling and Data Visualization to Agile, Integration to AI, researchers have been able to achieve their objectives with technologies that are rapidly evolving and maturing. It comes as no surprise that this GRIT report indicates research tech will continue to gain attention and build adoption well into 2022 and beyond.

It is those trends – and enabling them in creative and innovative ways – that excites us at Recollective. It demands out-of-the-box thinking along with the adoption of new tools, methods and (happily) innovative technology.

Most recently at Recollective we have started to explore how online communities and panels are used and ways to make them more effective. That involves better understanding their relative strengths and weaknesses and identifying how to design/manage research and engage participants differently using them.

Panels are great when you need to talk to a large audience or a select sub-group in a quantitative way, but the drawback is that they tend to only provide a one-way interaction between the customer/user and brand. This leaves much to be desired from the participant's point of view because after they share their opinions, there is typically no communication until the next survey opportunity which leads to dropout, lower response rates over time and dissatisfaction.

On the other hand, online communities can provide the degree of access and connection participants now seek. This is done by creating a more collaborative environment that facilitates a two-way interaction between the participants and the research team. The challenge is that online communities demand considerable effort to successfully manage and maintain them (especially at any significant scale).

In the past, organizations may have selected one versus the other based on a prioritization of their overall needs, also considering their available resources and budget. That selection naturally introduces a compromise that we believe should not be necessary. There needs to be a better solution; one that blends the best of both approaches to establish and nurture ongoing relationships with a target audience.

So, what does this mean moving forward?

As organizations push harder for rapid, just-in-time insights and adopt iterative, agile methods that require regular feedback, online qualitative communities are being forced to scale to include larger sample sizes. Likewise, quantitative panels must also accommodate better connection and engagement between members. Technology must evolve to meet these emerging needs.

With so many robust technologies for both online qual and quant already available, Recollective is designing "Recollective Hub" – a unique solution that enables researchers to utilize the best of online qual and quant tools within one platform.

Recollective Hub offers researchers and organizations a robust panel management solution that includes native qualitative components like home pages, communication tools and always-on discussion boards with the ability to easily connect any third-party tool such as surveys or UX testing apps. Hub provides a centralized home to engage with thousands of participants across any type of research program. It avoids lock-in to specific tools, future-proofing the panel for any future innovations.

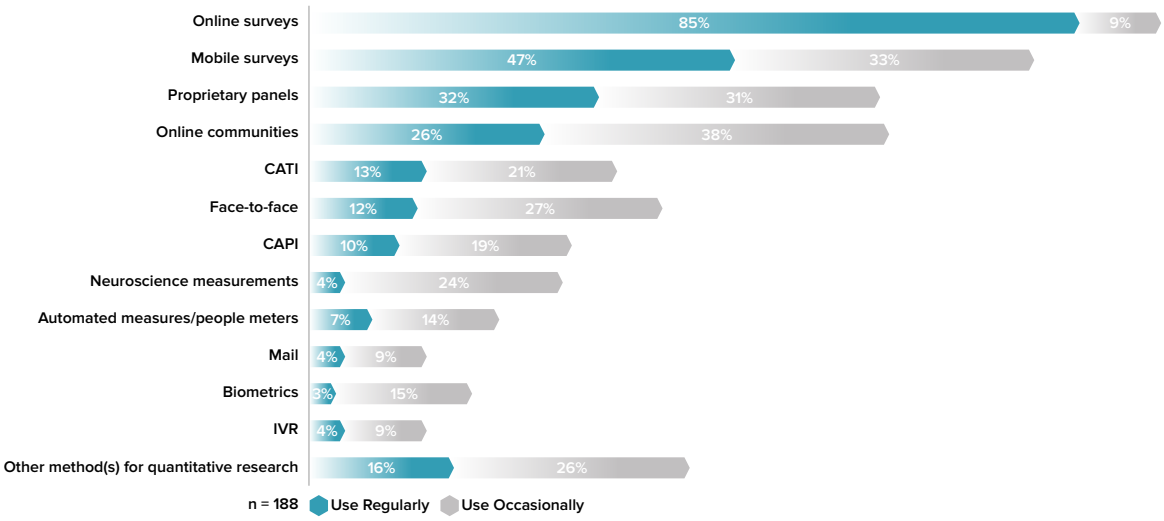
Within an industry whose continued mantra is "cheaper, faster, better" we need to collectively push ourselves to redefine what "better" can be. At Recollective, better means evolving to the changing needs of researchers. As technology companies continue to play a larger role, we are excited about the upcoming release of Recollective Hub and how it will continue empowering our customers to do more.

Online surveys, mobile surveys, and proprietary panels have the "deepest" usage

Usage of non-conscious measures has gone in two directions: neuroscience methods increased by 5% from 19W2 to 20W2 and stayed about the same in 21W2 while biometrics fell from 25% in 20W2 to 19% now. However, use of either method is not very "sticky"; of those who use them at least occasionally, fewer than 20% use them regularly.

As usual, most buyers use online surveys, mobile surveys, proprietary panels, and online communities for quant research. Online surveys, mobile surveys, and proprietary panels have the "deepest" usage: most buyers who use them do so regularly.

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY (BUYER)



DIFFERENCES BY INSIGHTS GROUP SIZE

DIFFERENCES IN USAGE OF ESTABLISHED METHODOLOGIES: INSIGHTS GROUP SIZE (BUYER)

% Projects	All Buyers	Insights Staff	Group Diff.
Quantitative only	47%	Fewer than 5	+9%
		5 to 9	-3%
		10 or more	-4%
Qualitative only	24%	Fewer than 5	-6%
		5 to 9	+5%
		10 or more	+1%
Both	24%	Fewer than 5	-3%
		5 to 9	-2%
		10 or more	+3%

All buyers (n = 188); Fewer than 5 (n = 52); 5 to 9 (n = 46); 10 or more (n = 87). Differences are directional, not statistically significant.

Across insights group sizes, methodology choices are statistically similar with some directional differences. Insights groups of fewer than 5 are more likely than larger groups to conduct quant-only projects and less likely to do qual-only. The percentage of projects that include quant range from 66% for insight groups of 5 to 9 staff to 77% for those with fewer than 5. Projects with qual range from 39% for the smallest insights groups to 52% for the largest.

Insights groups of 10 or more use a wider variety of methods than smaller ones. Within each size group, most use mobile surveys, online IDIs with webcams, and online focus groups with webcams at least occasionally, but usage of each of these is more widespread among groups with 10 or more staff than among smaller ones. Although used among only a minority of the smallest groups, online communities for qual and mobile qual are used at least occasionally by most buyers in the larger groups, especially among those with 10 or more staff. The largest groups are also more likely to use bulletin board studies, chat (text-based) online focus groups and IDIs, monitoring blogs, and neuroscience measurements.

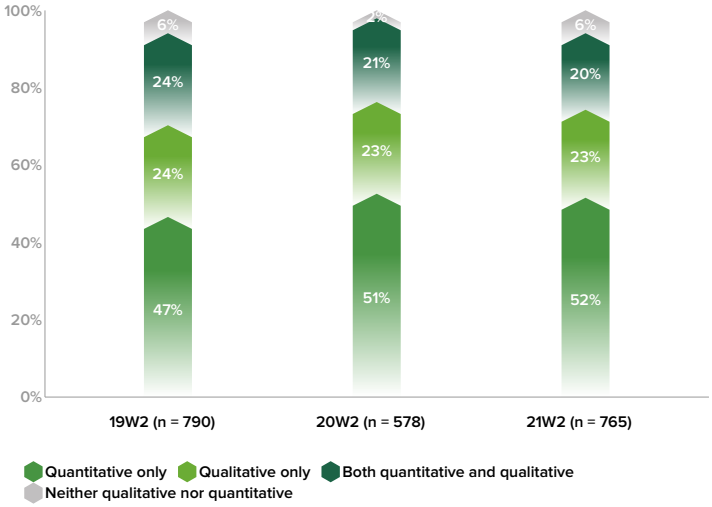
DIFFERENCES IN USAGE OF ESTABLISHED METHODOLOGIES: INSIGHTS GROUP SIZE (BUYER)

% Use Regularly or Occasionally	All Buyers	Insights Staff	Group Diff.
Mobile surveys (quantitative)	80%	Fewer than 5	-5%
		5 to 9	-13%
		10 or more	+10%
Online IDIs with webcams (qualitative)	70%	Fewer than 5	-16%
		5 to 9	-3%
		10 or more	+11
Online focus groups with webcams (qualitative)	67%	Fewer than 5	-15%
		5 to 9	-6%
		10 or more	+12%
Online communities (qualitative)	65%	Fewer than 5	-19%
		5 to 9	-2%
		10 or more	+12%
Mobile (diaries, image collection, etc.) (qualitative)	55%	Fewer than 5	-22%
		5 to 9	-2%
		10 or more	+14%
Bulletin board studies (qualitative)	41%	Fewer than 5	-18%
		5 to 9	-2%
		10 or more	+12%
Chat (text-based) online focus groups (qualitative)	38%	Fewer than 5	-17%
		5 to 9	-1%
		10 or more	+10%
Monitoring blogs (qualitative)	37%	Fewer than 5	-10%
		5 to 9	-9%
		10 or more	+11%
Neuroscience measurements (quantitative)	28%	Fewer than 5	-20%
		5 to 9	+7%
		10 or more	+9%
Chat (text-based) online IDIs (qualitative)	27%	Fewer than 5	-17%
		5 to 9	-1%
		10 or more	+7%

All buyers (n = 188); Fewer than 5 (n = 52); 5 to 9 (n = 46); 10 or more (n = 87)
For each methodology, at least one group is significantly different from the others, and all groups are shown.

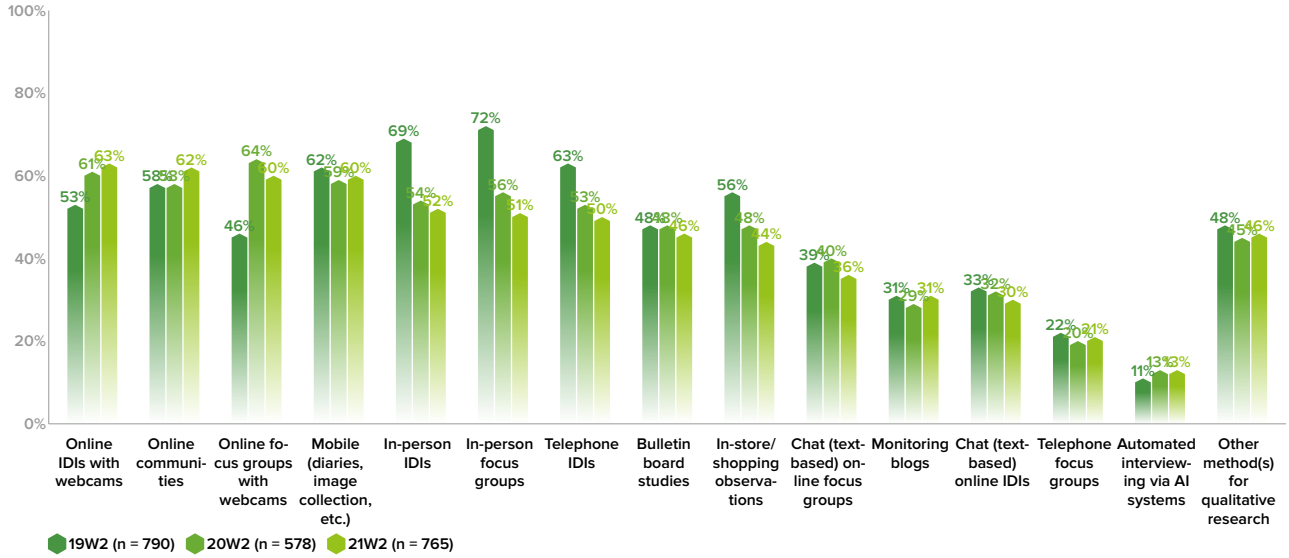
SUPPLIER PERSPECTIVE

PROJECT ALLOCATION ACROSS QUANT AND QUAL: GRIT WAVE (SUPPLIER)



Mirroring buyer trends, the percentage of supplier research projects that use both qual and quant methods has declined since 19W2, from 24% to 20%. The percentage that use any quantitative method has hovered around 72% since 19W2, but, unlike among buyers, the percentage that include any qual method has fallen by 5%, from 48% to 43%. The buyer "project population" and the supplier "project population" are not directly comparable, as the "average supplier" project mix will depend on the mix of supplier types reporting the breakdowns. For example, if the population of data and analytics companies is larger than in the past, the percentage of qualitative projects is likely to be lower.

QUALITATIVE METHODS USED REGULARLY OR OCCASIONALLY: GRIT WAVE (SUPPLIER)



Mirroring buyer trends, the percentage of supplier research projects that use both qual and quant methods has declined since 19W2

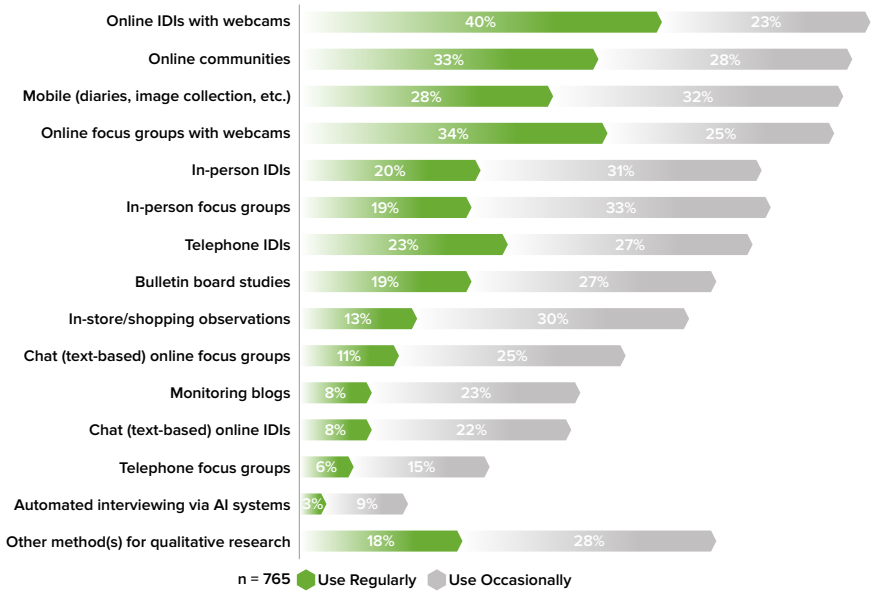
As with buyers, use of online IDIs and online focus groups for research projects increased dramatically in the first year of the pandemic (+8% and +18%, respectively), then slowed in the past year (+2%, -4%). Also similar to buyers, four qual methods have dropped more than 10% since 19W2: in-person IDIs (69% to 52%), in-person focus groups (72% to 51%), telephone IDIs (63% to 50%), and in-store/shopping observations (56% to 44%). For each of these, the lion's share of the drop occurred during the first year.

Among suppliers, online IDIs, online communities, and online webcams are the "stickiest" as most of those who use them at least occasionally use them regularly. Mobile (diaries, image collection, etc.) and telephone IDIs are used regularly by 46% of suppliers who use them at all, but telephone IDIs are declining while mobile qual is at least holding steady.

Suppliers are least committed to the least-used qual methods, monitoring blogs, chat (text-based) online IDIs, telephone focus groups, and automated interviewing via AI systems, each of which are used by fewer than one-third of suppliers. For each of these four, fewer than 10% use them regularly.

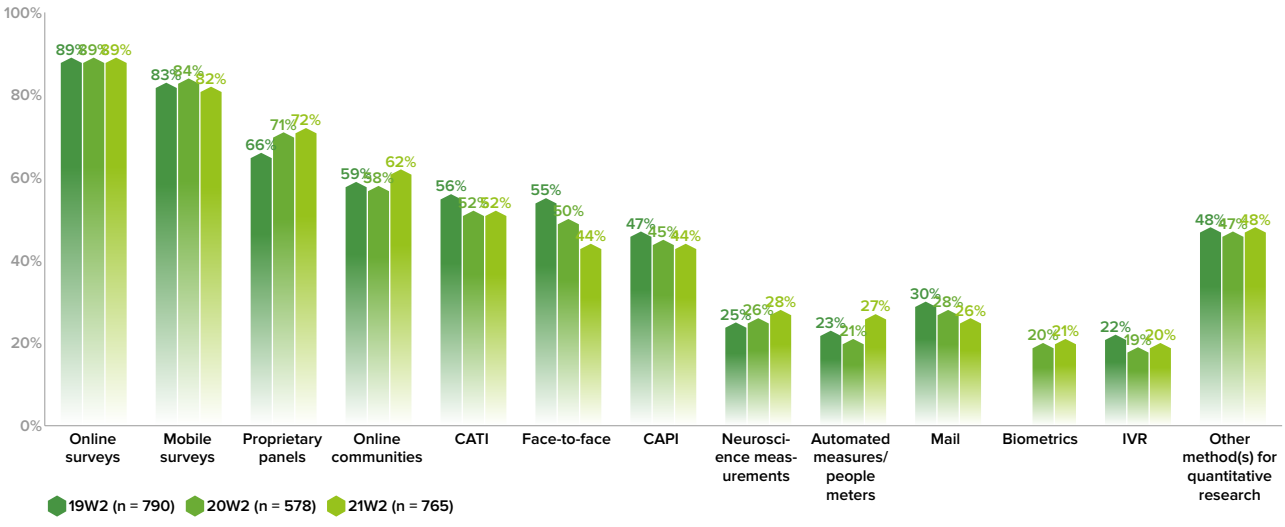
Among suppliers, online IDIs, online communities, and online webcams are the "stickiest" as most of those who use them at least occasionally use them regularly

QUALITITATIVE METHODS USED REGULARLY OR OCCASIONALLY (SUPPLIER)



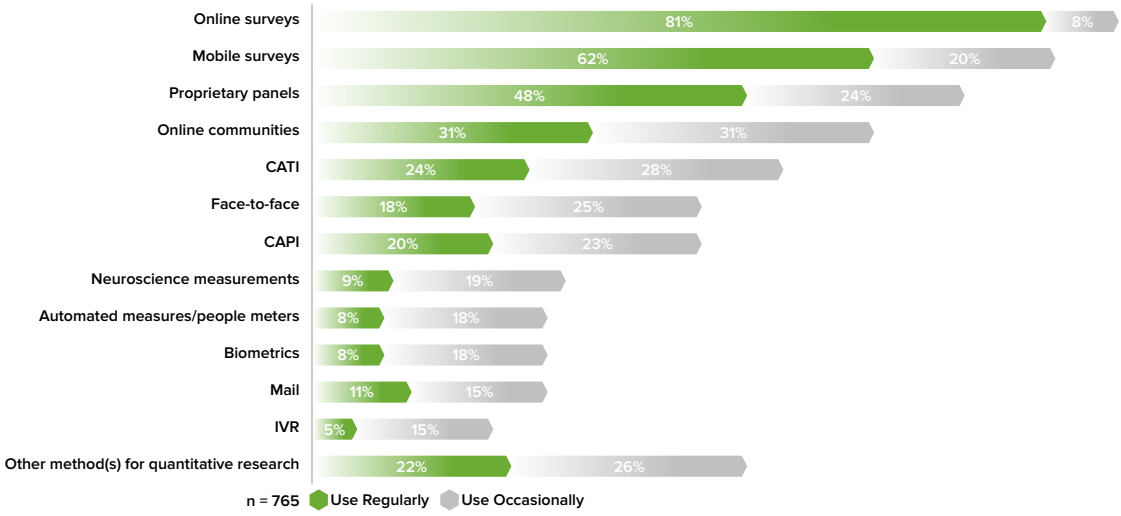
On the quantitative side, most suppliers use online surveys, mobile surveys, proprietary panels, online communities, and CATI just as they did in 19W2. The only quant method that dropped from majority use in 19W2 to a minority now is face-to-face, trending similarly to buyer use.

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY: WAVE (SUPPLIER)



As with buyers, the same three quant methods are the "deepest" as well as the most widely used: online surveys, mobile surveys, and proprietary panels are used by more than 70% of suppliers, and most of those use these methods regularly. Online communities are also used for quant by most suppliers, and half of those suppliers use them regularly.

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY (SUPPLIER)



DIFFERENCES BY SUPPLIER FOCUS

Online surveys, mobile surveys, and proprietary panels are used by more than 70% of suppliers

DIFFERENCES ACROSS TYPES OF PROJECTS: PROFESSIONAL FOCUS (SUPPLIER)

% Projects	All Suppliers	Professional Focus	Group Diff.
Quantitative only	52%	Technology	+8%
		Strategic consulting	-19%
Qualitative only	23%	Strategic consulting	+10%
		Technology	-6%
		Data & analytics	-7%
Both	20%	Strategic consulting	+7%
		Field services	-9%

All suppliers (n = 765); Full service (n = 360); Field services (n = 70); Strategic consultancy (n = 107); Data & analytics (n = 99); Technology (n = 125)
All results represent significant differences.

Currently, technology providers are more likely than others to do projects that are quant-only and less likely to do projects that only involve qual. Strategic consultancies are their inverse: they are less likely to do quant-only and more likely to do qual-only. Further, they are more likely to do projects that include both. Similar to technology providers, data and analytics providers are less likely than others to do qual-only projects. Finally, field services providers are less likely than other types to conduct projects that use both. Possibly, they do both the qual and quant parts of large projects but treat them as separate projects.

Considering qualitative methods, full service research providers and strategic consultancies are more likely than others to use online IDIs, telephone IDIs, in-person IDIs, and online communities. Full service researchers are also more likely than others to use online focus groups, mobile qual, bulletin board studies, and in-store/shopping observations. Strategic consultancies are more likely than others to monitor blogs. Each of these are less likely to be used by technology providers, and most are less likely to be used by data and analytics providers.

DIFFERENCES IN USAGE OF QUALITATIVE METHODOLOGIES: PROFESSIONAL FOCUS (SUPPLIER)

% Use Regularly or Occasionally	All Suppliers	Professional Focus	Group Diff.
Online IDIs with webcams	63%	Full service	+14%
		Strategic consulting	+11%
		Technology	-23%
		Data & analytics	-28%
Online communities (qualitative)	62%	Strategic consulting	+15%
		Full service	+5%
		Technology	-14%
		Data & analytics	-16%
Online focus groups with webcams	60%	Full service	+12%
		Data & analytics	-17%
		Technology	-23%
Mobile (diaries, image collection, etc.)	60%	Full service	+8%
		Technology	-12%
		Data & analytics	-20%
In-person IDIs	52%	Strategic consulting	+17%
		Full service	+10%
		Technology	-27%
In-person focus groups	51%	Full service	+10%
		Technology	-30%
Telephone IDIs	50%	Strategic consulting	+11%
		Full service	+10%
		Data & analytics	-21%
		Technology	-26%
Bulletin board studies	46%	Full service	+9%
		Data & analytics	-14%
		Technology	-24%
In-store/shopping observations	44%	Full service	+7%
		Data & analytics	-10%
		Technology	-20%
Monitoring blogs	31%	Strategic consulting	+16%
Telephone focus groups	21%	Technology	-12%

All suppliers (n = 765); Full service (n = 360); Field services (n = 70); Strategic consultancy (n = 107); Data & analytics (n = 99); Technology (n = 125)
All results represent significant differences.

Regarding quant methods, full service research and field services providers are more likely to use CATI and CAPI. Full service researchers are also more likely than others to use online surveys, mobile surveys, proprietary panels, face-to-face methods, and IVR. Data and analytics providers are more likely than others to use automated measures/ people meters. Technology providers are less likely to use CATI, CAPI, mail, and IVR.

DIFFERENCES IN USAGE OF QUANTITATIVE METHODOLOGIES: PROFESSIONAL FOCUS (SUPPLIER)

% Use Regularly or Occasionally	All Suppliers	Professional Focus	Group Diff.
Online surveys	89%	Full service	+4%
Mobile surveys	82%	Full service	+4%
Proprietary panels	72%	Full service	+5%
CATI	52%	Field services	+17%
		Full service	+12%
		Technology	-20%
Face-to-face	44%	Full service	+7%
		Technology	-24%
CAPI	44%	Field services	+15%
		Full service	+9
		Technology	-20
Automated measures/people meters	27%	Data & analytics	+14%
Mail	26%	Technology	-9%
IVR	20%	Full service	+5%
		Technology	-10%

All suppliers (n = 765); Full service (n = 360); Field services (n = 70); Strategic consultancy (n = 107); Data & analytics (n = 99); Technology (n = 125)
All results represent significant differences.

AROUND THE WORLD WITH ESTABLISHED METHODS

Buyers in North America are more likely to do projects that are quant-only while those in Asia-Pacific are more likely than buyers in other regions to do qual-only

Directionally, buyers in North America are more likely to do projects that are quant-only while those in Asia-Pacific are more likely than buyers in other regions to do qual-only. Use of qual methods is similar across regions, and a few quant methods differ in use. Mail and face-to-face methods are more likely to be used by European buyers, and mobile surveys are more likely to be used in North America. Outside of North America and Europe, online surveys are less likely to be used, but are still used by a majority.

DIFFERENCES IN USAGE OF ESTABLISHED METHODS: GLOBAL REGION (BUYER)

% Projects	All Buyers	Global Region	Group Diff.
Quantitative only	48%	North America	+4%
		Europe	–
		All others	-11%
		Asia-Pacific	-15%
Qualitative only	24%	Asia-Pacific	+11%
		All others	+5%
		Europe	+1
		North America	-3%
Both	24%	North America	+1%
		All others	–
		Europe	-2%
		Asia-Pacific	-4%

All buyers (n = 188); North America (n = 114); Europe (n = 44); Asia-Pacific (n = 17); All others (n = 13)
Results are not significantly different and some sample sizes are small.

DIFFERENCES IN USAGE OF ESTABLISHED METHODOLOGIES: GLOBAL REGION (BUYER)

% Use Regularly or Occasionally	All Buyers	Global Region	Group Diff.
Online surveys (quantitative)	94%	All others	-17%
		Asia-Pacific	-18%
Mobile surveys (quantitative)	80%	North America	+7%
		Asia-Pacific	-27%
Face-to-face (quantitative)	38%	Europe	+28%
		North America	-10%
Mail (quantitative)	19%	Europe	+20%
		North America	-6%

All buyers (n = 188); North America (n = 114); Europe (n = 44); Asia-Pacific (n = 17); All others (n = 13)
All differences are statistically significant, though some sample sizes are small. There are no statistical differences for qualitative methods.

Among suppliers, the project mix with respect to qual and quant components is similar across regions. Regarding specific qualitative methods, North American suppliers are more likely than those in other regions to use online IDIs and telephone IDIs. Suppliers in Asia-Pacific are more likely to use online communities, in-person focus groups, in-person IDIs, in-store/shopping observations, chat (text-based) online focus groups, monitoring blogs, and automated interviewing via AI systems. With respect to quant methods, suppliers in North America are more likely to use mobile surveys, and those in Asia-Pacific are more likely to use IVR. Suppliers outside of North America, and Europe are more likely to use CATI, and those outside of North America, Europe, and Asia-Pacific are more likely to use face-to-face, CAPI, and mail.

DIFFERENCES IN USAGE OF ESTABLISHED METHODS: GLOBAL REGION (SUPPLIER)

% Projects	All Suppliers	Global Region	Group Diff.
Quantitative only	48%	Europe	+3%
		All others	+1%
		North America	–
		Asia-Pacific	-6%
Qualitative only	24%	Asia-Pacific	+2%
		North America	+1%
		Europe	-3%
		All others	-3%
Both	24%	All others	+1%
		North America	–
		Asia-Pacific	–
		Europe	-1%

All suppliers (n = 765); North America (n = 394); Europe (n = 193); Asia-Pacific (n = 117); All others (n = 61)
Results are not significantly different.

Within suppliers and buyers, regular use of online IDIs and focus groups spiked in the first year of the pandemic, then largely kept their gains over the past year

DIFFERENCES IN USAGE OF QUALITATIVE METHODOLOGIES: GLOBAL REGION (SUPPLIER)

% Use Regularly or Occasionally	All Suppliers	Global Region	Group Diff.
Online IDIs with webcams	63%	North America	+4%
Online communities	62%	Asia-Pacific	+11%
Online focus groups with webcams	60%	Europe	-9%
In-person focus groups	51%	Asia-Pacific	+15%
		Europe	-9%
In-person IDIs	52%	Asia-Pacific	+15%
		Europe	-8%
Telephone IDIs	50%	North America	+5%
		Europe	-10%
In-store/shopping observations	44%	Asia-Pacific	+14%
		Europe	-10%
Chat (text-based) online focus groups	36%	Asia-Pacific	+11%
Monitoring blogs	31%	Asia-Pacific	+14%
Telephone focus groups	21%	Europe	-7%
Automated interviewing via AI systems	13%	Asia-Pacific	+11%
		North America	-3%

All suppliers (n = 765); North America (n = 394); Europe (n = 193); Asia-Pacific (n = 117); All others (n = 61)
All differences are statistically significant.

DIFFERENCES IN USAGE OF QUANTITATIVE METHODOLOGIES: GLOBAL REGION (SUPPLIER)

% Use Regularly or Occasionally	All Suppliers	Global Region	Group Diff.
Mobile surveys	82%	North America	+4%
CATI	52%	All others	+19%
		Asia-Pacific	+12%
Face-to-face	44%	All others	+32%
		North America	-5%
CAPI	44%	All others	+24%
Automated measures/people meters	27%	North America	-4%
Mail	26%	All others	+16%
		North America	-7%
IVR	20%	Asia-Pacific	+9%
		Europe	-9%

All suppliers (n = 765); North America (n = 394); Europe (n = 193); Asia-Pacific (n = 117); All others (n = 61)

BUYERS AND SUPPLIERS

Trends in usage of established methods are nearly identical across buyers and suppliers, allowing for differences across supplier portfolios due to the difference scopes of professional focus. For both buyers and suppliers, the pandemic has led to an increase in quant-only projects at the expense of qual-quant. Use of online methods has continued to increase since the start of the pandemic, and in-person research has declined as the result of health risks and budget pressure. Use of the telephone has also declined, possibly due to the ever-increasing difficulty of reaching people, but other old-school techniques, such as mail, have also regressed. These declines have been less pronounced for suppliers because they need to make these methods available as long as demand exists, but they are real, especially among qualitative methods.

Within suppliers and buyers, regular use of online IDIs and focus groups spiked in the first year of the pandemic, then largely kept their gains over the past year. Online communities for qualitative were largely unaffected, which could mean that growth of other kinds of online qualitative was driven mainly by those who were not using communities before the pandemic. Regular use of online communities for quantitative, however, has declined since the pandemic began, possibly indicating a greater need for more customized quantitative sampling.

In-person methods, both qualitative and quantitative, tended to plunge in the first year of the pandemic and continued to drop in the past 12 months. The second year drops for in-person methods seem steeper than the second year gains for online methods, and this may indicate that new adopters of online methods have shifted more of their in-person research online as their comfort increased.

CHANGE IN ONLINE METHODS USED REGULARLY OR OCCASIONALLY: GRIT WAVE (BUYER AND SUPPLIER)

	19W2 Baseline	20W2 Change	P12M Change
Online IDIs with webcams			
Buyer	52%	+16%	+2%
Supplier	53%	+8%	+2%
Online focus groups with webcams			
Buyer	49%	+13%	+5%
Supplier	46%	+18%	-4%
Online communities (qualitative)			
Buyer	66%	–	-1%
Supplier	58%	–	+4%
Online communities (quantitative)			
Buyer	69%	-8%	-3%
Supplier	58%	+4%	-4%

CHANGE IN IN-PERSON METHODS USED REGULARLY OR OCCASIONALLY: GRIT WAVE (BUYER AND SUPPLIER)

	19W2 Baseline	20W2 Change	P12M Change
In-person focus groups			
Buyer	80%	-16%	-7%
Supplier	72%	-16%	-5%
In-person IDIs			
Buyer	74%	-7%	-9%
Supplier	69%	-15%	-2%
Face-to-face			
Buyer	53%	-6%	-9%
Supplier	55%	-5%	-6%
In-store/shopping observations			
Buyer	43%	-3%	-2%
Supplier	56%	-8%	-4%
CAPI			
Buyer	36%	–	-6%
Supplier	47%	-2%	-1%

CHANGE IN TRADITIONAL METHODS USED REGULARLY OR OCCASIONALLY: GRIT WAVE (BUYER AND SUPPLIER)

	19W2 Baseline	20W2 Change	P12M Change
Telephone IDIs			
Buyer	50%	+4%	-13%
Supplier	63%	-10%	-3%
Mail			
Buyer	28%	-8%	-2%
Supplier	30%	-2%	-2%
CATI			
Buyer	44%	-3%	-6%
Supplier	56%	-4%	–
IVR			
Buyer	17%	+2%	-6%
Supplier	22%	-3%	+1%
Telephone focus groups			
Buyer	22%	–	-5%
Supplier	22%	-2%	+1%

This interpretation is supported by the fact the regular use of traditional, offline methods has decreased regardless of whether the method is in-person or remote. Last year, we reported a small bump for telephone IDIs as buyers flocked to remote interviewing techniques. That gain has turned into a loss, and this suggests that buyers are more satisfied that online methods can meet their needs than they were before the pandemic began.

Buyers are more satisfied that online methods can meet their needs than they were before the pandemic began

THE BIG PICTURE

Online methods have not only met the immediate needs but have proven to be capable replacements for traditional methods

COVID-19 challenged researchers to engage their target audiences in ways that minimized health risks, addressed novel issues, and fit within severe budget constraints. Online methods met all three criteria, gaining new users and increasing use among those who were already applying them. In-person research carried health risks and greater costs, and, arguably, the need for in-store research declined because customers weren't shopping there. The last GRIT Insights Practice Report documented the sudden migration from in-person to online methods, and now, a year later, it seems that online methods have not only met the immediate needs but have proven to be capable replacements for traditional methods. In-person, telephone, and mail methodologies are certainly not dead, having many regular users, even with the challenges of the pandemic. However, if it wasn't already clear that online methods are at least viable if not superior alternatives, it's clear now.

USAGE OF ESTABLISHED METHODS: MATURATION OF THE "PLATFORMIFICATION" OF INSIGHTS

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Across the globe, the digital transformation of market research continues to evolve rapidly. From APIs to natural language processing, new technologies are accelerating the shift to tech-enabled insights, especially in the Qualitative space. And as technology has developed, platforms — rather than tools — have become the key enablers of insights throughout organizations.

Through this platform-led approach, researchers can deliver actionable, accurate, and high-quality insights faster than ever before, and as importantly: everyone can leverage them.

The "Platformification" of Insights

Platformification is synonymous with tech-driven integration. It enables organizations to streamline and combine established research methods, collaborative solutions, data sources, reporting and advanced analytics to get to the **What, So What, and Now What** faster.

Answers are delivered seamlessly and on-demand, and researchers can carry out foundational explorations or quick follow-ups into surprising insights via a community with ease.

It's the future of market research — but one risk is that this frictionless, on-demand research can develop a life of its own. And in the rush to deliver answers and insights, it's easy to lose sight of the big picture.

Fortunately, digital research platforms provide the rigor, structure, scalability, and expertise to avoid this. The user-generated question libraries of today allow researchers to standardize metrics within their organization; its natural evolution is user-defined schematization of research designs and survey questions, ultimately becoming AI-based schematization.

Once these schemas are methodologically sound and organizations are comfortably relying on them, platforms can implement the appropriate comparative benchmarks to provide context and validate findings.

Getting to the Gestalt: The Integration of What, How and Why

Platformification consolidates data, but the real value is having qualitative and quantitative capabilities and datasets in a single platform, which is a not-too-distant reality. Organizations will be able to connect the dots at every stage to surface holistic insights more efficiently, whether from customer lists, research communities, or nationally representative or third-party samples. This eliminates the need to learn and master multiple systems, and provides a single source of truth for teams to utilize.

Analytically, platformification means organizations can yield richer insights with the seamless union of qualitative and quantitative data. At the same time, smaller organizations will be able to utilize powerful, AI-based statistical analysis tools (such as Stats iQ) and statistical programs (such as R) to easily elevate findings, allowing them to get more from data — whether that's identifying hidden trends or producing predictive models, without training.

Finally, teams will be able to share learnings quickly, using role-based dashboards to disseminate insights and provide basic or detailed recommendations based on job level or department. Executives, for example, can get broad, high-level summaries of findings, while research & development teams receive more granular reports.

Harnessing the Promise of Platformification

Ultimately, integrating research processes and projects will contribute to a gestalt of what, how, and why by ensuring each stage of research builds upon previous findings, creating a body of insights that enhances an organization's understanding of markets and its customers, and helps to close experience gaps. Through platformification, researchers can build high-quality and sustainable market research models that continue to deliver as and when they need to.

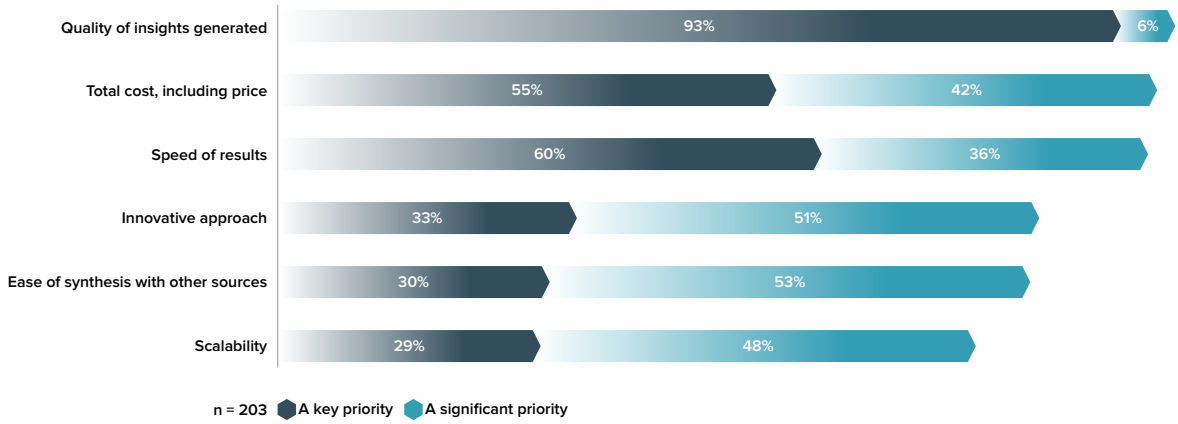
SELECTION CRITERIA

Quality of Insights and data are still the paramount concerns for buyers and suppliers, service levels are clearly next, but speed of results continues to increase in importance. To get these, buyers and suppliers are willing to trade off existing relationships and, to some extent, cost, but suppliers can't afford to de-emphasize innovation because clients can't be the risk takers and suppliers need to push the envelope in order to stay ahead of intense competition.

RESEARCH METHOD/APPROACH SELECTION

When choosing research methods or approaches, the top three buyer priorities are practically cliché: "better, faster, cheaper." Most say quality of insights, total cost, and speed of results are key priorities whereas only one-third or less say the same about innovative approach, ease of synthesis, and scalability. More than 90% say quality is a key priority, and more than 90% say total cost and speed are at least significant priorities. Although they are generally not key priorities, innovation, ease of synthesis, and scalability are considered significant ones by more than 75%. As we have suggested in the past, buyers may be somewhat spoiled for choice as new solutions and competitive sources enable them to fill their research needs without having to make painful trade-offs.

PRIORITIES FOR METHOD SELECTION (BUYER)

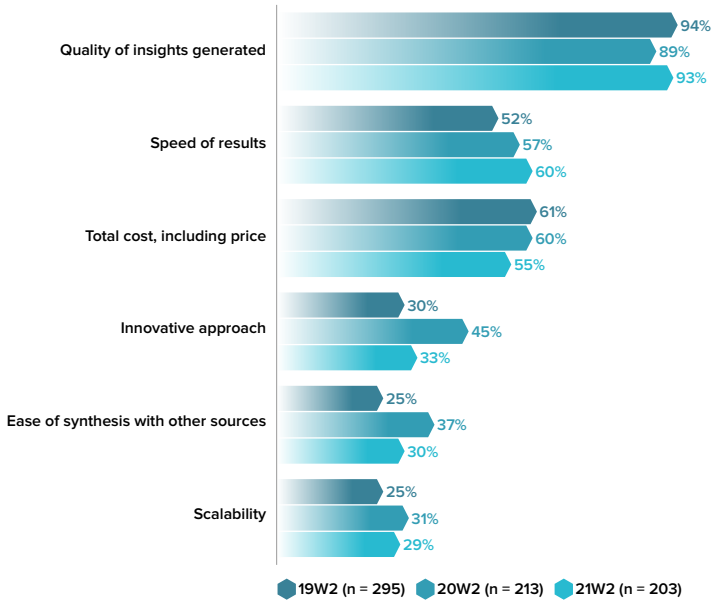


Buyers may be somewhat spoiled for choice as new solutions and competitive sources enable them to fill their research needs without having to make painful trade-offs

Overall, priorities have not changed much from before the pandemic, although there has been some movement among some buyers. Since 19W2, the percentage of buyers who consider speed of results a key priority has increased steadily from 52% to 60%, while total cost has decreased from 61% to 55%. Perhaps these two trends can be explained by the slight increases for ease of synthesis (25% to 30%) and scalability (25% to 29%), both of which may lead to faster results at lower cost.

In that same period, innovation surged as a key priority from 30% to 45% last year, then fell back to 33% currently. As innovation increased in importance, quality dipped slightly from 94% to 89% before returning to 93% this year. This suggests that some significant population of buyers were willing to risk quality to find new solutions during the height of uncertainty about the pandemic, but no longer need to risk this as they have settled into new routines. At a high level, however, buyer priorities are fairly stable and uniform, and there are no significant differences across sizes of insights groups.

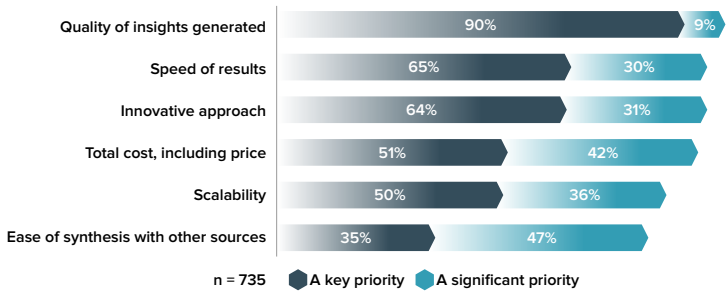
KEY PRIORITIES FOR METHOD SELECTION: GRIT WAVE (BUYER)



The percentage of buyers who consider speed of results a key priority has increased steadily from 52% to 60%, while total cost has decreased from 61% to 55%

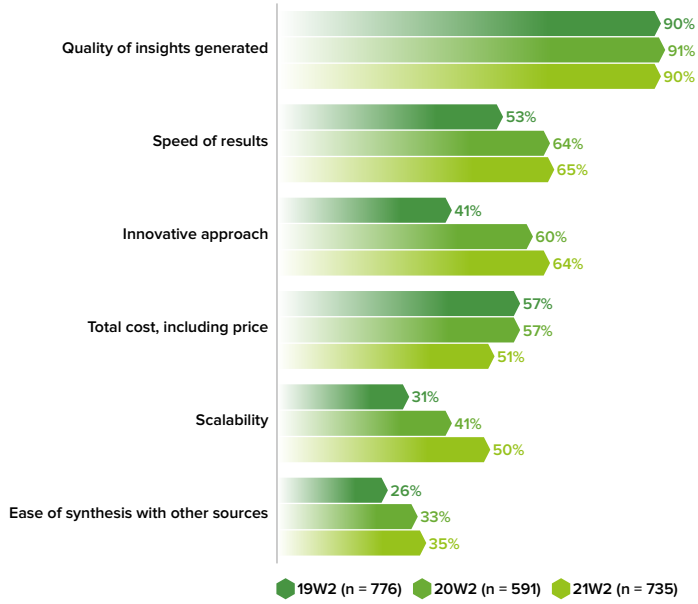
Similar to buyers' key priorities, suppliers' top two are quality (90%) and speed (65%), and most say total cost (51%) is also a key priority. Innovative approach, however, is a solid third key priority (64%), and total cost is in a virtual tie with scalability for fourth, each around 50%. Quality, speed, innovation, and total cost are at least significant priorities for more than 90% of suppliers, while scalability and ease of synthesis are significant for at least 80%. Innovation is important to suppliers because it helps them offer differential value and stand out from competition, and anything that helps them sell work or add more value can reduce the cost pressure. Buyers, on the other hand, need to meet internal requirements for quality, speed, and cost regardless of whether the methods are innovative or not. An innovative offering is worth something to them only if it results in greater quality, speed, or cost savings.

KEY PRIORITIES FOR METHOD SELECTION: GRIT WAVE (BUYER)



Quality, speed, innovation, and total cost are at least significant priorities for more than 90% of suppliers, while scalability and ease of synthesis are significant for at least 80%

KEY PRIORITIES FOR METHOD SELECTION: GRIT WAVE (SUPPLIER)



Last year demands on suppliers increased, resulting in more key priorities than pre-pandemic. Quality remained the most important priority, continuing to hover around 90%, and total cost remained at 57%, but all other criteria increased in importance, led by innovative approach (+19% key priority). Speed increased 11%, scalability increased 10%, and ease of synthesis increased 7%. Since last year, innovative approach and ease of synthesis increased by another 4% and 2%, respectively, while scalability shot up another 9% and total cost dropped by 6%. In sum, all criteria either maintained or increased their 19W2 importance except for total cost, an issue that may be moot when scalability increases enough to offset it.

Full service research providers are more likely than others to prioritize quality and less likely to prioritize scalability and ease of synthesis

Full service research providers are more likely than others to prioritize quality and less likely to prioritize scalability and ease of synthesis. Technology providers are more likely than others to focus on speed and scalability, field services providers are more likely to prioritize total cost, and data and analytics providers are more likely to prioritize ease of synthesis. Of the major supplier types, full service research providers may be the ones most responsible for executing complete standalone projects and most accountable for quality. Field services and data and analytics providers deliver services within a larger project, and technology providers and strategic consultancies may have more direct impact on how the company does business, including how they execute insights work.

KEY PRIORITIES FOR METHOD SELECTION: PROFESSIONAL FOCUS (SUPPLIER)

% A Key Priority	All Suppliers	Professional Focus	Group Diff.
Quality of insights generated	90%	Full service	+4%
Speed of results	65%	Technology	+12%
Total cost, including price	51%	Field services	+21%
Scalability	50%	Technology	+18%
		Full service	-10%
Ease of synthesis with other sources	35%	Data & analytics	+13%
		Full service	-6%

All suppliers (n = 735); Full service (n = 360); Technology (n = 117); Strategic consulting (n = 98); Data & analytics (n = 91); Field services (n = 64)

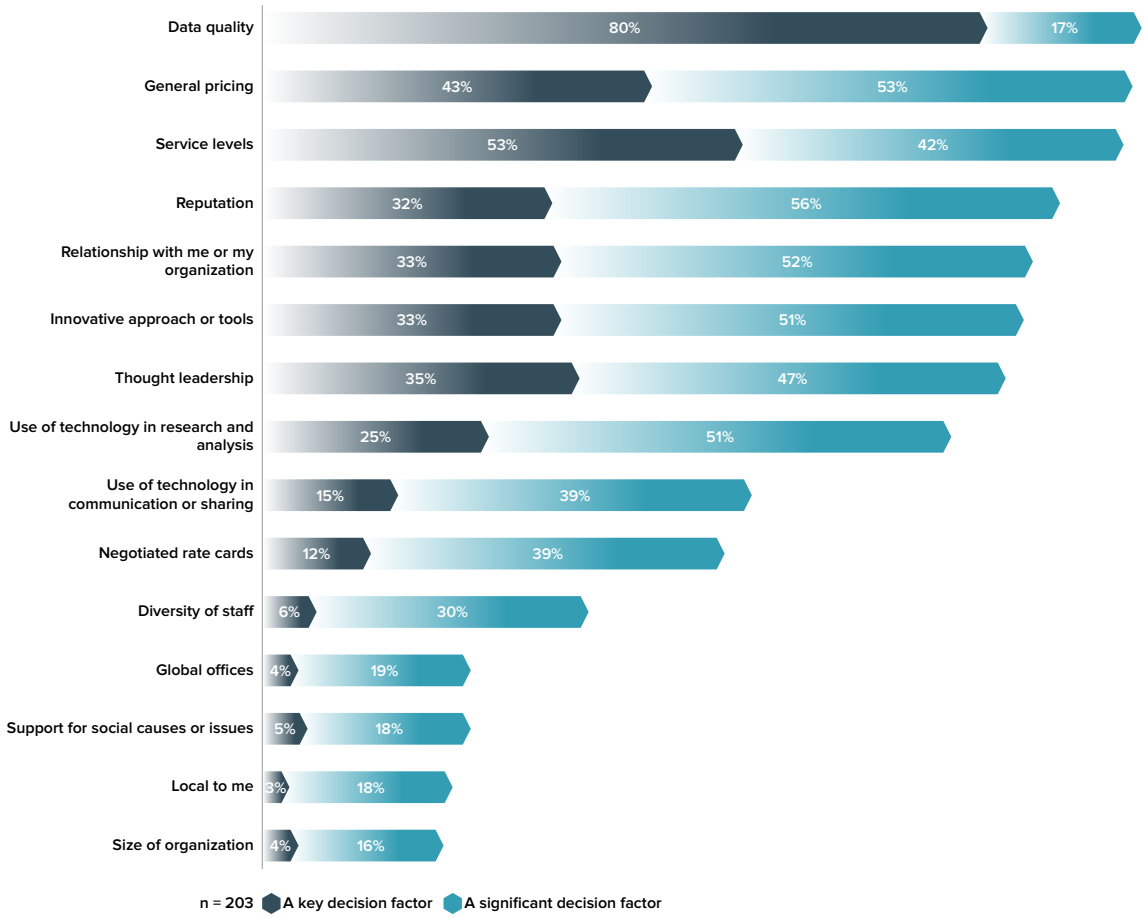
PARTNER/SUPPLIER SELECTION

Regarding selection of partners or suppliers, most buyers say data quality (80%) and service levels (53%) are key priorities, although data quality is key for many more buyers than are service levels. Eight criteria are at least significant priorities for three-fourths of buyers: data quality (97%), general pricing (96%), service levels (95%), reputation (88%), relationship (85%), innovative approach or tools (84%), thought leadership (82%), and use of technology in research and analysis (76%). Most buyers also find use of technology for communication and sharing (54%) and negotiated rate cards (51%) significant.

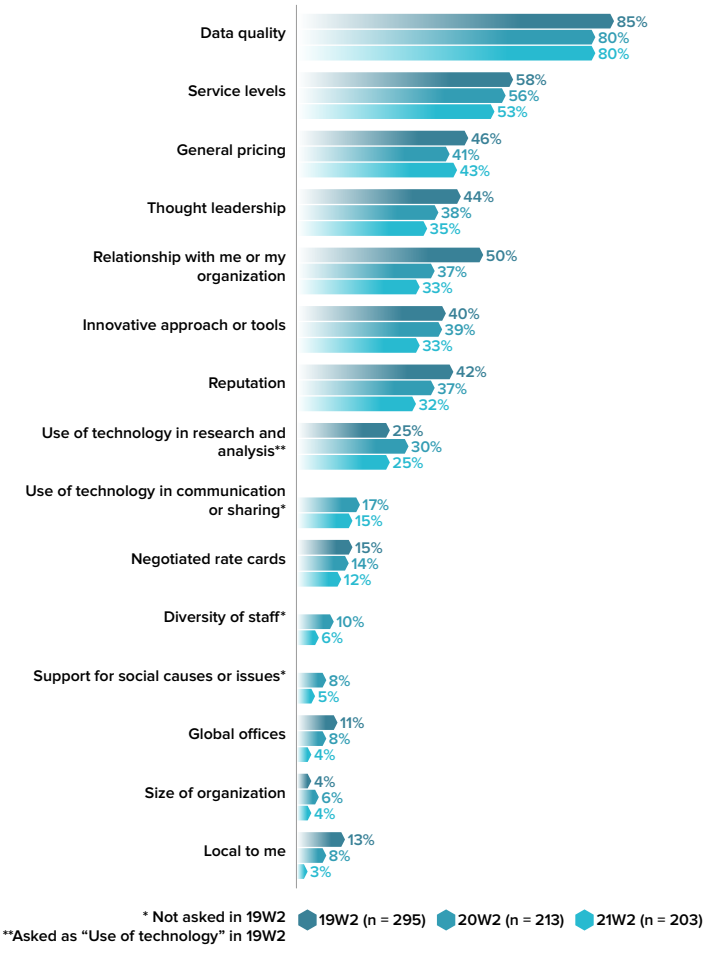
As we saw with the priorities for methods and approaches, we see "better" (data quality, service levels) and "cheaper" (general pricing) at the top of the list, and "faster" may be suggested by service levels, innovative tools, and use of technology. As we have commented in previous GRIT reports, we now see reputation, relationship, and innovative approach tightly clustered in a position of importance that used to be dominated by relationship. As the pandemic unfolded, buyers needed to find new ways to conduct insights work, so an innovative approach from a reputable supplier became competitive with a tried-and-true solution from an incumbent.

We see "better" (data quality, service levels) and "cheaper" (general pricing) at the top of the list

DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION (BUYER)



KEY DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION: GRIT WAVE (BUYER)



Since 19W2, data quality has maintained its position as the leading key priority, though with a slight drop-off from 85% to 80% since the pandemic hit. Three criteria fell at least 10% in that time: relationship (-16%), reputation (-10%), and local presence (-10%). No key priorities increased over that time, and the smallest changes occurred for general pricing (-3%, to 43%), negotiated rate cards (-2%, to 12%), use of technology in research (no change; 25%), and size of organization (no change; 4%). The other key priorities that dropped are thought leadership (-8%), innovative approach (-7%), global offices (-7%), and service levels (-6%). It seems that buyers have relaxed some of their traditional "must haves" and redistributed them across more and different criteria. Further, because no criteria have increased as key priorities, it seems that buyers are diverse with respect to their current priorities, except for data quality.

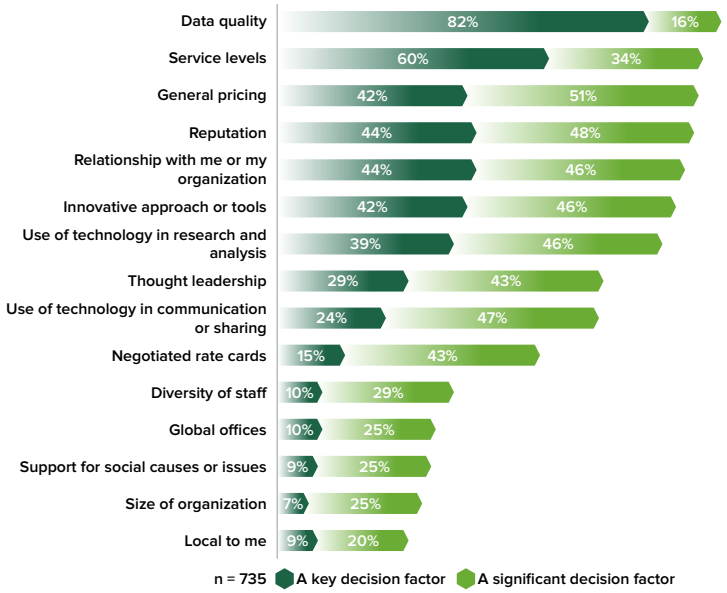
It seems that buyers have relaxed some of their traditional "must haves" and redistributed them across more and different criteria

Finally, there are no significant differences by insights department size, further suggesting that key priorities are buyer-specific, save for data quality.

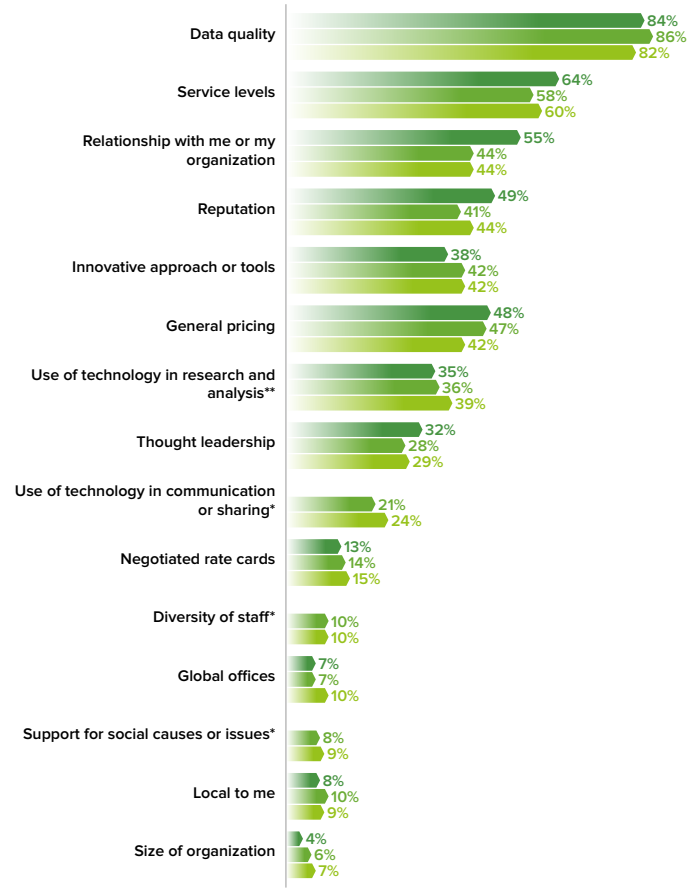
Similar to buyers, most suppliers emphasize data quality and service levels, again with data quality the more universal of the two. Five criteria are at least significant to 90% or more: data quality (98%), service levels (94%), general pricing (93%), reputation (92%), and relationship (90%). Four more are significant for at least 70%: innovative approach (88%), use of technology in research (85%), thought leadership (72%), and use of technology in communicating and sharing (71%). Most suppliers also find negotiated rate cards to be a significant priority (58%). Overall, their priorities are similar to those of buyers.

Since 19W2, the only key priority to decline by 10% or more is relationship (from 55% to 44%); its entire decline happened from 19W2 to 20W2. Reputation declined by 5% since pre-pandemic, to 44%, but it had dropped 9% in the pandemic's first year, so this represents a small bounce-back. Other criteria that declined are general pricing (-6%), service levels (-5%), thought leadership (-3%), and data quality (-2%). Service levels had dropped by 7% the previous year, so it recovered a little this year. Innovative approach and use of technology in research increased appreciably (+5% each), and there were small increases for global offices (+3%), negotiated rate cards (+2%), size of organization (+2%), and local presence (+1%). Overall, we see the continuation of a trend that began last year among buyers and suppliers to take more chances on new solutions from unfamiliar sources in order to meet unprecedented needs.

DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION (SUPPLIER)



KEY DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION: GRIT WAVE (SUPPLIER)



* Not asked in 19W2
**Asked as "Use of technology" in 19W2
19W2 (n = 295)
20W2 (n = 213)
21W2 (n = 203)

KEY DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION: PROFESSIONAL FOCUS (SUPPLIER)

% A key decision factor	All Suppliers	Professional Focus	Group Diff.
Data quality	82%	Full service	+4%
		Technology	-9%
Service levels	60%	Technology	-12%
Relationship with me or my organization	44%	Technology	-13%
Reputation	44%	Technology	-12%
General pricing	42%	Field services	+16%
		Full service	+5%
		Strategic consulting	-11%
Innovative approach or tools	42%	Data & analytics	+17%
		Full service	-6%
Use of technology in research and analysis	39%	Data & analytics	+14%
		Technology	+10%
		Strategic consulting	-15%
Thought leadership	29%	Data & analytics	+11%
		Full service	-5%
		Technology	-10%
Use of technology in communication or sharing	24%	Data & analytics	+16%
		Field services	+16%
		Full service	-5%
Diversity of staff	10%	Data & analytics	+14%
		Field services	+11%
		Full service	-3%
Global offices	10%	Data & analytics	+16%
		Full service	-3%
Support for social causes or issues	9%	Data & analytics	+11%
Local to me	9%	Data & analytics	+11%
Size of organization	7%	Data & analytics	+13%
		Full service	-3%

All suppliers (n = 735); Full service (n = 360); Technology (n = 117); Strategic consulting (n = 98); Data & analytics (n = 91); Field services (n = 64)

When selecting partners and suppliers, full service research providers look the most like buyers in some ways. They are more likely than others to place a high priority on data quality and general pricing and less likely to prioritize innovative approach, thought leadership, use of technology in communication and sharing, diversity of staff, global offices and size of organization. In contrast, technology providers are more likely to place higher priority on use of technology in research but lower priority on data quality, service levels, relationship, reputation, and thought leadership. Field services providers are more focused on general pricing, use of technology in communication and sharing, and diversity of staff. Similarly, data and analytics providers place more priority on use of technology in communication and sharing and diversity of staff, but also innovative approach, use of technology in research and analysis, thought leadership, global offices, support for social causes, local presence, and size of organization. Strategic consultants do not stand out versus other types with respect to placing higher priority on any criterion, but they are less concerned with general pricing and use of technology in research and analysis. In summary, full service research providers, who are the most involved in delivering complete research to an end client, look the most like end clients; field services providers' priorities reflect their need to deal in large volume; technology providers' priorities are very product-focused; and strategic consultants need to balance many priorities, can trade off price to meet them, and do not necessarily rely on technology to deliver their services. The priorities among data and analytics providers reflect their ongoing evolution we discussed in the GRIT Industry Benchmarking Report: they are looking for ways to diversify, and many are in transition from or to a field services role.

When selecting partners and suppliers, full service research providers look the most like buyers in some ways

AROUND THE WORLD WITH SELECTION CRITERIA

Among buyers, the priorities for selecting methodologies and approaches are very similar across global regions. Buyers are also similar across regions with respect to criteria for partner and supplier selection. The only differences are that those in Asia-Pacific place more emphasis on size of organization and local presence, while those outside of North America, Europe, and Asia-Pacific place more emphasis on negotiated rate cards.

KEY DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION: GLOBAL REGION (BUYER)

% A key priority	All Buyers	Global Region	Group Diff.
Negotiated rate cards	12%	All others	+29%
Size of organization	4%	Asia-Pacific	+15%
Local to me	3%	Asia-Pacific	+15%

All buyers (n = 203); North America (n = 127); Europe (n = 48); Asia-Pacific (n = 16); All others (n = 12)

Suppliers are also similar across regions with respect to selection of methods and approaches, the only difference is that those outside of North America and Europe place higher priority on innovative approaches.

KEY PRIORITIES FOR METHOD SELECTION: GLOBAL REGION (SUPPLIER)

% A key priority	All Suppliers	Global Region	Group Diff.
Innovative approach	64%	Outside North America & Europe	+12%

All suppliers (n = 735); North America (n = 379); Europe (n = 185); Outside North America & Europe (n = 171)

There are more differences, however, with respect to how suppliers select partners or other suppliers. Those outside North America and Europe place higher priority on innovative approaches, thought leadership, diversity of staff, global offices, support for social causes, local presence, and size of organization. In addition, suppliers in Asia-Pacific place higher priority on use of technology in research and analysis and in communication and sharing. As with buyers, those outside North America, Europe, and Asia-Pacific place more priority on negotiated rate cards. Suppliers in Europe and North America are less likely to prioritize thought leadership; those in North America are less likely to prioritize innovative approaches, use of technology in research and analysis and in communication and sharing, negotiated rate cards, diversity of staff, global offices, support for social causes, local presence, and size of organization; and those in Europe are less likely to prioritize reputation. In summary, it seems like those outside North America and Europe need to focus on leveraging technology, access to suppliers and partners, and, in the case of those outside Asia-Pacific, predictable pricing. Suppliers in Europe share these concerns to a lesser degree, and can trade off reputation for other priorities. Suppliers in North America don't seem to feel these needs as acutely as others do.

Among buyers, the priorities for selecting methodologies and approaches are very similar across global regions

It seems like those outside North America and Europe need to focus on leveraging technology, access to suppliers and partners, and, in the case of those outside Asia-Pacific, predictable pricing

KEY DECISION FACTORS FOR PARTNER/SUPPLIER SELECTION: GLOBAL REGION (SUPPLIER)

% A key decision factor	All Suppliers	Global Region	Group Diff.
Reputation	44%	Europe	-11%
Innovative approach or tools	42%	All others	+15%
		Asia-Pacific	+13%
		North America	-5%
Use of technology in research and analysis	39%	Asia-Pacific	+15%
		North America	-6%
Thought leadership	29%	All others	+19%
		Asia-Pacific	+16%
		North America	-4%
		Europe	-8%
Use of technology in communication or sharing	24%	Asia-Pacific	+18%
		North America	-4%
Negotiated rate cards	15%	All others	+13%
		North America	-4%
Diversity of staff	10%	Asia-Pacific	+16%
		All others	+12%
		North America	-5%
Global offices	10%	Asia-Pacific	+14%
		All others	+9%
		North America	-5%
Support for social causes or issues	9%	All others	+13%
		Asia-Pacific	+11%
		North America	-5%
Local to me	9%	All others	+15%
		Asia-Pacific	+12%
		North America	-4%
Size of organization	7%	Asia-Pacific	+9%
		All others	+8%
		North America	-3%
All suppliers (n = 735); North America (n = 379); Europe (n = 185); Asia-Pacific (n = 117); All others (n = 54)			

BUYERS AND SUPPLIERS

In the COVID-19 era, the priority for speed has continuously increased for both buyers and suppliers, the priority for quality has remained high for both, and the importance of total cost has slipped. In the first year of the pandemic, it seems like buyers were willing to trade quality for speed, but now they are trading cost. Suppliers have supported speed and dulled the pain of costs by increasing the priority on innovation, ease of data synthesis, and scalability. The priority of each of these rose for buyers last year, but diminished over the past 12 months, possibly due to a combination of the enduring impact of actions they took last year plus improvements their suppliers are continuing to make.

In the first year of the pandemic, it seems like buyers were willing to trade quality for speed, but now they are trading cost

CHANGE IN KEY PRIORITIES FOR METHOD SELECTION: GRIT WAVE (BUYER AND SUPPLIER)

	19W2 Baseline	20W2 Change	P12M Change
Quality of insights generated			
Buyer	94%	-5%	+4%
Supplier	90%	+1%	-1%
Speed of results			
Buyer	52%	+5%	+3%
Supplier	53%	+11%	+1%
Total cost, including price			
Buyer	61%	-1%	-5%
Supplier	57%	–	-6%

	19W2 Baseline	20W2 Change	P12M Change
Innovative approach			
Buyer	30%	+15%	-12%
Supplier	41%	+19%	+4%
Ease of synthesis with other sources			
Buyer	25%	+12%	-7%
Supplier	26%	+7%	+2%
Scalability			
Buyer	25%	+6%	-2%
Supplier	31%	+10%	+9%

Across the board, buyers have relaxed their criteria for partner and supplier selection, however slightly. Suppliers have, too, generally speaking, but innovative approaches and the use of technology in research and analysis have inched up in importance since the pandemic hit, and those small moves look larger in the context of the dramatic drop in the importance of relationship and, to a lesser extent, general pricing.

Data quality continues to be the dominant consideration for both buyers and suppliers, and service level is a decisive number two. Both buyers and suppliers are willing to trade off relationship and pricing to get these, and buyers are further willing to give up thought leadership, innovation, and reputation. Suppliers, however, can't afford to de-prioritize innovation or the use of technology because those are key ingredients to meeting buyer needs.

Data quality continues to be the dominant consideration for both buyers and suppliers, and service level is a decisive number two

CHANGES IN KEY DECISION FACTORS FOR TOP PARTNER/SUPPLIER SELECTION CRITERIA: GRIT WAVE (BUYER AND SUPPLIER)

	19W2 Baseline	20W2 Change	P12M Change
Data quality			
Buyer	85%	-5%	–
Supplier	84%	+2%	-4%
Service levels			
Buyer	58%	-2%	-3%
Supplier	64%	-6%	+2%
General pricing			
Buyer	46%	-5%	+2%
Supplier	48%	-1%	-5%
Thought leadership			
Buyer	44%	-6%	-3%
Supplier	32%	-4%	+1%

	19W2 Baseline	20W2 Change	P12M Change
Relationship with me or my organization			
Buyer	50%	-13%	-4%
Supplier	55%	-11%	–
Innovative approach or tools			
Buyer	40%	-1%	-6%
Supplier	38%	+4%	–
Reputation			
Buyer	42%	-5%	-5%
Supplier	49%	-8%	+3%
Use of technology in research and analysis			
Buyer	25%	+5%	-5%
Supplier	35%	+1%	+3%

THE BIG PICTURE

Both buyers and suppliers rank quality of insights and data quality far ahead of other considerations, and speed has become even more important than it had been before COVID-19 became a daily challenge. These needs have become more challenging to achieve since the pandemic hit, and buyers and suppliers are more inclined than ever to trade cost for quality and speed (though cost is still important). As we found in last year's GRIT Insights Practice Report, relationship is no longer the trump card it used to be, opening up opportunities for new suppliers and partners.

The important difference between buyers and suppliers is the relative emphasis they place on innovation and technology when choosing methodologies, partners, and suppliers. For an end client, if a solution provides the quality and speed they need, it doesn't matter if it pre-dates the dinosaurs. Suppliers, however, can't settle for solutions that are simply "good enough" because they need to constantly push the envelope as well as stand out from competitors. They also need to improve scalability and ease of data synthesis in order to offset costs and provide competitive pricing. Buyers may not be as willing to take a flyer on innovative but unproven solutions as they were before the pandemic, especially if they can satisfy their needs with "tried and true" ones. Suppliers, however, can't afford to sit still and let the competition pass them.

Relationship is no longer the trump card it used to be, opening up opportunities for new suppliers and partners

"SO, WHAT'S IMPORTANT TO ME?"

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This is the key question, and it changes. It changes day to day, project to project. And since, as the Rolling Stones said:" You can't always get what you want." It is a trade-off.

What are we talking about? In this case it is how do you, as a client, chose a partner for your data collection. For your sample might be easier to consider, since it has fewer dimensions to think about.

What do we want from a sample? First of all, we want it to be accurate. It needs to give the right answer for the population of interest. But how right must it be? That depends on how important the question is. If it absolutely must be the right answer, perfectly projectable according to the strictest sampling theory, then your choices of partner will be extremely limited, and your costs likely to be extremely high. You may even have to wait for fieldwork availability. These are the costs you pay, the trade-offs you make, in order to get what you need.

At the other end of the spectrum, you might be less concerned with accuracy. You may be looking for a ballpark answer? Is it "everyone," just like your <insert your favorite C-suite job title here> insists? Or is it a lot less than this – as you suspect? In which case speed trumps accuracy and you will accept circumstantial evidence and corroboration as proof that the answer is right enough.

And that is why the Greenbook data is multi-coded on selection criteria, whether this be method or partner selection.

While data quality (or accuracy) is the single most important facet this does not make it a winner every time. Think of it more as a hygiene factor. There is a quality bar below which you cannot trade.

More interesting is the space that suppliers play in, the six factors that each hover between 30% and 50%. Service, Price, Thought Leadership, Relationships, Innovation and Reputation. Five of the six have been declining year on year. In fact, the number of mentions across this question in total has been declining year on year. This implies less willingness to trade-off or a hardening of attitudes. Only Pricing has maintained its number of mentions. This is concerning since it starts to look like a commodity market. When you treat a product as a commodity when in fact it is not, you can come in for an unpleasant surprise. If you are not actively trading off and simply driving prices down, then you can be sure that your supplier is doing that trade-off behind the scenes. Sure, you might find you just do not get a dedicated person on your account, or the project team allocated to you is not as senior as you might like, but it might also mean that you are not getting the quality you expect.

I see the most worrying trend in the data in the collapse of the importance of relationships, down from one in two to now one in three seeing it as a key priority. Relationships in business are everything. A good relationship gets you the best prices, the best service and suppliers willing to go the extra mile to make you happy.

SUPPLIER PERFORMANCE

After more than a year of adapting to the pandemic, buyers are redefining how they work with suppliers and what they expect from them. The strong roles currently filled by full service research and technology providers, which are often complementary and sometimes competitive, are shaping the drivers of buyer satisfaction with suppliers.

HOW BUYERS WORK WITH SUPPLIERS

Buyer expectations of suppliers and their subsequent evaluations are influenced by the types of suppliers they use most frequently. It's not feasible for the GRIT survey to ask about satisfaction with specific suppliers or even specific types of suppliers, so we ask buyers for aggregate perceptions of their suppliers and which supplier types they use most often.

Most buyers work with most supplier types at least occasionally, but nearly all buyers work with full service research suppliers and technology providers, and qualitative researchers are nearly as common. Last year, most supplier types took hits from their pre-pandemic levels: full service dropped from 88% to 81%, data and analytics providers from 76% to 71%, qualitative researchers from 86% to 82%, and technology providers from 74% to 71%. Only strategic consultancies held their own, dropping only slightly from 65% to 64%.

One year later, full service research providers have rebounded to pre-pandemic levels and technology providers have surpassed them. Usage of qualitative researchers, data and analytics providers, and field services providers were stable, but field services providers declined slightly from 63% to 59%. Qualitative researchers have been challenged by the move from in-person to online methods, and we've noted in earlier GRIT reports that many suppliers who previously identified as strategic consultancies have had to focus on full service research; these points possibly account for the declines in usage of the two types. Similarly, some data and analytics providers may have been absorbed into full service research suppliers, resulting in their relative stagnation. Perhaps more significantly, the pandemic has driven more buyers to try out technology solutions, and the newly adopted DIY capabilities may explain some of the decline from pre-pandemic usage for some types.

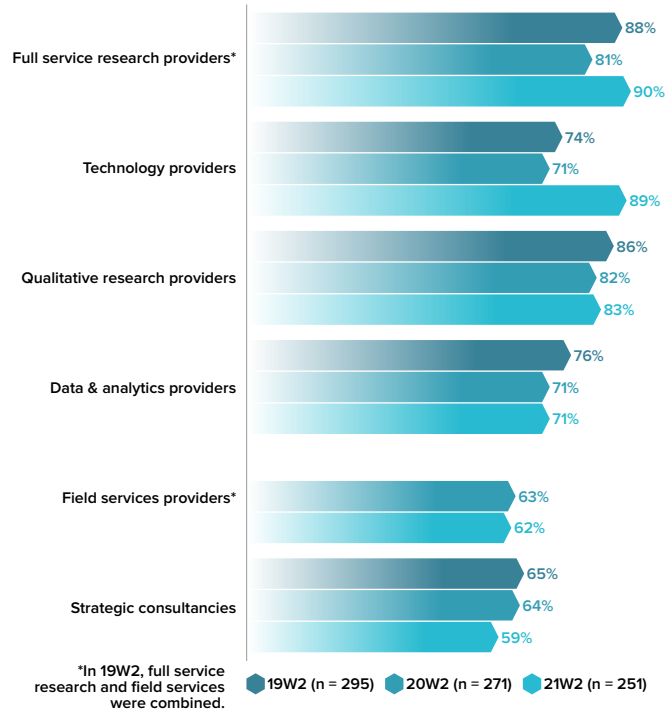
One year later, full service research providers have rebounded to pre-pandemic levels and technology providers have surpassed them

However, if we turn to situations in which buyers work regularly with supplier types, we expose the soft white underbelly of traditional suppliers, their vulnerability to technology and DIY. Full service research providers rebounded after dropping from 62% to 53% regular use in the first year of the pandemic, but only made it half-way back, to 58%. Qualitative researchers are down from 54% in 19W2 to 45%, data and analytics providers are down from 40% to 30%, and strategic consultancies are down from 23% to 16%. On the positive side, after dropping from 37% pre-pandemic regular use to 26% last year, technology providers have soared to 54%, joining full service research suppliers as the only types most buyers work with regularly. All supplier types lost ground in 2020 as buyers rationalized their supplier portfolios, but only technology providers have seen a double-digit bounce-back. The pandemic forced buyers to dial down their use of suppliers, assess their alternatives in a novel situation, and rebuild their supplier portfolios accordingly.

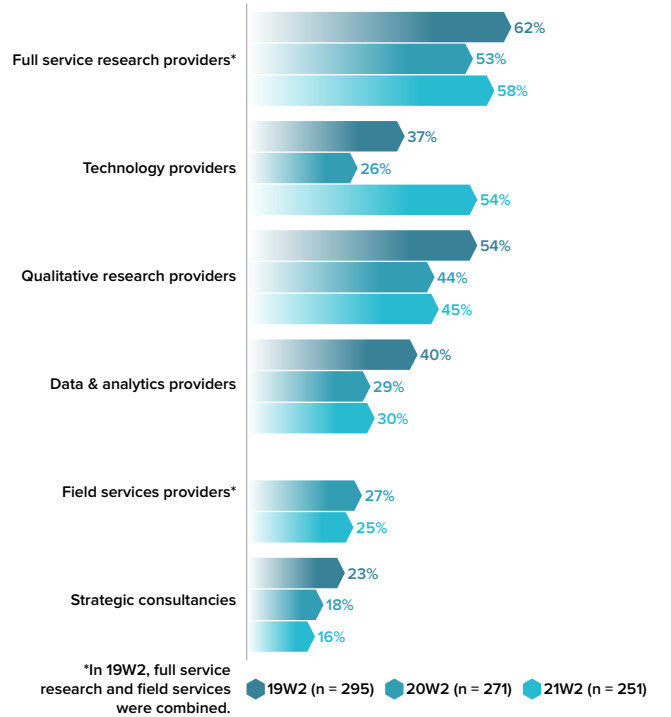
At the same time, the structure of the supplier market has changed in ways that are consistent with these trends. As we have discussed in last spring's GRIT Business & Innovation Report and the recent GRIT Industry Benchmarking Report, full service research suppliers seem to be acting more like project coordinators as buyer insights groups shift their focus from project management to internal consulting. As a result, field services and data and analytics providers would have more full service research suppliers as direct customers and fewer end buyers. As mentioned earlier, some strategic consulting firms have become full service research providers, accounting for the decline in regular use of them.

Full service research suppliers seem to be acting more like project coordinators as buyer insights groups shift their focus from project management to internal consulting

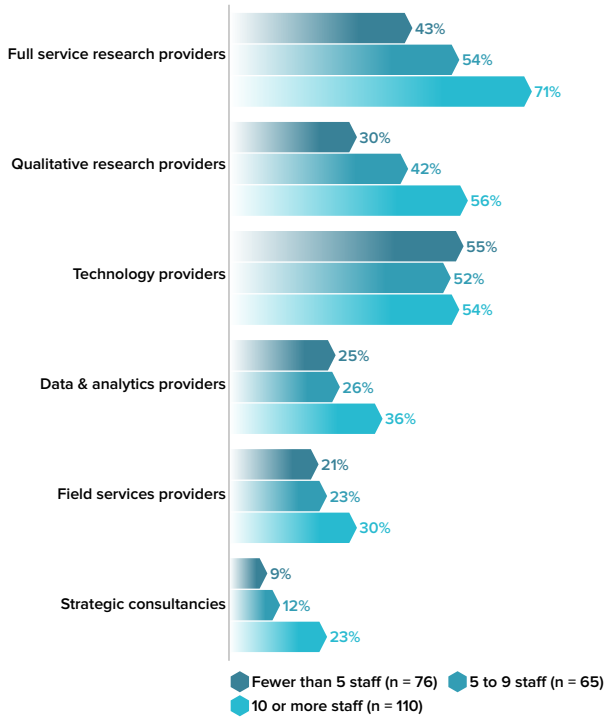
SUPPLIER TYPES WORK WITH AT LEAST "OCCASIONALLY" (BUYER)



SUPPLIER TYPES WORK WITH "REGULARLY" (BUYER)



SUPPLIER TYPES WORK WITH "REGULARLY": INSIGHTS GROUP SIZE (BUYER)



Considering supplier use by size of insights groups reinforces the finding that technology is upending the status quo. As size of the insights group increases, so does regular use of full-service research providers, qualitative researchers, data and analytics providers, field services providers, and strategic consultancies. Most buyers with staffs of 10 or more work with full service research providers and qualitative researchers regularly, and most with staffs of 5 to 9 work with full service research providers regularly, but the only supplier type a majority of buyers with fewer than 5 staff work with regularly are technology providers. They are also used regularly by a majority of the largest group (54%), and nearly as much as qualitative researchers (56%). Fifty-two percent of staffs of 5 to 9 work regularly with technology providers, nearly equaling full service research providers (54%). In other words technology providers are the only supplier type whose usage is independent of insights group size.

HOW SATISFIED ARE BUYERS?

Overall satisfaction with suppliers continues to hover in the low 50%s, slightly above its low of 49% in 2018, but satisfaction has increased over the past year with adjusting to COVID-19 (+10%), conducting research (+7%), and understanding the business (+5%). Each of these three are at an all-time high. At the other end, satisfaction with project management/service and managing changes have each dropped 6%. Project management hit an all-time low of 52%, down from a high of 65% in 2018, and managing changes tied its all-time low of 53%, down from a high of 63%, also in 2018.

The top five areas of buyer satisfaction are conducting the research, adjusting to COVID-19, implementing the research plan, understanding the issue to be researched, and designing the research plan. Each of these were in the top five last year, except understanding the issue to be researched, which moved up from seventh, replacing managing changes, which dropped from fifth to eighth. The bottom five are project management/service, data visualization, value for cost, understanding the business, and reporting research results and interacting with senior management tied for fifth-worst. Despites improvements in understanding the business (+5%) and data visualization (+4%), the bottom five remain the same as last year.

The top five areas of buyer satisfaction are conducting the research, adjusting to COVID-19, implementing the research plan, understanding the issue to be researched, and designing the research plan

SUPPLIER PERFORMANCE: % COMPLETELY/VERY SATISFIED (BUYER)

Type	Aspects	Scope	16W2	17W2	18W2	19W2	20W2	21W2	Delta %	Top 2 Box Rank
	Overall satisfaction	Overall	–	–	49%	55%	51%	53%	+2%	
	Overall satisfaction with strategic aspects	Strategic	46%	50%	47%	51%	52%	53%	+1%	
	Overall satisfaction with tactical aspects	Tactical	39%	51%	54%	50%	53%	53%	–	
	Adjusting to COVID-19 impact	Tactical	–	–	–	–	63%	73%	+10%	2
	Conducting the research	Strategic	70%	74%	70%	74%	70%	77%	+7%	1
	Understanding their business	Strategic	40%	45%	40%	42%	44%	49%	+5%	12
	Data visualization	Tactical	22%	24%	23%	27%	29%	33%	+4%	14
	Implementing the research plan	Tactical	–	71%	69%	70%	66%	69%	+3%	3
	Understanding the issue to be researched	Strategic	53%	58%	58%	63%	56%	58%	+2%	4
	Reporting research results	Strategic	42%	40%	35%	45%	49%	50%	+1%	10
	Data analysis	Tactical	51%	51%	52%	54%	54%	53%	-1%	7
$	Value for cost	Tactical	30%	35%	40%	34%	39%	38%	-1%	13
	Timeliness of deliverables	Tactical	52%	54%	64%	59%	56%	55%	-1%	6
	Interacting with senior management	Strategic	–	43%	46%	52%	52%	50%	-2%	10
	Designing the research plan	Strategic	–	62%	57%	58%	60%	58%	-2%	5
	Recommending business actions based on the research	Strategic	25%	29%	20%	27%	31%	29%	-2%	15
	Project management/service	Tactical	–	62%	65%	57%	58%	52%	-6%	9
	Managing scope or project specification changes	Tactical	–	62%	63%	53%	59%	53%	-6%	8
	n = (maximum aspect)		321	333	321	295	199	141		

Project management and execution Research relevant to organization Data analysis and reporting $ Value for Cost

Shading indicates time of highest satisfaction; aspects sorted by change in score 21W2 – 20W2

A potential confounding factor in the analysis of satisfaction ratings is forcing buyers to rate their satisfaction on factors that they consider irrelevant. For example, some buyers may be highly satisfied with how suppliers interact with senior management if the suppliers develop strong relationships with them while others may be highly satisfied if they don't interact with them at all. Asking the latter group to rate suppliers on interacting with senior management would produce higher ratings and may lead some to conclude that suppliers must increase their interaction with senior management when, actually, they should stay away from them.

After dropping from 37% pre-pandemic regular use to 26% last year, technology providers have soared to 54%,

Nearly one-third say they do not expect suppliers to interact with senior management

In fact, we offer buyers the opportunity to say that certain behaviors are not expected of suppliers, and nearly one-third say they do not expect suppliers to interact with senior management. The percentage is lowest for buyers who work with strategic consultancies regularly (14%) and highest for those who work regularly with field services providers (38%) and technology providers (36%). In between, approximately one-quarter of buyers who regularly work with full service researchers, qualitative researchers, and data and analytics providers do not expect suppliers to interact with senior management.

The other aspects of service do not stand out the way that interacting with senior management does; the only other two aspects for which at least 10% of buyers say they do not apply are designing the research plan (11%) and implementing the research plan (10%). These two aspects are driven by buyers who regularly use field services, data and analytics, and technology providers; each of these may be involved in a phase of the research rather than complete projects. The reason why these numbers are not higher is due to the way the questions are framed, asking buyers to rate the whole portfolio of suppliers rather than a specific type. For example, since most "regularly" use full service research providers, the ratings are likely to be skewed toward full service research suppliers. If we asked about field services providers directly, more buyers might say they do not expect these behaviors.

Therefore, when we see that 14% of buyers who use technology providers regularly and 13% of buyers who use field services providers regularly do not expect them to participate in research design, we can hypothesize that these percentages would be higher if the supplier types were rated individually rather than grouped together with other supplier types. In general, when we see trends across groups which are defined by supplier type, we can suppose that these trends are probably much more pronounced in reality than in these data.

WHAT BUYERS DO NOT EXPECT FROM SUPPLIERS THEY WORK WITH (BUYERS)

	Supplier Types Work with "Regularly"						
% Do not expect this from suppliers	All Buyers	Full service research	Field services	Qualitative research	Strategic consultancies	Data & analytics	Technology
Interacting with senior management	30%	26%	38%	22%	14%	28%	36%
Designing the research plan	11%	6%	13%	7%	3%	9%	14%
Implementing the research plan	10%	5%	15%	6%	3%	9%	10%
Recommending business actions	8%	3%	6%	2%	0%	0%	10%
Data visualization	6%	2%	8%	1%	0%	2%	9%
Data analysis	4%	1%	2%	1%	3%	2%	6%
Understanding your business	2%	0%	4%	0%	0%	0%	4%
Conducting the research	2%	0%	2%	0%	0%	2%	4%
Reporting research results	2%	1%	2%	0%	0%	0%	3%
Understanding the issue to be researched	2%	1%	4%	1%	0%	0%	2%
n =	161	111	48	82	29	54	105

DRIVERS OF SATISFACTION

Driver analysis reveals the relative strength of relationship between the various aspects of satisfaction and overall satisfaction, often interpreted as importance of each aspect. The following is a simple regression-based analysis that quantifies the relative influence each aspect has on higher or lower satisfaction. A caveat: the analysis can only work if ratings across buyers are different enough and have a consistent relationship with overall satisfaction. For example, if all buyers are highly satisfied with suppliers on implementing the research plan, implementing the research plan will not be a significant driver (even though it may, in fact, be a critical activity). Similarly, if all buyers have low satisfaction with implementing the research plan, it will also not be significant (though it may represent an opportunity to create differentiation by creating positive experiences).

A final caveat: these results are dependent on the circumstances at the time the ratings were given. There is always movement across these aspects of satisfaction, so the drivers represent a snapshot of buyers' feelings and perceptions and may differ from time to time.

The first analysis of drivers of satisfaction with supplier performance focuses on the aspects classified as "strategic" and identifies some similarities and differences from last year. Currently, three strategic aspects drive overall satisfaction: designing the research plan, understanding the issue to be researched, and reporting research results. These were also significant last year, but three of last year's drivers are no longer significant, including the strongest one, conducting the research. Two others also fell off the list, recommending business actions based on the research (tied for third in 20W2) and understanding your business (sixth last year).

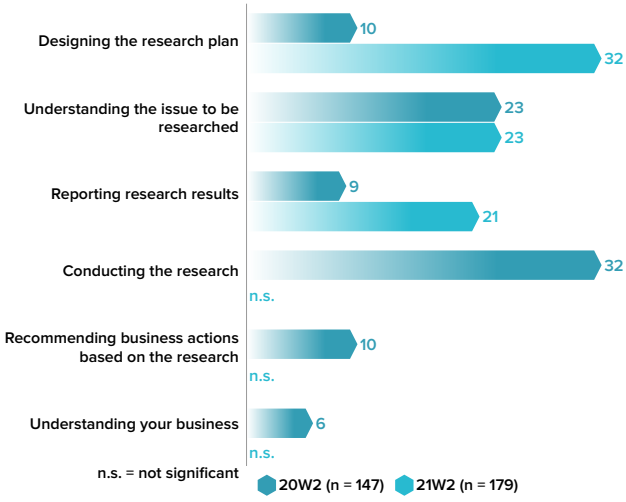
These findings are consistent with the industry "reckoning" we have identified in previous GRIT reports: to survive the pandemic, buyers and suppliers focused on what they did best rather than trying to be a jack-of-all-trades and master of none. Buyers focused on serving their internal clients by focusing on the application of insights rather than the execution of research. Full service research providers focused on research project design and management, taking over from end clients the engagement and management of specialist suppliers, while hybrid strategic consultancies/researchers cast their lots with full service research.

As a result, while it is still critically important to conduct research successfully, performance does not differentiate across suppliers because the level is consistently high and therefore is not a driver of higher or lower overall satisfaction. Understanding the business and recommending business actions no longer significantly differentiate suppliers, probably because end clients have taken more responsibility for it. These are more important service aspects for strategic consultancies than for other types, but consultancies have lately become a more niche competitor and do not determine drivers as much as other supplier types determine them. While buyers concentrate on the business applications of insights, suppliers are left with the core tasks of designing the research effectively and reporting the key findings clearly, both of which require them to fully understand the issue to be addressed, but not necessarily to be experts in the overall client business.

Three strategic aspects drive overall satisfaction: designing the research plan, understanding the issue to be researched, and reporting research results

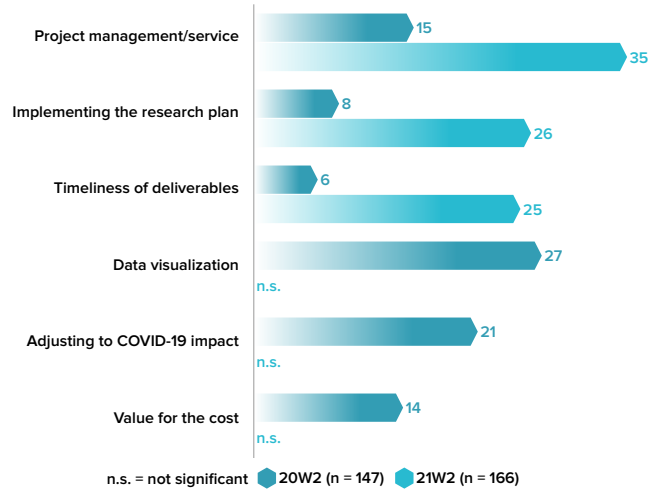
Understanding the business and recommending business actions no longer significantly differentiate suppliers, probably because end clients have taken more responsibility for it

SUPPLIER PERFORMANCE DRIVERS: STRATEGIC ASPECTS (BUYER)



The "tactical" drivers of overall satisfaction also reflect these trends toward greater separation of duties and adaptation under COVID-19

SUPPLIER PERFORMANCE DRIVERS: TACTICAL ASPECTS (BUYER)



Satisfaction with data visualization has improved since last year, but still ranks near the bottom

The "tactical" drivers of overall satisfaction also reflect these trends toward greater separation of duties and adaptation under COVID-19. The significant drivers are project management and service, implementing the research plan, and timeliness of deliverables. These were significant in 20W2, but secondary behind adjusting to COVID-19 impact and data visualization. Although still important, adjusting for COVID-19 no longer differentiates suppliers because they have all learned to adjust, or at least the ones that have survived have learned.

Satisfaction with data visualization has improved since last year, but still ranks near the bottom. We suppose that it has become a less significant supplier issue for a combination of reasons. Perhaps as buyers take more responsibility for the application of insights in their organizations, they are also taking more ownership of data visualization through DIY tools and expecting less from suppliers. Wave after wave, we see very low satisfaction with supplier performance on this critical activity, and the pandemic may have driven buyers to realize that the way to solve the problem is to own it.

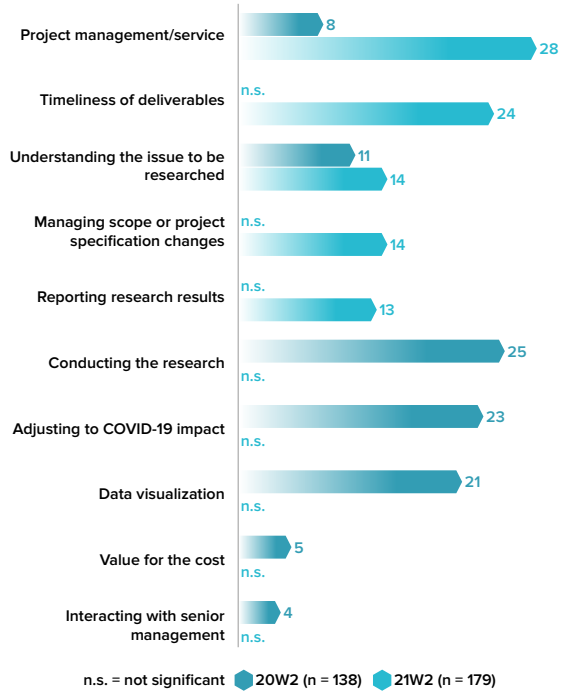
The relative impact of data visualization on supplier satisfaction also may have taken a back seat to the basic need to get things done. The urgency of tasks and distribution of responsibilities across organizations increases the need for trust and anticipation. Timeliness of deliverables is more important now and can only be achieved via strong project management and good service. It is telling that project management and service and implementing the research plan have increased in significance while conducting research no longer differentiates. There seems to be a subtle but important difference between research competence (conducting research) and, perhaps, research excellence (implementing the plan, managing the project, and serving the client). Lots of suppliers have expertise, but maybe some know what to do with it more than others.

One more "tactical" aspect fell off out of significance: value for the cost. As we have suggested in previous GRIT reports, cost is an important consideration, but irrelevant if what you buy accomplishes nothing. In these times, the focus in not

on maximizing value for the lowest cost, but on accomplishing what you need to get done when you need to get it done affordably. The "tactical" driver findings practically scream this point.

When we put the "strategic" and "tactical" aspects together, these driver trends are reinforced. Excellent project management and service are paramount, and timeliness of deliverables is now a top driver. Again, we see that understanding the issue to be researched is significant, but understanding the overall client business is not. Interacting with senior management was of minor significance last year, but not significant now; perhaps last year it was more important to huddle together to get the strategies and roles for handling the crisis worked out, and now the various parties are executing those roles on their own. Again, reporting research results is significant, but data visualization is no longer significant, and this suggests that suppliers are expected to package results in such a way that the direct client contact can easily turn it into an information packet that the broader organization can digest and disseminate.

SUPPLIER PERFORMANCE DRIVERS: ALL ASPECTS (BUYER)



Cost is an important consideration, but irrelevant if what you buy accomplishes nothing

BUYER SATISFACTION BY SUPPLIER PORTFOLIO

Ideally, we'd like to understand how performance varies by individual supplier, or, short of that, how it varies by supplier type. However, in order to address the broad range of topics covered by the GRIT survey, we compromise by asking for more generalized satisfaction at the overall supplier level rather than by supplier or supplier type. Although this compromise precludes us from analyzing supplier types with laser-like precision, we can at least glean some directional insights. When we look at ratings by buyers who regularly work with data and analytics providers, for example, their ratings also reflect satisfaction with the other supplier types they use. Because most buyers work regularly with full service research providers, ratings that apply to data and analytics providers will be strongly influenced by experiences with full service research suppliers. However, if we notice tendencies that are particular to buyers who regularly work with data and analytics providers, we can be reasonably sure that this finding applies to the category of data and analytics providers; we just can't quantify the extent with any certainty.

Given this, it is not shocking that we do not see significant differences with respect to performance by supplier types used regularly, although we do see some directional trends. Overall satisfaction with suppliers is highest among buyers who regularly work with full service research, field services, or qualitative research providers and lower for

Excellent project management and service are paramount, and timeliness of deliverables is now a top driver

strategic consultancies and data and analytics providers; technology providers are in the middle. The overall satisfaction scores are similar to last year's, except that buyers who work regularly with strategic consultancies appear somewhat less satisfied now and those who regularly work with data and analytics providers are more satisfied.

These trends may reflect some of the changes to the structure of the supplier market we have discussed in previous GRIT reports and in the GRIT Industry Benchmarking Report. As a result of financial pressure brought on by the pandemic, many strategic consultancies redefined themselves as full service research providers, leaving the category to "pure" strategists. The fruits of long term strategic consulting may not be realized very quickly, and this can tend to depress overall satisfaction scores when buyers are uncertain about the eventual success.

As a result of financial pressure brought on by the pandemic, many strategic consultancies redefined themselves as full service research providers

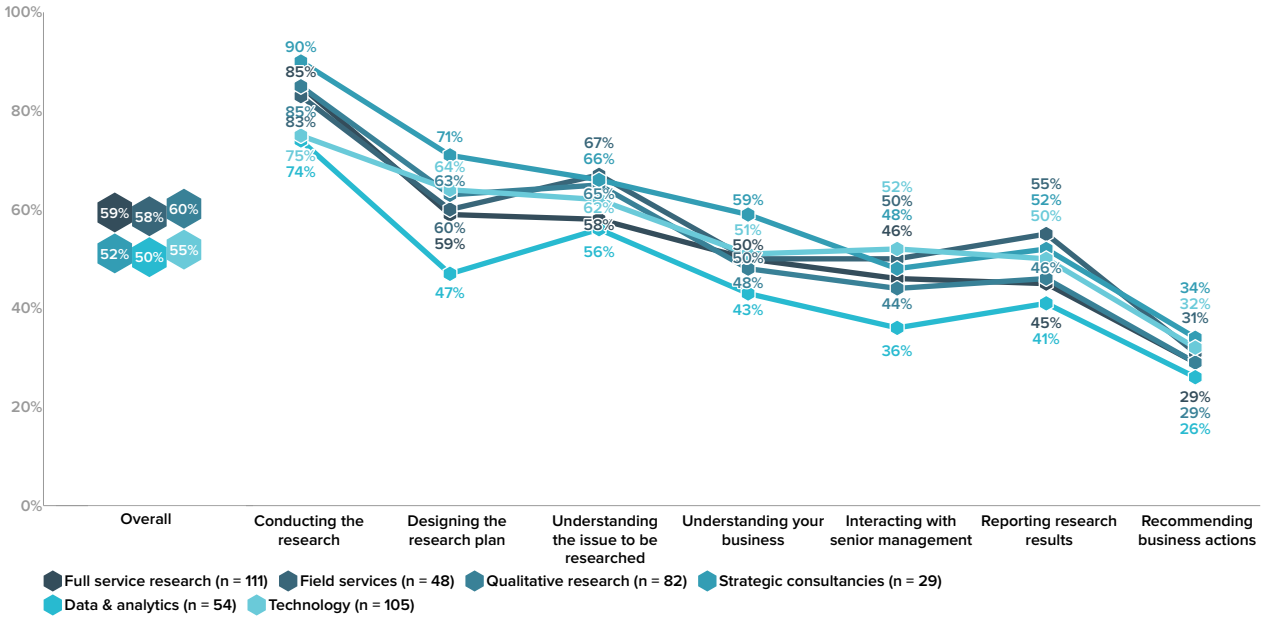
Though overall satisfaction among buyers who regularly use data and analytics providers is the lowest of any group, it is somewhat higher than it was last year. Earlier, we reviewed indications that data and analytics providers are not as likely to be expected to design and implement research as are some other types, and we've seen that implementing the design is a key driver of satisfaction. Their low ratings may be a sort of "guilt by association" driven by the performance of other members of the extended project team or supplier portfolio. It could be that data and analytics providers are frequently brought into situations where they need to buttress a weak research management team; if the research team provides them with bad data, there is not much they can do to rescue it. The increase in overall satisfaction since last year may be related to how the category has evolved as these providers leverage their expertise into adjacent services to better align with the market and expand activities to control more of the research process.

Satisfaction with understanding the overall business is understandably higher for those who work with strategic consultancies on a regular basis, and lower for those who work with data and analytics providers regularly

With respect to "strategic" aspects, there are a few directional trends:

- Regarding how the research is conducted, satisfaction is very high among buyers who work regularly with full service research, field services, or qualitative research providers, but lower for specialists like technology and data and analytics providers who may have less traditional research roles or support only one part of the overall research process.
- Satisfaction with designing the research plan is highest for buyers who regularly work with strategic consultancies, possibly because strategic research may need more customization than other kinds of research. It's lowest for buyers who regularly work with data and analytics providers, and this may be due more to the situations in which they are used regularly than with their performance. For example, buyers who work with them regularly may take responsibility for the research design, leaving little role for suppliers
- Satisfaction with understanding the overall business is understandably higher for those who work with strategic consultancies on a regular basis, and lower for those who work with data and analytics providers regularly. Again, it could be that in the latter case the buyer takes responsibility for the business end to the exclusion of the supplier.
- Satisfaction is also lower among buyers who regularly work with data and analytics suppliers with respect to interacting with senior management and recommending business actions. Again, this suggests that these types of projects may be more directly controlled by the end client than by suppliers.
- With respect to reporting research results, satisfaction is highest among those who work regularly with field services providers. Because they work on a well-defined process within a project rather than managing the overall research project, their reporting requirements may be simpler and more direct than for other supplier types. Also, they tend to make technology investments that may deliver better and timelier reporting for clients.

SATISFACTION SUPPLIERS THEY WORK WITH "REGULARLY": "STRATEGIC" ASPECTS (BUYER)

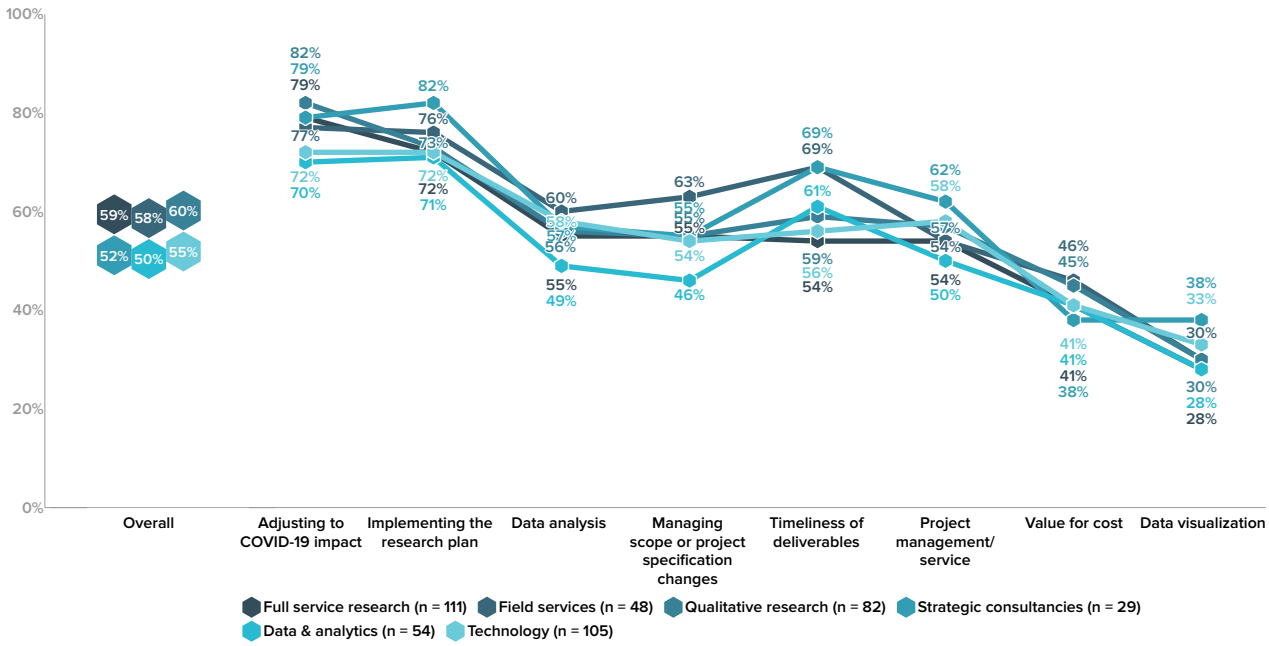


There are also some few directional trends with respect to "tactical" aspects:

- Project management/service is the strongest "tactical" driver of overall satisfaction, and, directionally, buyers who work regularly with strategic consultancies are more satisfied with it and those who work regularly with data and analytics providers are less satisfied. However, we've discussed how differences across these two supplier types do not strongly influence the drivers, so clearly there is a range of performance within supplier types.
- Timeliness of deliverables is another significant driver, and buyers who work regularly with field services providers or strategic consultancies are most satisfied while those who work regularly with full service research or technology providers are least satisfied. The nature of the projects may influence these experiences (e.g., full service research projects may have more parts and therefore more dates that can be missed). Also, because most buyers use full service research and technology providers, dissatisfaction with one may spill over onto the other.
- Implementing the research plan is another significant driver of overall satisfaction, and satisfaction levels exceed 70% within each type. This again suggests that overall satisfaction is driven by individual supplier differences within types rather than by the types themselves.
- Managing scope and specification changes also popped as a significant driver, and satisfaction is highest for those who regularly work with field services providers and lowest when working regularly with data and analytics providers. Field services providers may be under the strongest microscope here because they work on shorter, well-defined timelines and any failure to respond to changes has immediate and potentially devastating impact on project costs and success.

Project management/service is the strongest "tactical" driver of overall satisfaction

SATISFACTION SUPPLIERS THEY WORK WITH "REGULARLY": "TACTICAL ASPECTS (BUYER)



SUPPLIERS' PERCEPTIONS OF PERFORMANCE

To complement the buyer perspective, GRIT asks suppliers to rate how well suppliers in their segment meet client needs using the same sets of "strategic" and "tactical" aspects. Compared to buyer "top 2 box" ratings and taken at face value, full service research providers give themselves somewhat higher ratings (64% to 59% among buyers) as do strategic consultancies (58% to 52%) and technology providers (58% to 55%). Somewhat harder on themselves are field services providers (54% to 58% among buyers) and data and analytics providers (39% to 50%). As suggested earlier, field services providers tend to be under the strongest microscopes, and this may increase their sensitivity to performance. Similar to buyers' evaluations, data and analytics providers give themselves the lowest overall ratings, however, they judge their own performance much more critically than buyers seem to judge it.

With respect to "strategic" aspects, full service research providers say they perform at least as well as other supplier types on all aspects and better than others on conducting the research, designing the research plan, and understanding the issue to be researched. Strategic consultancies see themselves performing less well on conducting the research, but better than other supplier types on interacting with senior management, recommending business actions, and understanding the client's business.

These relative strengths, however, arise from the "weaknesses" of other supplier types on these "strategic" aspects. Field services providers rate themselves below the average on all aspects, coming closest to average on understanding the client business (-4%). Similarly, data and analytics providers give themselves below average evaluations on all aspects, performing best on recommending business actions (-6%). As we saw from the overall ratings, technology providers aren't quite as hard

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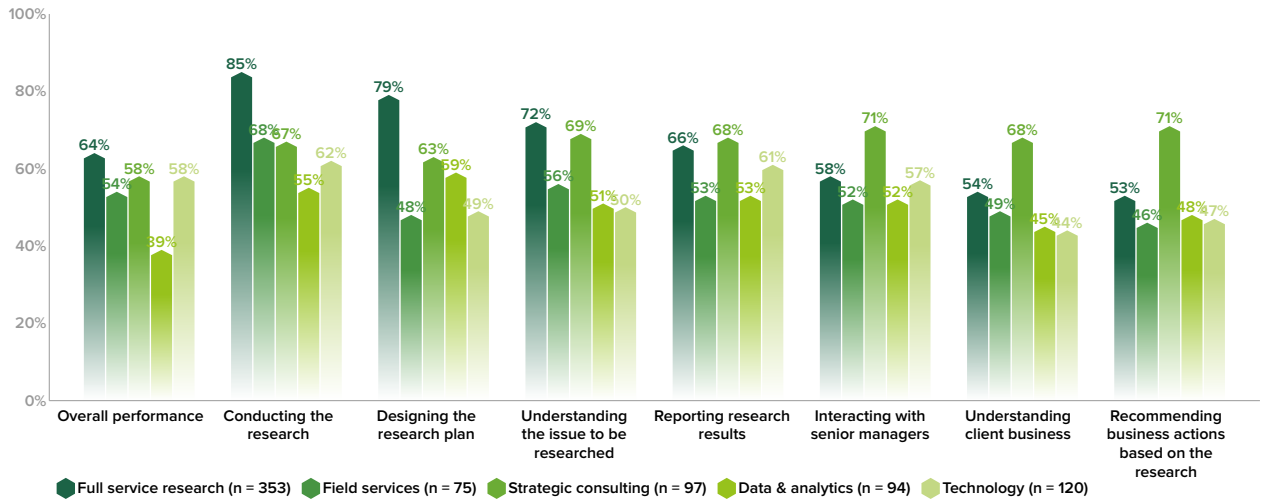
This pattern supports the idea that full service research and technology providers are symbiotic

on themselves, rating themselves below average on most aspects but very nearly average on reporting research results and interacting with senior management (-1% each). These results are consistent with the idea that the supplier market has aligned under COVID-19, to some degree, where more research projects are coordinated and managed by "generalists," such as full service research or strategic consultancies, who bring in "specialists" such as field services, data and analytics, and technology providers. Where this structure applies, the burden of delivering on "strategic" aspects falls more heavily on the generalists than on the specialists.

PERCEPTION OF SUPPLIER PERFOMANCE ON STRATEGIC ASPECTS WITH SUPPLIERS IN THEIR SEGMENT (SUPPLIER; %TOP 2 BOX)



These results are consistent with the idea that the supplier market has aligned under COVID-19, to some degree, where more research projects are coordinated and managed by "generalists"

As on "strategic" aspects, full service research suppliers think of themselves as just as good as or better than other supplier types. They are at or near parity on timeliness, data visualization, and value for cost and at least somewhat better at implementing the research plan, project management/service, managing scope changes, adjusting to COVID-19 impact, and data analysis. Technology providers are the complement of full service providers: they see themselves as better than others on data visualization and value for cost, but not competitive on implementing research plans, project management/service, or managing scope changes. This pattern supports the idea that full service research and technology providers are symbiotic, and also the hypothesis that technology suppliers are enabling buyers to do their own data visualization, minimizing it as a pain point when dealing with suppliers.

Strategic consultancies, data and analytics, and field services providers do not see themselves as leading the industry on any "tactical" aspects, but acknowledge some aspects on which they are not competitive. Field services providers are not competitive on data analysis, implementing the research plan, data visualization, and timeliness, but see themselves as at least at parity on adjusting to COVID-19 and value for cost, two issues that might be magnified for collectors of data. It's somewhat surprising that they rate themselves so low on implementing research plans, timeliness, and data visualization. Implementing research plans correctly and timeliness are obviously crucial issues for field services, and we've seen evidence earlier that they are investing in data visualization and that buyers seem to recognize that. The explanation may be that field services providers are more self-critical than other types of suppliers because their work tends to

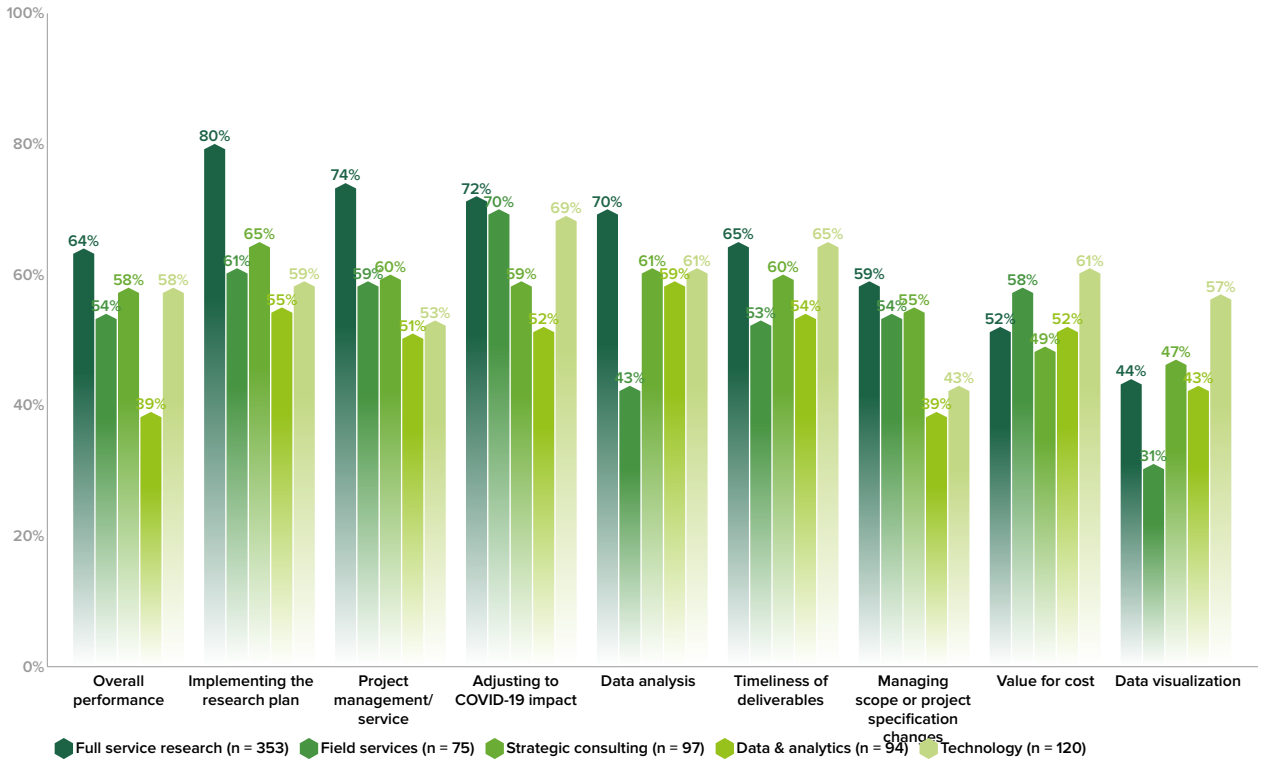
have very short turnaround times, likely unplanned changes to address, and strict specifications that directly impact cost, timing, and quality, and these factors force them to be acutely aware of details and conscious of mistakes or missed goals and deadlines.

Strategic consultancies do not seem as pre-occupied with "tactical" aspects and see themselves at parity on most issues. Their lowest self-evaluations are for implementing the research plan (-5%) and project management/service (-7%). While it may seem counter-intuitive that they have below-average ratings for project management/service, the ratings trail only full service research suppliers, who give themselves very high ratings. Perhaps full service research has more client checkpoints and issues that require direct client involvement to resolve compared to strategy work.

Finally, data and analytics providers give themselves the lowest overall ratings and very low ratings on implementing the research plan, project management/service, managing scope changes, and adjusting to COVID-19 impact. The only "tactical' areas where they seem themselves near parity are data visualization (-2%) and value for cost (-1%), the two areas that are most challenging for suppliers of any type. As we have hypothesized earlier, data and analytics providers may have the least control of any supplier type over the management of the complete research project and feel as though they lack opportunities to excel in these tactical areas. In previous GRIT reports and the GRIT Industry Benchmarking Report, we have discussed the turbulence within the data and analytics provider category as these suppliers try to expand services and take more control of their projects. Their relatively low self-ratings may reflect this turbulence and uncertainty.

Data and analytics providers may have the least control of any supplier type over the management of the complete research project and feel as though they lack opportunities to excel in these tactical areas

PERCEPTION OF SUPPLIER PERFOMANCE ON STRATEGIC ASPECTS WITH SUPPLIERS IN THEIR SEGMENT (SUPPLIER; %TOP 2 BOX)



THE BIG PICTURE

Buyers' overall satisfaction with suppliers and their satisfaction on specific aspects of service reflect the portfolio of suppliers they work with most frequently. Last year, buyers reduced their supplier portfolios in response to the pandemic and, on average, worked less frequently with every type of supplier. In the past 12 months, full service research suppliers and technology providers have rebounded the most strongly, and they are the only suppler types used regularly by a majority of buyers. Most buyers do not have a consistent role for true strategic consultancies, and field services and data and analytics providers are only needed for specific parts of large projects. Buyer satisfaction most strongly reflects their use of full service research and technology providers.

These two supplier types are complementary. Full service research suppliers manage tasks that free up buyers to focus more on applying insights to their businesses. Technology suppliers provide tools that streamline tasks, and this also frees up buyers' time, but they also provide capabilities that close supplier performance gaps. In particular, year after year, GRIT records very low buyer satisfaction with data visualization from suppliers, and last year it was a very significant driver of satisfaction. This year, satisfaction with data visualization is still low, but not a significant driver. The likely reason is that technology enables buyers to perform their own data visualization and customize it for an audience they know well. Not surprisingly, technology providers give themselves the highest ratings on data visualization of any supplier type.

The critical drivers that suppliers can most influence are project management/service, timeliness of deliverables, understanding the issue to be researched (but not necessarily the overall client business), managing scope changes, and reporting research results. These drivers overlay very nicely with the key criteria for selection of methodologies, partners, and suppliers covered elsewhere in this report. The kicker is that some kinds of suppliers, such as field services or data and analytics providers, may not be able to influence some aspects because they either work on only a portion of the research or else do not work directly with the end client. In these situations, it is important to be conscious of all the key drivers of buyer satisfaction and influence them as positively as you can, even if that influence is indirect.

It is important to be conscious of all the key drivers of buyer satisfaction and influence them as positively as you can, even if that influence is indirect

ADVANCING TOGETHER THE POWER OF INNOVATIVE AND AGILE PARTNERSHIPS

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When it comes to consumer insights, everyone is looking for the perfect balance of cost, speed, and quality. But getting there depends on the kind of partnerships clients build with their suppliers. In fact, it could be argued that building a true partnership creates a huge advantage when clients and suppliers are on the same page and remain focused on the future.

Consider the importance of consultative partnerships

When choosing a supplier, it's important to seek out consultative partnerships. Experience really matters here. After all, service is more than just troubleshooting, it's about peace of mind—having experts you can trust to guide you over the finish line. Build partnerships where support empowers greater speed and agility by understanding your supplier's approach to service. Is their process built organically in-house or is it outsourced? How well do they know the platform your research is taking place on? And possibly most importantly, do they have a say in the ongoing development of features in the platform? This is innovation in action, paving the way for a consultative partnership geared towards delivering on speed, cost, quality and serving your unique business objectives as the relationship progresses.

Understanding the true meaning of quality

Research without quality standards is just going to keep you guessing—or worse, drive decisions with inaccurate or skewed insights. In this industry, panel technology is often viewed as a commodity, but it's important to remember we're talking about people here. Respondents who aren't well-respected aren't very reliable. Ask your potential partner how they approach their audiences. A partner who understands the true meaning of data quality will prioritize people—nurturing a community of individuals who are willing to share, not just corralling a pool of respondents to fill a quota.

Increase speed to insight with an iterative process

Looking to go faster without sacrificing quality? Find a partner who's willing to iterate with you. It's becoming clear that increasing speed to insight requires tapping into the power of agile tools—those that can still be used even in full-service handoffs. Partners who value an iterative approach to consumer insights will empower you to take full advantage of the tools needed to pull relevant insights in moments that matter. By working iteratively, you bring the voice of the consumer to the table more often, driving strategic business decisions and creating the opportunity for stakeholders to have ongoing conversations with target audiences. Can your agile partner accommodate both quick-turn short surveys and sophisticated research tests?

Seek out the innovators

At the end of the day, your consumers are dynamic; your research should be too. If you're a tech native buyer who's looking for what's next, seek out the innovators who aren't settling for the industry status quo. Look for partners who leverage automation to help you do more with less. Suppliers with a focus on ongoing innovation will help you cut costs tremendously. Ask suppliers what they think the landscape will look like in five years? Do they recognize the industry is changing and how do they define those changes? Find a nimble partner who is ready and able to innovate based on your unique needs —one who is willing to build the future of market research alongside you.

Final thoughts on gauging supplier performance

Remember that a true partner should become an extension of your team. Be sure to define success criteria together. That means setting ongoing review cycles and allowing for the ability to pivot as needed to ensure the partnership is effectively working towards your research needs.

A DAY IN THE LIFE OF AN INSIGHTS PROFESSIONAL

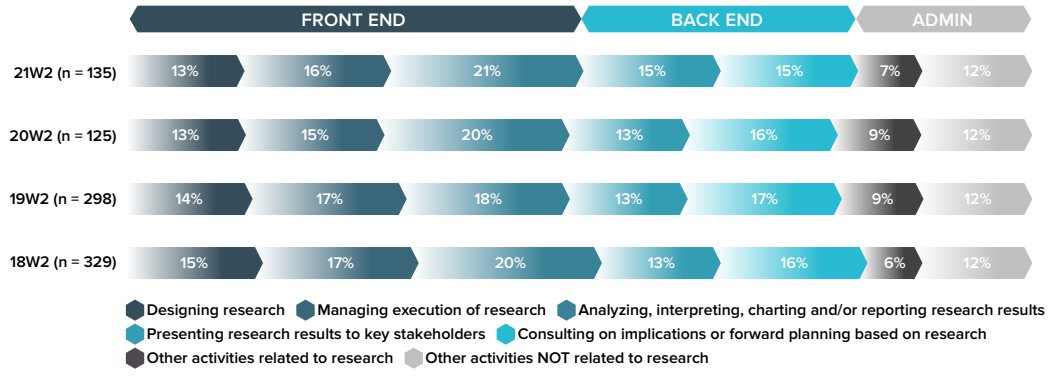
How are the changes in technology, organizational structure, focus etc. impacting the way insights professionals actually use their time and the tasks they perform? Apparently not much based on the unchanging results from this area of exploration.

BUYER PERSPECTIVE

At GRIT, we sometimes joke about how some results change so little that we could save time by cutting and pasting from last year's results. "A Day in the Life of an Insights Professional" is the poster child for that sentiment, as nothing has changed in four years, a situation that GRIT pronounced "worrisome" after just three years. As with the late John Lennon's unfortunate protagonist in the Beatles' "A Day in the Life," we haven't noticed that any lights have changed. In our case, it's because they haven't, and it feels like we've learned the equivalent Lennon's "how many holes it takes to fill the Albert Hall."

However, we can't just cut and paste past results even if the news seems rather sad because we have to perform our due diligence. Going back to 2018, there are no differences from wave-to-wave in how the average buyer spends time on any of the eight activities covered by GRIT. Aggregated into three macro categories, "Front End" has ranged from 49% to 52% of buyer time, "Back End" has always been at 30%, and "Admin" has ranged from 19% to 21%. Though cutting and pasting last year's report looks very attractive, let's wake up, get out of bed, and take a closer look at "A Day in the Life" or, more accurately, "A Month in the Life," which is how GRIT asks for the breakdown by activity.

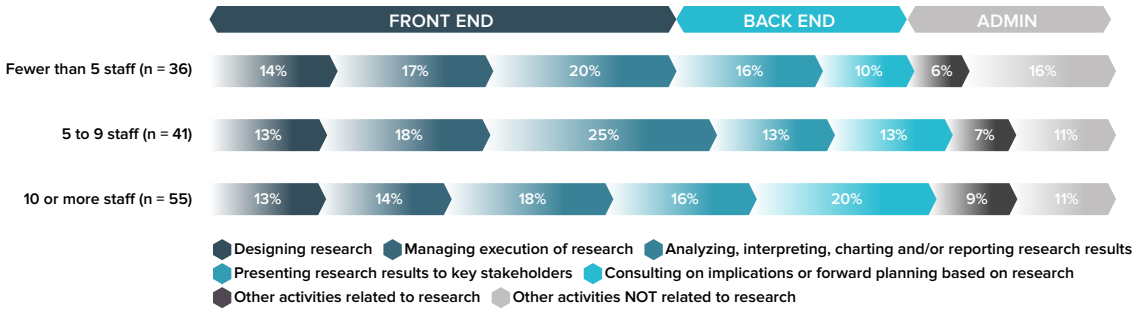
% OF TIME SPENT ON ACTIVITIES: GRIT WAVE (BUYER)



Buyer time allocations differ by the number insights professionals on staff. The most significant difference is that buyers with staffs of 10 or more professionals spend twice as much time consulting on implications as those with staffs of fewer than 5. Directionally, those with the smallest staffs spend the most time on non-research activities, and this may be an indication that they are required to take on many different roles whereas those with larger staffs of insights professionals have more opportunity to specialize. Also, directionally, those with staffs of 10 or more spend the least time managing research, possibly because they are large enough to have distinct project management roles for some staff while others focus on other responsibilities, bringing the average down.

The amount of time spent designing the research does not vary by insights staff size, however. This is likely because, as we note in other sections of this report, if the design is wrong, the rest of the research is wrong, too. This task may not be as specialized as some others because the impact of the design ripples through the research and everything it touches, so everyone has a stake in its design.

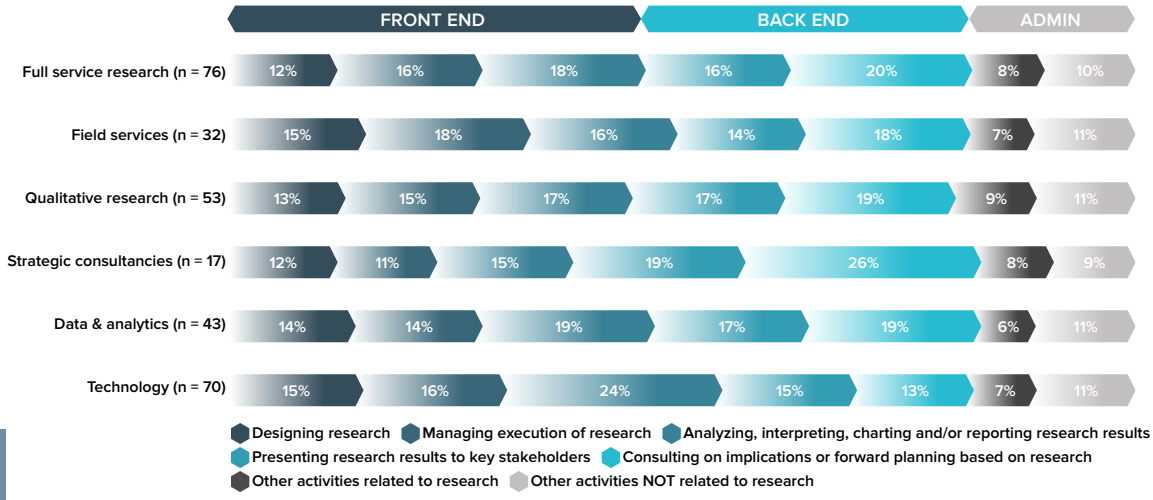
% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES: INSIGHTS GROUP SIZE (BUYER)



If we look at buyers based on which types of suppliers they use "regularly," we see some other differences. Because buyers who regularly use one type of supplier may also regularly use another type of supplier, too, the differences are not as sharp as they might otherwise be. The most significant differences are, again, for the consulting activity: buyers who work regularly with full service research providers and strategic consultancies spend more time on it while those who regularly work with technology providers spend the least time consulting. Knowing that full service research firms and strategic consultancies also spend time consulting with buyers, we might expect these relationships to reduce the time that buyers who regularly work with them spend consulting on implications. However, they spend more time.

Buyer time allocations differ by the number insights professionals on staff

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES: SUPPLIERS THEY WORK WITH "REGULARLY" (BUYER)

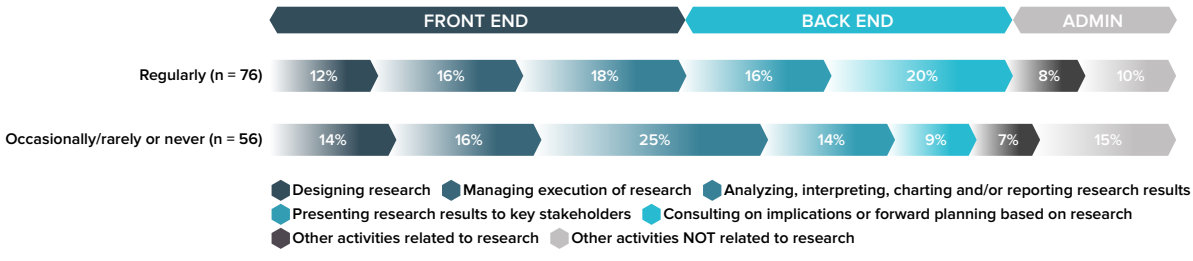


It looks like those who use full service research suppliers regularly don't have to spend as much time on analysis and reporting, so they are able to free up time for consulting on the implications

On the other hand, we might expect that those who work regularly with full service research providers would spend less time on the front end of projects, but that is not the case because they spend as much time on the front end as any of these other usage-based groups. Remember, these groups overlap, and, because most buyers use full service research providers regularly, these buyers strongly influence the results. If we clean this up by isolating those who work with full service research providers regularly from those who don't, we see that they each group spends about 30% of their time designing and managing research, but those who don't work with full service research suppliers regularly spend 25% of their time on analysis and reporting compared to only 18% for those who do. The gap in time spent on consulting is even greater: those who work with full service research suppliers regularly spend 20% of their time on it compare to just 9% who don't. This gap is exacerbated by the gap in time they spend on non-research activities: 15% for those who don't work with full service research suppliers regularly to just 10% for those who do.

We know that those with more insights professionals on staff are more likely to work regularly with full service research providers, so some of the gap is related to staff size. Overall, however, it looks like those who use full service research suppliers regularly don't have to spend as much time on analysis and reporting, so they are able to free up time for consulting on the implications. It appears they remain "hands on" for the design and management of the work because, while you can correct a flawed analysis or report, you can't fix flawed data.

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES: FREQUENCY WORK WITH FULL SERVICE RESEARCH PROVIDERS (BUYER)



For two reasons, it's a little surprising that those who work regularly with technology providers spend less time consulting. First, we would expect that technology solutions would free up time for consulting. Second, because most buyers work with them regularly, we would expect this group to look more like the overall average; instead, it's much lower. However, only about half of those who work regularly with full service providers also work regularly with technology suppliers, so the effect of the overlap is not so great. Those who work regularly with technology providers spend more than half their time (54%) on the front end of research compared to less than half for those who work regularly with full service research suppliers (47%) and strategic consultancies (38%). They also spend nearly one-quarter of their time on analysis and reporting (24%) compared to just 18% for those who work regularly with full service research suppliers and 15% for those who work regularly with strategic consultancies. Is technology making them less rather than more efficient?

We suspect the answer is that technology is making these buyers more efficient as well as making more capabilities available to them. In other words, these buyers are more efficient, but they are also taking on more tasks that suppliers might otherwise do for them, or even new tasks that no one would do. In fact, nearly three times as many buyers who work regularly with technology suppliers say they also decreased the amount of work they give to external suppliers over the past year (29%) compared to those who do not work with them regularly (11%). The reason that they are doing more front end work is likely because they can do more front end work and prefer to do it themselves.

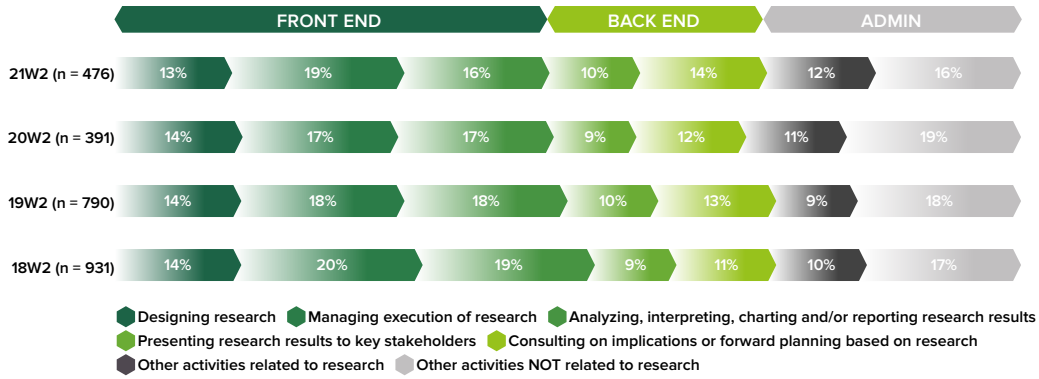
Technology is making these buyers more efficient as well as making more capabilities available to them

SUPPLIER PERSPECTIVE

As we experienced with buyers, supplier time allocation is virtually unchanged since 2018. If wanted to make a leap, we could say that time spent on analysis and reporting has inched (or centimetered) down each year from 19% to 16%, and this would be consistent with the hypothesis that buyers are taking more of it in-house via technology, although we know that this is balanced out by the amount going out to full service research providers. We could also claim the opposite trend for consulting, which has increased from 11% of time in 2018 to 14% now, but, instead, we should take a closer look.

As we experienced with buyers, supplier time allocation is virtually unchanged since 2018

% OF TIME SPENT ON ACTIVITIES: GRIT WAVE (SUPPLIER)

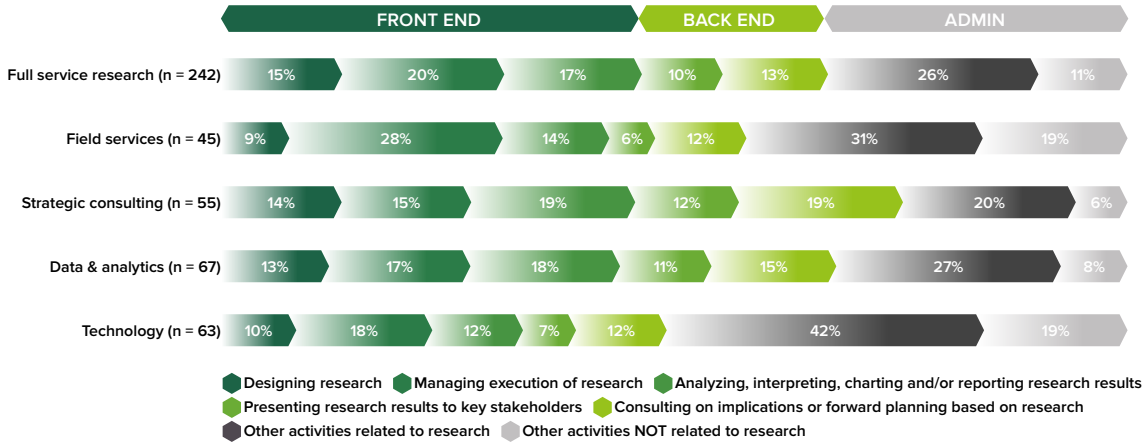


There are some differences across types of suppliers with respect to how they allocate their time, although not as many as one might expect. Elsewhere in this report, we discuss these "big bucket" supplier types in detail and note that there is a lot of overlap with respect to the services they offer. Full service research suppliers spend the most time of any supplier type designing research

(15%), but strategic consultancies (14%) and data and analytics suppliers (13%) are close. Predictably, field services providers spend the least time designing (9%) and presenting research (6%), and strategic consultancies spend the most time consulting on implications (19%).

Technology providers are unique among supplier types. They spend much less time on analysis and reporting (12%) compared to strategic consultancies (19%) and full service research (17%) and data and analytics providers (18%), and much more time on "other" research-related activities (42%). These other areas could include technology development and implementation. Similar to field services providers, they are at or near the bottom in time spent designing (10%) and presenting (7%) research.

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES: PROFESSIONAL FOCUS (SUPPLIER)



It's somewhat more satisfying to review differences by individual professional focus than by company professional focus. Those who primarily do client-facing project work spend as much time as anyone else designing research (15%), more time than most other functions managing research execution (23%), and much more time analyzing data and reporting results (24%). They spend much less time than any other function on "admin" activities (16%), and the least time consulting (11%).

Technology providers are unique among supplier types

Compared to those on the front lines, client or account managers allocate similar amounts of time to designing research (14%) and managing it (20%), but much less time on analysis and reporting (12%). Instead, they spend much more time on "admin" (29%) and a bit more time consulting (14%).

Those who work in R&D or other internal projects are lowest or tied for lowest allocations to back end activities (18%) presenting research (7%) and consulting (11%). Presumably, internal development projects are more likely to address front end research issues such as data collection or analysis than to address the back end.

Marketing and communications staff spend the least time on front end activities (39%), especially managing the research execution (12%). They allocate the most time of any function to non-research activities (25%).

Those in executive management spend nearly as little time on the front end (41%) as marketing and communications, but spend nearly as much time as anyone else on research design (12%), underscoring the universal importance of that step. They spend the second-most amount of time on non-research activities (21%).

It may seem a bit peculiar that those who are closest to the client spend the most time of any functional area on analysis and reporting but the

IT'S TIME TO OPEN UP TO OPEN ENDS

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As a researcher, you love data. As a researcher, you love developing data-driven narratives. As a researcher, you love challenging assumptions and making a positive impact on the business. You love almost everything about being a researcher, but you hate open ends.

All that nice, quantitative data ruined by slang, swears, memes and misspellings. That wealth of information, depth and nuance locked behind the tedious, time consuming (and/or expensive) task of coding. As a result, many insights organizations don't fully utilize the responses from their open-ended questions. Perhaps they code just a sample, use them only for survey quality control or cherry-pick verbatim quotes for their reports (we won't tell).

The biggest risk of this approach is missing critical insights that may be hidden in the unstructured text data of open ends. The last several years have demonstrated the importance of empathy for consumer-facing brands. Missing the emotional value expressed in open ends could make the difference between a good campaign and a great campaign. Open-ended questions are also one of the most effective ways of generating unfiltered, unbiased consumer feedback.

Let's take a look at how open-ended questions are used through the lens of several research examples.

Consumer Behavior Study: Open-ended questions in consumer behavior surveys can be used to better understand consumer attitudes, particularly when it comes to new or quickly-evolving topics. Perhaps most importantly, open-ends are critical in capturing the emotions and emotional intensity consumers have towards a topic.

Examples: How do you feel about cooking at home? What does sustainability mean to you? Describe your ideal vacation.

Product Feedback / Concept Testing: Open ends in product feedback surveys are essential for capturing the attributes consumers recognized and/or valued in a product, particularly when using a predefined set of attributes is not advisable. Open ends are more likely to return unexpected feedback.

Examples: What did you like most about [PRODUCT X]? How would you describe the taste? What do you think is missing? What is the biggest benefit you would get by using this product?

Audience Feedback / Ad Tests: Audience feedback and ad test are all about the feels, aka emotional response. Analysis is likely to center on sentiment/emotion measurement (how did the viewer feel about the content?) as well as the elements, moments or characters that drove this reaction.

Examples: What did you like/dislike the most? What was confusing/interesting? What do you remember? How would you describe the character?

Customer Experience (CX) Surveys: Perhaps no survey has become as ubiquitous as the Net Promoter Score (NPS) survey. Regardless of the specific customer satisfaction methodology used, almost all incorporate an open-ended question that aims to get at the "why" behind the rating a customer gave. When analyzed, particularly in conjunction with the rating cohorts, they can reveal powerful insights regarding the customer experience.

Examples: What is the primary reason for your score? What is one thing we could do to make you happier?

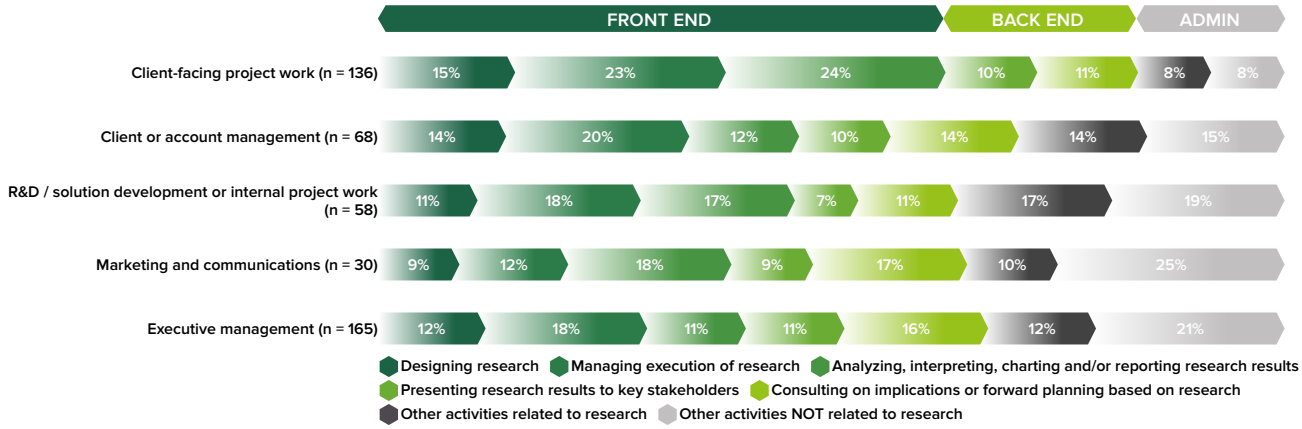
Brand and Awareness Study: Open-ended questions are particularly important for unaided type questions (unaided awareness or unaided brand attributes). Additionally, open ends can be used to better understand the emotional resonance of brands with consumers.

Examples: When you think of anvils, what brands come to mind? When you think of Acme, what comes to mind first? How do you feel about the Acme Corporation?

So you're almost ready to love open ends again. But…what about the significant time and resources needed to decipher and code in addition to potential for human bias and error? New research technology like Canvs AI is giving insights professionals the power to automate or semi-automate the coding of open-ended responses, bringing quantitative scale and statistical significance to this form of qualitative feedback. This has the potential not only to accelerate discovery and enhance analytical confidence, but also to expand the potential for open-ended questions in research.

least time consulting on implications. Presumably, they are the ones who know the client and the data the best. This may be partly explained by the fact that 32% of those with client-facing responsibilities have worked in insights for fewer than 10 years compared to just 10% of those in executive management. It may also be that skills required for project management and data analysis don't overlap with business knowledge very often, and that the client personnel who work on the research are not the same as those who work on implementing the results, so the relationships are not as valuable for that phase.

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES: FUNCTIONAL AREA (SUPPLIER)

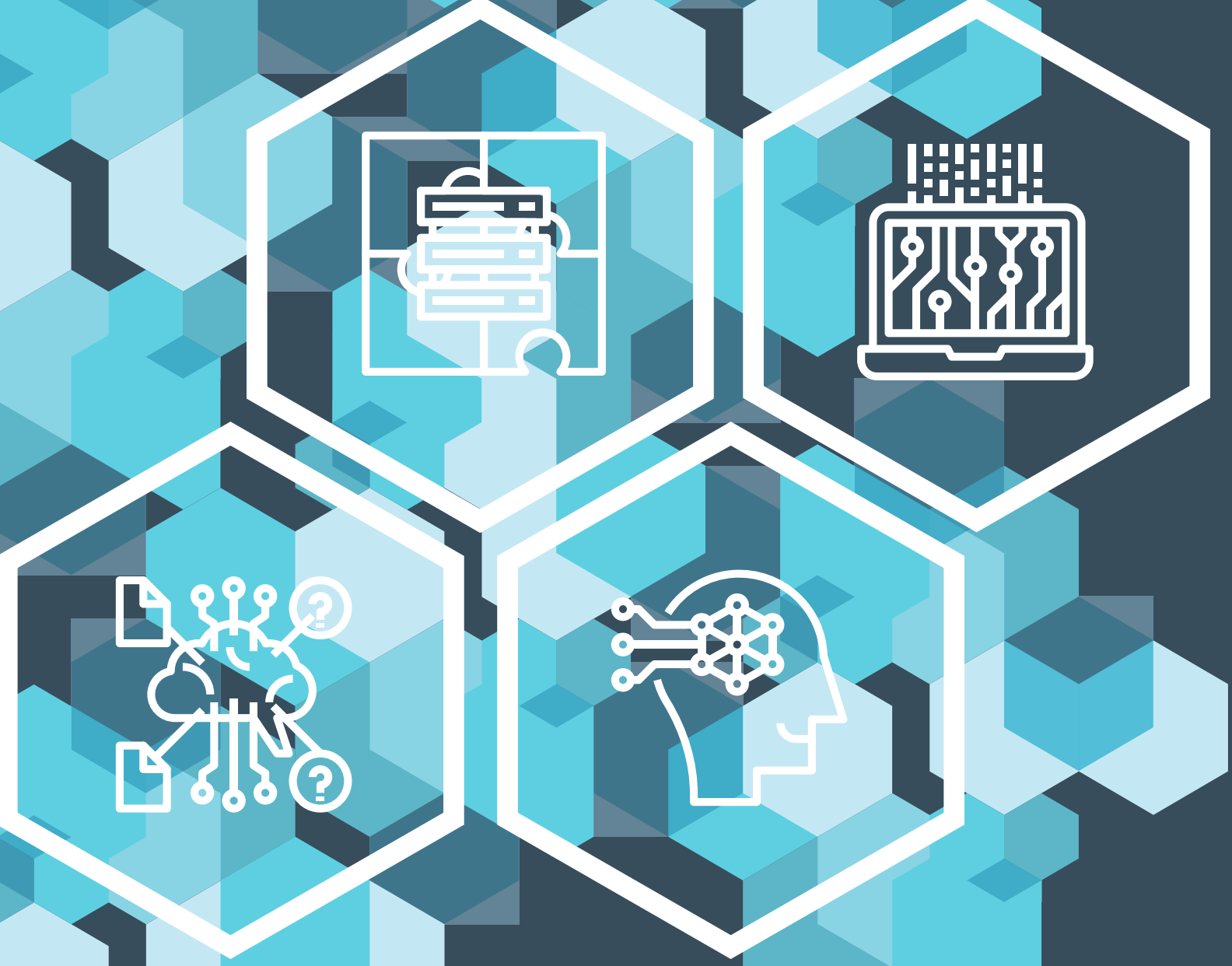


THE BIG PICTURE

Maybe it's not so wrong to copy last year's report after all. It said: "While the 'how' has changed, the 'what' of activities researchers do has not changed nearly as much." So far, so good, but then it glumly declared: "Given the increasing need for both buyers and suppliers to demonstrate business value, this lack of change in the 'what' has to be considered worrisome for the business of market research and career possibilities." Of course, a year ago, glumness was the flavor of the day as so much of the GRIT results were negative, and change was considered a prerequisite rather than a prerogative for survival.

When we take a closer look at the "what," we actually see a lot of change. The problem is, when you mix all the colors together, the rainbow disappears, and first you get all brown and then you get all black. At the macro level, our results are "all black;" nothing has changed in four years of tracking. Pulling those "colors" apart, however, reveals patterns, such as the surge in technology adoption leading some buyers to do more front end work instead of less while others outsourced more work to full service research providers, reducing their front end time. These two behaviors appear to have cancelled each other out.

We know that different buyers and suppliers are following different strategies to achieve the same goal, to make their businesses as healthy as possible. It's hard to imagine any of them succeeding without allocating time to research design, research management, analysis and reporting, sharing results, consulting on implications, and other activities (which are not insignificant, just not specified in GRIT). If the lack of change at the macro level is "worrisome," it's been worrisome for at least four years. Maybe 2022 will be the year that DIY encroaches so much on supplier work that we see changes in time allocation at an aggregate level. Or maybe not, because individual buyers and suppliers like to design their own workflows that work best for them, and all of these activities measured by GRIT need to occur. As the post-Beatles John Lennon said, "whatever gets you through the night."



THE EVOLVING INSIGHTS ORGANIZATION

THE EVOLVING INSIGHTS PROFESSIONAL

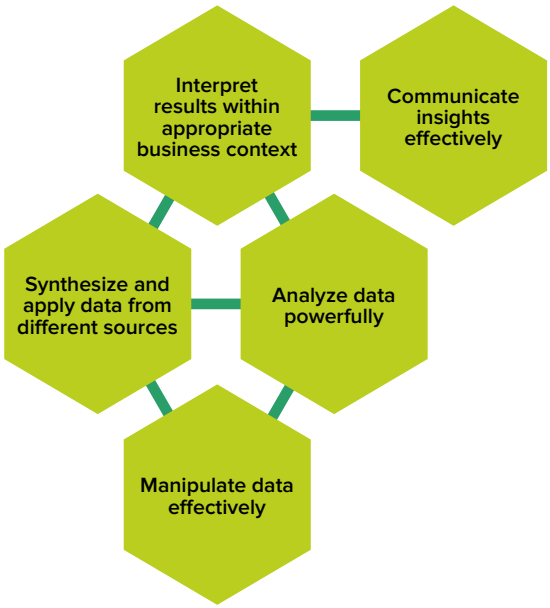
Impactful insights can be driven by myriad skills, individually and in different combinations. Today's insights professional must master the traditional disciplines of research and consulting and apply them to their chosen areas of expertise.

BUYER PERSPECTIVE

The organization can only benefit from insights if they are relevant, credible, and understood by those who can take action

For the spring GRIT Business & Innovation Report, buyers tell us how they prioritize six skills to develop within their staff. Last spring, their top priorities were business knowledge, followed by people skills and innovative focus. Analytical and market research expertise formed the third tier, and technical/computer expertise was the lowest priority. Although only 21% said technical/computer expertise was a key priority for them, most said it was a secondary priority (52%).

For this report, buyers tell us their top-of-mind thoughts on which single skill they would most like to add to their organization if they were going to hire one individual with that skill. This is subtly different from the spring question, which focuses on the importance of developing each skill within their current staff. In contrast, the question du jour focuses on complementary skills an organization can gain via a single individual, and responses may or may not overlap with the skills tested in the spring; it can be thought of as way to stand out from other job seekers, but not necessarily as the complete package of needed skills.



In the last GRIT Insights Practice Report, the most frequently mentioned skills concerned the use of multiple data sources, market research aptitude, communication skills, and data analytics. A year later, the key themes are similar: use of multiple data sources, communicating insights effectively, appreciating the business or market context, and expertise in analytics or data manipulation. These themes are interconnected, and, while they represent the major themes among buyers, they are not always mentioned as a set by every buyer who mentions one.

The end goal of insights work is to benefit the organization or business as a whole, although there have been insights organizations that seemed more concerned with their own ends than with the greater good. The organization can only benefit from insights if they are relevant, credible, and understood by those who can take action. They are relevant if they are developed with the appropriate business context in mind, credible if they are built on sound data and analytics, and understood if they are communicated effectively.

If those responsible for insights work don't understand the business context, they can't design the front end or interpret the back end meaningfully. As one buyer whose insights team functions as strategic consultants points out: "One of the biggest missing links in typical MR is the lack of context (overall market, competitors, current plans and expectations, etc.) used for developing a project and reported as part of the results." Similarly, another buyer, whose insights team mainly functions as data analysts would like to add this skill: "analyzing the problem of the client, related to the decision the client has to take, resulting in relevant research questions that can actually help the client make the optimal decision. This means knowledge of marketing and/or decision making."

These two buyers mention that knowledge of the market players and dynamics as well as marketing and decision-making expertise are critical to developing meaningful insights, others discuss it from the perspective of applying multiple data sources. One buyer adds: "...connecting the dots between primary and syndicated research – see the 'whats' from Nielsen/IRI and explain with the 'why' from qual/quant." Another buyer also links the application of multiple data perspectives to sharper analytical skills, mentioning "synthesis of multiple data sources (critical thinking)."

Other buyers mention the importance of developing relevant insights without specifically mentioning multiple data sources. One buyer would like to add industry knowledge: "The person should have expertise in the same industry with insight into where changes are anticipated." Another describes this skill as "translating data results into actionable insights for our company." Linking data manipulation to developing more relevant insights, another buyer would like to add "business understanding of data, [and] ability to transform and interpret data."

Without mentioning the quality of the insights generated, other buyers express needs for data manipulation skills. Some mention experience in "data integration" and "the ability to tie data sources together like VOC, GA, CRM, POS, etc.," and other mention tools commonly used for data manipulation, such as R and SQL.

These data skills help support the credibility of the insights by enabling the analyst to test hypotheses from different perspectives as well as to establish a solid fact-base. Data transformation makes analytics possible, and integrating different data sources expands its palette. Analytics, of course, translate data into insights, enabling interpretation, decisions, and actions.

Some buyers mention the need to add analytics skills generally, using terms such as "advanced analytics," "data analysis," and "data science," the last of which, of course is not limited to analytics, but covers areas such as data manipulation and integration. Others would like to add specific kinds of analytics, including digital, web, UX, media, social media, Big Data, and predictive analytics. Also mentioned are packages or processes such as SPSS and natural language processing.

Of course, without effective communication, relevant business insights, no matter how robust, are like trees falling in a deserted forest: no one hears them. Consequently, many buyers would like to add "compelling storytelling," "data visualization skills," "presentation design," "communication of data research results," and "dashboarding."

At a more personal level, buyers mention certain characteristics they would like to add. These include "resourcefulness," "coherent thinking," "multi-tasking," "consumer thinking," "management of humans," and "negotiation skills." General critical thinking is also a desired quality, such as the ability to "discriminate between good and bad research/data/analytics" and a "better understanding of what good analytics are and when they are total rubbish." Finally, while some buyers are looking for very specialized skills, others would like to add someone with a "broad skillset" and "diverse" experience.

Knowledge of the market players and dynamics as well as marketing and decision-making expertise are critical to developing meaningful insight

These data skills help support the credibility of the insights by enabling the analyst to test hypotheses from different perspectives as well as to establish a solid fact-base

SUPPLIER PERSPECTIVE

The skill needs of full service research suppliers run the gamut from market research to technical skills

Last spring's GRIT Business & Innovation Report identified the top supplier priority for skills to develop as market research expertise, followed by analytical expertise, innovation focus, and people skills, with business knowledge just behind those. Technical/computer skills were a distant sixth. In last year's GRIT Insights Practice Report, we reported that top-of-mind skills to add were, first of all, sales and business development, followed by software development, design/graphic design, data visualization, and data analytics. We suspect that the apparent discrepancy between GRIT waves regarding computer/technical expertise and software development may be largely driven by the difference between developing that skill among current staff versus hiring it in. In other words, suppliers who need to add technology solutions to their processes or offerings are likely to need to hire out for it because they do not have it on their staff. At least, they don't appear to want to take people away from tasks at which they already excel to focus them on becoming software developers.....eventually.

FULL SERVICE RESEARCH SUPPLIER PERSPECTIVE

Full service research suppliers also need to bring in staff who can interpret data and develop insights that are meaningful to clients

By far the largest supplier segment, yet with significant overlap with other types, the skill needs of full service research suppliers run the gamut from market research to technical skills. Because full service research providers offer soup-to-nuts (whatever that means) services, and because the largest ones are complementing them all the time, their needs are diverse. Their key themes are analytics, interpretation, communication, project management, research, technical skills, business development, and adaptability.

Regarding analytics, the skills mentioned by full-service research suppliers seem more general than those mentioned by buyers and range from rudimentary to advanced. In a later section of this report, we discuss how different types of suppliers have added data and analytics as a secondary revenue source, but these are a minority of full service research suppliers. Several mention a need for "data scientists," and this may be driven by a need to build a service or to enhance existing services. While we are certain that some have developed expertise in specific types of analytics, many seem to be attempting entry into the data and analytics service area, and their general comments reflect that. Some have more basic needs, such as "data tabulation" and the "ability to work in VBA" to "pull Qualtrics export results more efficiently," but others need "deep statistical knowledge and understanding of how to integrate different types of data effectively."

More specific needs include "artificial intelligence expertise," "experience using a range of CX and AI research analysis software," and "strong social and data analytics skills." Others cite the need to handle larger data sets, "Big Data scientist/physicist who can glue megabytes of data together properly," and others cite someone who understands enough of the big picture to know how the pieces fit, "see behind numbers and [be] guided by intelligent use of tools." In sum, there does not appear to be one singular area of analytics upon which full-service research suppliers are focusing, but a range from the general need to add "analytics" capabilities to very defined needs among those who have committed to a specialty.

Full service research suppliers also need to bring in staff who can interpret data and develop insights that are meaningful to clients. At a general level, they need "analytical/business intelligence skill" and "business thinking." Some allude to the need to put different pieces together: "operate within any data stream, integrate and interpret impact from varied data sources" and "connect the data dots /

synthesize disparate points of the story." Other full service research suppliers need someone who can speak to a specific issue, such as "brand planning and strategy" or "qual research innovation strategy." In some cases, they may need a customized approach: "look at the big picture and how the work we do impacts different aspects of our client's world; to basically see things from the client's perspective."

Many full service research suppliers feel the need to add skills that help communicate insights, as well as sales and marketing messages, more effectively. Some mentioned the need more generally, such as "storytelling," "client-ready reports," "writing good reports," and "storytelling background, perhaps journalism experience, and teach them research." Some emphasize their preferred implementation: "report writer who makes beautiful PowerPoints!," "infographics," "create data visualization," "graphic designer who, among other things, creates reports and proposal templates in the CI accessible to everyone," and "deep expertise in dashboard construction for tracking ads and brands." Others emphasize the need to communicate insights derived from quantitative analysis, such as "quantitative report writing," "data scientist [who] knows how to visualize data and tell a story with it," and "experienced at storytelling based on data analysis."

Perhaps fleshing out the finding in the recent GRIT Business & Innovation Report regarding the high priority suppliers place on market research expertise, full service research suppliers also describe a range of research needs, many within what we might call the "established" or "traditional" areas of qualitative and quantitative research. Qualitative research needs range from general ("qualitative research," "experienced qualitative researcher," "senior qual researcher") to specific ("bi-lingual moderator," "French moderator / helping with the 2nd language in the country").

In the "Established Methodologies" section, we discussed how much qualitative research has changed since the onset of the pandemic, and this may be a significant driver behind the need some full service research suppliers have to find individuals who can lead it. These needs can range from the qualitative research process itself (the afore-mentioned "qual research innovation strategy") to practice-building ("add a Qualitative expert to help us build out our Qualitative Practice to complement our Quant work") to specific areas of expertise ("Ethnographic research leadership").

Similarly, needs for quantitative skills range from general ("basic and solid quantitative market research skills," "methodical quantitative skills") to more specific ("strong survey design skills," "questionnaire design at the highest level (inc. semantics, Conjoint, etc."). Unlike the top-of-mind needs in the qualitative kingdom, specific quantitative needs extend beyond data collection to analysis ("primary research quantitative segmentation," "survey results analysis / report preparation").

To be sure, effective analysis and reporting of qualitative research also requires specialized expertise, and the lack of specific mention of these skills may highlight some latent perceived differences across qualitative and quantitative research. Insights professionals may consider qualitative research to be a complete package; i.e., if you can do the design and data collection properly, you are likely able to do the analysis, implications, and reporting well, too. Qualitative research often is very transparent as the client can observe events real-time, suggest changes to the approach between events, and debate findings with the moderator as the research progresses. Further, clients trust qualitative researchers to interact directly with their customers and prospects, and, to be effective, they must understand the industry and business issues very well. This perspective carries through to the analysis and reporting, and so insights professionals may not distinguish between the phases of qualitative research, unless they are specifically focused on sources other than focus groups and IDIs, such as text or social media. Quantitative research, on the other hand, may typically entail a greater division of labor with different "experts" responsible for survey design and implementation, tabs set up, analysis, reporting, presenting, etc.

Unlike the top-of-mind needs in the qualitative kingdom, specific quantitative needs extend beyond data collection to analysis

As experienced research managers move up to more senior positions, there may be a vacuum of "traditional" researchers who are ready to step into these roles

Consistent with last spring's finding that suppliers are prioritizing market research expertise, full service research providers also express needs for project management skills that are specific to research. These are phrased as "research project management," "experienced research managers," and "project management at a researcher level." More specific needs include "project management at a researcher level" and "familiarity with quantitative research (because I don't do quant research) and excellent project management skills." Some emphasize the experience dimension: "research seniority" and "expert level market researcher – well rounded with experience in multiple industries." There is also a need for research design skills and experience, such as "DCM design," "chief methodologist with a PhD in marketing or related field," and "capacity to transform complex research requirements intro a structured and effective program and output."

Perhaps these needs are easily filled, or perhaps the relative urgency that the spring results seem to communicate indicate a dearth of potential hires with these skills. Possibly, as experienced research managers move up to more senior positions, there may be a vacuum of "traditional" researchers who are ready to step into these roles, exacerbating the need for market research expertise. This is a hypothesis for debate.

Full service research suppliers also have needs for data collection skills, some of which may indicate an intention to expand capabilities. Again, these range from the more general ("Super Recruiter, someone that knows how to find all audiences no matter how difficult they are to find") to more specialized ("digital data collection specialist," "B2B digital recruitment skills," "technological data collection skills"). The needs cover structured as well as unstructured data ("someone with strong experience in analyzing unstructured data and how to scrape for data to analyze").

One that seems especially representative of the times is the need for adaptability, flexibility, and versatility

Full service research suppliers are also looking for "technology" skills, and these needs cross many functions and may support new capabilities. Looking strategically, one supplier cites the need for "Technology Strategist that understands customer needs and associates [it] to our technology solution to provide that initial introduction and support," while another needs someone "well-versed with new technology and [can] come up with innovative ideas to improve overall delivery." Some are looking to improve reporting and other processes: a need for "IT and technology in analysis and presentation," someone with the "vision & skills to enable report automation," and "engineering and scripting capabilities – to build our own efficiency tools."

Others phrase their technical or technology needs in more tactical terms. One needs "coding ability in open source platforms like R, Python, etc." As mentioned earlier regarding reporting, another is looking to add "someone with deep expertise in dashboard construction." Others describe their needs in terms of general function or position, such as "software design and development" and "technical/software engineer."

In the Business Outlook section, we see that suppliers who increase revenue frequently credit marketing and business development for their success, while those who lost revenue usually identify it as an area to improve. Not surprisingly, it is also a skill that many full service research suppliers would like to add: "better business development function," "Business Development with marketing research experience," and, simply, "Biz Dev." Some are more targeted in their comments: from "lead generation" and "outbound sales and marketing" to "natural sales ability," "relationship management and sales skills," and "strong negotiation skills / commercial mindset."

Full service research suppliers also touched on other topics, and one that seems especially representative of the times is the need for adaptability, flexibility, and versatility. Often, this seems to be a personality trait: "ability to cope with change and ambiguity," "ability to adapt, carry on work," and "ability to easily and quickly switch between project management, account management and business development." It's also mentioned as a more defined skill: "versatility: of research techniques, quantitative (survey, desk research) and

qualitative (focus group, participant observation), task difficulty, junior (coding, cleaning files) and senior (conclusions, client presentations)" and "CHANGE manager!"

PERSPECTIVES FROM OTHER SUPPLIER TYPES

Full service research suppliers are by far the largest supplier type, and so they supply a great number of the responses to the question regarding which skills to add. For other supplier types, there are much fewer responses, and the findings are less well defined.

As with full service research suppliers, strategic consultancies, data and analytics providers, and technology providers express needs for business development expertise. Descriptions of this need from strategic consultancies include "individual with strong sales and business development skills," "sales and conversion skills," and "another senior level strategist to help pull in more business and could take a lead role with clients and generate more business." Some data and analytics providers describe this need as "major account new business generator," "selling the benefits of expertise to external clients," "retention," and "sales of custom research projects in a consultative way." For technology providers, the need may be more focused on new business development: "demand generation," "new relationship development," and "sales person to grow potential clients."

Beyond business development, strategic consultancies express a variety of needs across the breadth of activities, suggesting that the activities that need to be shored up differ across firms. Some need more data and analytical expertise ("programming and analysis skills," "understanding of AI and technical solutions to gather insights"), some need to improve or enhance reporting capabilities ("visual communication," "storytelling," "qualitative analysis and report narratives"), and some are looking for research skills ("recruiting," "better harnessing of tech to be able to manage online groups better, or know what tools would help," "DIY market research"). In particular, these needs seem to exist where technology intersects with core services ("understanding of AI and technical solutions to gather insights.")

Data and analytics providers seem to be more concerned with improving their core services. Some needs are expressed as broad data skills likely to be needed by any data and analytics provider ("data entry," "data science," "analytics," "data visualization"), while others are related to consulting ("business analysis") or technology ("understanding of various dashboard tools and using large datasets," "qualitative skills, but qual skills that can be scaled via technology").

Technology providers seem more concerned with data, analytics and functions common to any business, such as business development. Desired data skills include "data management/dashboarding for KPIs," "expertise in digital psychology/behavioral finance to help us understand the link between data and decision-making," and "database bridging," while analytics skills include "advanced analytics" and "Data Analytics (ability to query various data bases, join and wrangle data, visualize output, identify trends and inconsistencies, apply mathematical standards to analysis for validity)." Some comments regarding more universal business functions include "HR Manager to staff more appropriate people (we simply don't have a proper HR organization in place, which is a huge barrier to further development)," "Well-being manager," "internal comms," "Legal with specific knowledge about our market," "inter-departmental relationships and strategy," "product manager," and "insight management and librarian." Some of these needs focus specifically on clients: "client management," "customer support," "client services," and "SME for client onboarding and customer training." It seems like the average technology provider is grappling with the challenge of growing from an entrepreneurial mindset to a more mature business culture.

Data and analytics providers seem to be more concerned with improving their core services

It seems like the average technology provider is grappling with the challenge of growing from an entrepreneurial mindset to a more mature business culture

THE BIG PICTURE

To continue to grow in your career, however, it seems that facility with a variety of methods, data, and heuristics will be necessary, along with a healthy familiarity with technology

The insights industry depends on its ability to impact business and organizations positively, and, to do this, it must effectively communicate business-relevant or mission-relevant insights with a reliable fact-base. As many insights professionals are experiencing, market research expertise is a requirement to make this happen, not because traditional methodologies are eternal, but because the discipline supports all types of endeavors and ensures the robustness of their deliverables.

To say that in-demand skills concern communication effectiveness, business context, analytical ability, and data skills does not tell us much about the "evolving" insights professional because these are fundamentals. Evolution occurs within these pillars and involves the application of multiple data sets or points of view, usage of new types of data, new modes of communication, and new methodologies plus the technology that enables this variety. Across the different types of insights buyers and suppliers, niches exist for a range from "traditional" to emerging skills, although it seems as though a meaningful exposure to relevant technology would help any insights professional to evolve.

We've seen that buyers use many different kinds of analytical tools and need to integrate all phases of the research and insights development processes to create their deliverables. We've also seen that suppliers have different ways of blending various skills into their own unique business models. Given all this diversity, there seems to be plenty of opportunity to specialize in order to make your mark in a particular field; you don't need to be a Renaissance insights professional. To continue to grow in your career, however, it seems that facility with a variety of methods, data, and heuristics will be necessary, along with a healthy familiarity with technology.

To continue to grow in your career, however, it seems that a facility with a variety of methods, data, and heuristics will be necessary, along with a healthy familiarity with technology

TODAY'S INSIGHTS PROFESSIONAL: TOMORROW'S CEO

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"Well Rounded" Doesn't Do It Justice

Many moons ago, when I first started in market research, the insights professional was a bit of jack-of-all-trades. Throughout the workday, you would play the part of ethnographer, statistician, programmer, graphic designer, therapist, and consultant. To say you had to be "well rounded" just doesn't do it justice. To be successful, you had to conjure real-time skillsets, on-demand personality quirks, and level-headed stoicism to address any issue thrown at you. The top performers, however, enacted the most thrilling persona of all – the one with validated impact – the role of CEO.

Insights: Best Equipped Person in the Room

When you think about it, the impact of insights is pretty incredible. Insights help humans to be understood in order for companies to develop brands, products, and services that change their lives. At GutCheck, we call this Agile Human Experience Intelligence™, a multi-dimensional way of connecting brands to people.

But intelligence only matters if it delivers results. A "winning concept" means nothing if it doesn't perform in market. A "breakthrough innovation" is only successful if it meets margin requirements. A "revolutionary campaign" is only applauded if it helps you sell. The bottom line matters.

That's why the evolving insights professional needs to constantly sharpen their business acumen and think more holistically about the implications of their insights. They need to be prepared to answer any question thoughtfully and with backed-up perspective.

Stop Saying, "Good Question" – Sometimes, It's Not

But I would argue that today's insights professional also needs to be bold – to challenge stakeholders' questions as much as justify responses. Think about the broader business implication – the big decision being made – what SHOULD we be asking ourselves? What human understanding, quantifiable metrics, and hypotheses must we address? What part of the narrative is simply noise, and should be disregarded? Part of good decision making is not "losing the plot", but rather staying focused on the issue at hand. Today's insights professional must think like a CEO.

The CEO's Remit

One aspect of having a CEO mindset is cross-functional accountability. When designing, executing, and delivering research, what are the implications to Operations, Finance, Procurement, in addition to Sales and Marketing? What are the internal effects on decisions – what does it mean for employee morale, retention, and growth? What are tradeoffs that must be made, and are there novel ways to see opportunities in those tradeoffs? Even if your main research stakeholder represents a single department, having this cross-functional perspective is imperative to strategic alignment.

Another critical CEO purview is fiscal responsibility. What will it take to deliver on decisions made from research? What supply chain, staffing, and resource considerations must be factored into the equation? While not required to be financial wizards, expert insights professionals provide full visibility into the economic aspects of their recommendations.

Then there's the softer skills of how you inspire, motivate, and execute the vision. The strongest insights leaders have conviction in their recommendations, back up intuition with facts, and persuasively "sell" the vision internally and externally. Insights leaders must be the investigators, authors, and ambassadors of the human truth.

At the End of the Day, Own It.

The evolving insights leader will be evaluated and valued based on their tangible contributions to the business. This includes tracking execution results, not being afraid to pivot, imbuing human understanding throughout the organization, assessing and articulating the cross-functional impact of decisions and recommendations, communicating with influence, and embracing accountability for outcomes. It's what any good CEO would do – so own it.

ROLE OF INSIGHTS GROUP

The pandemic forced significant proportions of insights staffs to shift their focus from growing and maintaining the business to saving it. Over the past 12 months, insights staffs appear to be taking on the same roles they had before the pandemic, although they are not necessarily executing them in the same ways. Will the latest COVID-19 surge undo the progress of the past 12 months or are buyers now better prepared to hold their ground?.

PRIMARY ROLE OF INSIGHTS FUNCTION

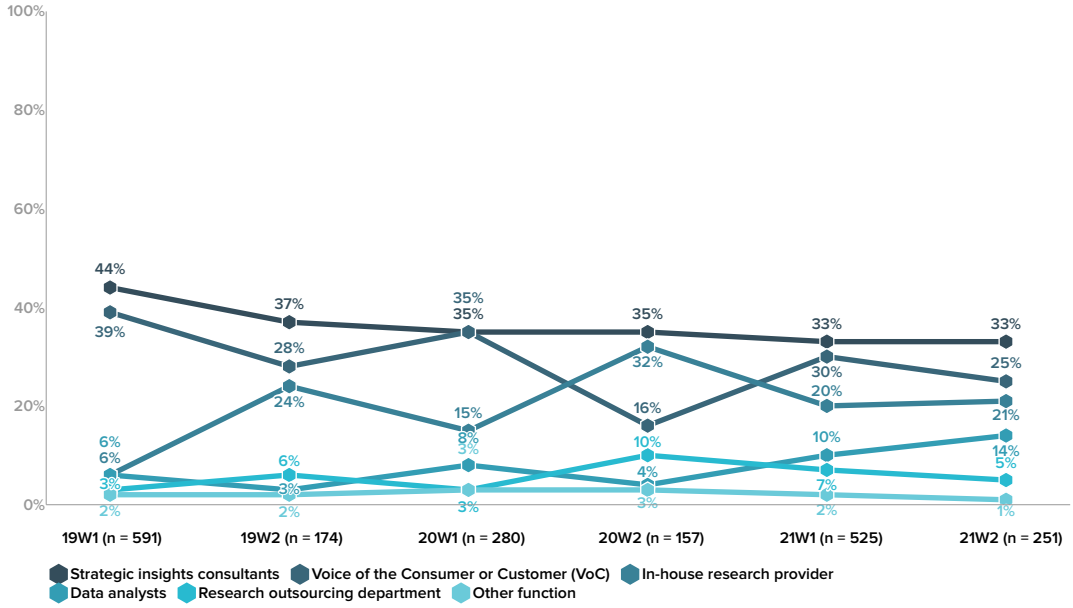
In past GRIT surveys, we've asked buyers to tell us about their insights departments or groups, but in the current survey we ask them to think about "insights professionals" at their company and then consider them as a group. So, when we talk about "the insights function," we are talking about the sum total of activities across all those who primarily function as insights professionals, and these people may or may not be organized into a formal group or department.

To better understand the insights function, GRIT asks buyers to choose a specific role that best describes what insights professionals do for their organization. Of course, many roles may be performed, and we ask for those, too, but we also want to understand the "elevator speech" version of what they focus on in terms of strategic insights consulting, Voice of the Customer, in-house research provider, data analysis, research outsourcing, or something else. Up until now, GRIT also offered the choice of "hybrid," but we have removed this option because it's sort of a cop out; we want one role that most stands out, but we are not ignoring the others. In the accompanying line chart, responses from past waves have been re-normalized with "hybrid" removed.

The role that stands out most is strategic insights consulting. It is the leading role or tied for the lead in each wave, but it has also declined since 2019, largely due to the growth of in-house research and data analyst roles. These two roles are the ones most likely to get a boost from research automation, and although the rise has not been steady, it is undeniable. Both stood at 6% in 19W1, but since then in-house researcher has been at 20% or more in each wave except the first wave of the pandemic, and the data analyst role has grown for three straight waves to more than double its initial measurement in 2019. In-house researcher hit a high of 32% last fall when buyers were scrambling to figure out how to get research done and seems to have returned to its equilibrium level of about 20%.

Functions with a primary role of research outsourcing also hit a high last fall, reaching 10%, more than 3 times its initial measurement from 2019. Although clearly a secondary role, it appears that the pandemic pressured more organizations to prioritize outsourcing while others were prioritizing insourcing.

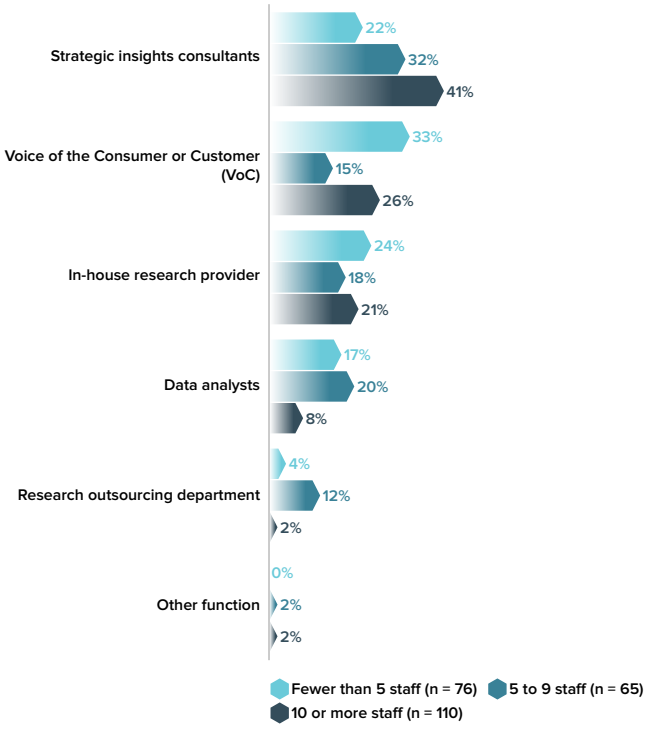
BUYER SEGMENT IDENTIFICATION/MOST IMPORTANT ROLE (BUYER)



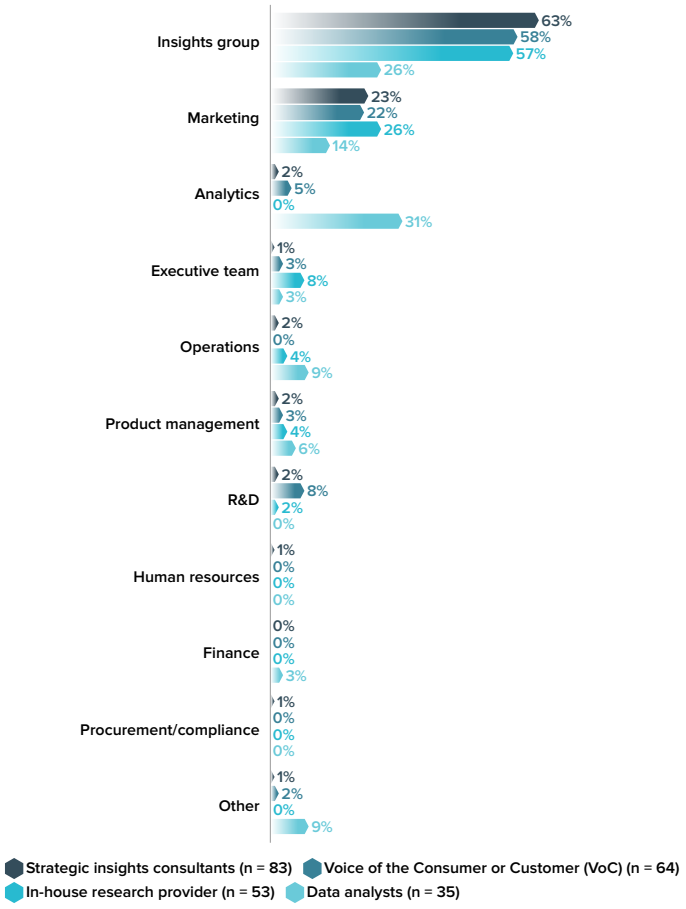
Voice of the Consumer or Customer (VoC) has been the most volatile role of all. It peaked at 39% the first time it was measured, hit a low of 16% last fall, and rebounded to 30% last spring before dropping slightly to 25% now. Its nadir came when the data supply was threatened, causing buyers to ask insights professionals to focus on in-house research or research outsourcing because it is useless to act as the voice of something if you can't find out what it wants to say.

Directionally, the number of insights professionals on staff is related to how they define their primary roles. Generally, as staff size increases, so does the likelihood that insights professionals will primarily function as strategic insights consultants. Smaller staffs of fewer than 10 professionals are more likely than larger ones to function primarily as data analysts. Mid-size staffs of 5 to 9 professionals are at least three times more likely to act primarily as research outsourcers than either the smallest or the largest staffs (this is the only statistically significant difference), and they are less likely to function primarily as the Voice of the Customer.

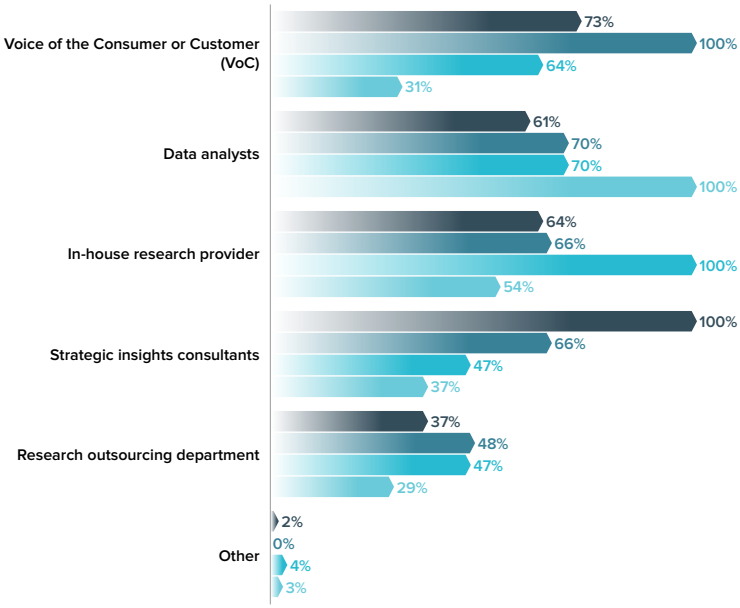
BUYER SEGMENT IDENTIFICATION/MOST IMPORTANT ROLE: INSIGHTS GROUP SIZE (BUYER)



ALL INSIGHTS FUNCTIONAL AREAS: MOST IMPORTANT ROLE (BUYER)



ALL INSIGHTS FUNCTION ROLES: PRIMARY ROLE (BUYER)



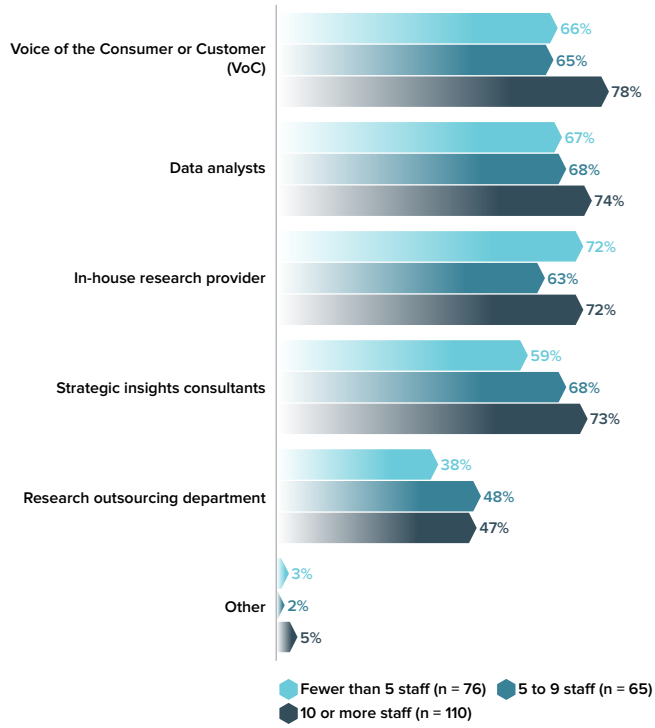
Most buyers who say their insights staff function primarily as strategic insights consultants, Voice of the Customer, or in-house researchers also say that these insights professionals work in a formal insights group, and about-one-quarter say they work in marketing. The last quarter are distributed across various other internal functions. Only about one-fourth who function primarily as data analysts work as part of an insights group, whereas about one-third work in an analytics department. The next most likely places to find them are in marketing (14%) and operations (9%). Although the most likely place to find the insights function is within an insights group, buyer organizations vary with respect to where they locate insights professionally functionally.

Although the primary role skews toward strategic insights consultant, when all roles are considered, the percentage of insights staff that function as VoC, data analysts, in-house research providers, and/or strategic consultants hovers around 70%. These four roles are very common, but research outsourcing is not: fewer than half say that their staff functions as research outsourcers. Most of those who claim strategic insights consulting as their primary role also act as the Voice of the Customer, in-house researchers, and data analysts, and most of those whose primary role is Voice of the Customer also perform all four roles. When the primary role is in-house researcher, however, fewer than half act as strategic insights consultants, although most also act as Voice of the Customer and data analysts. Finally, those who are primarily data analysts are the least likely to perform other functions. About half act as in-house researchers and about one-third act as strategic insights consultants, Voice of the Customer, or research outsourcers.

Insights staffs of different sizes play similar roles in their organizations. Most act as Voice of the Customer, data analysts, in-house researchers, and strategic insights consultants. Although there are no significant differences across sizes, the role of strategic insights consultant becomes more common as insights staffs get larger, and the largest staffs are more likely to act as Voice of the Customer. The mid-size staffs are least likely to act as in-house research providers.

Although the most likely place to find the insights function is within an insights group, buyer organizations vary with respect to where they locate insights professionally functionally

ALL INSIGHTS FUNCTION ROLES: INSIGHTS GROUP SIZE (BUYER)



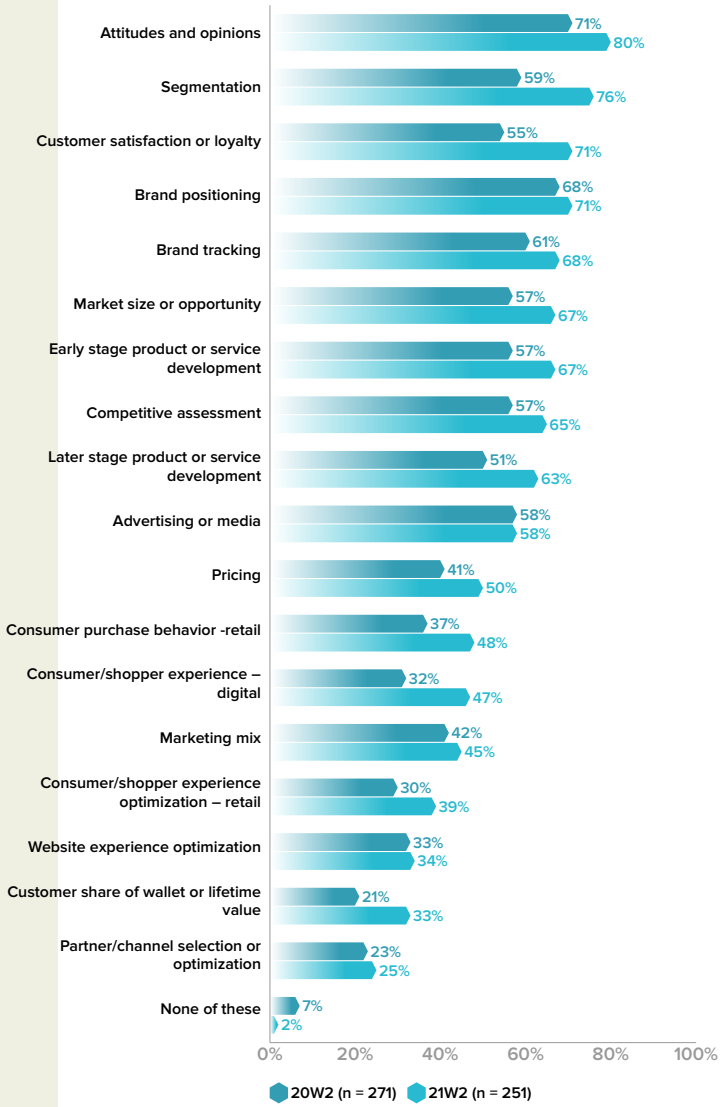
AREAS IMPACTED BY INSIGHTS FUNCTION

As it was a year ago, most insights functions directly impact 10 areas: attitudes and opinions, segmentation, customer satisfaction or loyalty, brand positioning, brand tracking, market size or opportunity, early stage and later stage product or service development, competitive assessment, and advertising or media. However, the size of those majorities has increased in each area except advertising/media, which has held steady at 58%. Overall, nine areas saw double-digit increases: segmentation (+17%), customer satisfaction or loyalty (+17%), digital consumer/shopper experience (+15%), later stage product or service development (+12%), customer share of wallet or lifetime value (+12%), retail consumer purchase behavior (+11%), market size/opportunity (+10%), early stage product or service development (+10%), and retail consumer/shopper experience optimization (+10%). Last year represented a contraction of impact areas as insights work had to focus on short term solutions and digital marketing, but now their impact is broadening again.

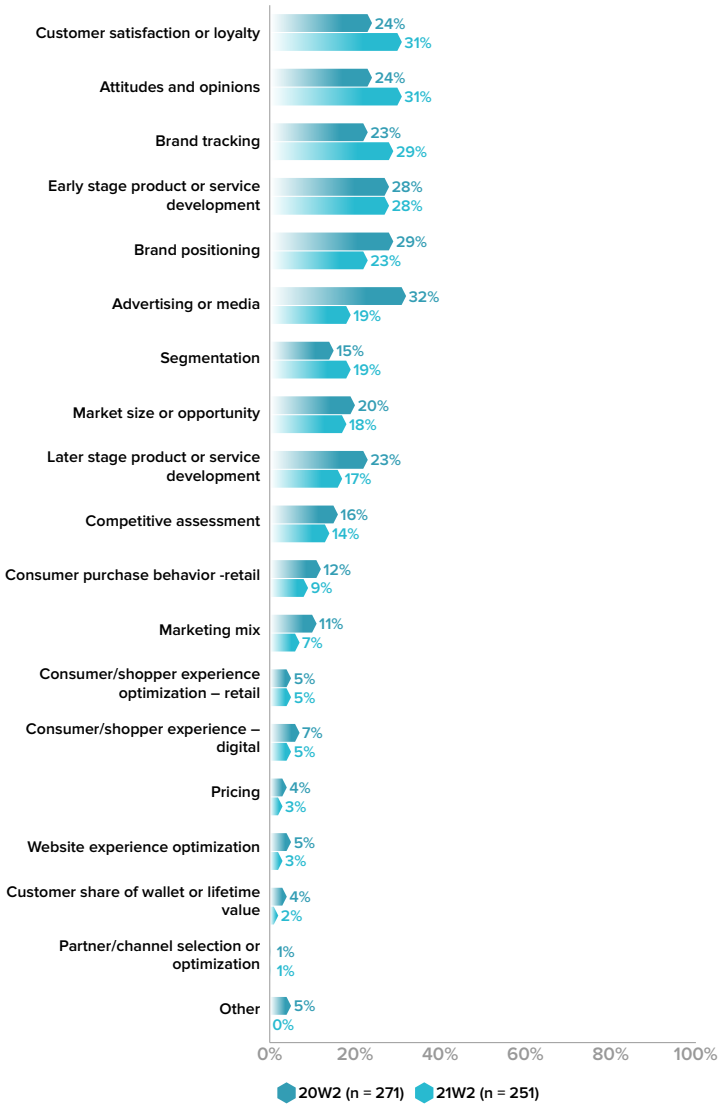
Last year represented a contraction of impact areas as insights work had to focus on short term solutions and digital marketing, but now their impact is broadening again

Looking at just those areas where insights have the most impact, the top three last year were advertising/media (32%), brand positioning (29%), and early stage product or service development (28%). Now the impact has shifted toward customer satisfaction or loyalty (31%, +7%), attitudes and opinion (31%, +7%), and brand tracking (19%, +6%). Arguably, these trends represent shifts from the short term focus necessary to combat the effects of the pandemic back toward long term planning.

ALL AREAS DIRECTLY IMPACTED BY INSIGHTS FUNCTION: GRIT WAVE (BUYER)



AREAS MOST DIRECTLY IMPACTED BY INSIGHTS FUNCTION (UP TO 3): GRIT WAVE (BUYER)



Areas where the insights staff have direct impact occasionally vary according to their primary role. Strategic insights consultants are more likely to directly impact segmentation, brand tracking, and marketing mix. In-house research providers are less likely to directly impact pricing and marketing mix, and data analysts are less likely to directly impact brand tracking and later stage product development.

ALL AREAS DIRECTLY IMPACTED BY INSIGHTS FUNCTION: PRIMARY ROLE (BUYER)

% Directly impact	Strategic insights consultants	Voice of the Consumer or Customer (VoC)	In-house research provider	Data analysts
Attitudes and opinions	87%	80%	83%	63%
Segmentation	88%	70%	74%	66%
Customer satisfaction or loyalty	72%	70%	75%	66%
Brand positioning	82%	69%	70%	51%
Brand tracking	86%	69%	55%	46%
Market size or opportunity	76%	61%	66%	66%
Early stage product or service development	76%	72%	62%	46%
Competitive assessment	76%	64%	64%	51%
Later stage product or service development	71%	66%	68%	34%
Advertising or media	64%	59%	53%	40%
Pricing	61%	56%	30%	37%
Consumer purchase behavior – retail	51%	58%	40%	31%
Consumer/shopper experience – digital	57%	53%	36%	29%
Marketing mix	63%	41%	19%	43%
Consumer/shopper experience optimization – retail	36%	50%	38%	29%
Website experience optimization	39%	34%	34%	26%
Customer share of wallet or lifetime value	42%	34%	25%	20%
Partner/channel selection or optimization	34%	19%	25%	14%
None of these	1%	2%	2%	3%
n =	83	64	53	35

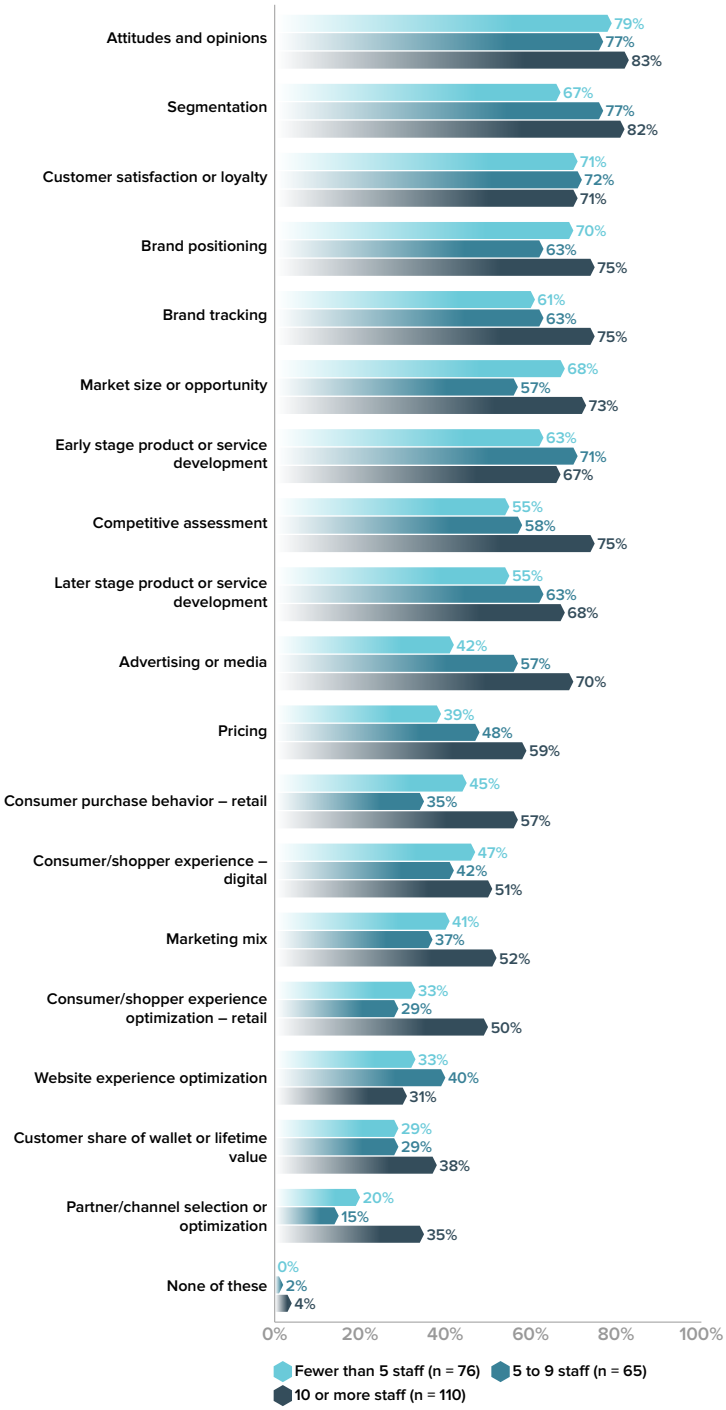
Narrowing the focus to the areas where insights have the most impact, there are a few differences according to primary role. Strategic insights consultants are more likely than others to have their most direct impact on brand positioning and tracking plus segmentation, and, with data analysts, also have the most direct impact on advertising/media. Those who primarily act as Voice of the Customer or in-house research providers have the most direct impact on customer satisfaction/loyalty. Data analysts and in-house researchers are more likely to have the most direct impact on competitive assessment, and data analysts are the most likely to impact market size/opportunity.

AREAS MOST DIRECTLY IMPACTED BY INSIGHTS FUNCTION (UP TO 3): PRIMARY ROLE (BUYER)

% Most directly impact (up to 3)	Strategic insights consultants	Voice of the Consumer or Customer (VoC)	In-house research provider	Data analysts
Customer satisfaction or loyalty	24%	39%	36%	31%
Attitudes and opinions	30%	30%	32%	31%
Brand tracking	36%	20%	30%	23%
Early stage product or service development	33%	33%	28%	14%
Brand positioning	34%	16%	21%	14%
Advertising or media	22%	14%	9%	23%
Segmentation	25%	16%	15%	17%
Market size or opportunity	16%	19%	11%	31%
Later stage product or service development	22%	16%	21%	9%
Competitive assessment	11%	11%	21%	26%
Consumer purchase behavior – retail	6%	17%	6%	9%
Marketing mix	8%	8%	4%	9%
Consumer/shopper experience optimization – retail	2%	8%	4%	6%
Consumer/shopper experience – digital	5%	8%	4%	3%
Pricing	4%	2%	2%	3%
Website experience optimization	1%	2%	9%	3%
Customer share of wallet or lifetime value	0%	3%	2%	3%
Partner/channel selection or optimization	2%	0%	2%	0%
n =	83	64	53	35

Insights staff with 10 or more professionals are more likely to directly impact competitive assessment, advertising/media, consumer/shopper retail experience optimization, and partner/channel selection/optimization. Directionally, impact increases with staff size for segmentation, later stage product/service development, and pricing, and staffs of 10 or more have more impact on brand tracking, consumer retail purchase behavior, marketing mix, customer share of wallet/lifetime value, and partner/channel selection/optimization.

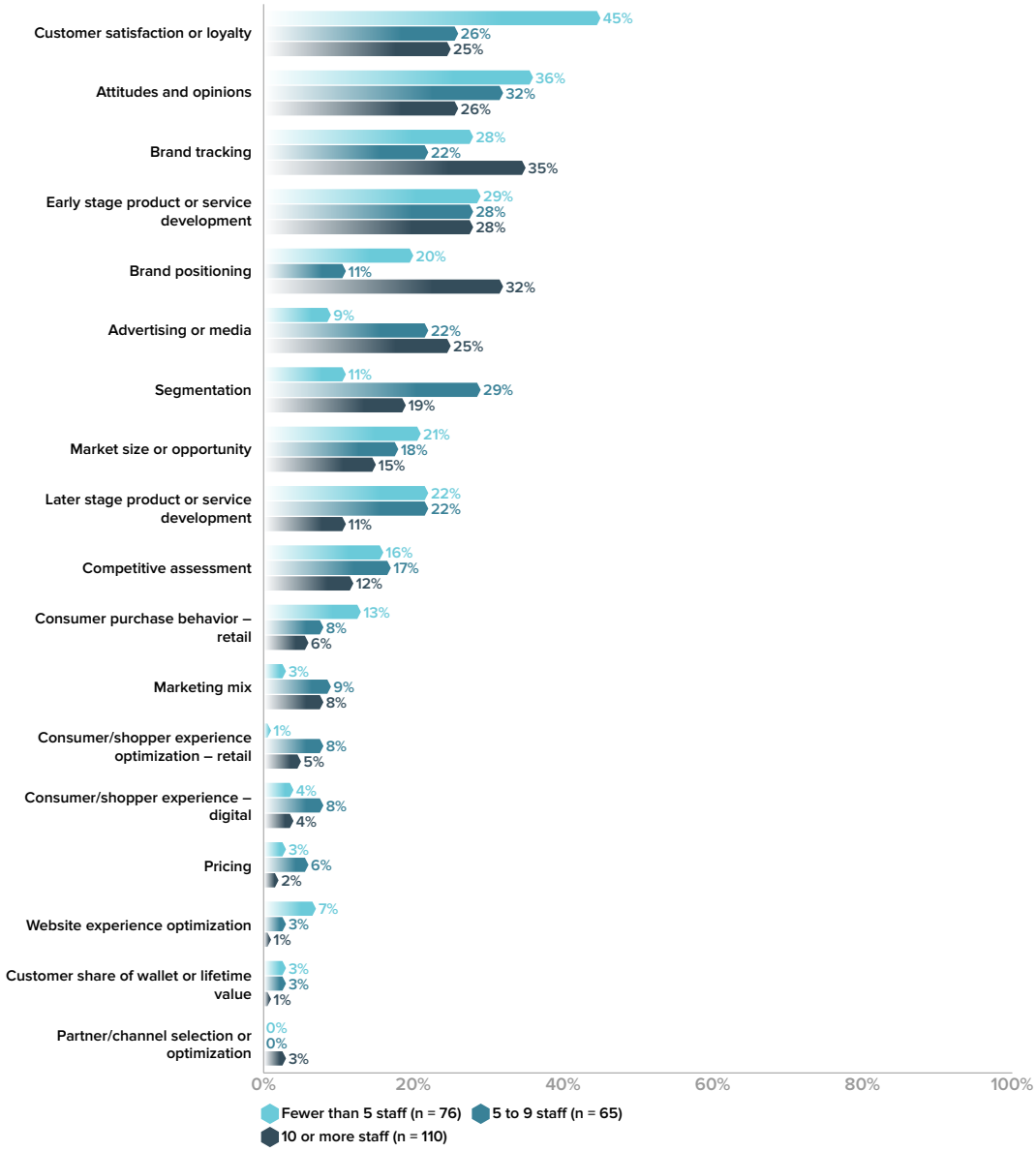
ALL AREAS DIRECTLY IMPACTED BY INSIGHTS FUNCTION: INSIGHTS GROUP SIZE (BUYER)



The largest teams are more concerned with brand, the smallest with customer satisfaction, but insights teams of all sizes are concerned with early stage product work

Again narrowing the focus to areas with the most direct impact, there are some differences and similarities. The top three areas for staffs of 10 or more are brand tracking (35%), brand positioning (32%), and early stage product/service development (28%). For mid-size staffs with 5 to 9 professionals, the top three are attitudes and opinions (32%), segmentation (29%), and early stage product/service development (28%). For the smallest insights teams, the top three are customer satisfaction or loyalty (45%), attitudes and opinions (36%), and early stage product/service development (29%). The largest teams are more concerned with brand, the smallest with customer satisfaction, but insights teams of all sizes are concerned with early stage product work.

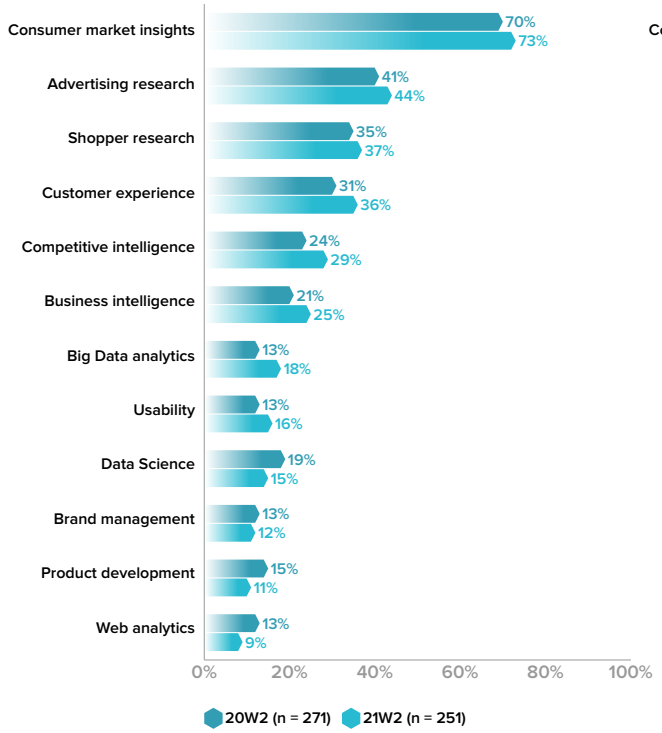
AREAS MOST DIRECTLY IMPACTED BY INSIGHTS FUNCTION (UP TO 3): INSIGHTS GROUP SIZE (BUYER)



AREAS LEAD OR CONTRIBUTE

The insights function can lead a variety of areas, and these responsibilities have not changed since last year, though some have grown. As they did last year, most insights functions lead consumer market insights (70% last year, 73% now), about 40% lead advertising research, and about one-third lead shopper research and customer experience. For three areas, insights leadership increased by 5%: customer experience (to 36%), competitive intelligence (to 29%), and Big Data analytics (to 18%). Only one area declined by 5%, product development (to 11%).

ALL AREAS LED BY INSIGHTS FUNCTION: GRIT WAVE (BUYER)



AREAS INSIGHTS GROUP LEAD OR CONTRIBUTE: GRIT WAVE (BUYER)

Considering areas to which insights contribute or lead, the situation is mostly stable compared to last year. Involvement in advertising research is up 11% (to 86%) and two other areas increased by at least 5%, consumer market insights (to 98%) and customer experience (to 92%), but there are no dramatic changes in rankings. The only area to fall by 5% is Data Science (to 64%).

There are a few areas where leadership varies by primary insights role, at least directionally. Strategic insights consultants are more likely to lead consumer market insights, advertising research, and competitive intelligence. Along with Voice of the Customer, they are more likely to lead shopper research. Voice of the Customer is more likely to lead to customer experience, and data analysts are more likely to lead business intelligence, Big Data analytics, and Data Science.

Most insights functions lead consumer market insights (70% last year, 73% now), about 40% lead advertising research, and about one-third lead shopper research and customer experience

AREAS LED BY INSIGHTS GROUP: PRIMARY ROLE (BUYER)

	Strategic insights consultants	Voice of the Consumer or Customer (VoC)	In-house research provider	Data analysts
Consumer market insights	84%	73%	70%	51%
Advertising research	54%	30%	42%	37%
Shopper research	42%	41%	28%	29%
Customer experience	30%	50%	32%	26%
Competitive intelligence	37%	25%	21%	31%
Business intelligence	29%	17%	11%	43%
Big Data analytics	19%	11%	8%	34%
Usability	19%	13%	19%	11%
Data Science	16%	9%	8%	31%
Brand management	12%	16%	6%	9%
Product development	10%	8%	17%	3%
Web analytics	8%	9%	4%	14%
n =	83	64	53	35

Expanding to include areas where the insight function contributes as well as leads, strategic insights consultants and Voice of the Customer are more likely to be involved in advertising research, brand management, and business intelligence. Voice of the Customer is more likely to be involved in shopper research, and data analysts are more likely to be involved in Data Science, Big Data analytics, and web analytics.

AREAS INSIGHTS GROUP LEAD OR CONTRIBUTE: PRIMARY ROLE (BUYER)

% Lead or contribute to it	Strategic insights consultants	Voice of the Consumer or Customer (VoC)	In-house research provider	Data analysts
Consumer market insights	99%	100%	96%	94%
Customer experience	93%	94%	91%	94%
Product development	90%	94%	92%	77%
Competitive intelligence	94%	86%	81%	77%
Advertising research	89%	92%	72%	77%
Brand management	92%	92%	74%	71%
Business intelligence	88%	88%	74%	89%
Usability	75%	73%	75%	74%
Data Science	70%	52%	58%	83%
Shopper research	60%	77%	45%	69%
Big Data analytics	69%	63%	42%	83%
Web analytics	52%	45%	36%	63%
n =	83	64	53	35

By size of insights function, leadership increases in advertising research and Big Data analytics as the staff size grows. Staffs of five or more are more likely to lead competitive intelligence and usability. Staffs of 10 or more are more likely to lead shopper research, Data Science, and web analytics.

By size of insights function, leadership increases in advertising research and Big Data analytics as the staff size grows

AREAS LED BY INSIGHTS GROUP: INSIGHTS GROUP SIZE (BUYER)

% Lead it	Fewer than 5 staff	5 to 9 staff	10 or more staff
Consumer market insights	64%	74%	79%
Advertising research	34%	46%	50%
Shopper research	32%	34%	44%
Customer experience	37%	32%	37%
Competitive intelligence	22%	31%	33%
Business intelligence	21%	26%	26%
Big Data analytics	8%	18%	24%
Usability	11%	18%	18%
Data Science	9%	12%	21%
Brand management	9%	11%	14%
Product development	11%	12%	10%
Web analytics	7%	6%	12%
n =	76	65	110

Expanding to include areas to which they contribute as well as lead, staffs of 10 or more are more likely to be involved in Big Data analytics and web analytics, and those with 5 or more are more likely to be involved in Data Science.

AREAS INSIGHTS GROUP LEAD OR CONTRIBUTE: INSIGHTS GROUP SIZE (BUYER)

% Lead or contribute to it	Fewer than 5 staff	5 to 9 staff	10 or more staff
Consumer market insights	96%	97%	99%
Customer experience	91%	91%	95%
Product development	87%	88%	92%
Competitive intelligence	82%	85%	90%
Advertising research	84%	83%	87%
Brand management	86%	85%	85%
Business intelligence	86%	80%	88%
Usability	72%	72%	76%
Data Science	50%	68%	72%
Shopper research	64%	62%	65%
Big Data analytics	53%	55%	75%
Web analytics	46%	42%	56%
n =	76	65	110

THE BIG PICTURE

In 2020, as the pandemic progressed, many had to reallocate their insights staff from growing and maintaining the business to rescuing it. At the start of 2020, 35% of buyer insights staffs defined their primary role as strategic insight consultants and an equal proportion said its role was to be the Voice of the Customer. By the end of 2020, 33% identified as strategic insights consultants, but the proportion of VoC more than halved to just 16% while the proportion focused on in-house research more than doubled, to 32%, and the proportion of research outsourcers tripled, to 10%. A significant swath of insights groups pivoted from championing the Voice of the Customer to trying to find ways to hear it while they bailed water and stuck fingers in dikes.

By spring of 2021, the percentage of strategic insights consultants was still holding steady at 33% and VoC had reverted back to 30%; both remain at or near those numbers now. A year ago, insights staffs were having the most impact on immediate issues such as advertising, brand positioning, and new product development. Although new product development might normally be considered more of a long-term, strategic endeavor rather than an immediate concern, last year was far from normal. A year later, insights groups are having the most impact on customer satisfaction and loyalty, attitudes and opinions, and brand tracking, and that sounds more like a return to managing the business rather than saving it.

Between the time the survey closed and the final draft of this report, COVID-19 has surged, once again impacting shopping, travel, and leisure, and there is some uncertainty as to how similar or different life will be compared to the first outbreak. The new variants are likely more contagious but less harmful, and the world has had time to learn ways to adjust and adapt to it, unlike in early 2020. It remains to be seen whether insights groups will be forced back into emergency mode as they were last year, or if they can maintain the sorts of roles they had prior to the pandemic.

Insights groups are having the most impact on customer satisfaction and loyalty, attitudes and opinions, and brand tracking, and that sounds more like a return to managing the business rather than saving it

5 COMMON PAIN POINTS FACING INSIGHTS GROUPS

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There is no question that insights professionals play a critical role across an organization. They are a strategic partner to sales, product marketing, R&D, and leadership. They are the voice of the consumer, experts on trends and curators of data. The insights they supply stakeholders influence business decisions of today and future innovations.

As a vendor serving insights teams, it is important to understand their roles and the challenges that hinder them from focusing on their primary responsibilities.

In our work with insights teams across industries, we have interviewed dozens or organizations to gain a clearer understanding of needs and goals. Through these interviews, we have found five pain points that seem to universally stand out.

Too much data, too many places

It is a challenge to find answers from the owned or licensed data spread across too many tools, systems, and "folders." With so much information in so many places, it is hard to know what there is, where it is and how to leverage it when needed. It is impossible to find THE best answer. Even if you can keep track of all of the sources, nobody has the time to search them all for the specific answers needed. "Where do I even begin?" With limited time to get the work done, there is only so much time you can spend finding out what's available. "Search finds documents, we really appreciate answers"

A Limited View

Each tool has its own interface that requires proficiency and offers varying levels of search. None of the tools are consistent with one another. This results in spending too much time in numerous interfaces ("if I even remember the sources I have logins for"). With no triangulation of the data, you are left to wonder how you could possibly have the complete picture.

Same Question; Different Day

There are so many questions from various constituents, it is hard to have the time to answer all of them. Often the same questions are asked again and again. This redundancy requires locating and re-presenting work that has already been published. This is very disruptive as each query takes time and distracts from planned work. "If we could get our clients to start with the search before reaching out, that would save a tremendous amount of time."

The game of Guess who?

With the frustration of finding past information when needed, the current state is to ask others to help. The round trip from asking the question to getting a response can consume many hours. (Even in the best response times, with one in Australia and one in Europe, the answer is delayed for at least a day). "If I happen to get lucky and track down someone in the know, it's still difficult to access the learnings. They need to extract relevant information for me."

Groundhogs Day

"How do I know the work wasn't done before?" There's no way to know what everyone else (including predecessors) have worked on. If you don't know who to contact or where to look, the risk of duplication is high. This is both time consuming and expensive. In real time, different team members are receiving similar or related requests from clients; redundancies continue.

Listening to the voice of insights groups, the inefficiencies are clear. They also provide a roadmap to where technology can drive the most value. New capabilities have already emerged, and much groundwork laid for an empowering path ahead. Working in partnership with clients and vendors, we look forward to continuing to make huge gains in delivering total Knowledge Management to ease these common pain points.

INDUSTRY GRITSCAPE

The market structure of the insights and analytics industry is rapidly changing due to the pressure of several interrelated forces, impacting how both buyers and suppliers define themselves and their focus areas. In some ways the supplier community is in a clearly defined bifurcation between service and technology-centrism, but there is a massive amount of overlap as well and many other segments are under pressure to clearly differentiate themselves.

Since 2018 we have been striving to provide a comprehensive market structure framework to the insights and analytics industry. Originally, we visualized this as a geographic map, inspired by our love of fantasy, but due to the shifting landscape of the industry we decided that was too limiting, so in this edition we are going for something a bit more aligned to a conventional Lumascape, while maintaining our desire to show the complex and dynamic nature of our market structure. We call this the GRITscape, our take on the Lumascape concept, and it visualizes the evolving industry as a market populated by buyer and supplier companies positioned according to the degree of similarity of their functions (buyers) or core offerings (suppliers). The end result is driven by what insights professionals told us about their own companies, with some necessary data cleaning and recoding here and there for clarity.

On that last point we should point out that we do not assign any companies into categories, nor do we choose which companies are listed. We ask GRIT respondents a series of questions to assign their own organizations into our segments, and also give them the choice of whether to have their company listed. So the GRITscape is driven entirely by the information given to us by our respondents, not by any subjective measures we choose. This approach can lead to some messiness in the data (which we'll delve into later in this section), but even that messiness is an important learning, as you'll see.

It was particularly appropriate to undertake a new way to visualize the market now due to three highly disruptive drivers:

- Changes driven by adaptation to COVID-19 disruptions
- The acceleration of the bifurcation of the supplier community into primarily "service-led" and "technology-driven"
- The unprecedented level of mergers, acquisitions, and investment activity in the industry in 2021

These trends are interrelated to be sure, and collectively add up to a rapidly changing market that we capture throughout this report. Our goal here is to show these changes in a visual way that we hope is both easy to understand and engaging for our readers.

So the GRITscape is driven entirely by the information given to us by our respondents, not by any subjective measures we choose

CAPITAL MARKETS ARE DRIVING CHANGES IN INDUSTRY STRUCTURE

Over $26B flowed through this industry across 142 transactions in 2021, with almost $23B of that just within the last six months

The massive amount of change due to the impact of capital market interest in our space is worth briefly exploring before we dive into the actual respondent data.

Dependent on context, "follow the money" is a phrase with a lot of different meanings, but one of its most basic implications is that, by following financial flows, insight can be gained. That is certainly true when we examine the unprecedented amount of investment and merger/acquisition activity that happened in the insights and analytics space in 2021 (and will likely continue in 2022).

Here is a quick summary of the activity using articles published by our friends at MR Web:

Acquisition Values	Investment Values	Acquisition Deal Volume	Investment Deal Volume	Period
$5,187,600,000	$84,200,000	17	4	Q4
$14,178,600,000	$3,375,600,000	47	15	Q3
$2,164,200,000	$0	24	0	Q2
$1,365,000,000	$8,200,000	33	2	Q1
TOTALS				
$22,895,400,000	$3,468,000,000	121	21	

And that isn't even complete. Most deals reported fall under the "terms were not disclosed" category, and we are sure some deals were not reported at all, so the numbers cited above are only part of the story. The totals are likely much, much higher. That said, just using this partial data, over $26B flowed through this industry across 142 transactions in 2021, with almost $23B of that just within the last six months of the year! *Unprecedented* doesn't even do this level of activity justice – it is downright *astounding*.

So, what do we make of this amazing level of financial transaction activity? Well, we have a few thoughts that we hope will help everyone get a handle on what is happening and what it means for the industry.

In the last few years, the closest sector to our industry that saw a surge like this was the heyday of AdTech and MarTech. That was driven by three key characteristics: 1.) technology-driven companies, 2.) access to critical data streams, and 3.) advanced analytics. The heyday of research is *now*, and we are seeing the same three characteristics for the majority of the deals happening; the largest value acquisitions are all SaaS-based businesses and virtually all of the investments are going to tech/data/analytics companies. It doesn't mean that no service-based businesses participate in this frenzy, but they are not driving it. However, many of the technology-led businesses also do have service offerings, sometimes substantial ones, but that service-based revenue is typically not the "tip of the spear" when it comes to driving deal value.

Largest value acquisitions are all SaaS-based businesses and virtually all of the investments are going to tech/data/analytics companies. It doesn't mean that no service-based businesses participate in this frenzy, but they are not driving it

The combination of scalability for tech-led businesses and the demand for data to unlock new business value is obviously attractive but combined with the fact that the insights and analytics industry in North America grew last year, and that it is an industry being disruptively transformed by multiple trends makes it a virtually irresistible target for financial markets. That is why we are seeing both consolidation (the merger of sample suppliers Lucid and Cint being the most obvious example) and venture capital activity driving growth for many

companies (with technology providers Attest, Disqo, Suzy being recent examples). What is particularly interesting across transaction types are the large valuations; our industry traditionally did not see high forward revenue-based multiples, but in 2021 that has been the rule with 10X (and higher!) being normal. That is a sure sign that the industry is now being considered as a good bet for continued growth and value creation. And that trend will be driven by technology-led companies, hence the significant repositioning of many suppliers we see, as well as the realignment of many buyers who are using them in a transformative way.

HOW GRIT RESPONDENTS DESCRIBE THEIR ORGANIZATIONS

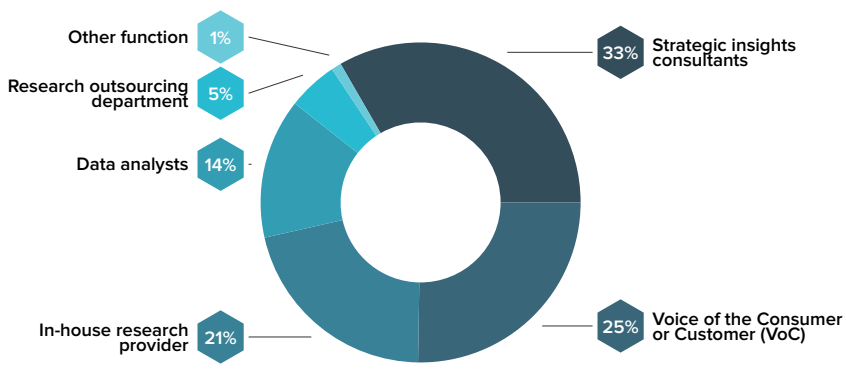
To develop the GRITscape, we opted to use the most commonly selected category for each company as its final positioning segment

One of the "messy" aspects of the GRITscape section is that in some cases individual respondents from the same organization classified their companies differently. To develop the GRITscape, we opted to use the most commonly selected category for each company as its final positioning segment.

In previous editions we took this phenomenon to possibly be a sign of lack of mission cohesion across the organization, but this year our hypothesis has changed a bit, and although a lack of overarching identity could be a factor we believe it is more likely that this phenomenon is driven by two factors. The first is the "blind men and the elephant" concept that people tend to focus on their own limited experience (and jobs) to describe something large and multi-faceted like an organization. People tend to think of their organization based upon their experience within that organization, so for companies that do a lot of different things, our respondents may just be naturally selecting the category that reflects their specific roles. Secondly, due to market forces, organizations are changing. Service-led organizations are feverishly working to bring more technology in house, while technology-driven organizations increasingly have to offer some levels of service due to client demand. And virtually all types of companies are working to diversify their offerings to capture a larger share of wallet and/or to find new opportunities for growth. So, we think we should be more forgiving for different respondents from the same company having a different view on how best to classify their company; things are pretty complicated in our industry right now!

The end result is that we see some changes in how GRIT respondents identify the best segment for their organization that we go quite in depth on in other sections. For our purposes though, we are able to identify the basic breakdown for both buyers and suppliers.

BUYER GRITSCAPE (AKA MOST IMPORTANT ROLE)

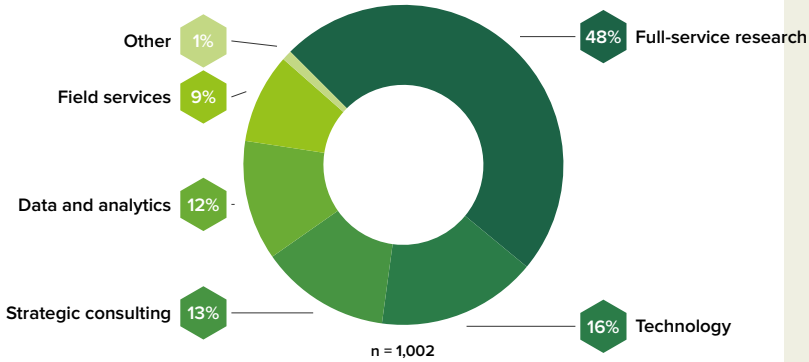


n = 251

The buyer GRITscape categories and their current distribution are discussed in another section and reproduced here in the accompanying chart. GRIT asks buyers to select which roles are significant for insight professionals at their organizations, then ask them to choose one as most significant, and we use that one for the GRITscape. GRIT used to allow them to say their most significant function was a "hybrid," but that category produced very little in the way of industry insights. "Hybrid" is not a single category; "hybrid" insights groups can be as different from each other as they are from other types. Understanding that this is a simplification, it is a useful one nonetheless and is discussed in detail in the Role Of The Insights Group section of this report

At the begin of this section, we mentioned the changes in the industry, the resulting complexity, and the need for our GRITscape visualization to change with it. One of the biggest changes to the GRITscape is the visualization of "first level" and "second level" supplier categories. The first level is identified as the "Big Bucket" segments GRIT usually uses: full service research, field services, data and analytics, and technology providers plus strategic consultancies. GRIT asks which of these service areas provide significant revenue, then which of those provide the highest revenue. This last response becomes their first level

SUPPLIER FIRST LEVEL GRITSCAPE SEGMENTS (AKA PROFESSIONAL FOCUS/HIHGEST REVENUE CATEGORY)



GRITscape designation, which is discussed in the Supplier Profiles section and recapped here in the accompanying chart.

For the second level, GRIT asks which specific services provide significant revenue from a set of more than two dozen, then which of those is most significant to their business. These responses are discussed in great detail in the Supplier Profiles section, in particular how services overlap across suppliers and categories. The level of overlap highlights the challenges that suppliers face when trying to differentiate themselves, and we suspect we'll see more emphasis on specialization as time progresses, especially among technology suppliers.

SUPPLIER ORGANIZATIONS GRITSCAPE

While the GRIT survey has done a great job of identifying overlap across suppliers and categories, we ran the risk our GRITscape looking more like a generic Venn diagram than an industry Lumascape.

We settled on using a combination of the highest revenue "Big Bucket" category, the company name provided by the respondent, and the most significant specific service offering from each company. In the cases of multiple responses by employees of the same company, we then looked at the most frequent category as the definitive categorization.

This enabled us to come up with a broadly representative list of multiple companies in each category. The sets of companies within each category are not based on relative company size, but on how GRIT respondents from specific supplier organizations classified themselves.

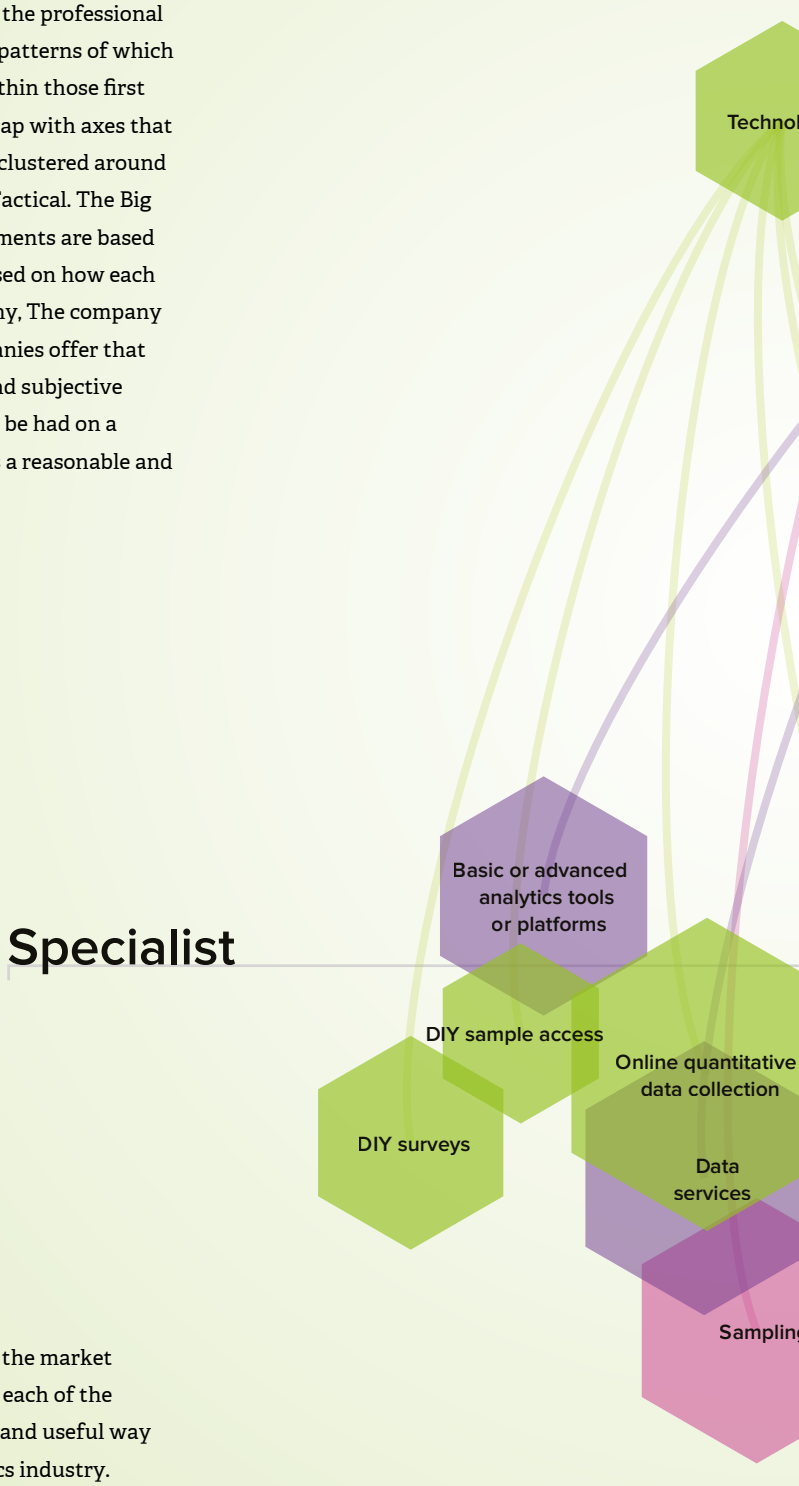
The result is the new version of the GRITscape for 2022! To fully explore the GRITscape, we suggest that you visit the following link: https://www.greenbook.org/mr/grit/market-research-industry-map-interactive/

GRITSCAPE INTERACTIVE INDUS

For several years we have been refining our view on mapping the complex insights and analytics industry. For the latest and greatest iteration, we began with our five key "Big Bucket" segments (based on the professional focus area with the highest revenue), then looked at the patterns of which specific service offerings are significant to companies within those first level segments. This resulted in a traditional quadrant map with axes that we identified according to the second level services that clustered around them: Generalist versus Specialist and Strategic versus Tactical. The Big Bucket segment assignments and corresponding subsegments are based entirely on respondent answers to this wave of GRIT based on how each respondent sees the primary positioning of their company, The company level subsegments are based on other services the companies offer that generate revenue. The axes rating is our own curation and subjective assessment, so although certainly reasonable debate can be had on a case-by-case basis, based on our experience we think it is a reasonable and accurate framework for this type of mapping exercise.

This map is entirely interactive in several important (and fun!) ways:

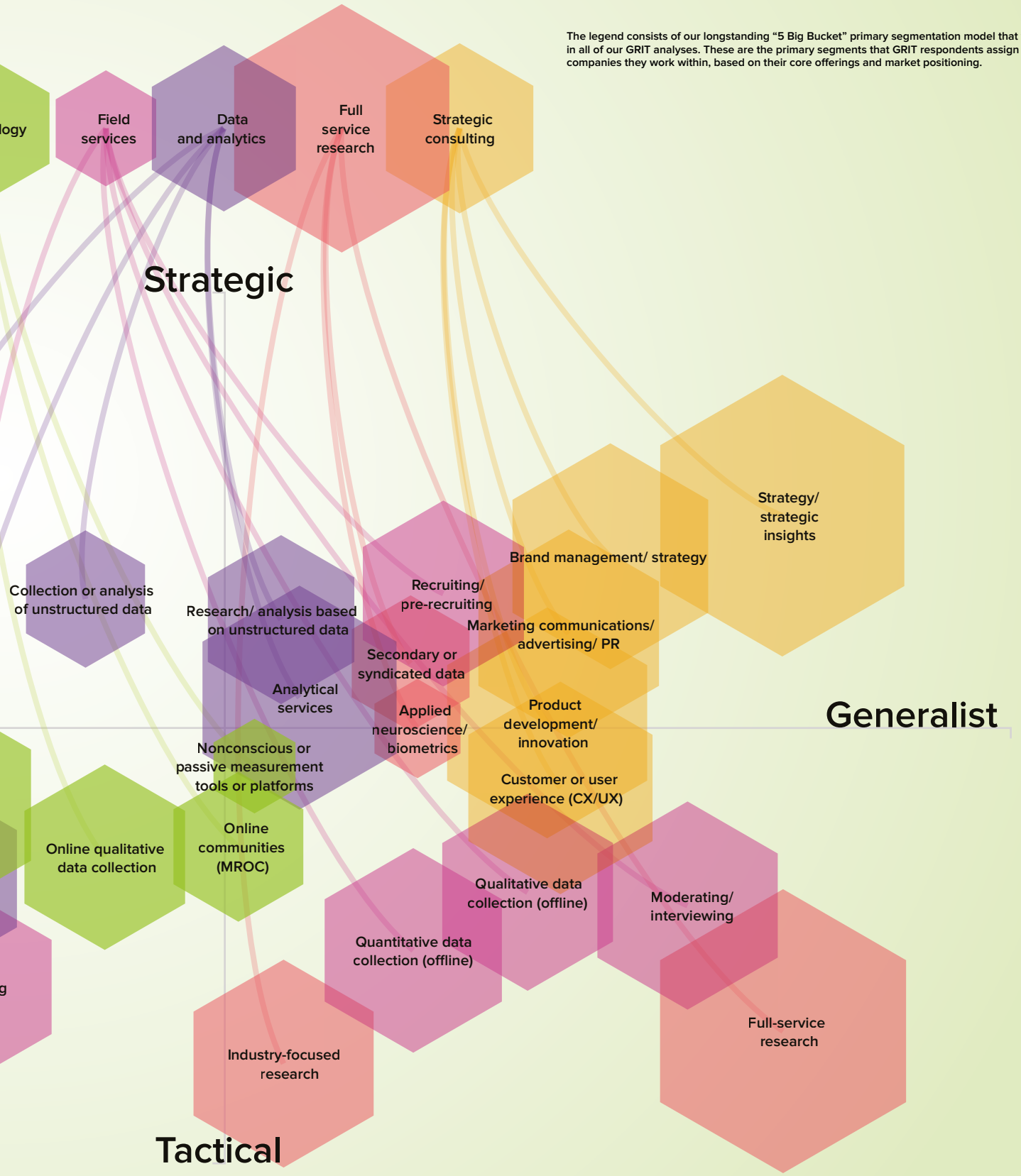
- As you click on the "Big Bucket" segments in the legend, all of the related subsegments will come to the fore so they can be more easily viewed.
- You can enable an additional level of data that will size all elements based on the number of companies included in each.
- As you click on each subsegment, it will open up a new layer that includes all of the logos of each company that is included based on the responses given by their own employees.
- When available, you can click on each company logo and it will open up their GreenBook Directory listing so you can learn more about the company.



We think this new approach to showing the structure of the market and the complex multiple positioning considerations for each of the supplier-side constituents is a more realistic, interesting and useful way to visualize the constantly evolving insights and analytics industry. That said, this is an iterative process, so we'll keep working on refining and improving the GRITscape in the future.

STRY MAP

The legend consists of our longstanding "5 Big Bucket" primary segmentation model that we use in all of our GRIT analyses. These are the primary segments that GRIT respondents assign the companies they work within, based on their core offerings and market positioning.



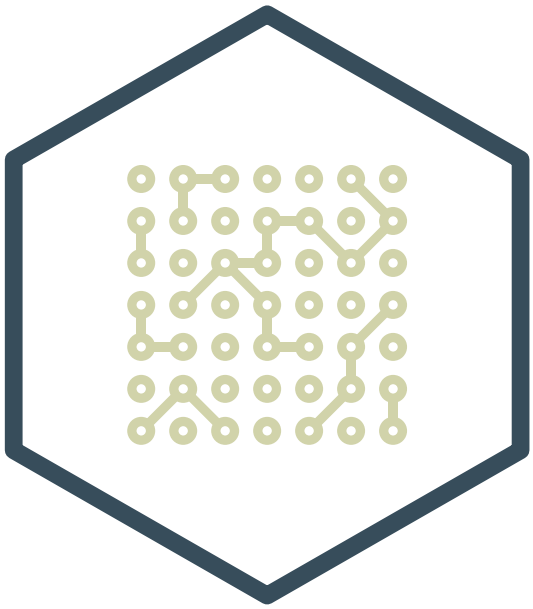
It's clear that the structure of the Supplier community is changing in response to market forces. The question is what does will final shape look like? That is that is a question that may never be answered, but these data give us a reference to track that evolution.

THE BIG PICTURE

The research industry is a very segmented marketplace, to no one's surprise. Understanding where you fit, especially as a supplier, is important for positioning and marketplace success. Based on the data from this edition of GRIT, this is often not clear and is becomingly increasingly challenging as the industry continues to evolve.

It's clear that the structure of the Supplier community is changing in response to market forces. The question is what does that final shape look like?

We expect to see significant shifts in the number and size of the companies in the categories that we defined in the GRITscape exercise. Shifts caused by the changing nature of the industry include a massive influx of capital driving mergers and acquisitions, the growth of automation and other technologies, methodology changes, and resource constraints (including time). The shift in how research is done will continue to impact processes within both supplier and buyer organizations. Our understanding of what we do (and what we don't) will have to constantly evolve. We'll explore these questions more deeply throughout this report to help provide some guidance on what that evolution may look like as it progresses.



We expect to see significant shifts in the number and size of the companies in the categories that we defined in the GRITscape exercise

HOW TO BE FAMOUS

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The challenge to stand out is as important in MRX as it is for washing powder or breakfast cereal. But yet again, in this GRIT report, we see that researchers don't make good marketers.

The point of positioning is knowing what you do – and what you don't do. In past reports, we have seen inconsistency from respondents within supply-side companies as to what their company does. And in this report again "the employees of many supplier companies aren't really sure about their company's position in the marketplace, or don't know how to describe it consistently… leaders of supplier companies need to clarify their market positioning and communicate that definition effectively throughout their organizations."

Here we are, busy working for our clients and helping them to make sure their washing powder or breakfast cereal stands out in the market. We, in insights, wrote the manual on how having a core offering based on expertise or a distinguishing viewpoint is fundamental to successful marketing. But we simply do not apply that to ourselves.

There are three core reasons why I think this is such a challenge in MRX.

Firstly, many companies struggle to define their difference in the fear that they will narrow down their pool of potential clients. The 'do not do' part of the proposition de-facto rules you out of pitching for a whole lot of work. There's a fine balance between wanting to be clear about what it is you do, the one thing you want to be famous for, and needing to bring revenue through the door. And that balance has been really wobbling in the middle of a global pandemic.

Secondly, many in insights do not apply the first rule of marketing and communication to themselves – namely 'know thy audience; know thyself.' I have countless examples of insights companies (and client insights teams) not doing research on themselves – not asking customers and stakeholders what they think, or then integrating those views into their targeted communications, proposition, or service. The irony of this lack of interest in our own research is not lost on anyone.

Finally, suppliers (sometimes perhaps encouraged by the GRIT report itself), are often distracted by 'buzz.' We have seen several 'hot topics' come and go – agile being one. Leaders get distracted by the excitement of a buzzword at the expense of their strategy and focus. As with technology, hopping on a bandwagon is only a good marketing tactic until the next new buzzword, or tech development, comes along. If you don't focus on your long-term brand messaging and build awareness of why you are different, if you run off to jump on the buzzword bandwagon then you are just copying everyone else, your differentiation is diluted, and fame will be lost.

Being distinctive really matters. As this GRIT report shows, to survive the pandemic, buyers and suppliers focused on what they did best rather than trying to be a jack-of-all-trades and master of none. Being a "one-stop-shop" may be an effective strategy to capture share of wallet, but it's not an effective way to differentiate organizations in a crowded marketplace – or a long-term strategy for growth.

So, give your clients a break; stop making them work so hard to find out what makes you special. Get your positioning right, get it showcased in all the content your company creates – your mailers, blogs, whitepapers, website, and company branding – and your clients will know who you are and why to partner with you.

SUPPLIER PROFILES

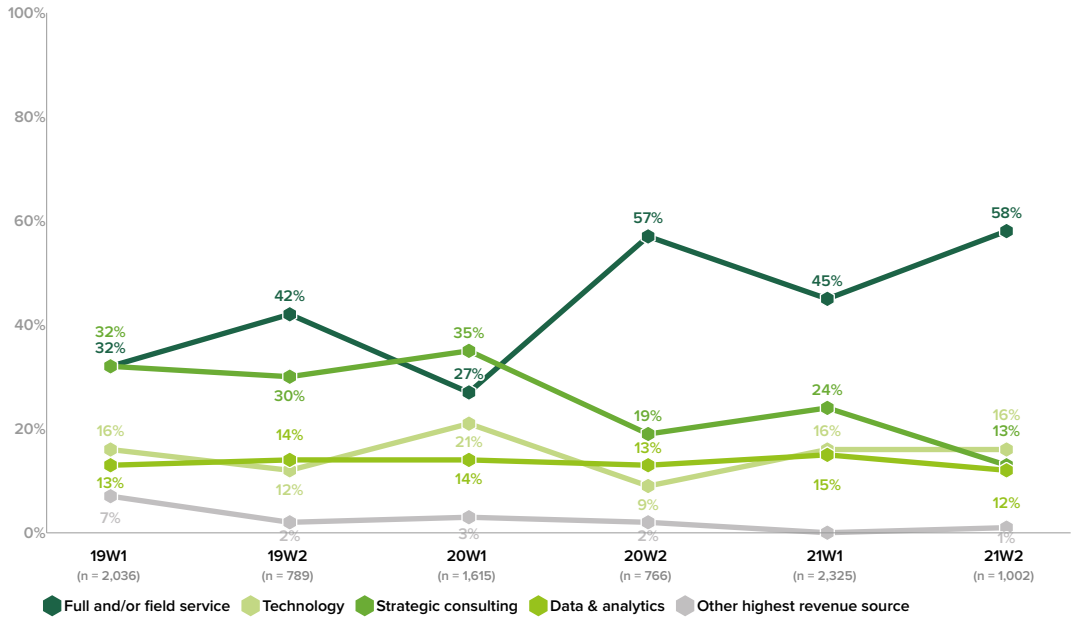
Suppliers to the insights and analytics industry typically offer multiple lines of services, and their ability to shift their emphasis from one to another helped them survive the first year of the pandemic. As the industry continues to adjust, some supplier categories are emerging with clear mandates while others are in the process of choosing their direction.

PROFESSIONAL FOCUS

In last spring's GRIT Business & Innovation Report, we documented the contraction of the strategic consultancy category following its brief ascendancy, the full service research provider renaissance, the ongoing fluctuation of the technology provider category, and the comparative stability of data and analytics providers. Since then, the strategic consulting category has continued to contract to its smallest size while full service research has peaked again, and technology has stabilized while data and analytics has experienced its largest-ever change and hit its lowest point.

Until last fall, GRIT treated full service research and field services as a single category but has since split them apart. In 20W2 and in 21W1, field services providers made up 5% of all suppliers; since then, they have nearly doubled, to 9%. This is probably related to the first-ever measurable drop in data and analytics suppliers, as we have previously reported how some of them have been moving into adjacent service areas.

RELATIVE SIZES OF PROFESSIONAL FOCUS/HIGHEST REVENUE CATEGORIES: GRIT WAVE (SUPPLIER)



Even though GRIT classifies each supplier into one of five "Big Bucket" types, suppliers are more complex than that. On average, each type of supplier has two "Big Bucket" sources of revenue, but in no instance is the second source the same for most suppliers of any type. Within each segment, the second source is the same for about 40% of them, and two or three sources exceed 10% in each segment. Among full service research providers, the most common second source of revenue is strategic consulting (38%), followed by data and analytics (29%), technology (15%), and field services (13%). For each other type except technology providers, the most common secondary source of revenue is full service research, offered by 43% of strategic consultancies, 41% of field services providers, 41% of data and analytics providers, and 35% of technology providers.

Data and analytics services are a significant secondary source within each supplier type. For technology providers, data and analytics (39%) is just ahead of full service research as the second most common source of revenue, and it is the third most common for field services (29%) and strategic consultancies (27%). Technology is also significant, especially among field services (24%) and data and analytics providers (25%); it is less common among full service research suppliers (15%) and strategic consultancies (10%).

Except among field services providers, field service is a less common source of revenue than any of the other types, and this suggests that field services is the most distinct specialty because it is seldom offered as a supplementary source of revenue. Although the difference is not great, field services are more likely to be offered by technology and data and analytics providers than by full service research providers, and this affirms the decision to separate them in GRIT.

On average, each type of supplier has two "Big Bucket" sources of revenue, but in no instance is the second source the same for most suppliers of any type

ALL SIGNIFICANT SOURCES OF REVENUE: PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
Full service research	100%	41%	43%	41%	35%
Strategic consulting	38%	13%	100%	31%	25%
Data & analytics	29%	29%	27%	100%	39%
Technology (e.g., platforms, software, tools)	15%	24%	10%	25%	100%
Field services	13%	100%	8%	15%	18%
Other	0%	0%	2%	0%	0%
Average number of revenue sources	1.9	2.1	1.9	2.1	2.2
n =	484	94	131	124	163

We continue to see technology grow in importance for them (68% increased their spend), and GRIT continues to report on the increased overlap across field services, data and analytics, and technology providers

Historically, GRIT has grouped full service research and strategic consultancies together as "generalists" and data and analytics and technology providers together as "specialists" for simplicity. Because GRIT used to combine full service research and field services, field services were always counted as "generalists," but the case can be made for them to be considered "specialists," particularly given the current analysis. It also makes sense to group them with "generalists" because their revenue, staff, and technology investment trends usually look more like trends for full service research providers and strategic consultancies than like the trends for data and analytics and technology providers. However, we continue to see technology grow in importance for them (68% increased their spend), and GRIT continues to report on the increased overlap across field services, data and analytics, and technology providers.

Compared to last year, "specialists" have increased from 22% of suppliers to 29%. If we include field services providers in that set, the growth becomes 27% to 38%. The decrease in strategic consultancies accounts for most of this growth, and the decrease seems to be consistent across larger and smaller strategic consultancy sizes. The growth among specialists is mainly driven by the more than doubling of larger technology providers (100 or more employees) from 4% to 10% of suppliers. Possibly, this explosion could have been fueled by some of last year's strategic consultancies merging with technology suppliers.

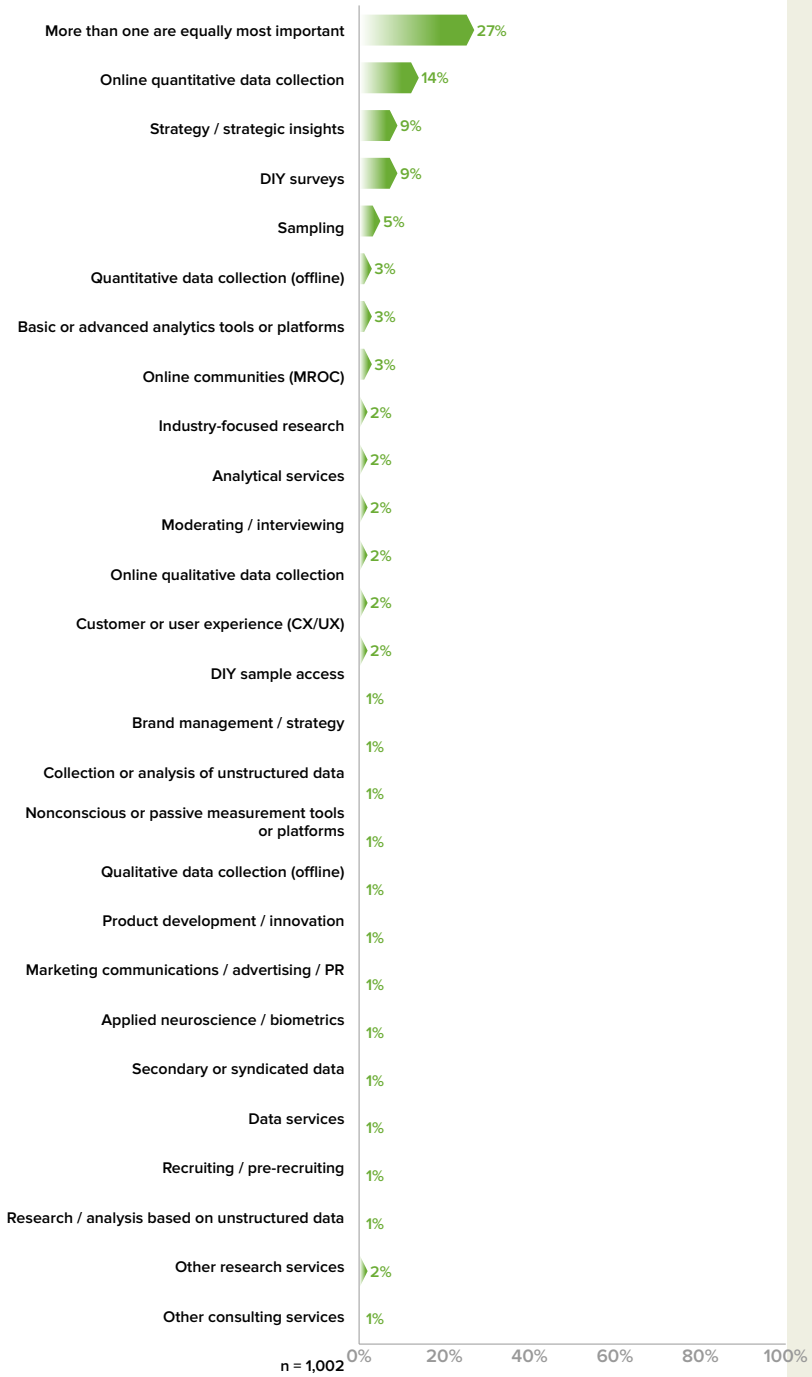
PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)

SPECIFIC SERVICE OFFERINGS

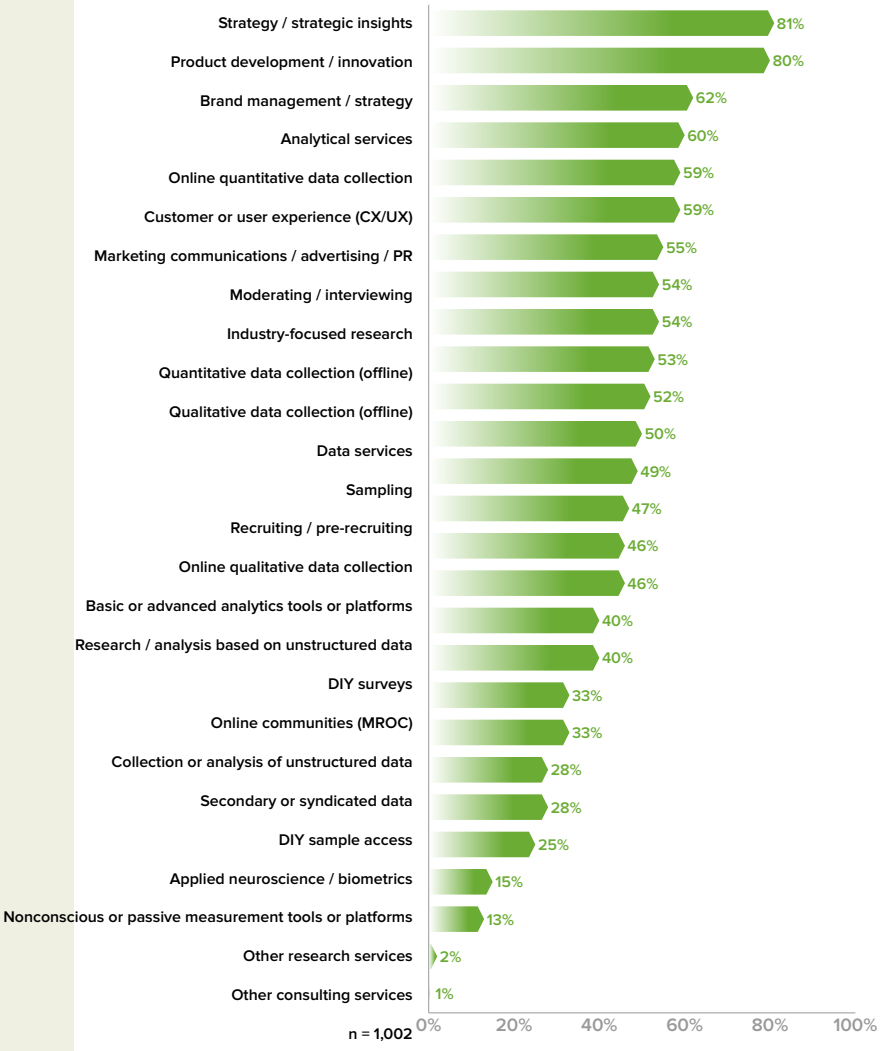
Beyond the "Big Bucket" segments, GRIT takes a more granular look at specific service offerings, and the current survey has been revamped to ensure clarity. For example, online data collection is now distinct from offline data collection. GRIT asks suppliers which services they offer, then which service they would consider to be their "primary." As we saw with the "Big Bucket" services, suppliers have multiple revenue sources, and it can be difficult to name one as "primary," particularly if their core offering is truly a hybrid. For this reason, GRIT allows a choice of "more than one are equally most important."

The difficulty in selecting just one service offering as "primary" is suggested by the long-tail distribution of responses. As we would expect, the leading primary service is full service research (27%), and "more than one equally important" is second (14%), as usual. After those, no service is chosen by at least 10% of suppliers, and 24 specific services are represented as "primary." The top five are completed by online quantitative data collection (9%), strategy/ strategic insights (9%), and DIY surveys (5%).

MOST IMPORTANT SERVICE AREA (SUPPLIER)



ALL SERVICES OFFERED (SUPPLIER)



We believe that the current GRIT survey offers the most detailed and accurate data on current service offerings yet

For comparison, last year 45% said their primary service was full service research, and 38% named it as "primary" in 19W2. "More than one," or "hybrid," was the same last year (14%) and slightly higher in 19W2 (19%). Strategic consulting was 14% in both 20W2 and 19W2, while the nearest analog, strategy / strategic insights is only 9%. The declines in full service research and strategic consulting are likely due to changes in the survey, as more specific services were offered as choices. Also, previous surveys offered a choice of 19 services on one screen which might bias respondents toward selecting services that were easier to pick out of the list, like "strategic consulting" versus "product innovation consulting."

Online quantitative data collection is now 9% and DIY surveys is 5%, but there are no clear analogs in previous waves. GRIT used to offer as choices "license quantitative data collection tools and/or platforms" and "quantitative data collection company," and these combined for only 8% in 20W2 and 7% in 19W2, but they are not really comparable to the services GRIT lists now. For example, "quantitative data collection company" did not distinguish between online and offline. We believe that the current GRIT survey offers the most detailed and accurate data on current service offerings yet.

The most common service offerings by far are full service research (81% of suppliers) and strategy/ strategic insights (80%), and this is expected because they are broadly defined and foundational to many kinds of offerings. Nine more services are offered by most suppliers: product development/ innovation (62%), brand management/strategy (60%), analytical services (59%), online quantitative data collection (59%), CX/UX (55%), marketing/ communications/advertising/PR (54%), moderating/ interviewing (54%), industry-focused research (53%), and offline quantitative data collection (52%). The least common service offerings are DIY sample access (25%), applied neuroscience/biometrics (15%), and nonconscious or passive measurement tools or platforms (13%).

Looking at how primary service offerings align with supplier professional focus provides some insight into supplier strategies. About half of full service research suppliers say their primary service offering is full service research, and another 14% say multiple services are equally important. Fifteen other services comprise the remaining 37%, led by online quantitative data collection (8%) and strategy/strategic insights (6%). Although many suppliers package their services as full service research, different suppliers drive that research with different core services.

One-third of strategic consultancies name strategy/strategic insights as their primary service offering, and another 17% say more than one service are equally important. More than nineteen other services account for the remaining 48%, led by full service research (9%), brand strategy/research (4%), and moderating/interviewing (4%). Strategic consulting is hardly a monolithic enterprise, and many kinds of core offerings can drive strategic recommendations.

Similar to other supplier types, 15% of field services providers say that multiple service offerings are equally most important, but no service stands out as the focal point. Three service offerings account for nearly 50% of primary offerings from field services providers: online quantitative data collection (20%), sampling (15%), and offline quantitative data collection (14%). Ten other services account for the remaining 36%, led by full service research (7%), DIY sample access (5%), and offline qualitative data collection (4%).

Similarly, 14% of data and analytics suppliers say multiple services are equally most important, but only one service eclipses the 10% mark, online quantitative data collection (14%). Twenty other services make up the other 72%, led by analytical services (9%), sampling (8%), DIY surveys (7%), strategy/strategic insights (6%), basic or advanced analytics tools or platforms (6%), and industry-focused research (6%). As we discussed in the GRIT Business & Innovation and the GRIT Industry Benchmarking reports, the data and analytics category is experiencing a sort of identity crisis. When suppliers in the other categories decide to expand their offerings, data and analytics is a common direction to take. Suppliers who are already focused on those services don't have that option, and now they face increased competition for their bread-and-butter offerings. As a result, many are considering whether to follow the "data" path toward field services or the "analytics" path toward strategic consulting.

There are also several primary services that define technology provider offerings, but they are not in as much flux. Multiple offerings are equally most important for 12% of technology providers, and only three specific service hit 10%: DIY surveys (16%), online quantitative data collection (12%), and basic or advanced analytics tools or platforms (10%). The most common services after those are CX/UX (7%), MROC (5%), online qualitative data collection (4%), DIY sample access (4%), and nonconscious or passive measurement tools or platforms (4%). Although technology providers define their primary offerings differently from each other, as a group, they seem to have a firm sense of their identity and core offerings.

Although many suppliers package their services as full service research, different suppliers drive that research with different core services

As we discussed in the GRIT Business & Innovation and the GRIT Industry Benchmarking reports, the data and analytics category is experiencing a sort of identity crisis

PRIMARY SERVICE AREA: PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
Full service research	49%	7%	9%	3%	6%
More than one are equally most important	14%	15%	17%	14%	12%
Online quantitative data collection	8%	20%	2%	14%	12%
Strategy / strategic insights	6%	0%	35%	6%	2%
DIY surveys	2%	0%	2%	7%	16%
Sampling	1%	15%	1%	8%	1%
Quantitative data collection (offline)	3%	14%	1%	0%	1%
Basic or advanced analytics tools or platforms	0%	0%	1%	6%	10%
Online communities (MROC)	3%	1%	1%	0%	5%
Industry-focused research	2%	0%	3%	6%	1%
Analytical services	1%	0%	3%	9%	1%
Moderating / interviewing	2%	3%	4%	1%	0%
Online qualitative data collection	1%	3%	0%	2%	4%
Customer or user experience (CX/UX)	1%	0%	2%	1%	7%
DIY sample access	0%	5%	0%	1%	4%
Brand management / strategy	1%	0%	4%	0%	2%
Collection or analysis of unstructured data	0%	2%	2%	2%	3%
Nonconscious or passive measurement tools or platforms	0%	0%	3%	1%	4%
Qualitative data collection (offline)	0%	4%	1%	3%	1%
Product development / innovation	1%	0%	2%	1%	2%
Marketing communications / advertising / PR	2%	1%	1%	0%	1%
Applied neuroscience / biometrics	1%	0%	2%	2%	0%
Secondary or syndicated data	0%	0%	1%	2%	2%
Data services	0%	2%	0%	2%	1%
Recruiting / pre-recruiting	0%	3%	0%	1%	1%
Research / analysis based on unstructured data	0%	0%	0%	3%	1%
Other research services	1%	2%	5%	1%	2%
Other consulting services	1%	1%	2%	2%	1%
n =	484	94	131	124	162

Although suppliers within each type are diverse, some services are characteristic of most types. Full service research suppliers are characterized by full service research (97%) and strategy/strategic insights (88%). They offer an average of twelve services, the most of any type, and eleven services are offered by most of them. The most common services involve strategy, analysis, and data collection. At least 60% offer product development/innovation (70%), brand management/strategy (66%), CX/UX (65%), moderating/interviewing (65%), analytical services (63%), offline quantitative data collection (60%), and marketing communications/advertising/PR (60%).

The characteristic service for strategic consultancies is, naturally, strategy/strategic insights (98%), and the next tier is dominated by strategic services: brand management/strategy (78%), full service research (72%), marketing communications/advertising/PR (69%), and product development/innovation (66%). Each of these are also among the most common services among full service research providers, and the difference between the two types is not so much which services are common, but how common they are within each type. Strategic consultancies are more likely to offer brand management/strategy (+12%), strategy/strategic insights (+11%), and marketing communications/advertising/PR (+10%). On average, strategic consultancies offer one fewer service than full service researchers, and these gaps best distinguish the two types. Full service research firms are much more likely to offer full service research (+26%), recruiting/pre-recruiting (+18%), sampling (+17%), online quantitative data collection (+15%), offline quantitative data collection (+15%), data services (+14%), online qualitative data collection (+14%), DIY surveys (+13%), and MROC (+13%). In sum, several services are very common to both full service research suppliers and strategic consultancies, but the emphasis they place on them and how they are complemented and packaged are very different.

Although not as universal as the defining services for full service research suppliers and strategic consultancies, the services that characterize field services suppliers are sampling (78%), data services (71%), offline quantitative data collection (70%), and recruiting/pre-recruiting (70%). The other common services offered by 60% or more are online quantitative data collection (65%), full service research (64%), and offline qualitative data collection (60%).

For technology providers, online quantitative data collection (80%) and basic or advanced analytics tools or platforms (70%) could be considered characteristic services. Other common services offered by 60% or more include full service research (66%), strategy/strategic insights (63%), and DIY surveys (63%).

Data and analytics providers are a bit less well-defined than the other types. The services that are most "characteristic" for them are strategy/strategic insights (78%) and analytical services (69%). The only services that 60% or more have in common are online quantitative data collection (65%) and full service research (60%), although data services (59%) is close. The prominence of analytical services distinguishes them from other supplier types, but most full service research suppliers, strategic consultancies, and technology providers plus nearly half of field services providers also offer it.

ALL SERVICE AREAS: PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
Full service research	97%	64%	72%	60%	66%
Strategy / strategic insights	88%	49%	98%	78%	63%
Product development / innovation	70%	41%	66%	54%	53%
Brand management / strategy	66%	32%	78%	53%	50%
Analytical services	63%	46%	55%	69%	53%
Online quantitative data collection	55%	65%	40%	65%	80%
Customer or user experience (CX/UX)	65%	38%	59%	40%	45%
Marketing communications / advertising / PR	60%	34%	69%	51%	38%
Moderating / interviewing	65%	55%	61%	33%	28%
Industry-focused research	56%	43%	61%	57%	45%
Quantitative data collection (offline)	60%	70%	44%	49%	31%
Qualitative data collection (offline)	58%	60%	52%	40%	26%
Data services	45%	71%	31%	59%	56%
Sampling	45%	78%	27%	45%	52%
Recruiting / pre-recruiting	52%	70%	34%	29%	37%
Online qualitative data collection	47%	45%	33%	39%	59%
Basic or advanced analytics tools or platforms	33%	33%	26%	48%	70%
Research / analysis based on unstructured data	40%	29%	45%	48%	36%
DIY surveys	28%	38%	15%	34%	63%
Online communities (MROC)	37%	27%	24%	24%	39%
Collection or analysis of unstructured data	24%	20%	28%	40%	37%
Secondary or syndicated data	30%	18%	29%	35%	19%
DIY sample access	19%	35%	10%	29%	45%
Applied neuroscience / biometrics	19%	6%	16%	14%	8%
Nonconscious or passive measurement tools or platforms	15%	5%	11%	12%	14%
Other research services	0%	0%	0%	0%	0%
Other consulting services	0%	0%	0%	0%	0%
Average number of services	12.3	10.7	10.8	11.1	11.1
n =	484	94	131	124	162

EMERGING SUCCESSFUL: THE RISE AND POWER OF NONCONSCIOUS TOOLS IN RESEARCH

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Human behavior change has accelerated rapidly over the past two years, the COVID-19 pandemic forcing adaptation, rewiring brains, and forming new habits around everything from food and entertainment to shopping and travel. While some of this may be temporary, lasting only so long as the impact of the pandemic, others have become deep-rooted or at least have become the building blocks for a new normal.

For marketers, this is likely the most disruptive period since the birth of e-commerce – a once-in-a-generation disordering that will have an impact which we cannot yet comprehend. Thus, there's a critical need to understand what's happening, and what it may mean for a business, products and marketing.

In my view, those that arise successfully are going to more deeply embrace "emerging methods" as a necessary complement to those that are more "established." Traditional methods, such as surveys and questionnaires have value in providing quick snapshots, but, as we know, are subject to significant biases. Algorithm-based, big data are great at seeing what choices are made but lack the underlying understanding of why decisions were made.

Now more than ever, the world has necessitated that marketers break through this rational layer to understand emotional context: what is the reasoning behind these stated and actual choices. What was someone feeling at every moment along the path toward a decision – and what were the true influencers. Emerging methods like eye-tracking, facial coding and biometrics, capture these nonconscious emotional responses – including attention, emotion and intensity. Given that it's estimated that more than 95% of brain processing occurs below conscious awareness, the importance of these insights cannot be understated.

Think about it like painting a picture. Traditional methods provide a sketch – they give a lot of essential information about what a consumer did and how they behaved. But that doesn't always give the full picture. You need details and colors to get an actual portrayal. And that's exactly what a lot of emerging methods provide by looking at the nonconscious – by looking at what goes on in the brain and understanding the underlying reasoning, the why, behind human behavior.

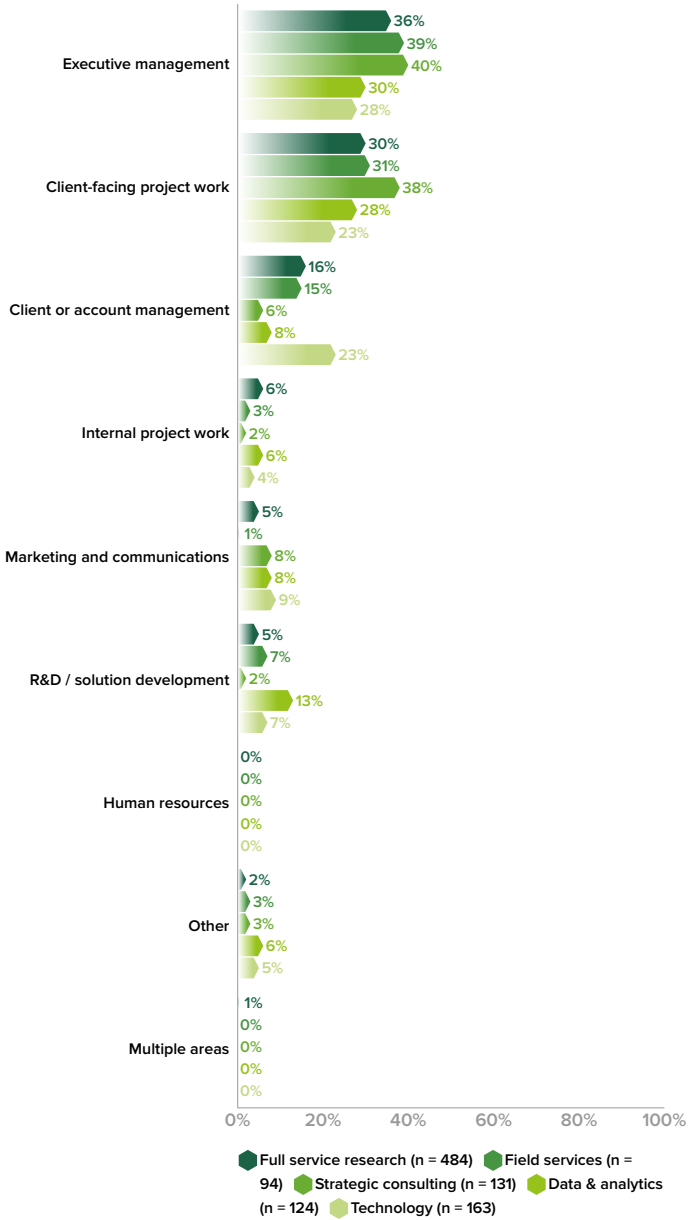
When it comes to understanding non-conscious responses, I've always believed the more data, the better. The more of a person's physiology you can monitor, the deeper insights you can gather and the better you can understand the emotions behind behavior and decision-making. At iMotions, we call that multimodal: the power and ability to leverage multiple nonconscious technologies like eye-tracking, facial expression analysis, EEG and GSR, to get a comprehensive look at human behavior.

For a long time, investing in these nonconscious tools was a challenge. They were costly and bulky, could only really be used in a lab and analyzed individually. But that has fundamentally changed. Sensors are cheaper and more powerful, smaller and more mobile, and the data collected is streamlined and more easily interpreted.

Overall, it's always inspiring to see the adoption of individual technologies grow. But as emerging methodologies solidify their place within the industry and new ones (even those that may not yet exist yet) materialize, we must continue to use this as our north star: no single technology has a monopoly on the truth. While individual technologies have the power to reveal certain aspects of human behavior on their own, together they are always much more powerful.

For further context, GRIT asks respondents where they work within their supplier organization. Respondents from data and analytics suppliers are somewhat less likely to be in executive management (30%) than ones from full service research (36%), field services (39%), or strategic consulting (40%), so perhaps they are less clear on their company's strategy. However, technology respondents have the lowest percentage (28%) in executive management, and they seem pretty clear about company strategy.

FUNCTIONAL AREA WITHIN COMPANY: PROFESSIONAL FOCUS/ HIGHEST REVENUE (SUPPLIER)



THE BIG PICTURE

Most suppliers of each "Big Bucket" type offer full service research services, and most in all but field services offer strategy/strategic insights. As many buyer insights groups shifted their focus from growing and maintaining the business to finding ways to save it, many suppliers followed the market and sold more research services as the demand for strategic consulting was put on hold. As a result of being "service type-fluid," the proportion of full service research providers has reached an all-time high while the proportion of strategic consultancies is now at an all-time low.

The scramble to offer full service research impacted technology and data and analytics suppliers. These specialists comprised 35% of suppliers pre-pandemic, but only 22% at the end of last year. Now, technology providers have surged to bring the percentage back up to 28%, but data and analytics providers have begun to decline. As with other supplier types, at least 60% of each currently offer full service research, which may have become the main focus for some of them last year, either directly for end clients or through partnerships. Technology providers seem to have emerged stronger as more buyers realized how DIY tools could help them survive the crisis, and so have field services providers, which nearly doubled, as buyers struggled to find and engage their target markets.

The data and analytics category, on the other hand, has emerged with questions. While the service portfolios of strategic consultancies, full service research, field services, and technology providers clearly align with their identities, the portfolio of the average data and analytics providers is less coherent. Competition has intensified from suppliers who offer more complete solutions and who are adding more data and analytics services to their arsenals. There is not a single clear direction for data and analytics providers to follow, and some are moving more deeply into full service research, some into field services, and some into strategy.

MAXIMIZING YOUR EXISTING MARKET DATA

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While technology spending remains strong on the insights buyer side and is rebounding on the supplier side, one clear trend that has emerged from the 2021 GRIT Insights Practice Report is a growing desire to do more with existing data. This is a trend my organization, Bloomfire, also saw in a 2021 research study of insights and customer experience professionals we conducted with 451 Research: only a third of respondents believed they needed more customer data. The bigger concern for the majority of respondents was operationalizing data and knowledge assets across the customer journey. In other words, mature insights teams aren't just focusing on collecting more data–they're focusing on embedding existing data and insights across their organizations to fuel decision-making.

We see this trend reflected in one of the key areas of investment for GRIT Report respondents: data integration technology. 46% of buyer-side respondents cited data integration technology as a key priority in 2021, up from 34% in 2020 (supplier-side respondents also saw an increase from 27% to 36%). "Data integration" is a broad term, but technology in this category helps organizations store data, combine data from disparate sources, synthesize insights, and simplify access to insights through a centralized platform. As the volume of available data explodes, it's crucial to capture the insights that emerge across all sources and establish a single source of truth for the entire organization.

This need for a single source of truth is exacerbated by another trend that emerged in the GRIT Report: volatile changes in insights staff size. Changes in staff size have been particularly dramatic for large buyer-side insights teams (10-plus team members), with 32% reporting they have increased staff and 21% saying they have decreased. Whether teams are growing, shrinking, or being reorganized, organizations can't rely on processes where individual team members serve as gatekeepers for data and insights. Instead, organizations must centralize their data and insights within one platform so that nothing is lost in the shuffle.

When centralizing data and insights, organizations also need to think about how they are going to make this information easily accessible and searchable for the team members and decision-makers who need it. All too often, insights are scattered across multiple repositories–or if they are stored in a central location, it is difficult for decision-makers to search without knowing exact file names or the taxonomy the insights team is using. This leads to insights becoming siloed within teams or lines of business, and decision-makers miss opportunities to leverage available data. It can also cause organizations to suffer from what one of our clients refers to as "goldfish memory," or duplicating existing research simply because the organization has forgotten what they already know.

As insights teams become more mature, their primary challenge isn't how to generate and collect more data–it's how to maximize the value of the data they already have. When organizations make the investment in data integration technology, they see returns in the form of more data-driven business decisions, increased efficiency in finding and applying insights, and more innovation as stakeholders are empowered to tap into the wealth of data and insights available to them.

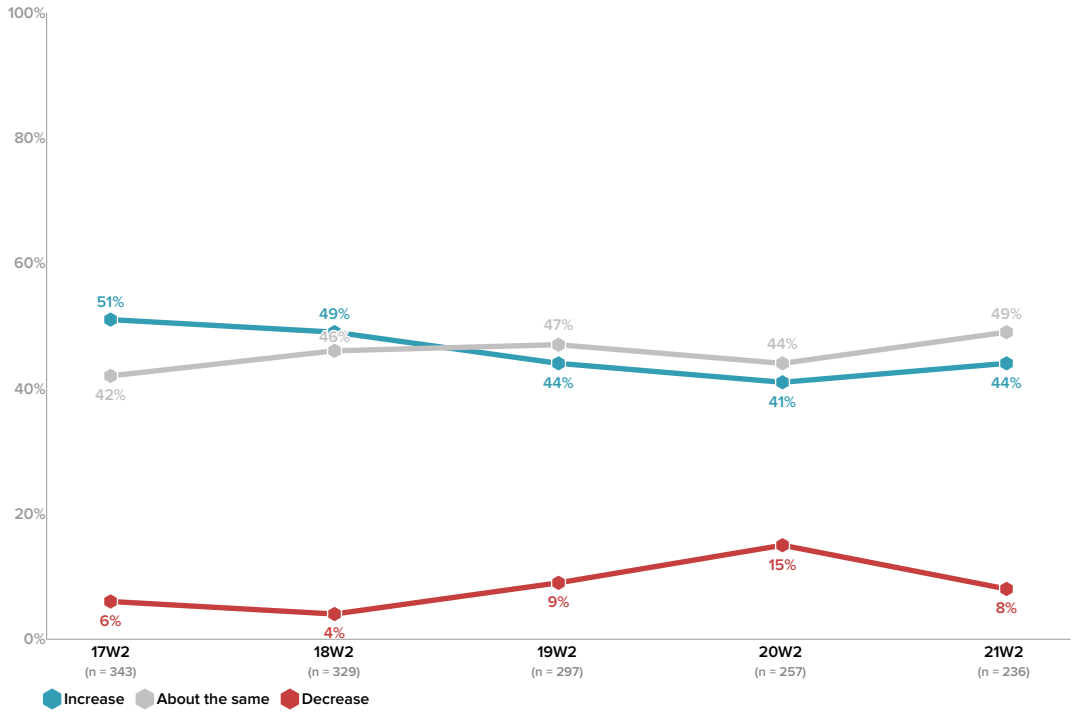
INVESTMENT TRENDS

More supplier staffs have increased compared to buyer insights staffs while investment in technology continues to increase. Buyers appear to be growing more self-sufficient with respect to analyzing existing data and visualization, but DIY trends do not seem to have diminished overall research outsourcing among both buyers and suppliers.

BUYER PERSPECTIVE: TECHNOLOGY SPEND

As always, buyer technology spending continues to be strong. Though down from its high of 51% in 17W2, the percentage of buyers who increased spending on research- and insights-related technology remains above 40%, and the percentage who decreased spending is below 10%. The pandemic brought a spike in buyer decreases last year, but things are back to normal now, at least with respect to technology spending and if only for the time being. The trend is consistent across buyers regardless of insights staff size, and we have noted previously that, large or small, insights staffs always need to find ways to do more with less, and technology enables that.

CHANGE IN TECHNOLOGY SPEND: GRIT WAVE (BUYER)

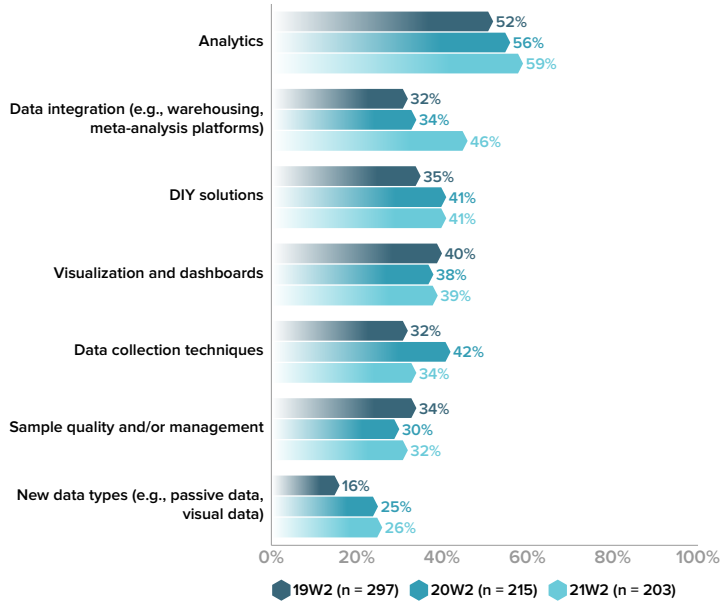


As always, buyer technology spending continues to be strong

Another familiar trend is that most buyers make analytics a key priority for their technology spending, and this metric is now at an all-time high of 59%. Also at an all-time high, data integration is a key technology priority for 46% of buyers, spiking up from 34% last year. At the same time, spending on data collection techniques as a key priority fell from last year's high of 42% back to 34%, but new data types (26%) and DIY solutions (41%) retained their increases from last year. The pandemic seems to have sparked greater interest among buyers to make more use of existing data, fueling the increased priority on new data types and data integration. The drop in the priority of data collection techniques after last year's spike may mean that one-time investments have addressed data collection issues going forward or that buyers are more comfortable outsourcing data collection now than they were a year ago.

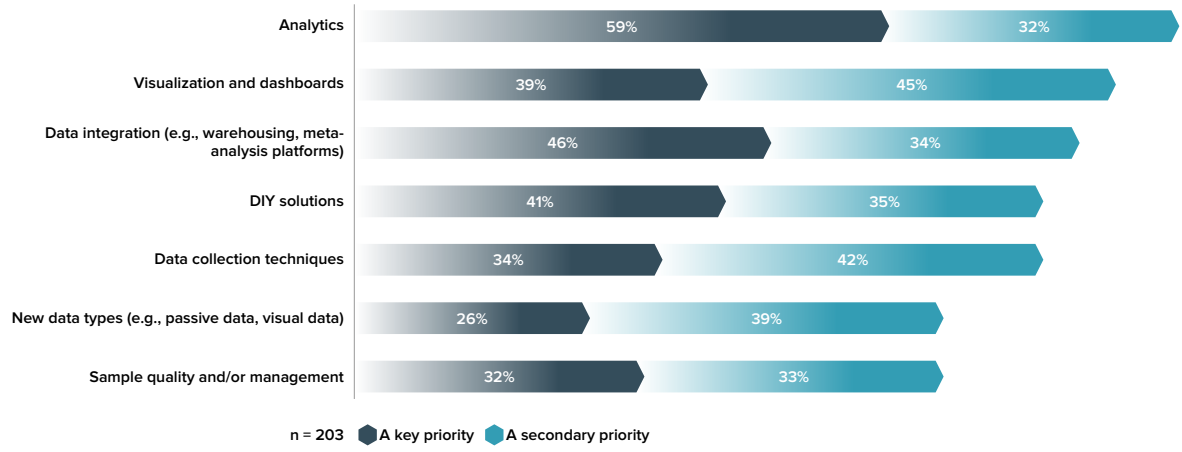
Looking beyond the key priorities to include secondary priorities, over 90% of buyers have analytics on their technology radar, and more than three-fourths prioritize visualization and dashboards, data integration, DIY solutions, and data collection techniques. Technology spending continues to be strong, and its reach continues to be wide.

KEY PRIORITIES FOR TECH SPENDING: GRIT WAVE (BUYER)

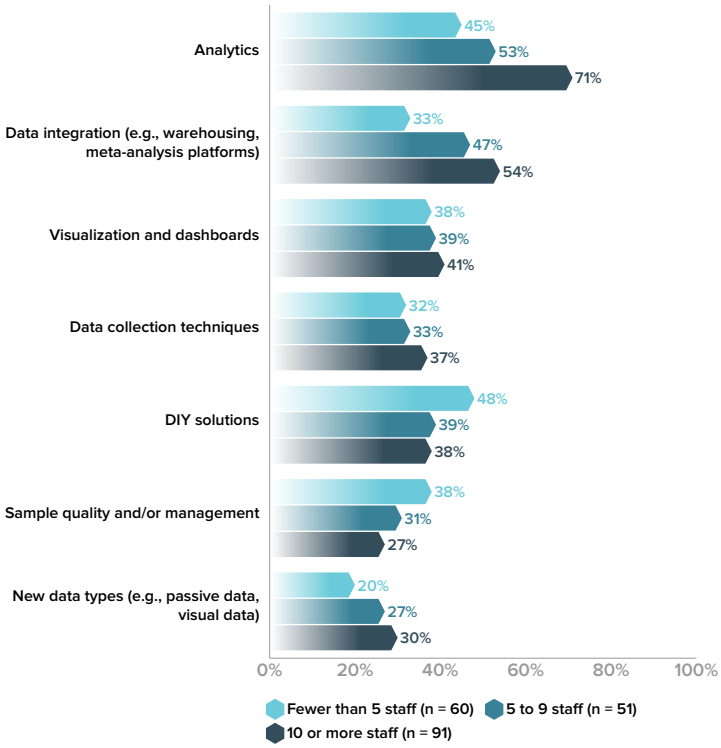


The pandemic seems to have sparked greater interest among buyers to make more use of existing data, fueling the increased priority on new data types and data integration

PRIORITIES FOR TECH SPENDING (BUYER)

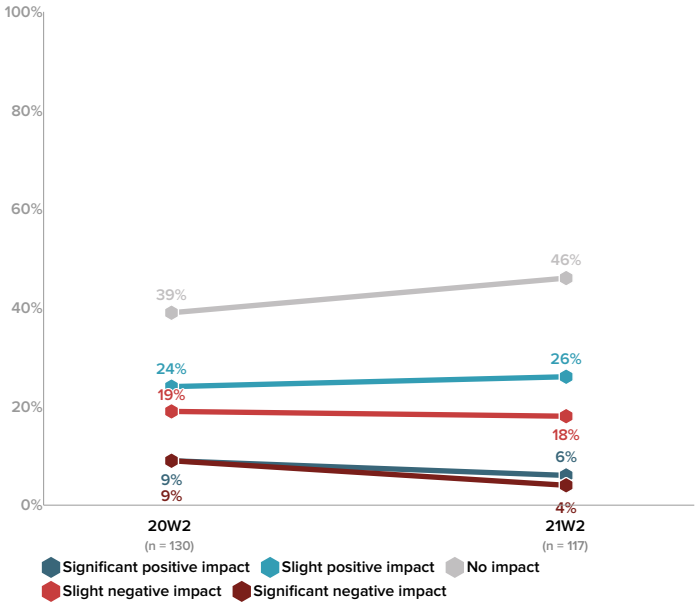


KEY PRIORITIES FOR TECH SPENDING: INSIGHTS GROUP SIZE (BUYER)



Technology spending is strong regardless of insights staff size, although the priorities are a bit different. Buyer with 10 or more staff are much more likely to make analytics a key priority than those with smaller staffs. The priority of data integration tends to increase with insights staff size, as does interest in new data types, but interest decreases with respect to DIY solutions and sample quality/management.

IMPACT OF COVID-19 ON INVESTMENT IN TECHNOLOGY: GRIT WAVE (BUYER)



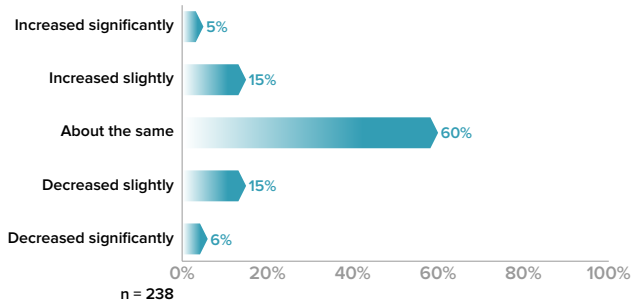
Last year, 35% of buyers said that the COVID-19 pandemic spurred increased spending on insights technology, and now 32% hold that point of view. By contrast, last year, 28% said the pandemic had a negative impact on tech spending, but now only 22% believe that.

The priority of data integration tends to increase with insights staff size, as does interest in new data types, but interest decreases with respect to DIY solutions and sample quality/management

BUYER PERSPECTIVE: INSIGHTS OUTSOURCING VS. DIY

For the first time, the GRIT survey measures trends in outsourcing versus taking or keeping work in-house. Most buyers (60%) say that the amount of work by external suppliers has stayed the same over the past year, and the percentage who increased cancel out the percentage who decreased (20% to 21%). Although we don't know by what percentage external work increased or decreased, the significant increases (5%) are similar to the significant decreases (6%). There are no significant differences by size of insights staff.

INSIGHTS WORK BY EXTERNAL SUPPLIERS VS. IN-HOUSE (BUYER)



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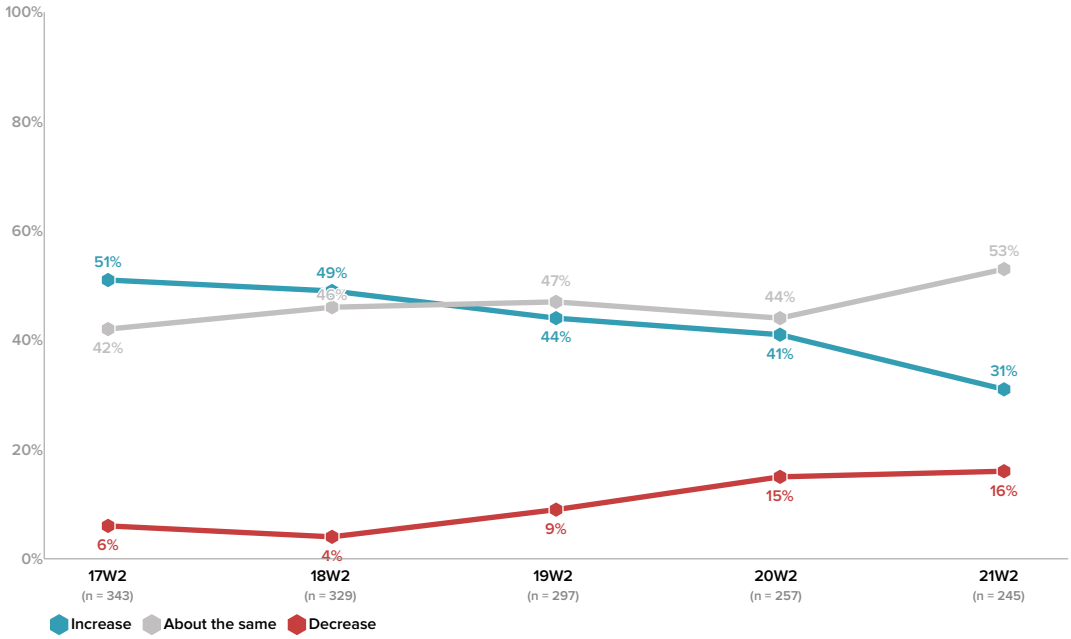
BUYER PERSPECTIVE: INSIGHTS STAFF SIZE

As reassuring as the technology spend trends are, the buyer staff size trends are alarming. Last year, the percentage who decreased insights staff jumped from 9% to an all-time high of 15%, and it remains elevated now (16%). The percentage who decreased staff, however, was more dramatic. After a small decline last year from 44% to 41%, increases plunged to just 31% currently, 20 points lower than its high of 51% in 17W2.

CHANGE IN INSIGHTS STAFF SIZE: GRIT WAVE (BUYER)



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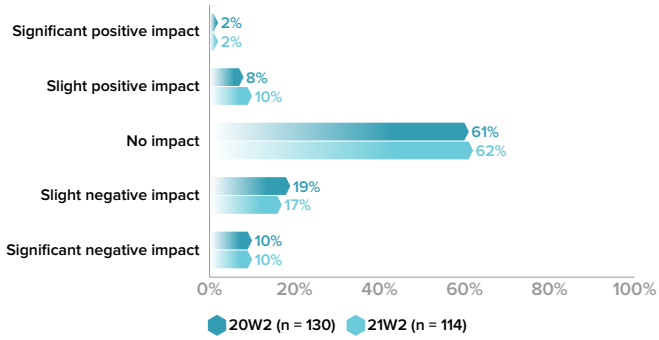
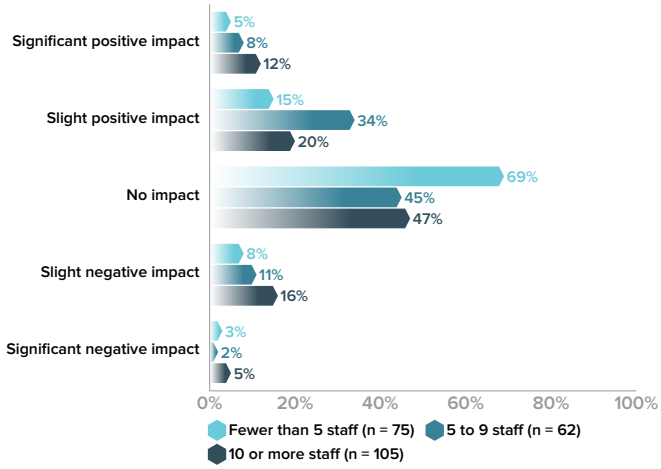


The impact of COVID-19 on staff size is the same as last year's: in 2020, 10% said the impact was positive and 29% said it was negative, and now the percentages are 12% and 27%. The percentages of "significant" positive and negative impacts are also virtually the same.

CHANGE IN INSIGHTS STAFF SIZE: INSIGHTS GROUP SIZE (BUYER)



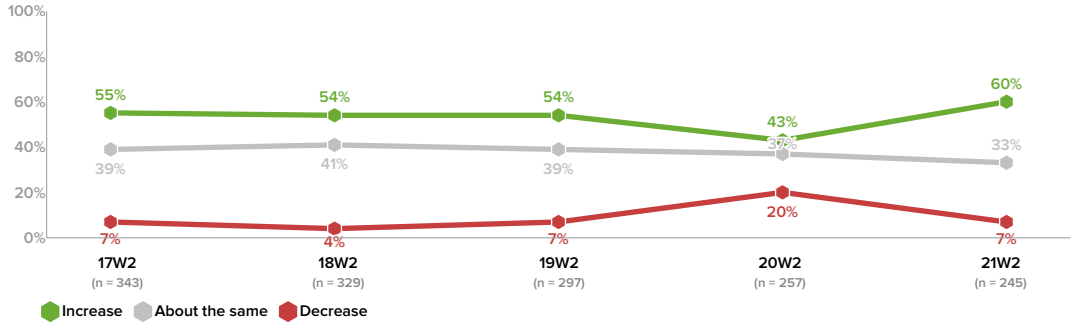
The changes in staff size are more volatile for larger staffs. For staffs of 10 or more, 32% increased staff and 21% decreased; among staffs of fewer than 5, the percentages are lower, 20% and 8%. In the middle, the percentages are 42% increased and 13% decreased. It looks as though many mid-size and larger insights staffs are re-organizing.

SUPPLIER PERSPECTIVE: TECHNOLOGY SPEND

Supplier technology spending mirrors buyers': after a spike in decreases last year to an all-time high of 20% and a sharp drop in increases to an all-time low of 43%, it rebounded in big way. Decreases in spending have dropped to 7% while increases have sky-rocketed to an all-time high of 60%.

Decreases in spending have dropped to 7% while increases have sky-rocketed to an all-time high of 60%

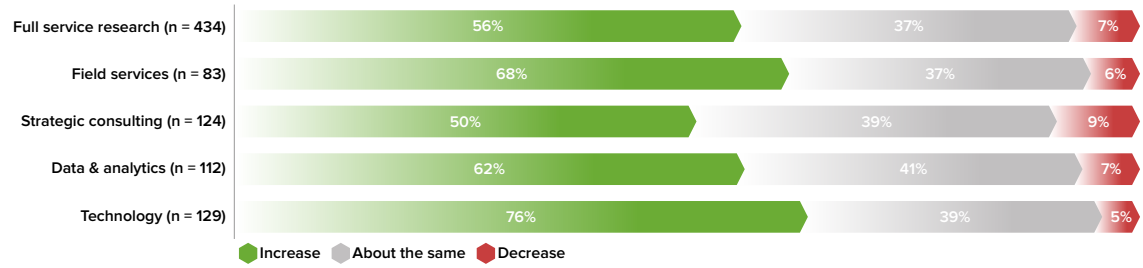
CHANGE IN TECHNOLOGY SPEND: GRIT WAVE (SUPPLIER)



Technology spend increased the most among technology (76%) and field services (68%) providers and the least among strategic consultancies (50%). These trends are consistent with the portfolios of services offered by these types of suppliers, as strategic consulting are the least involved in technology-based services.

It looks as though many mid-size and larger insights staffs are re-organizing

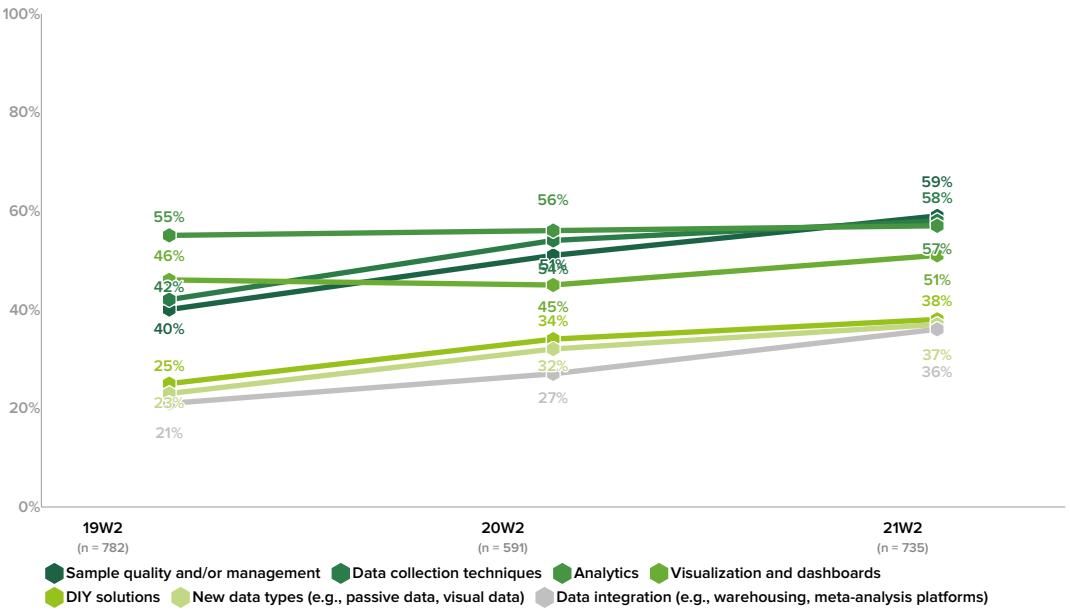
CHANGE IN TECHNOLOGY SPEND: PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)



Similar to buyers' priorities, most suppliers say analytics is a key priority for technology investment, but the biggest movement has been in data integration (+9%), sample quality and/or management (+8%), visualization and dashboards (+6%), and new data types (+5%). Sample quality and/or management as a key technology investment priority is now up 19% since pre-pandemic, data collection techniques are up 16%, new data types are up 14%, data integration is up 15%, and DIY solutions are up 13%. As with buyers, technology spend is strong, and its reach is wide.

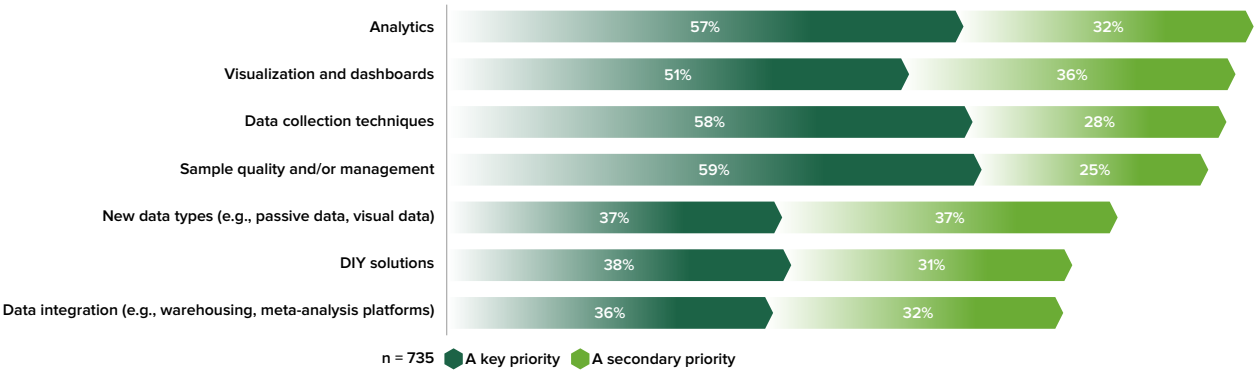
Sample quality and/or management as a key technology investment priority is now up 19% since pre-pandemic

KEY PRIORITIES FOR TECH SPENDING: GRIT WAVE (SUPPLIER)



Similar to buyers, nearly 90% of suppliers say analytics is a key or secondary priority for technology investment. More than three-fourths prioritize visualization and dashboards (87%), data collection techniques (86%), and sample quality and/or management (84%).

PRIORITIES FOR TECH SPENDING (SUPPLIER)



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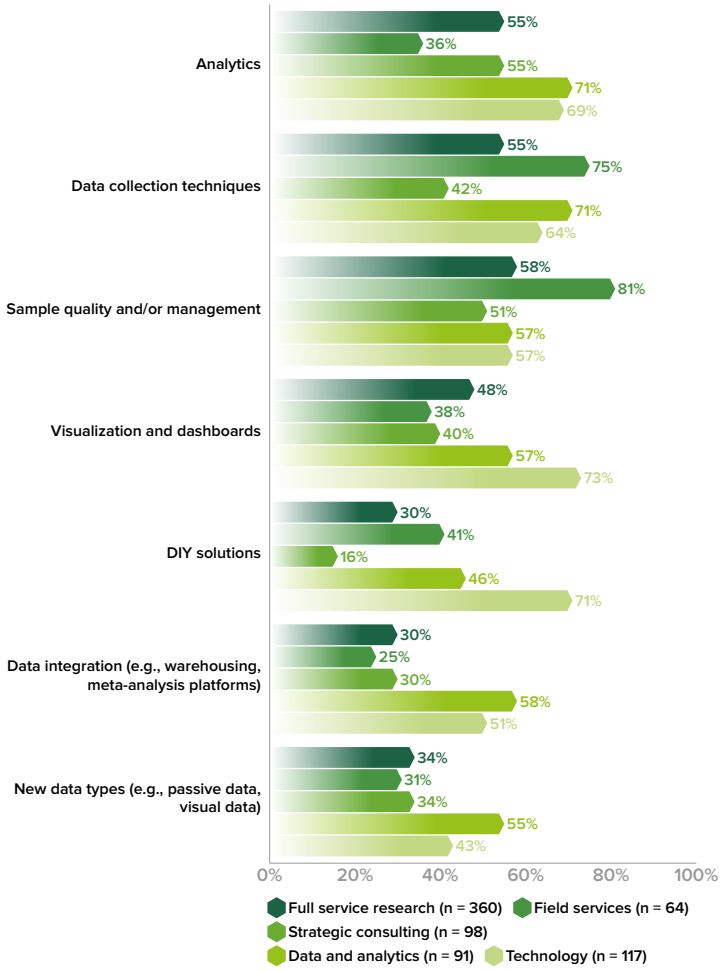
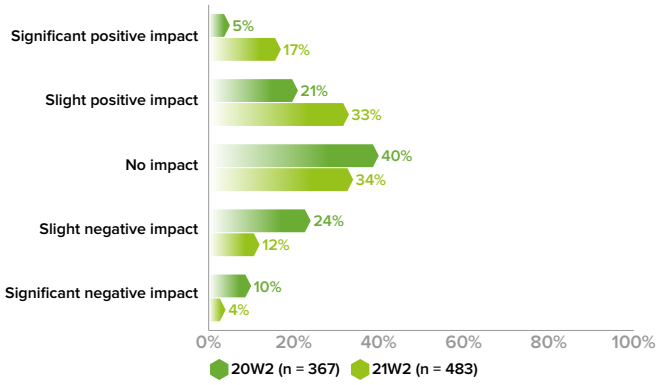


Intuitively, technology providers are more likely to make analytics, visualization and dashboards, DIY solutions, and data integration key priorities for technology investment. Data and analytics providers are also more likely to make key priorities of analytics and data integration, but also data collection techniques and new data types. Field services providers are least likely to make analytics a key priority, but, intuitively, more likely to make key priorities of data collection techniques and sample quality and/or management. Full service research suppliers are less likely to make DIY solutions or data integration key priorities, and strategic consultancies, not surprisingly, are less likely to make key priorities of data collection techniques, visualization and dashboards, and DIY solutions.

For suppliers who are surviving the pandemic, COVID-19 has helped fuel technology investment. Last year, 26% said it had a positive impact on tech spend and 34% said the impact was negative; now, 50% say the impact is positive and only 16% say it was negative. There are no significant differences by supplier type.

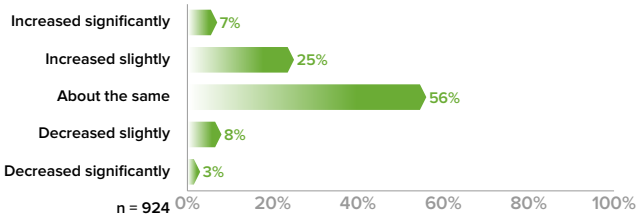
IMPACT OF COVID-19 ON INVESTMENT IN TECHNOLOGY: GRIT WAVE (SUPPLIER)



SUPPLIER PERSPECTIVE: INSIGHTS OUTSOURCING VS. DIY

Although 56% of suppliers did not change their outsourcing practices, 32% increased their outsourcing and only 11% took more work in-house. Surprisingly, this does not differ by supplier type.

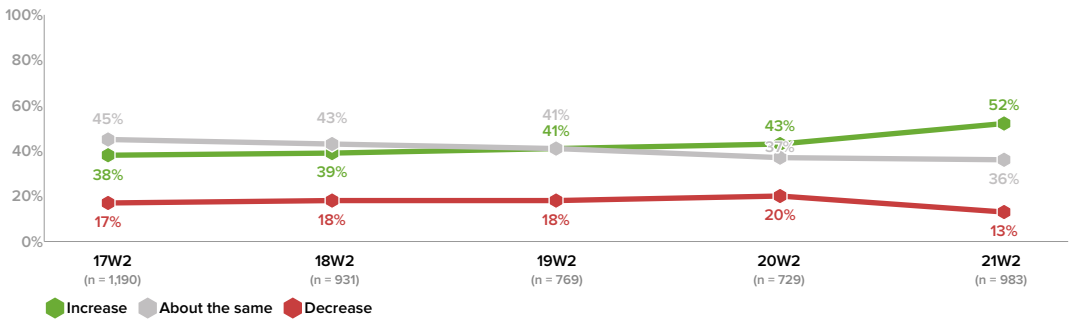
INSIGHTS WORK OUTSOURCE VS. PERFORM IN-HOUSE (SUPPLIER)



SUPPLIER PERSPECTIVE: INSIGHTS STAFF SIZE

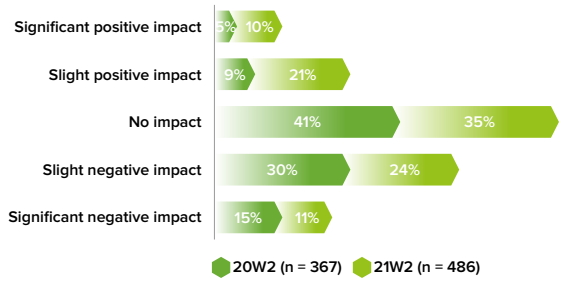
With respect to staff size trends, suppliers had the opposite experience of buyers: after increases hovered around 40% for four years, they spiked to 52% this year. Staff decreases had spiked to an all-time high of 20% last year, but subsequently dropped to an all-time low of 13%.

CHANGE IN INSIGHTS STAFF SIZE: GRIT WAVE (SUPPLIER)



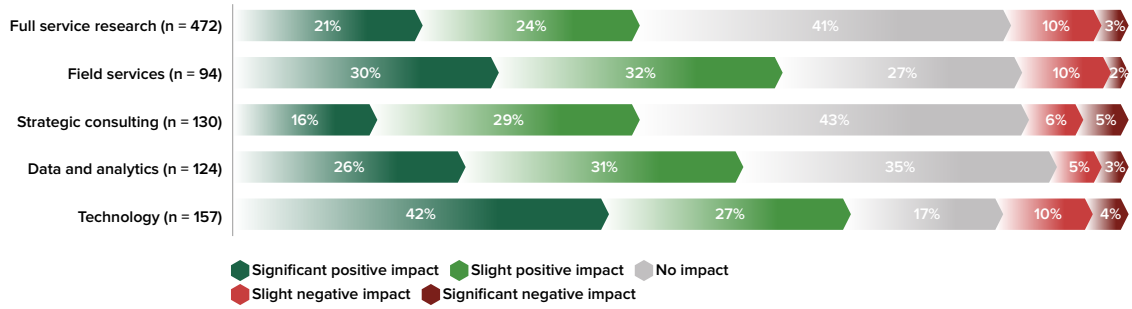
For suppliers who are surviving the pandemic, COVID-19 has helped fuel technology investment

IMPACT OF COVID-19 ON INSIGHTS STAFF SIZE: GRIT WAVE (SUPPLIER)



Last year, COVID-19 had a devastating impact on supplier staff size: it had a negative impact for 45% and positive impact for only 14%; this year, it nearly evened out to 35%-31%. The positive impact was especially strong for technology providers: not only did the segment size increase but the 69% reported a positive impact on staff size due to COVID-19. For full service research suppliers, only 45% reported a positive impact.

CHANGE IN INSIGHTS STAFF SIZE: INSIGHTS GROUP SIZE (SUPPLIER)



THE BIG PICTURE

The pandemic continues to have a negative impact on buyer insights staff size, particularly larger ones, and a slightly positive impact, overall, on buyer technology spending, which would be strong without it. Tech spending remains high for analytics and strong for DIY and visualization and dashboards. It has spiked for data integration and slowed for data collection techniques after last year's jump. About 20% of buyers have increased outsourcing in the past year, but another 20% have taken more work in-house. Technology has enabled buyers to do more with less and to reduce the fixed cost of salaried employees.

On the supplier side, COVID-19 has had a more negative than positive impact on staff size, but, despite this, many more suppliers are increasing staff than decreasing it now. Technology spend is also strong, and suppliers are particularly focused on sample and data collection, analytics, and dashboards and visualization. Suppliers have adopted a more symbiotic approach under the pandemic, and about three times as many have increased their outsourcing as have taken work in-house.

Overall, DIY tools seem to be having a greater impact on buyer staff sizes than on research outsourcing, and suppliers are strengthening their services with technology and human resources.

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IS ZERO-PARTY DATA A TRANSIENT BUZZWORD OR A PERMANENT ADDITION TO OUR MARKETING LEXICON?

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Zero-party data is now popular. Forrester coined it in 2019 as "data a customer intentionally and proactively shares with a brand, including preference center data, purchase intentions, personal context, and how the individual wants the brand to recognize [them]."

Is zero-party data just a buzzword? I believe it's more than hype and offers a vital path to consumer relevance while also being respectful of their right to make choices and control the use of their data. Let's explore why.

Privacy versus personalization

First, we have to acknowledge the evolving privacy landscape prompting brands to rethink research, measurement, and campaign optimization. The days of blithely collecting data consumers casually emanate as they go about their digital lives have been under scrutiny – and are coming to an end.

While expectations for privacy and transparency have increased, real traction only began recently. Prompted by regulations like GDPR and CCPA, big tech firms are making changes to eliminate exposure. Third-party cookies and identifiers such as Apple's IFDA are being phased out. Mozilla, Firefox, and Apple Safari have already stopped supporting third-party cookies, and Google's grace period in Chrome will conclude soon.

As this plays out, consumers are demanding personalized experiences from brands. When on a brand-owned site, or when reached through channels like email, consumers expect to be recognized and for messages to be relevant. This is a dilemma between competing demands for personalization and privacy.

First-party data... not the whole answer

Many brands are investing in first-party data to make sure that they can meet expectations for personalization. This is data they collect via their own web and app properties, and through CRM platforms, subscription-based emails, customer feedback surveys, and more.

Considered "gold" by many marketers, first-party data is a worthwhile investment, but not the whole solution for our industry's reckoning with privacy and relevance. First-party data collection does not necessarily equate to carte blanche for unlimited use.

Constraints in how first-party data is typically collected mean that it cannot be used to create the fullest view of the consumer's journey. It also falls short helping brands to learn about customers they don't have, their competitors, and the general market. Without a wider view, the marketer has gaping holes in their understanding of trends, consumer journeys, paths to purchase, and more.

Building better insights with a zero-party approach

The industry is often preoccupied with devising workarounds for today's persistent consumer tracking using cookies and other identifiers. However, we now have a crucial opportunity to *stop working around* the consumer and to *work with them* instead. With zero-party data, consumers voluntarily share, granting the right to use their data for a particular purpose or value exchange.

For example, behavioral data voluntarily shared by a consumer in a zero-party approach provides a truly objective and full view of their journey across platforms – for the first time – because the consumer is the gatekeeper and not the platforms they visit. This eliminates guesswork and gives a neutral and objective view of their experiences. The marketer can connect this behavioral data to what the consumer may share about their perceptions. When they do, they can close the "say-do" gap in ways never before possible.

The zero-party path is an elegant solution for moving from workarounds to more effective and sustainable insights programs we can trust for the long haul. If first-party data is gold, then zero-party data is platinum.

At DISQO, our focus is to empower brands with a scaled, platform-based approach for leveraging trusted zero-party data in their most vital business decisions.

Zero-party data is not destined for the buzzword graveyard. It's here to stay.

BUSINESS OUTLOOK

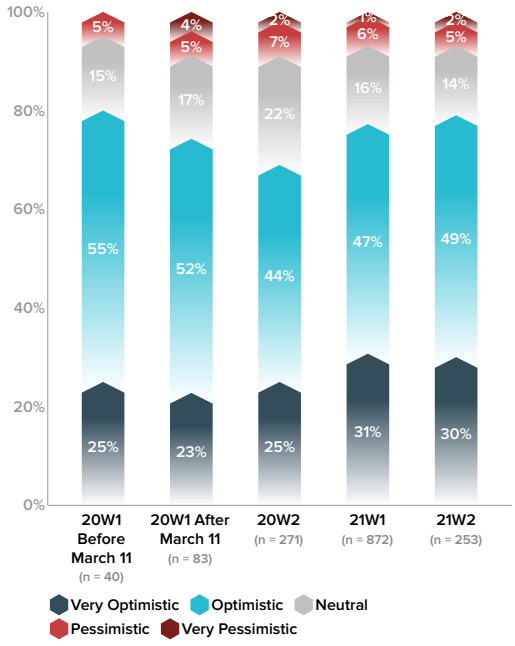
On the eve of the pandemic in early spring 2020, business outlook metrics were very positive and, in many cases, had reached all-time highs. Of course, by the end of 2020, it all came crashing down, but current GRIT metrics show a continuation of the recovery we reported earlier. Buyer and supplier adjustments seem to have made them more confident in the industry than ever, but, then, COVID-19 has recently surged again...

OPTIMISM AND COVID-19

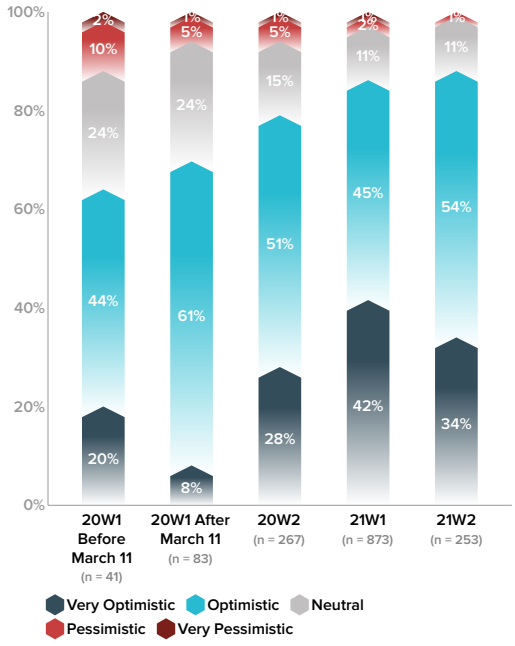
Possibly, the COVID-19 crisis initially caused some personal anxiety over job security, but subsequent experience has increased confidence in the industry

Buyer optimism about their department or role entered the pandemic at 80%, then steadily declined to 69% toward the end of 2020. Now, however, it is very close to pre-pandemic levels, hitting 79% in the spring GRIT wave and 78% now. Further, the percentage who are "very optimistic" is higher than it was entering the pandemic (31% now to 25% then). Optimism about the insights and analytics industry overall entered the pandemic at 63%, climbed to 79% by the end of 2020, and is now 87%. Possibly, the COVID-19 crisis initially caused some personal anxiety over job security, but subsequent experience has increased confidence in the industry. Throughout this report, we have discussed the many adjustments and adaptions that have exposed buyers to unfamiliar tools and approaches, and apparently these experiences have been productive and restorative.

OPTIMISM ABOUT DEPARTMENT OR ROLE: GRIT WAVE (BUYER)



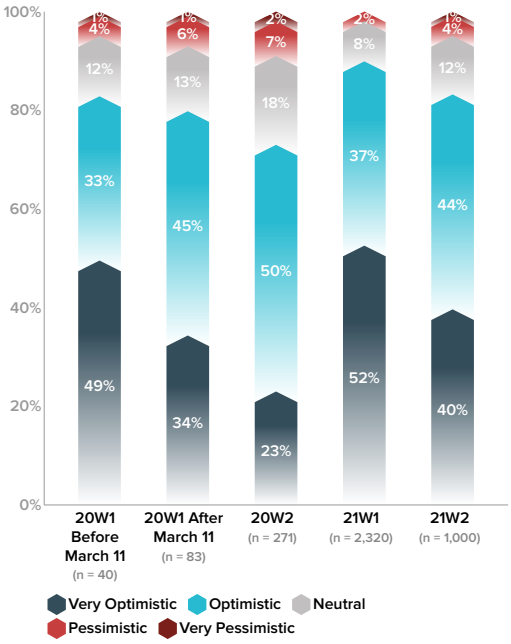
OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY (BUYER)



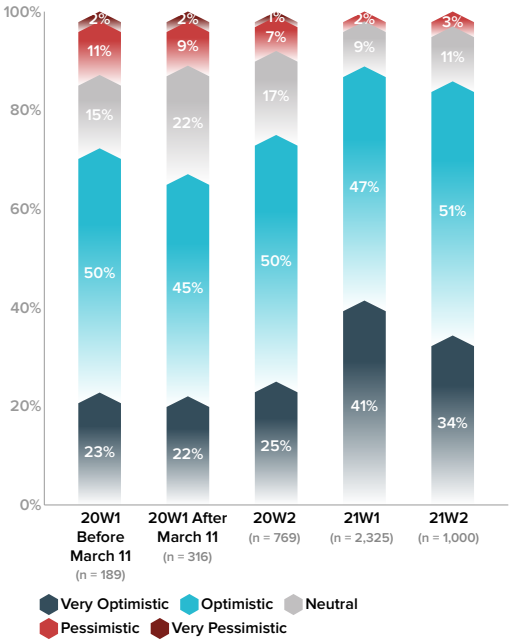
Suppliers have had a similar journey of personal anxiety followed by relief accompanied by increasing confidence in the insights and analytics industry. Company optimism entered the pandemic at 83%, dropped to 73% by the end of 2020, and has returned to the 80%s in each wave of 2021. Optimism about the insights and analytics industry entered at 72%, but steadily increased and has been in the mid- to upper-80%s in both 2021 waves. The percentage who are "very optimistic" about their company started at 49% before plunging to 23% by the end of 2020, but has climbed back up to 40%. Entering the pandemic, 23% were "very optimistic" about the industry, and that number is now up to 34%.

A word of caution: the current GRIT survey was conducted prior to the recent surge in COVID-19 cases, and we don't know what impact that will have.

OPTIMISM ABOUT COMPANY (SUPPLIER)



OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY (SUPPLIER)



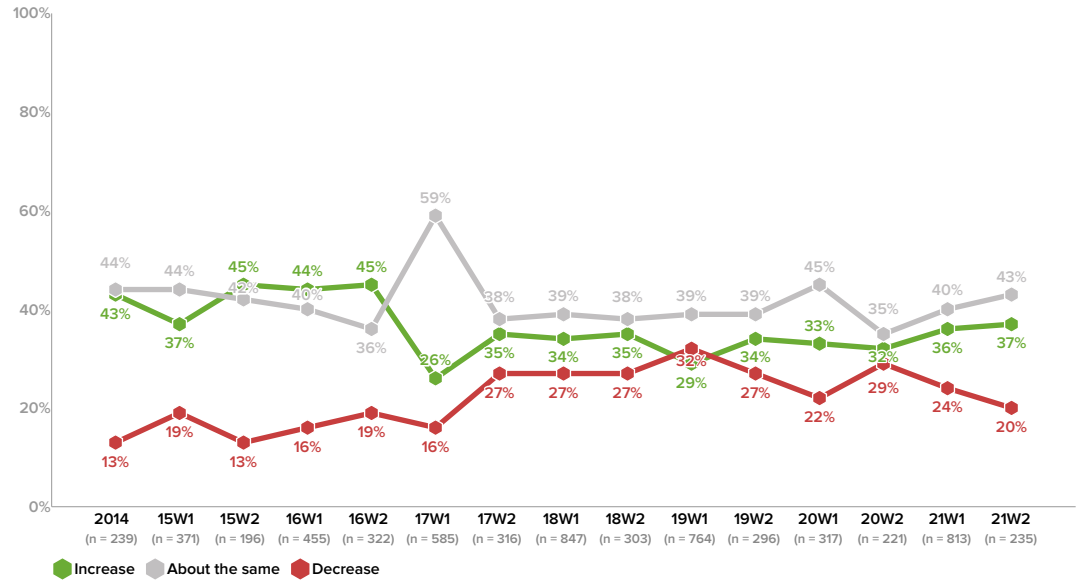
The proportion of buyers with larger research project budgets has inched up to 37%, its highest point since 2016

RESEARCH PROJECT SPENDING TRENDS

From the second half of 2017 through the end of 2019, at least 27% of buyers reported decreases in research project budgets. When 2020 began, this had dropped to 22%, but the pandemic pushed it back to up to 29% by the end of the year. Since then, the proportion with smaller research budgets has contracted and now stands at 20%, just below its pre-pandemic level.

Even better, the proportion of buyers with larger research project budgets has inched up to 37%, its highest point since 2016. These conditions usually result in higher optimism, and that's what we see today relative to the first part of the pandemic.

ANNUAL RESEARCH PROJECT SPENDING TREND: GRIT WAVE (BUYER)



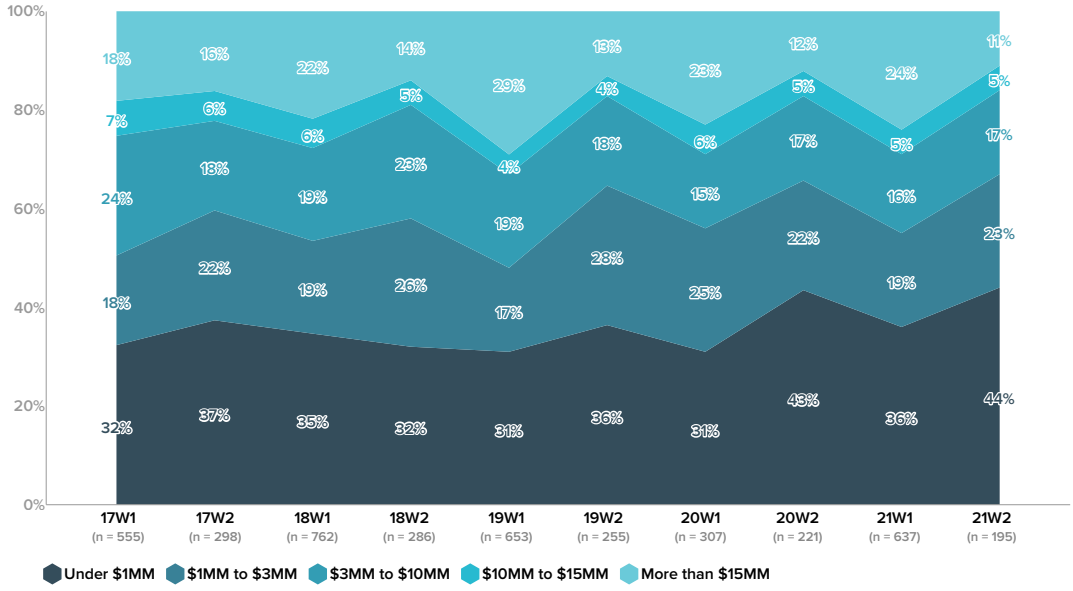
More buyers tell us that COVID-19 had a positive effect on overall research volume than tell us that is it had a negative effect

Even though the research project budget trends are good news for individual buyers, they are not necessarily having a huge impact on the insights and analytics industry. Because there may be seasonal effects on budgets, GRIT usually compares fall waves to other fall waves and spring waves to spring waves, and the percentages of budgets that fall into each budget size category are nearly identical to those from a year ago. Last year, 44% of budgets were under $1MM and 12% were more than $15MM; now the percentages are still 44% and 12%. In the most recent spring waves, the percentages were 31% under $1MM and 23% over $15MM in early 2020 versus 36% and 24% earlier in 2021; the proportion of buyers with the smallest budgets had increased by 5% while those with largest stayed virtually the same.

If we look back to 2019, budgets under $1MM were reported by 31% of buyers in the spring and 36% in the fall. In spring of 2020, before the pandemic, the proportion of the smallest budgets remained the same as in 2019; after the pandemic hit, the proportion of research project budgets under $1MM grew year-over-year to 43% and has stayed that high since then. The largest budgets, more than $15MM, belonged to 29% of buyers in 19W1 and 13% in 19W2; year-over-year, the mostly pre-pandemic spring number dropped to 23% while the post-pandemic fall number was largely unchanged (12%).

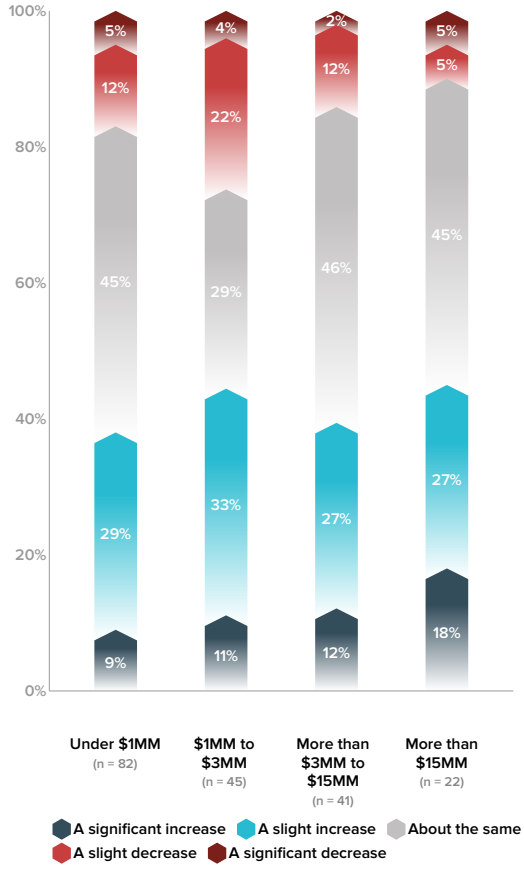
So, compared to 2019, we are seeing more of the smallest budgets and fewer of the largest budgets, and it is not clear how much these trends were affected by the pandemic. Later in this section of the GRIT Report, we'll discuss everything buyers and suppliers told us about the impact of COVID-19, but the relevant point here is that more buyers tell us that COVID-19 had a positive effect on overall research volume than tell us that is it had a negative effect. Last fall, the gap favored positive impact, 36% to 31%, and the gap increased to 41% to 30% last spring and is currently 39% to 26%. This finding supports the trend in budget increases, but does not explain why more buyers have smaller budgets.

ANNUAL RESEARCH PROJECT BUDGET SIZE: GRIT WAVE (BUYER)

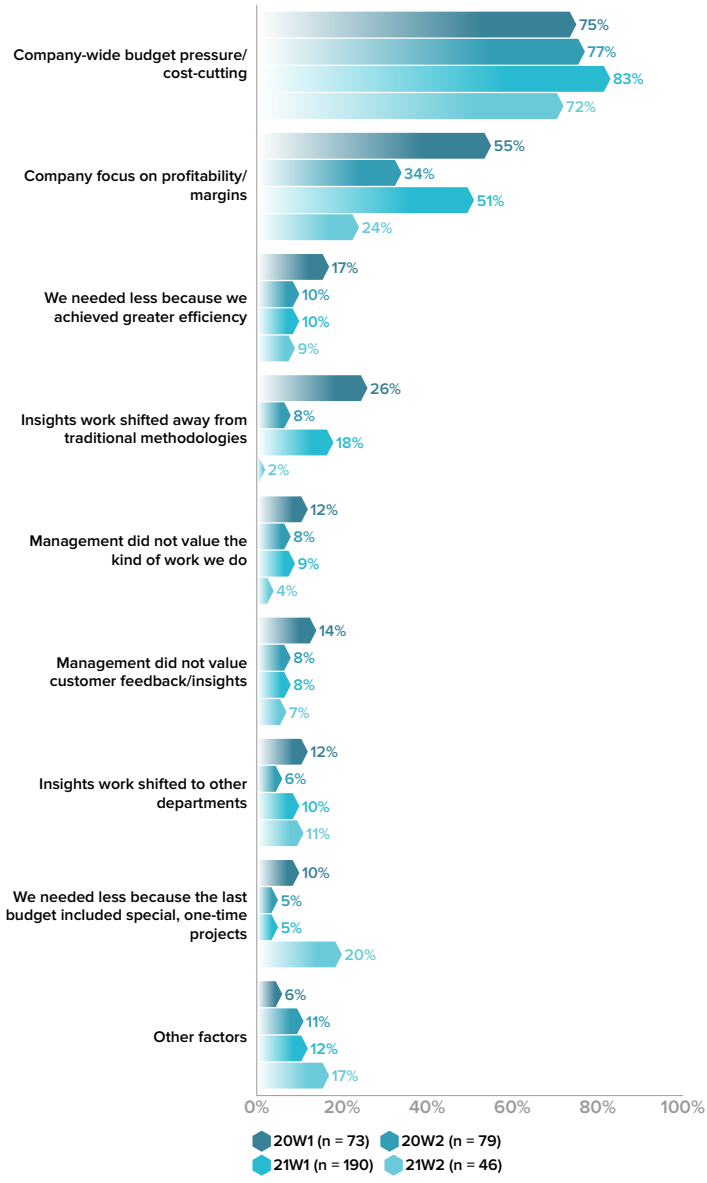


If we look at research project budget trends by budget size, we see that buyers with the largest budgets experienced the most significant increases (18%), double the proportion for the smallest budgets (9%). They also reported the fewest decreases (10%); 14% of buyers with budgets of $3MM to $15MM reported decreases, 26% of those with budgets of $1MM to $3MM reported them, and 17% of those with budgets less than $1MM reported decreases. The trend toward budget increases is a real one, but, as they say, "the rich are getting richer and the poor are getting poorer."

ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND: BUDGET SIZE (BUYER)



SIGNIFICANT FACTORS BEHIND BUDGET DECREASE: GRIT WAVE (BUYER)



Typically, most buyers who report budget decreases attribute them, at least in part, to corporate-wide budget pressure independent of the insights function. This is still the top reason (72%), but lower than it was last spring. Only one-quarter said the decrease was due to company focus on profitability and margins, and this represents the lowest level ever and less than half of what was reported last spring. Lows were also reached for insights work shifting away from traditional methodologies (2%) and management not valuing the kind of work insights professionals do. The only factor that stands out as more significant than in the past is that one-time projects conducted the previous year were not needed in this year's budget. The proportion giving this reason is four times the proportion in each of the last two GRIT Reports. Fewer budgets decreased compared to past waves, and the decreases that were implemented were seldom due to any anti-insights department agenda.

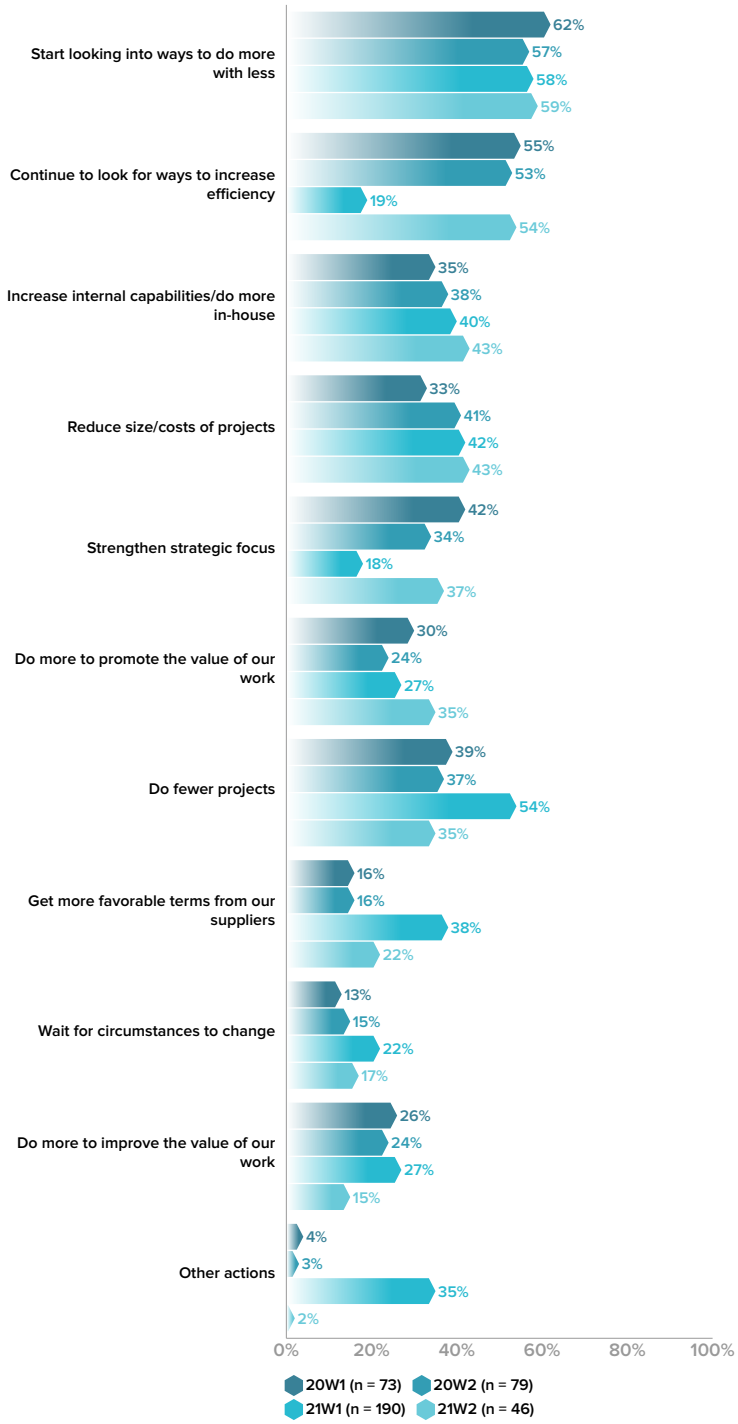
The top response to budget decreases is not surprising because it has been the top answer in every wave and named by the majority: start looking for ways to do more with less. The second response is also not a surprise – if we ignore last spring. It's been the second reason in every wave and named by a majority in every wave except last spring: continue to look for ways to do more with less. Usually given by 53% to 55% of buyers who experienced a decrease, it was given by only 19% in the last wave. Instead, their second response was to do fewer projects (54%), a response usually given by only about a third of buyers who experienced decreases. Perhaps those who had not started to look for ways to do more with less at the start of the pandemic were caught unprepared and had no choice but to reduce their research work and start looking for ways to be more efficient.

The top response to budget decreases is not surprising because it has been the top answer in every wave and named by the majority: start looking for ways to do more with less

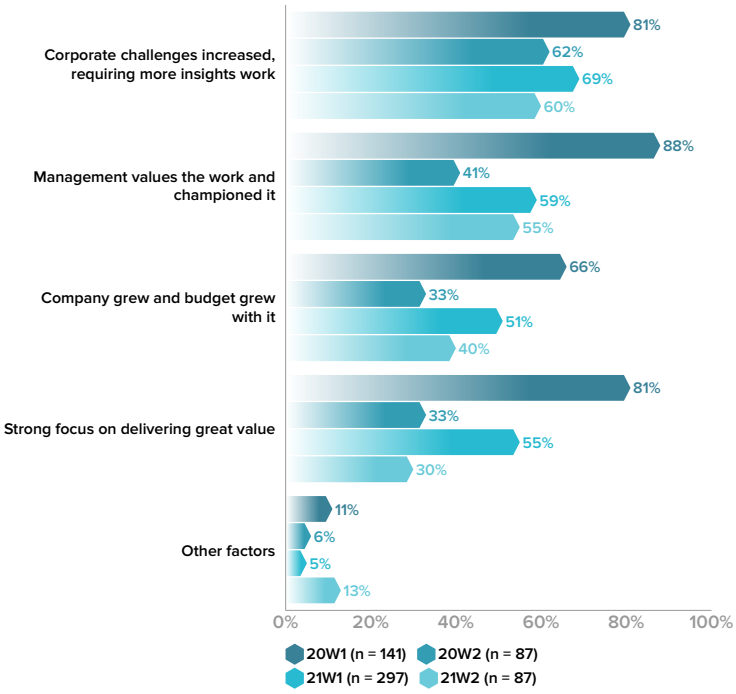
A few responses have become more common over time, at least directionally. In early 2020, 33% of those facing a reduced budget said they would reduce the size and cost of their projects. More than 18 months into the pandemic, that percentage has risen to 43%. Similarly, just before the pandemic, 35% said they would increase their internal capabilities and take more work in-house; now, 43% would do that. In the other direction, 26% said they would do more to increase the value of their work before the pandemic, but now that number is just 15% as well as based on fewer buyers with budget decreases. Further, that entire drop occurred since spring 2021. Various findings in this report suggest that buyer insights staffs have had less trouble justifying their value recently and are leveraging DIY technology to do more visualization while outsourcing basic research activities. They are still subject to corporate-wide budget pressures, so they continue to prioritize ways to be more efficient with time and money.

Various findings in this report suggest that buyer insights staffs have had less trouble justifying their value recently and are leveraging DIY technology to do more visualization while outsourcing basic research activities

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



SIGNIIFICANT FACTORS BEHIND THE BUDGET INCREASE: GRIT WAVE (BUYER)

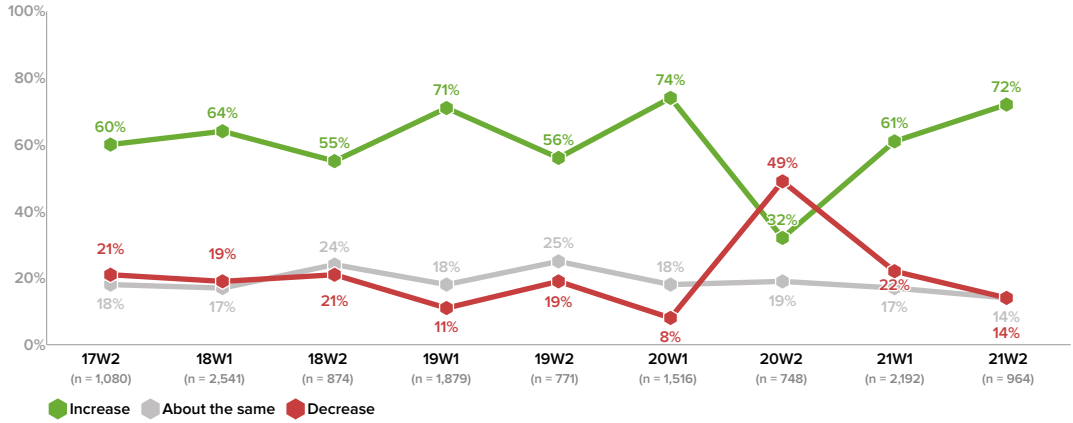


Going into the pandemic, times were good for insights groups. The gap between budget increases and decreases had widened favoring increases, and at least two-thirds credited the increase to management valuing and championing the work (88%), increased corporate challenges (81%), their own focus on delivering great value (81%), and company growth (66%). By the end of 2020, budget increases were nearly equaled by budget decreases, and the only factor named by a majority was increased corporate challenges (62%). Things have improved this year and once again the majority cites management support as a factor behind budget increases, but company growth as a budget driver has not made a big comeback, and neither has focusing on delivering great value. It's likely that insights groups have had to focus more on helping their companies survive than on helping them thrive.

SUPPLIER REVENUE TRENDS

A year ago, supplier revenue decreases outnumbered revenue increases, and it wasn't close (49% to 32%). GRIT has tracked revenue trends since 17W2, and that was the first time revenue decreases exceeded increases. In fact, the ratio of increases to decreases had never been lower than 2.7 to 1 and had gone as high as 9.3 to 1, a record that was set by the final pre-pandemic measure. Not only was the 2020 finding unprecedented, it was somewhat counter-intuitive. Not that it was surprising that many suppliers lost revenue; the astounding part was that so many lived to tell the tale. By early 2021, the ratio of increases to decreases came back to a much more normal 2.8 to 1, then continued to climb to today's robust 5.1 to 1.

REVENUE TREND: GRIT WAVE (SUPPLIER)



Not that it was surprising that many suppliers lost revenue; the astounding part was that so many lived to tell the tale

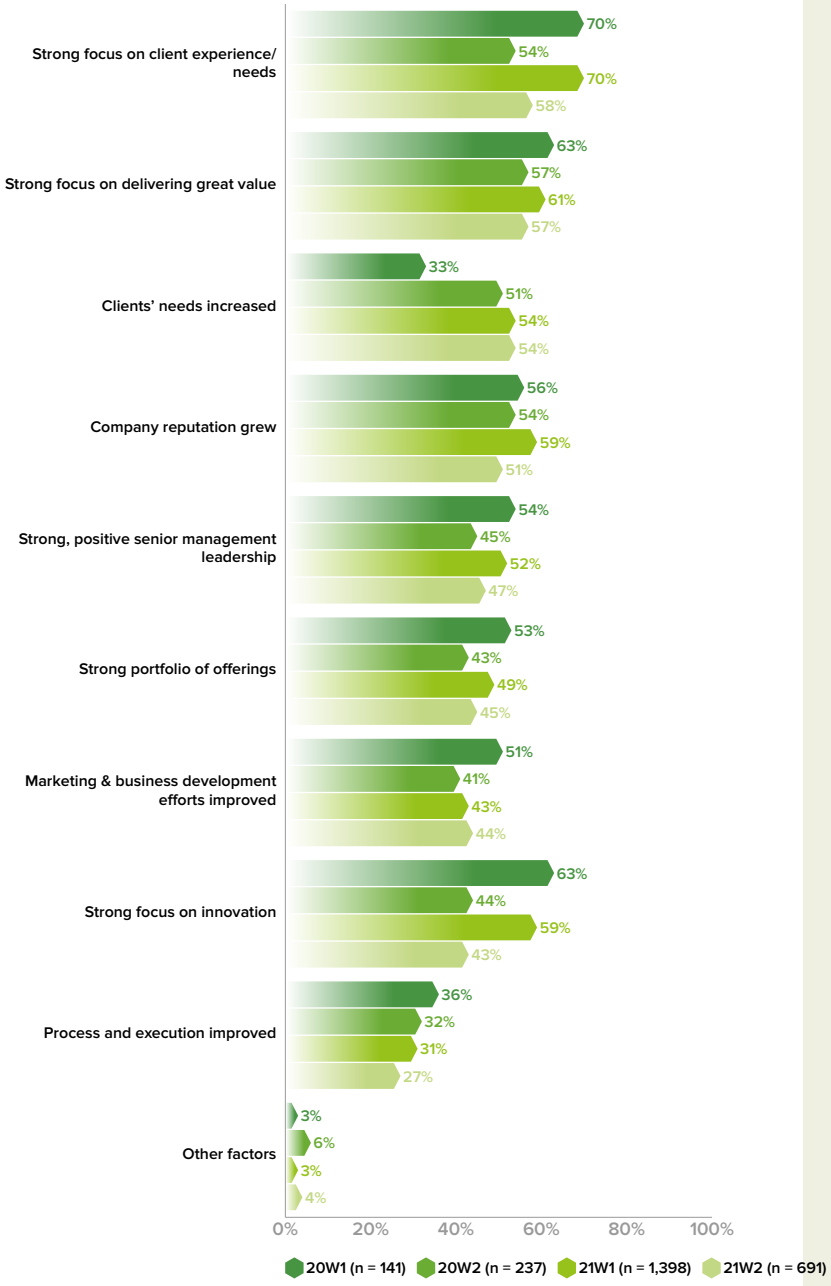
When revenue increases, suppliers usually attribute it to an average of about four factors rather to a single masterstroke, and this comeback has been no exception. In every GRIT wave since the beginning of 2020, most suppliers whose revenue increased attributed it to their focus on client experience and needs, delivering great value, and their own growing reputation. Since the pandemic began, most suppliers also cite an increase in client needs as a significant revenue driver; pre-pandemic, only 33% attributed revenue growth to it.

Two factors seem to be seasonal, at least with respect to GRIT "seasons." Strong focus on client experience/needs has been 70% in each spring wave and in the 50%s in each fall wave, while strong focus on innovation peaks around 60% in the spring and hovers in the mid-40%s in the fall. Given this effect, it's difficult that argue that these have become less significant revenue drivers.

True to the Law of Entropy, it takes an average of four factors to explain revenue increases, but only about two-and-a-half to explain revenue decreases. Pre-pandemic, suppliers explained revenue decreases with an average of 2.7 factors, but no factor was named by a majority. The leading drivers of revenue loss were client budget decreases (49%), unfavorable economy and market conditions (40%), clients taking more work in-house (38%), and more competitors offering similar services for lower prices (36%). Since then, citations of unfavorable economy and market conditions have more than doubled in 20W2 and 21W1 to about 90% and two-thirds cited decreases in client budgets. Currently, these are still cited as significant drivers by a majority, but have started to recede. Unfavorable economy/market has dropped about 20%, and decreased client budgets has dropped about 10%.

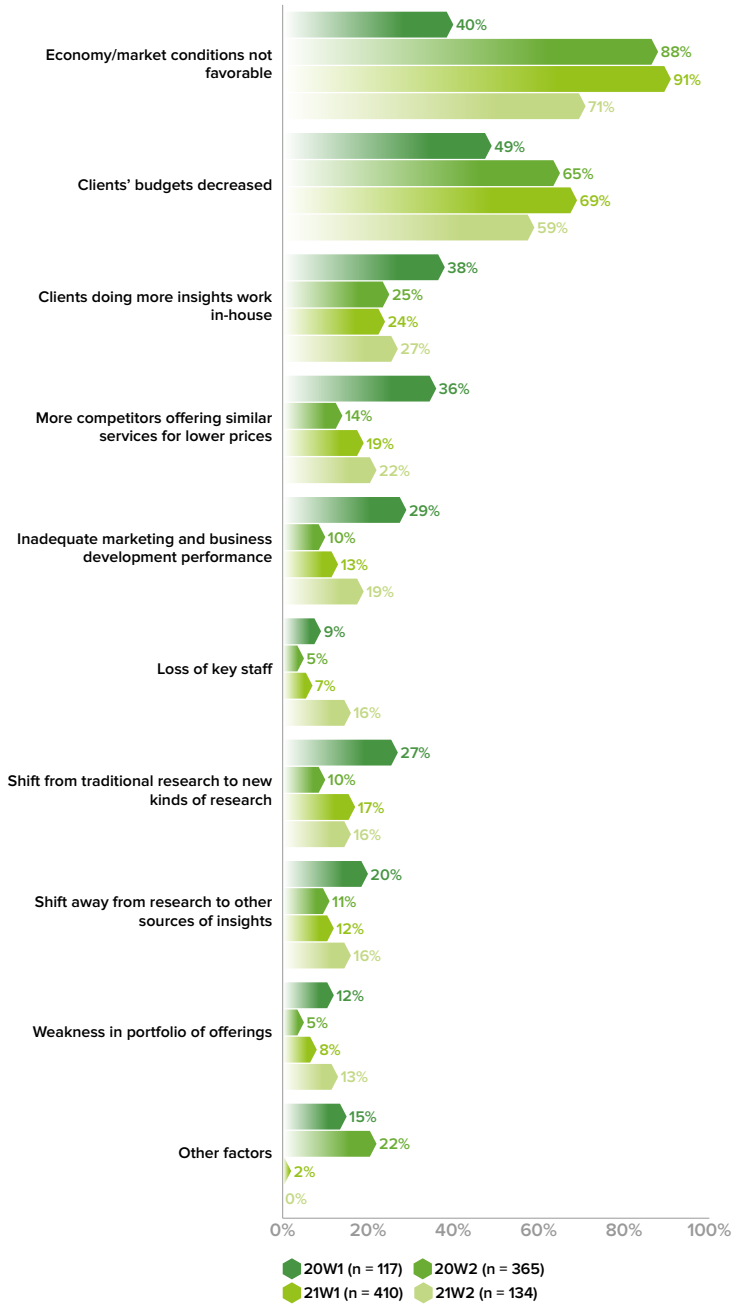
Almost every other driver dropped in significance when the pandemic broke out. By late 2020, citing similar competitors with lower prices as a driver dropped from 36% to 14% and now sits at 22%. In the Selection Criteria section, we discussed how buyers have become more willing to trade cost savings for quality and speed, and taking chances on cheap solutions just to save some money does not seem to be in their playbook right now.

FACTORS BEHIND THE REVENUE INCREASE: GRIT WAVE (SUPPLIER)



True to the Law of Entropy, it takes an average of four factors to explain revenue increases, but only about two-and-a-half to explain revenue decreases

SIGNIFICANT FACTORS BEHIND REVENUE DECREASE (SUPPLIER)



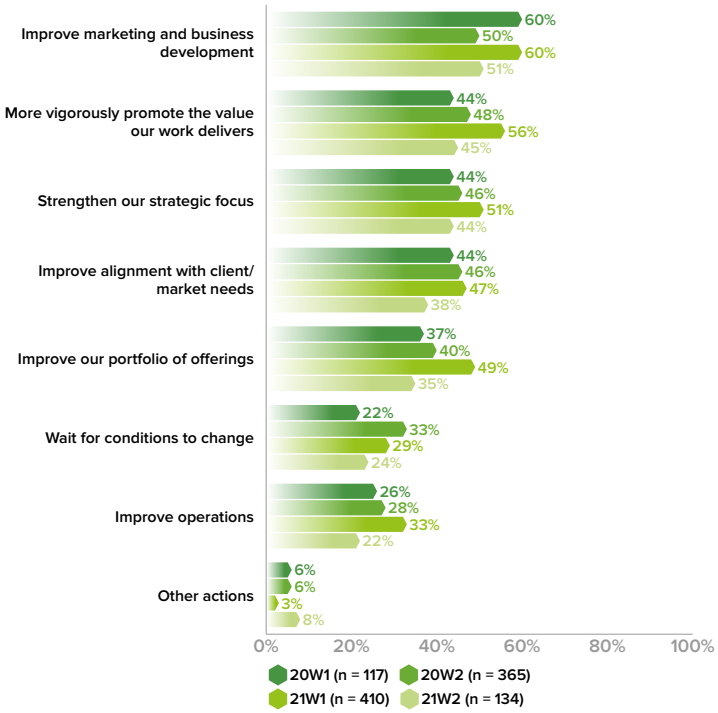
Clients taking more work in-house was a driver for 38% of suppliers who lost revenue pre-pandemic, fell to 25% by late 2020, and has remained in the mid-20%s since then. When we asked buyers directly, the same proportion said outsourcing had decreased as said it increased; it's possible that many buyers are doing more work themselves and continuing to outsource because they have to get a lot done. They may also be automating tasks and adding capabilities that they wouldn't pay suppliers to do anyway.

A shift away from traditional research was cited as a significant driver of revenue decrease by 27% pre-pandemic, and by the end of 2020 it plunged to 10%. It's climbed back up to 16%, but buyers aren't citing it as a driver of budget decreases; it's dropped from 26% pre-pandemic to just 2% now. Buyer technology investments suggest that analysis of existing data is a focus of their "non-traditional" research, that they wouldn't be using suppliers for this anyway, and that this work does not replace the primary research they still need to conduct.

Finally, nearly one-third of suppliers who lost revenue pre-pandemic named inadequate marketing and business development as significant drivers, but that dropped to just 10% by the end of 2020. Since then, it has climbed back to 19%, and this may represent a kind of equilibrium with unfavorable economic and market conditions. If you believe you have a strong offering but are still losing revenue even with an improving market, inadequate marketing and business development is a convenient explanation for it. Or, if you're the kind of person who typically criticizes your company's marketing and business development, you may have still believed it was inadequate last year but didn't necessarily believe that improved activities in this area would have made any difference given all the other barriers to success.

Supplier responses to revenue decreases haven't varied much, even given the pandemic. Most say they will improve marketing and business development, and significant minorities say they will promote the value of their work more vigorously, strengthen their strategic focus, improve alignment with client and market needs, or improve their portfolio of offerings. Some of these spiked during the crisis of late 2020, but none are much different now than they were before the pandemic began.

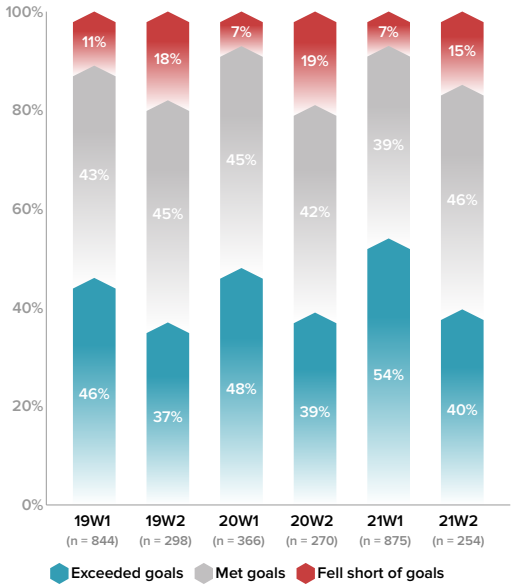
HOW ORGANIZATION WILL RESPOND TO THE REVENUE DECREASE (SUPPLIER)



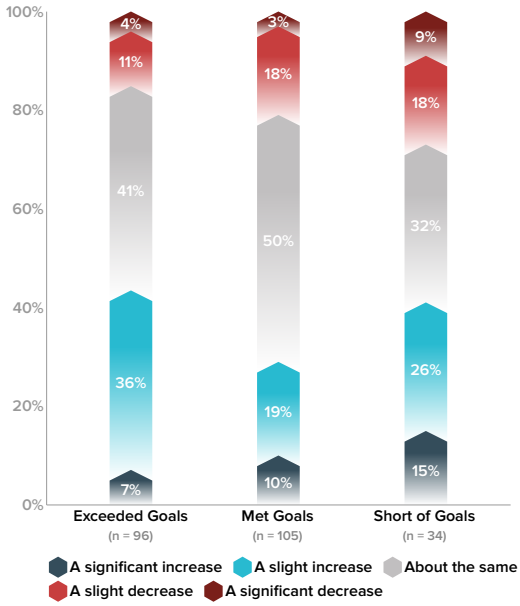
BUYER PERFORMANCE AGAINST GOALS

GRIT asks buyers how well they met their research, insights, and analytics goals over the past year, and results are generally consistent from fall to fall. Starting in 2019, fall measures for exceeding goals have inched up from 37% to 40% while the percentage falling short of goals has declined from a high of 19% to a low of 15%. In the spring waves, the percentage exceeding goals has gradually climbed from 46% to 54% while the proportion who fell short has dropped from 11% to 7%. Even a nominal improvement is noteworthy given that more buyers say COVID-19 has had a negative impact on their ability to meet goals than say it has had a positive effect.

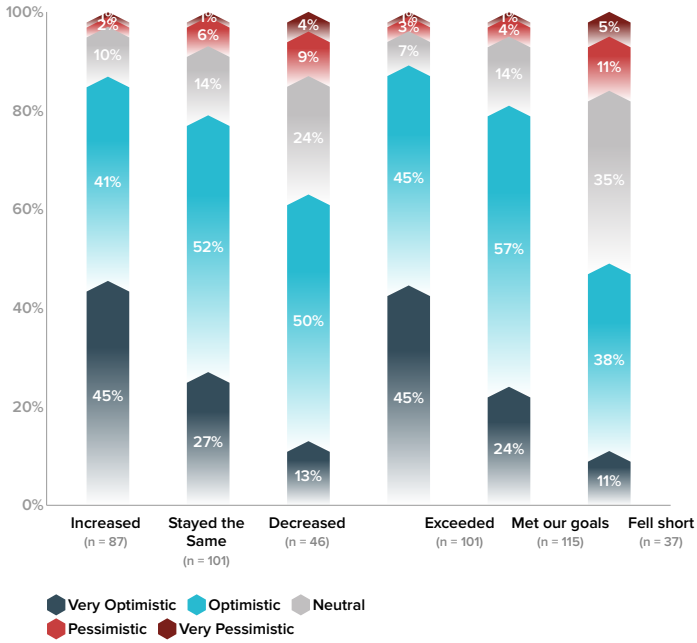
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (BUYER)



PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND (BUYER)



OPTIMISM ABOUT ROLE: RESEARCH PROJECT BUDGET SIZE TREND AND PERFORMANCE AGAINST GOALS (BUYER)



Buyers who exceeded their goals were much more likely to see budgets increase (53%) than decrease (15%), but so were those who fell short of goals (41% to 27%). About half of buyers who met their goals saw no change in budget, but somewhat more saw an increase (29%) than a decrease (21%). The group that saw the most significant increases were those who fell short of goals (15%), double that of those who exceeded goals (7%). If it seems strange to "reward" underperforming insights groups with larger budgets, just remember that strange days have tracked us down. Although some buyers said that COVID-19 had a positive impact on their ability to meet goals (25%), more said the impact was negative (34%). It's not much of leap to think that those who set the budgets were aware of these barriers, and that some redoubled their efforts to overcome them by increasing their investment in insights.

Budget decisions can affect employee morale. When the budget increases, 86% are optimistic. When they don't change, optimism drops to 79%. When budgets decrease, optimism falls much farther to 63%. There is a similar impact on pessimism: 3% of those experiencing budget increases are pessimistic which more than doubles to 7% when budgets are static and doubles again to 13% when budgets are cut.

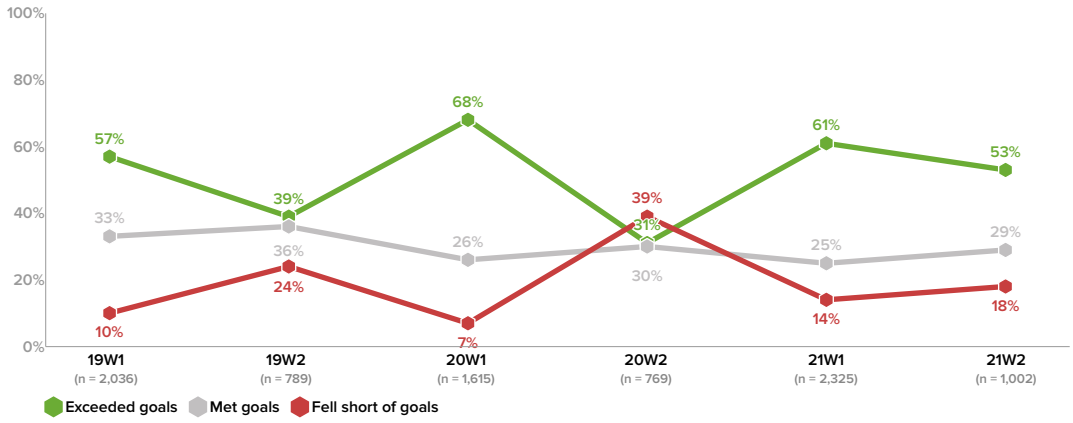
Performance against goals impacts morale even more than budget changes do. Optimism hits 89% when goals are exceeded, drops to 81% when they are met, and absolutely craters to 49% when goals are not met. Pessimism is at 4% when goal are exceeded, 5% when goals are met, and triples to 16% when goals are not met. It is worse for morale to fall short of goals than to cut the budget because budget cuts can be due to outside factors, such as corporate-wide pressures or the economy, or might result from successfully concluding a big project that does not need to be repeated. It is harder to rationalize falling short of goals, and staff can take it as a personal reflection on their performance. Therefore, it is important for morale that you take care when you communicate about goal performance, and, if you believe COVID-19 has created unfair barriers, that you share that perspective with staff.

SUPPLIER PERFORMANCE AGAINST GOALS

Supplier performance against goals has been more volatile than buyers' performance. Spring to spring, 57% of suppliers exceeded goals in 2019, and things were looking very good just before the pandemic as 68% reported that they had exceeded goals. However, after the torture of 2020 and despite a rebound in early 2021, the percentage who exceeded goals dropped to 61%. The percentage falling short of goals was 10% in spring of 2019, fell to 7% just before the pandemic, and doubled to 14% at the end of the first year of the pandemic. Fall to fall, 39% had exceeded goals in 2019, and this plunged to 31% last year. Now, however, far more suppliers have exceeded their goals than in 2020 or 2019, 53%. In fall of 2019, 24% fell short of goals, and this swelled to 39% when the pandemic was in full swing before dropping to 18% at toward the end of 2021.

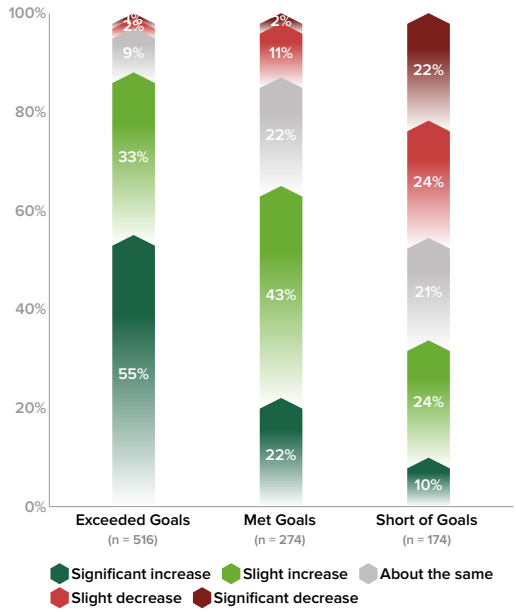
Supplier performance against goals has been more volatile than buyers' performance

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (SUPPLIER)



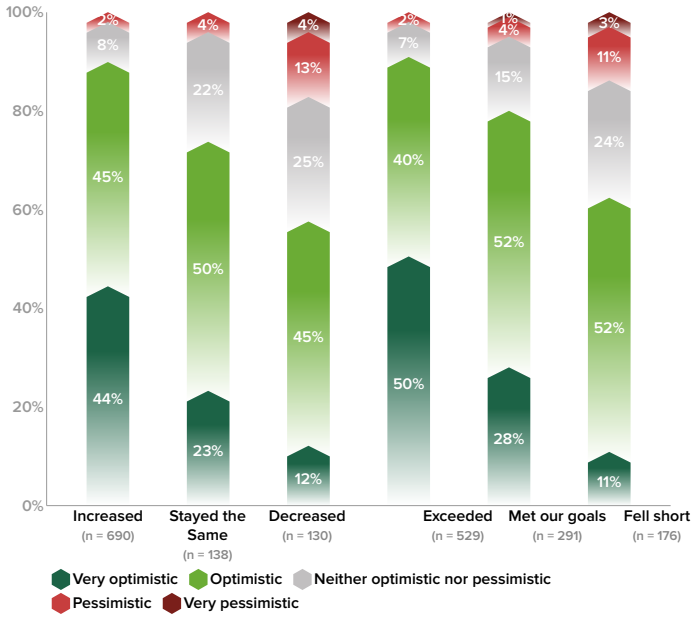
Unlike client research budget trends, supplier revenue trends are strongly related to performance against goals. When you come right down to it, all meaningful supplier goals eventually relate to revenue generation. When goals were exceeded, revenue increased significantly for 55% of suppliers. When goals were met, only 22% increased revenue significantly, and when suppliers fell short of goals, revenue increased significantly for only 10%. When goals were exceeded or met, revenue decreased significantly for less than 2% of suppliers, but decreased significantly for 22% when goals were not met. The relationship between goal performance and revenue is very direct.

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: REVENUE TREND (SUPPLIER)



When you come right down to it, all meaningful supplier goals eventually relate to revenue generation

OPTIMISM ABOUT ROLE: REVENUE TREND AND PERFORMANCE AGAINST GOALS (SUPPLIER)



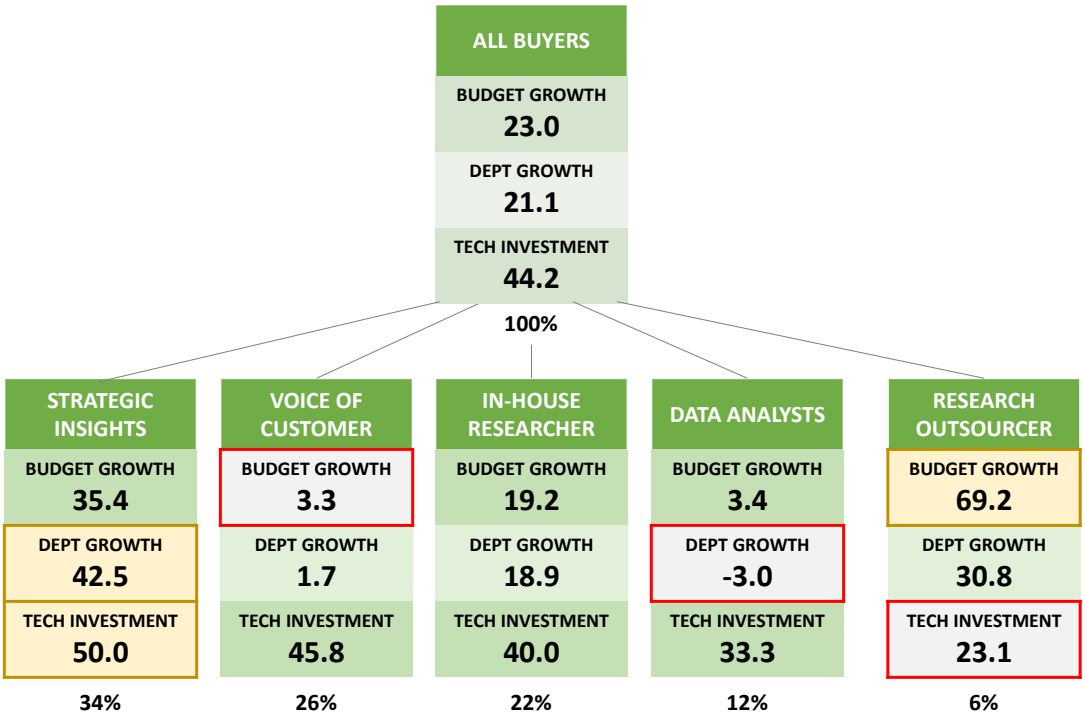
For suppliers, employee morale is triggered more directly by revenue performance than by goal performance, although they are similar because they are inseparable. As revenue trend moves from increase to no change to decrease, optimism drops from 89% to 73% to 58% and pessimism increases from 3% to 4% to 17%. As performance against goals moves from exceed to meet to fell short, optimism drops from 91% to 80% to 63% and pessimism grows from 2% to 5% to 14%. The patterns are similar, but a bit sharper for revenue performance than for goal performance, probably because revenue performance is much more quantifiable and tangible.

BUYER SEGMENT HEALTH

Overall, buyer trends for research project spending (23.0) and staff size (21.1) were moderately positive, and for technology spend (44.2) were more strongly positive, though not phenomenal

To summarize and illustrate the business outlook for buyers, we create a "health tree" with metrics for research project budget, technology spend, and staff size trends. The metrics in the tree represent scores calculated from the complete data discussed earlier which account for the direction of the trend and how strongly the buyer felt about it. For example, if a buyer said staff size increased significantly, they would count as 200; if they said it slightly increased, they would count for 100; if they said it stayed the same, they would count as 0. Decreases are treated as the negative of increases, e.g., counting as -100 or -200. An average score of 200 means that every buyer thought the metric increased significantly, and a score of -200 means every buyer thought it decreased significantly. A score of 100 means it increased slightly, on average; -100 means it decreased slightly on average; and 0 means it was unchanged on average.

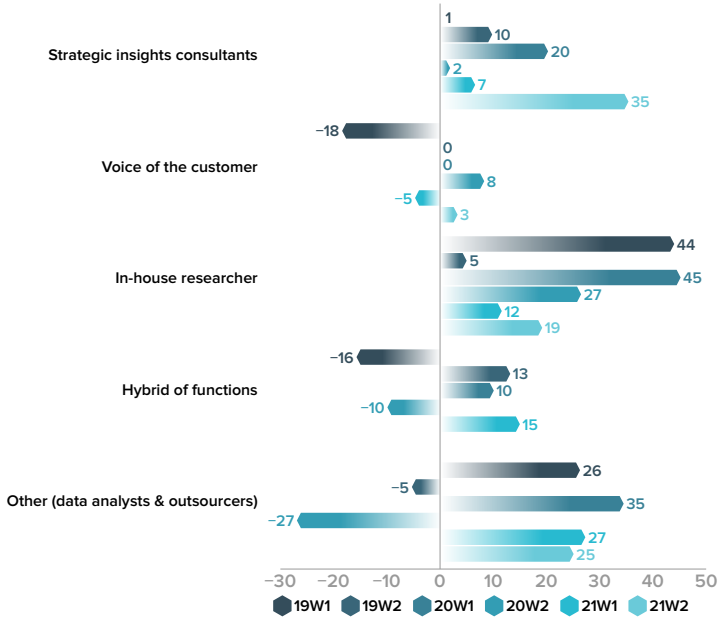
Overall, buyer trends for research project spending (23.0) and staff size (21.1) were moderately positive, and for technology spend (44.2) were more strongly positive, though not phenomenal. Budget growth was strongest among the smallest segment, research outsourcers (69.2) and weakest for Voice of the Customer (3.3). Department growth was strongest for strategic insights consultants (42.5) and slightly negative for insights staff who function primarily as data analysts. Technology spend was well above 0 for all segments, and highest for strategic insights consultants and lowest for research outsourcers, who are the least likely to be conducting research and analysis themselves.



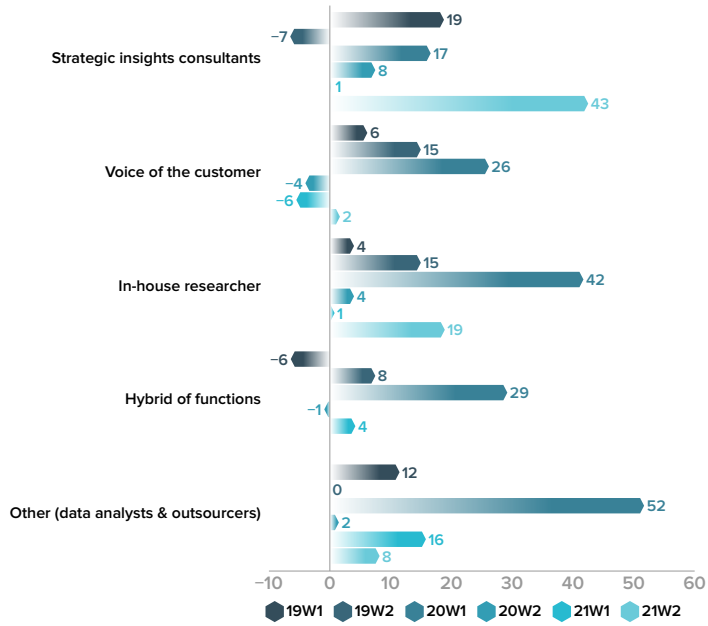
Before looking at change by segment over time, a few words of introduction are in order. In past waves, we gave the option of "hybrid" but discontinued that this wave, and past results are shown but the current wave is empty. Also, segment sizes wax and wane, and due to smaller sample sizes in some waves, data analysts and research outsources are combined for each wave.

Research project spending has strengthened dramatically for strategic insights consultants and in-house researchers but very slightly for Voice of the Customer, which had been negative last spring. The combination of data analysts and outsourcers declined very slightly. A year ago, strategic insights consultants (1.9) and Voice of the Customer (8.3) hovered around zero, representing a tumble for consultants but an improvement for Voice of the Customer. In-house researchers (26.5) had also tumbled yet retained a pulse, and hybrid of functions and others had gone negative. Over time, strategic insights consultants and in-house researchers have had the most consistent support from budget-owners.

ANNUAL RESEARCH PROJECT SPENDING TREND INDEX: GRIT WAVE (BUYER)

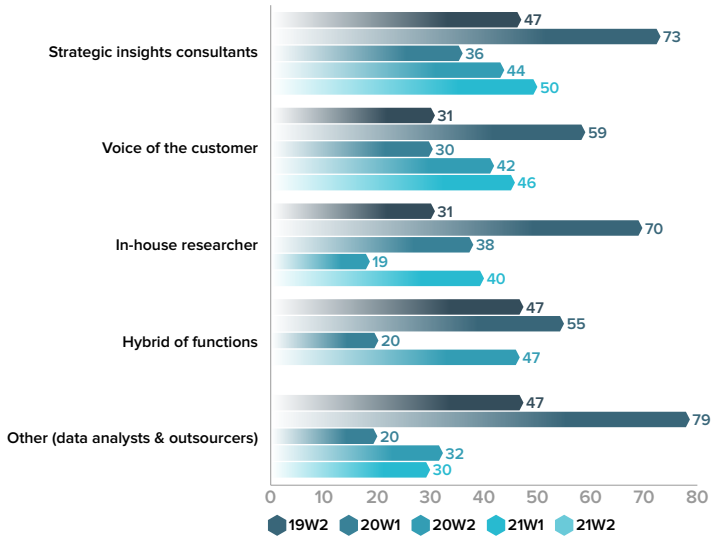


STAFF SIZE TREND INDEX: GRIT WAVE (BUYER)



Although fairly robust for strategic insights consultants, staff size trends are unremarkable for other segments as they have continued to hover near zero since late 2020, the largest value is only 18.9 for in-house researchers this wave. In the last pre-pandemic wave, all segments but strategic insights consultants had recorded their strongest metrics since measurement began.

TECHNOLOGY SPENDING TREND INDEX: GRIT WAVE (BUYER)



The most consistently robust metrics are for technology spend, though no segment has regained the momentum of the last pre-pandemic wave. All but the combination of data analysts and research outsourcers have a value of at least 40, and this difference is only partly due to the low index for research outsourcers; data analysts would still be lower than the other three, but the gap would be a little bit narrower.

The most consistently robust metrics are for technology spend, though no segment has regained the momentum of the last pre-pandemic wave

SUPPLIER PROFESSIONAL FOCUS SEGMENT HEALTH

Turning to suppliers, the reason for the lack of enthusiasm for the buyer scores should become obvious. The suppliers' revenue score is four times the buyers' budget score, the department size score is nearly three times larger than buyers', and the technology spend metric is more than 50% higher. Suppliers are making money again, which fuels hiring and technology investment.

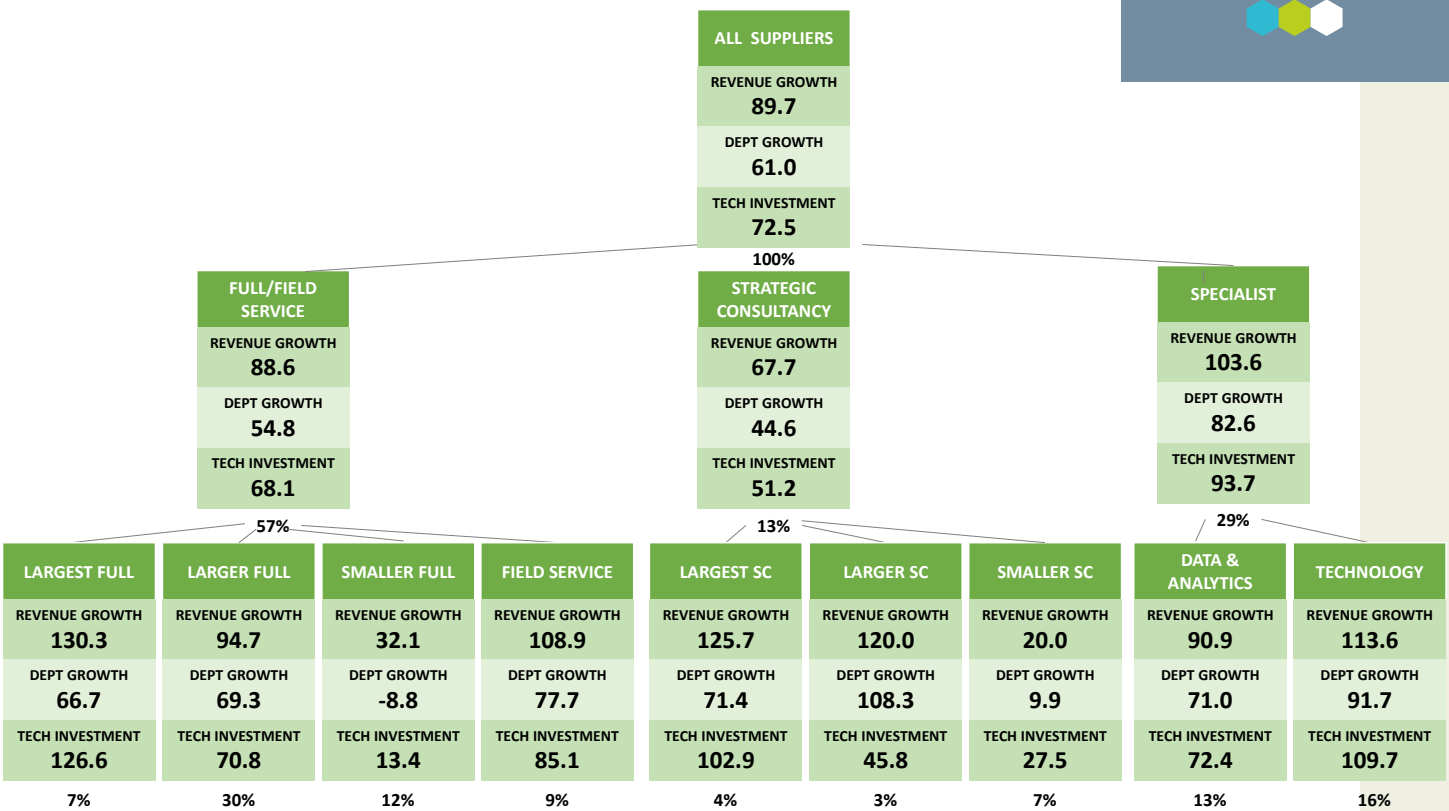
Looking a level lower, the combination of data and analytics and technology suppliers are well ahead of the combination of full service research and field services providers and strategic consultancies, who are also behind full and field services providers on every metric. The best news is that no metric is below or near zero for any supplier type.

Moving down to the bottom of the tree, we see that technology providers have the highest score on each metric, and, if they were removed from the tree, data and analytics providers would have the highest score on each, albeit with a photo-finish on technology spending. The lowest scores on each belong to smaller strategic consultancies (20 or fewer employees), including a negative score on revenue (-6.7). Smaller full service research suppliers (10 or fewer employees) are struggling just as much with revenue (-2.7) and staff size (8.6 to 3.6), but are quite bit stronger on technology spend (44.8 to 23.2).

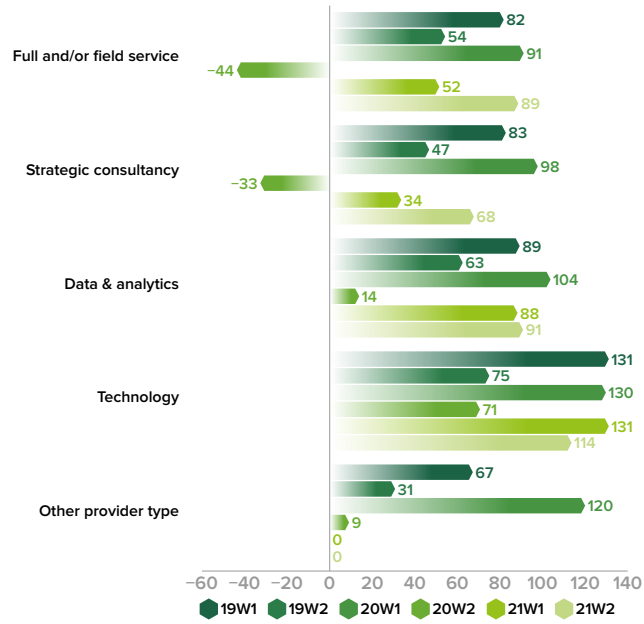
While the smaller strategic consultancies and full service research suppliers are struggling, the larger strategic consultancies (21 to 100 employees) and full service research suppliers (11 to 1,000 employees) are thriving to a greater extent than the largest ones. Field services suppliers have solid revenue and staff growth, and their technology spend rivals that of the large generalists.

Suppliers are making money again, which fuels hiring and technology investment

Moving down to the bottom of the tree, we see that technology providers have the highest score on each metric

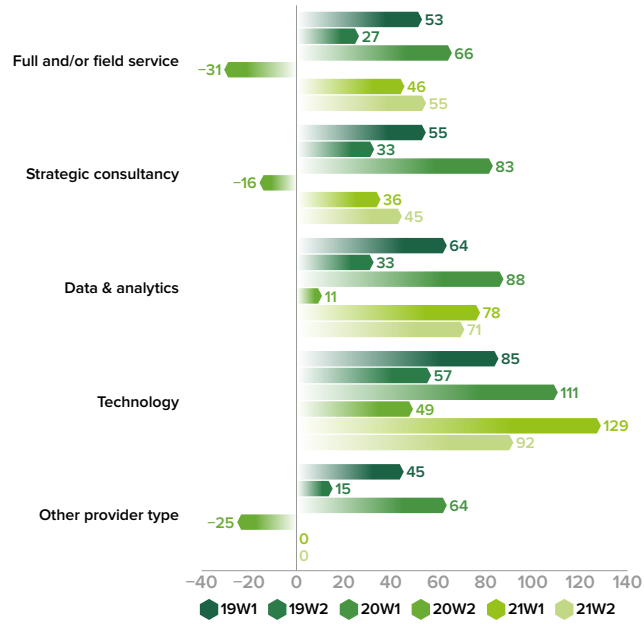


REVENUE TREND INDEX: GRIT WAVE (SUPPLIER)



On the eve of the pandemic, every supplier type had a revenue score of at least 90, and each hit is all-time high, with the exception of technology providers whose score of 129.7 was just shy of its previous high of 131.1. By the end of 2020, full service research/field services providers and strategic consultancies went significantly negative, and data and analytics providers hovered just above zero. Technology providers sported a robust 70.6, 56.7 points higher than data analytics providers, the next strongest type, but 59.1 points lower than it had been at the beginning of the year. Since then, full service research/field services providers have climbed back to near their all-time high point, strategic consultancies show a strong positive trend, data and analytics providers are back above 90, and technology providers have posted consecutive scores of over 100.

STAFF SIZE TREND INDEX: GRIT WAVE (SUPPLIER)

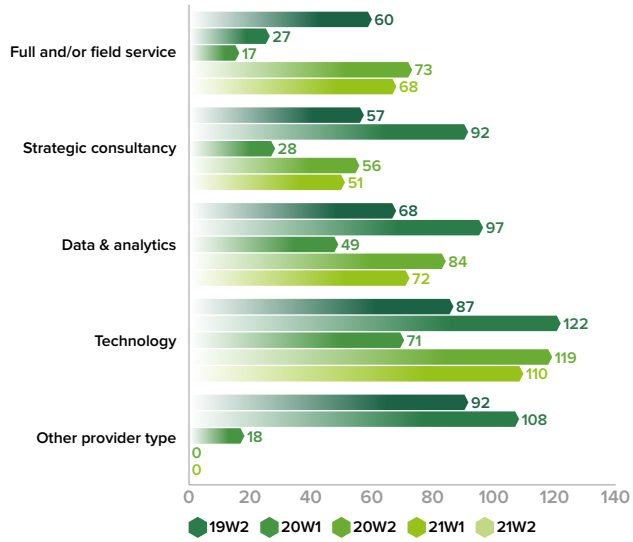


Staff size trends followed a similar pattern, peaking just before the pandemic, crashing immediately after it spread, then climbing back toward previous levels, though not making it as far back as the revenue scores did. Until the start of this year, strategic consultancies always posted stronger staff size trend scores than full service research/field services suppliers, even if by a slim margin. Now, full service research/field services providers have posted higher scores than strategic consultancies in each of the two most recent waves.

Full service research/field services providers have climbed back to near their all-time high point, strategic consultancies show a strong positive trend, data and analytics providers are back above 90, and technology providers have posted consecutive scores of over 100

Technology spend trend scores also peaked on the eve of the pandemic, tumbled immediately once it began, but bounced back at the start of this year. Full service research/field services providers hit their all-time this year, and technology and data and analytics providers came close to their high water marks. Only strategic consultancies have failed to rally back close to their 20W1 score. To survive the pandemic, many strategic consultancies changed their focus to full service research capabilities, leaving the category to consultants whose service portfolios did not suggest a strong need for a lot of technology.

TECHNOLOGY SPENDING TREND INDEX: GRIT WAVE (SUPPLIER)



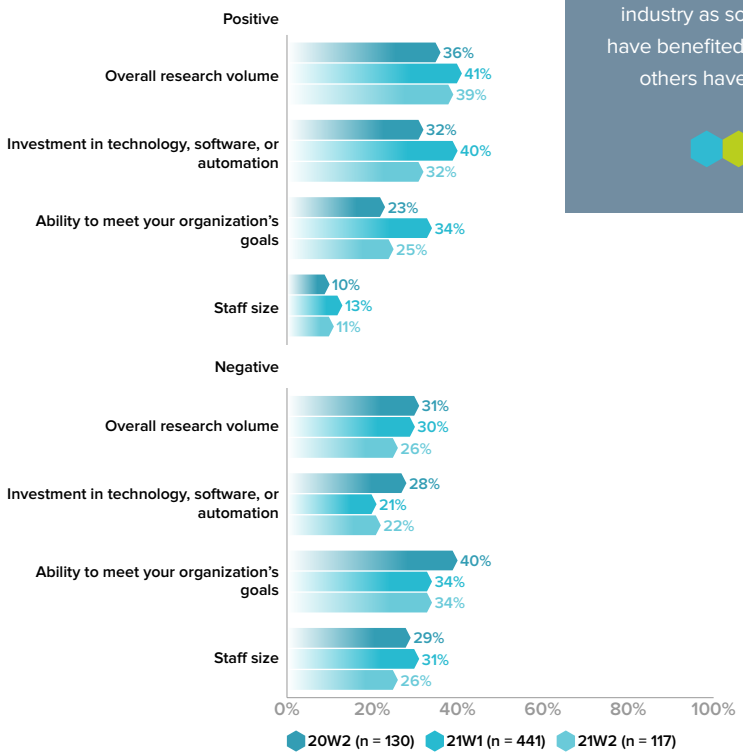
IMPACT OF COVID-19

The pandemic has not had uniform impact across the insights and analytics industry as some players have benefited from it while others have suffered. For example, the pandemic may have inspired some to increase their technology spending as they searched for the right formula for survival, but it may have caused others to reduce it because they simply could not raise the cash.

A year ago, 5% more buyers said the pandemic had a positive impact on overall research volume than said it had a negative impact. Last spring, that gap doubled, to 11%, and it now stands at 13% more positives than negatives. The positive-negative gap for technology spending was +4% in favor of positive impact a year ago, swelled to +18% last spring, and has slackened off a bit to +10%.

There are other areas, however, for which more buyers suffered a negative impact than a positive one. Last year, COVID-19's negative impact on ability to meet goals was 17% greater than its positive impact. Now, the gap is 9% favoring negative impact. Buyers also were more likely to say it had a negative impact on staff size, as negatives were 19% more common than positives last year and still hold a 15% lead over positives today.

IMPACT OF COVID-19: GRIT WAVE (BUYER)



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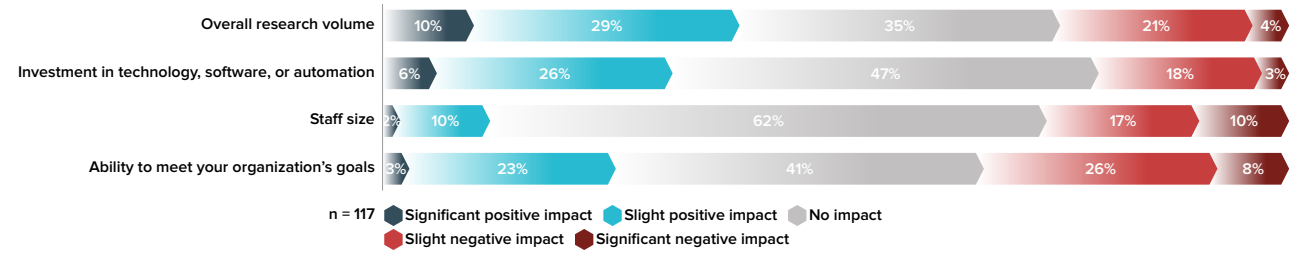
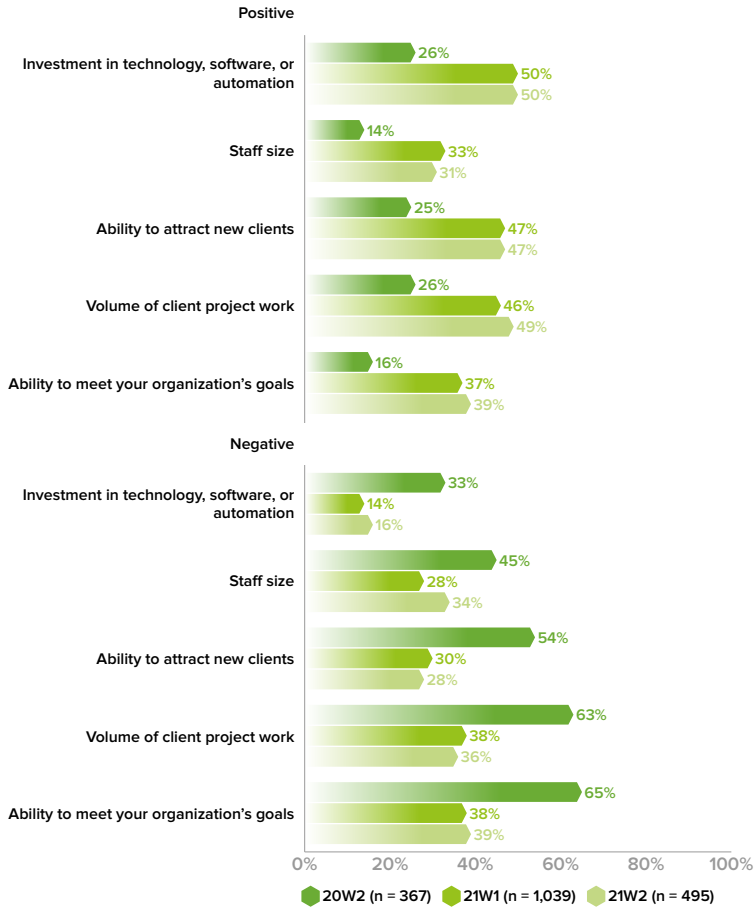
IMPACT OF COVID-19 (BUYER)



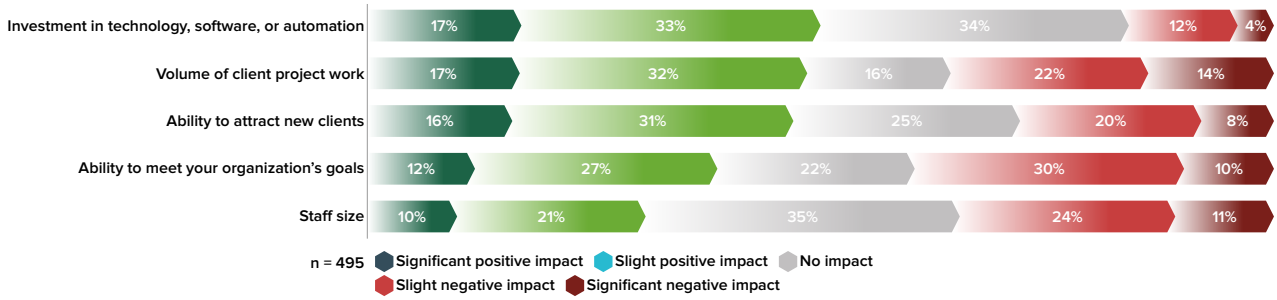
IMPACT OF COVID-19: GRIT WAVE (SUPPLIER)



The supplier journey has been somewhat different, as negative impact was more common than positive on every issue a year ago, but now only one area is more negative than positive, and not by much. Last year, 7% more suppliers said COVID-19 had a negative impact on technology spending than a positive impact on it. Now, 34% more suppliers said it's had a positive impact than a negative one. The script also flipped on ability to attract new clients: there were 29% more negatives than positives a year ago, but now positives lead negatives by 19%. Finally, negatives led positives by the end of 2020 by 37%, and now the situation is reversed as positives lead negatives by 13%.

Even the issues that have not flipped to positive are not overwhelmingly negative. A year ago, negative impact on staff size was reported by 37% more suppliers than positive impact, and 49% more said the pandemic's impact on their ability to meet goals was negative. Now, only 3% of suppliers separate those who claim a negative impact on staff size from those who say it has had a positive impact, and there is no difference with respect to ability to meet goals.

IMPACT OF COVID-19 (SUPPLIER)



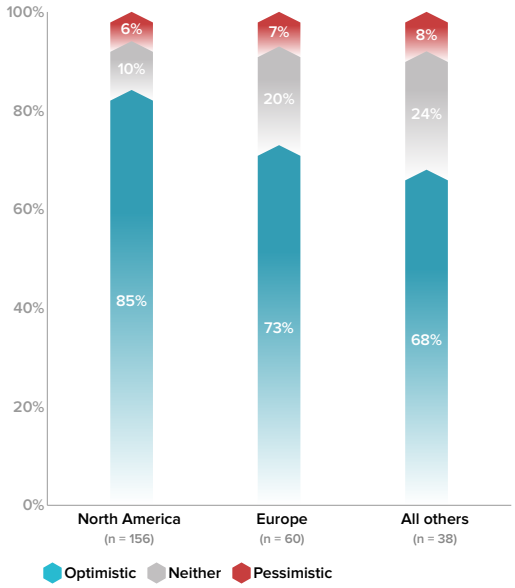
Before we raise our glasses and toast COVID-19 for the net "positive impact" it seems to currently have, we must reflect on a couple of sobering points. First, the largest percentage of suppliers who said it had a significant positive impact doesn't exceed 17% for any issue, and, for buyers, COVID-19 did not have a significant positive impact for more than 10% on any issue. Second, except for technology spend, which is a very resilient activity, at least one-quarter of suppliers and one-quarter of buyers suffered negative impact on any given issue, and the percentage of those claiming positive impact only cancels this out mathematically; it doesn't take the pain away. Put another way, your more muscular leg doesn't make me miss my amputated leg any less. Further, the preponderance of those claiming a positive impact is a 2021 phenomenon; we don't know how many of those who felt a negative impact in 2020 lived to tell.

Except for technology spend, which is a very resilient activity, at least one-quarter of suppliers and one-quarter of buyers suffered negative impact on any given issue

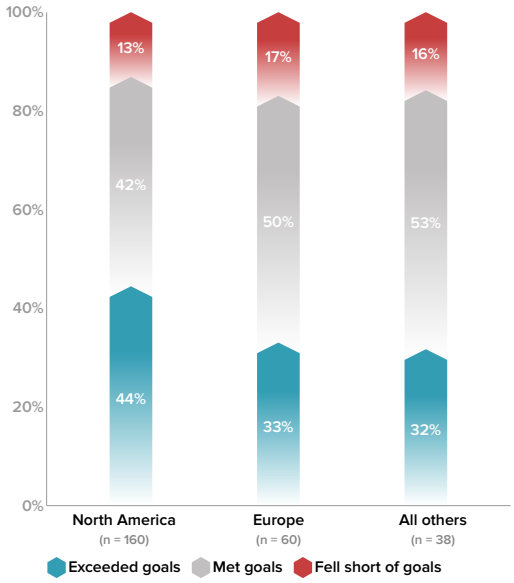
BUSINESS OUTLOOK AROUND THE WORLD

Although optimism about their own role and performance against goals are lowest outside North America and Europe, buyers in those regions are the most likely to have increased research project spending. Optimism about their role is highest for insights professionals in North America (85%) than those in Europe (73%) or other regions (68%), and North American insights professionals were more likely exceed their goals (44%) than those in Europe (33%) or other regions (32%). Research project spending increased for 40% of buyers in North America and decreased for only 18%; only 22% of buyers in Europe experienced an increase compared to 25% whose budgets were reduced. Outside those two regions, 48% reported a budget increase versus 21% who experienced a decrease.

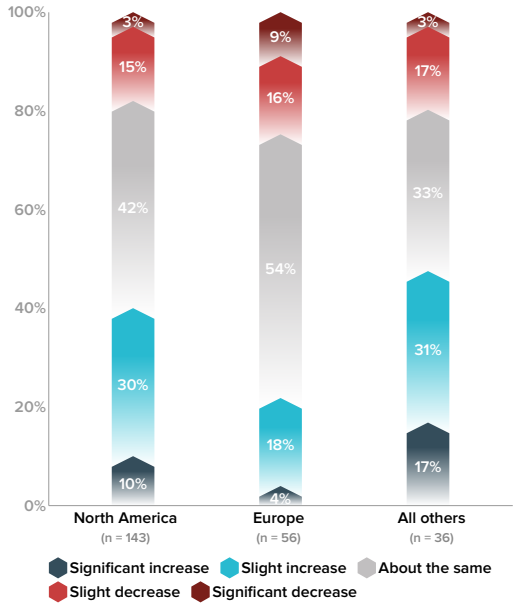
OPTIMISM ABOUT DEPARTMENT OR ROLE: GLOBAL REGION (BUYER)



PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ ANALYTICS GOALS: GLOBAL REGION (BUYER)



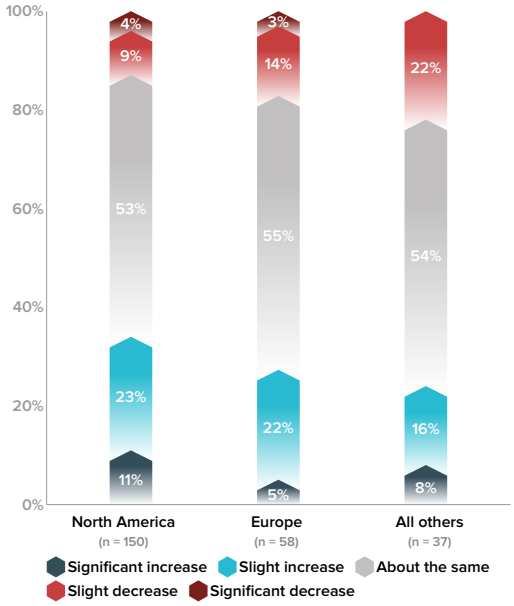
ANNUAL RESEARCH PROJECT SPENDING TREND: GLOBAL REGION (BUYER)



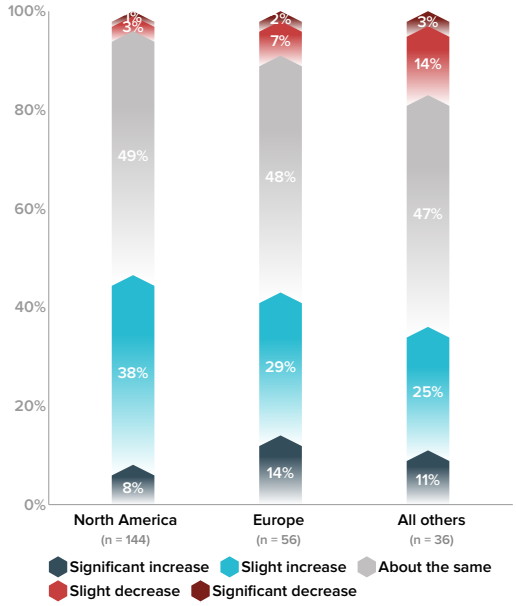
Insights staff sizes increased for 33% of North American buyers, followed by 27% of European buyers and 22% of buyers elsewhere

Insights staff sizes increased for 33% of North American buyers, followed by 27% of European buyers and 22% of buyers elsewhere. Insight staff sizes decreased for 13% of North American buyers, 16% of Europe buyers, and 21% of buyers in other regions. None of the buyers outside North America and Europe reported a significant decrease, however. Finally, technology spend increased for 43% of buyers in North America and decreased for only 4%; in Europe, 41% increased spend and 9% decreased it; and, in other regions, 35% of buyers reported an increase compared to 16% reporting a decrease.

INSIGHTS STAFF SIZE TREND: GLOBAL REGION (BUYER)



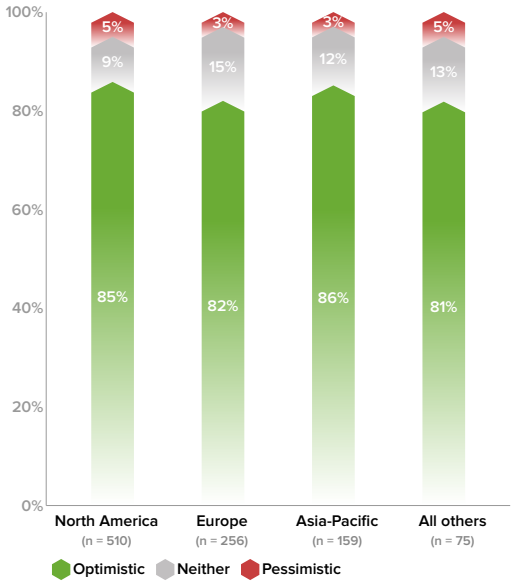
TECHNOLOGY SPEND TREND: GLOBAL REGION (BUYER)



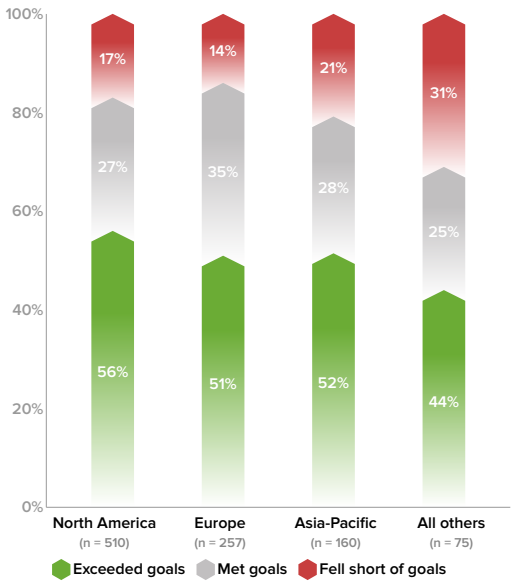
Optimism about their company is fairly uniform for suppliers across global regions, ranging from 81% outside North America, Europe, and Asia-Pacific to 85% in North America and Asia-Pacific. Those with pessimistic perspectives fall within a narrow band of 3% to 5% across regions. Despite this uniformity, performance against goals differed widely: 56% of North American suppliers exceeded their goals as well as 52% in Asia-Pacific and 51% in Europe, but only 44% of suppliers in other regions accomplished that. In those regions, 31% reported that they fell short of their goals, followed by 21% of suppliers in Asia-Pacific, 17% in North America, and 14% in Europe.

Optimism about their company is fairly uniform for suppliers across global regions

OPTIMISM ABOUT COMPANY: GLOBAL REGION (SUPPLIER)



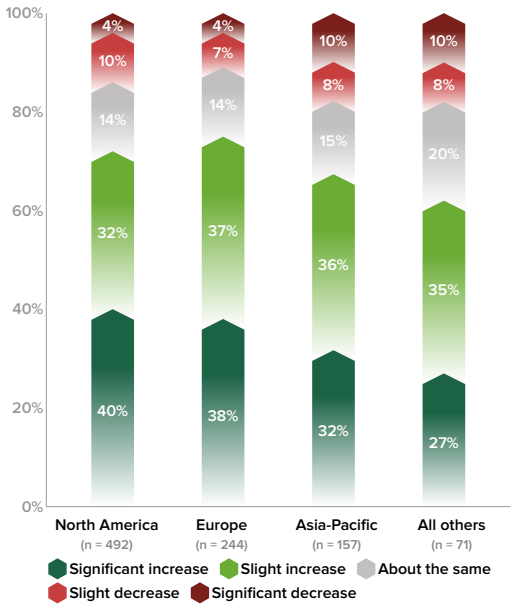
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ ANALYTICS GOALS: GLOBAL REGION (SUPPLIER)



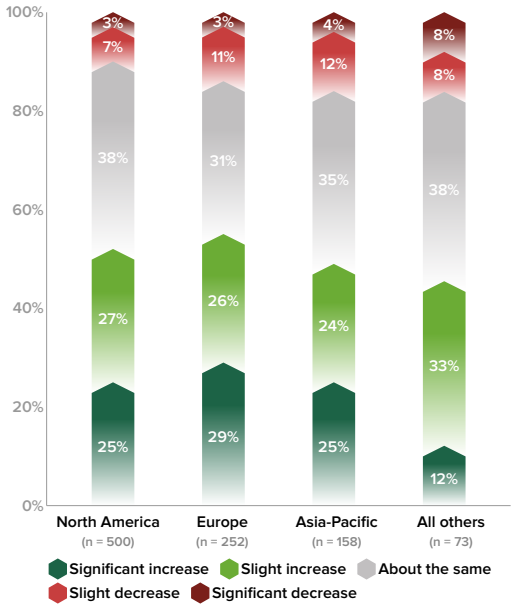
Revenue increases were strongest in North America where 72% experienced increases, including 40% who experienced significant increases

Revenue increases were strongest in North America where 72% experienced increases, including 40% who experienced significant increases. Slightly more European suppliers experienced revenue increases (75%), though slightly fewer experienced significant increases (38%). Revenue increases were less common for suppliers in Asia-Pacific (68%) and other regions (62%), and significant increases were experienced by only 32% and 27% respectively. The percentage of suppliers whose revenue decreased ranged from 11% in Europe to 18% in Asia-Pacific and those outside North America, Europe, and Asia-Pacific.

REVENUE TREND: GLOBAL REGION (SUPPLIER)

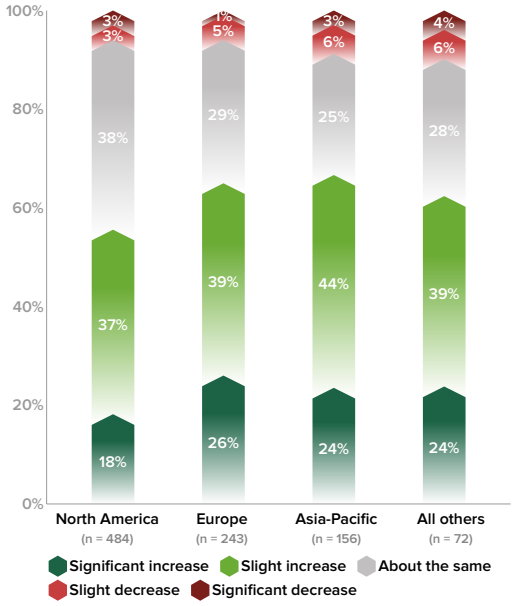


INSIGHTS STAFF SIZE TREND: GLOBAL REGION (SUPPLIER)



Staff size increases were fairly similar across suppliers in North America, Europe, and Asia-Pacific, ranging from 49% in Asia-Pacific to 55% in Europe, and about half in each region were "significant" increases. Outside of those regions, staff size increases were reported by only 44%, and only about one-quarter of them were "significant." Decreases ranged from 10% in North America to 16% in Asia-Pacific.

TECHNOLOGY SPEND TREND: GLOBAL REGION (SUPPLIER)



Across regions, about one-quarter of suppliers made "significant" increases in technology spending, except in North America, where fewer than 20% did. In Asia-Pacific, 77% increased technology spending, followed by Europe (63%), regions outside Asia-Pacific, Europe, and North America (61%), and North America (53%). Decreases in spend ranged from 6% in Europe and North America to 9% in Asia-Pacific and all other regions.

THE BIG PICTURE

GRIT's main business outlook metrics – trends in research project budgets, supplier revenue, staff size, technology spend, performance against goals, and optimism – look almost as strong as they did on the eve of the pandemic when many of them had established all-time highs. By the end of 2020, all of these had tanked; even technology spend, the most resilient of them, dropped. They say it's always darkest before the dawn, and the adjustments made (and, unfortunately, attrition that occurred) in those black days have led to optimism about the insights and analytics industry that exceeds the pre-pandemic level.

The adjustments and adaptations made in 2020 are documented throughout this report and range from increased adoption of online over in-person methodologies to greater application of research technology to redefined buyer roles and supplier professional focus. These changes have enabled buyer insights staff to return to helping their businesses grow instead of having to focus narrowly on survival and enabled suppliers to grow revenue and hire more staff. The supplier market structure is far from settled, but many seem to have a clearer idea of who they are and how they can succeed.

Buyers are leveraging technology that enables their staffs to do more work, but it does not seem to be at the great expense of suppliers. Research outsourcing remains strong, and buyers seem to be automating and enhancing new research areas, such as analysis of existing data, rather than basic research functions that are more expertly and cost-effectively handled by external suppliers. To be sure, a significant portion of buyer insights work is driven by in-house researchers, but, after a brief spike in 2020, this segment has returned to historic levels and is not really a new threat to suppliers.

Instead, the casualties of automation and technology, if any, may be buyer insights staff rather than suppliers. Indications throughout this report are that hiring is weaker at buyer insights organizations than at supplier firms, and this trend, if significant and durable, may suggest that some buyers are trading the fixed cost of research staff for a research pay-as-you-go model where suppliers carry the fixed costs. The adaptations made to enable companies to survive the as-yet darkest days of COVID-19 seem to have staying power beyond the challenges of the pandemic.

The biggest "Big Picture" business outlook view is, of course, the one we can't see yet: how the latest COVID-19 surge (and any future ones) will impact the industry. We suspect that the changes made in 2020 plus the likelihood that each new generation of virus is less dangerous (though more contagious) than its ancestors will enable the industry to avoid the pitfalls of the first year of the pandemic.

The adaptations made to enable companies to survive the as-yet darkest days of COVID-19 seem to have staying power beyond the challenges of the pandemic

GRIT's main business outlook metrics – trends in research project budgets, supplier revenue, staff size, technology spend, performance against goals, and optimism – look almost as strong as they did on the eve of the pandemic when many of them had established all-time highs

GreenBook
FUTURE LIST

THE GREENBOOK FUTURE LIST

The Next Generation of Insights Leaders

The GreenBook Future List recognizes leadership, professional growth, personal integrity, and a passion for excellence in the next generation of insights creators, users, and marketers. We are pleased to showcase this year's rising stars in the expanding insights universe.

TO THE FUTURE OF INSIGHTS

GreenBook is proud to announce the third annual GreenBook Future List – an awards program to inspire, support and celebrate leaders who are driving insights forward in novel and unexpected ways. The list recognizes leadership, innovation, growth, social good, and professional drive. These honorees have outstanding multidisciplinary career performances and a wide range of research community roles and entrepreneurial ambitions. They've published research, launched companies, received numerous awards and accolades, and spoken at industry events around the world.

After hundreds of nominations, this list reflects a fiercely competitive set of peers. Each of these honorees has a decade or less in the insights industry, yet all are well on their way to having a lasting impact on the future of our industry. We find them exceptionally inspiring and hope you will too.

THANK YOU TO THIS YEAR'S JUDGING PANEL:


Gregg Archibald
Gen2 Advisors


Adriana Rocha
eCGlobal


Nikki Lavoie
Mindspark Research International


Dmitry Gaiduk
CoolTool UXReality


Lisa Courtade
Organon


Susan Griffin
Griffin + Skeggs


Mario Carrasco
ThinkNow Research


Emily Fullmer
GreenBook


Joseph Chen
Leo & Dragon


Roben Allong
Lightbeam Communications


Jamin Brazil
HubUX Happy Market Research


Annie Petit
E2E Research

GREENBOOK FUTURE LIST HONOREES

SUMIT ANEJA

CEO, **Groupe Voxco Inc.** *(Canada)*

LinkedIn: www.linkedin.com/in/sumit-aneja

Sumit is the CEO of Voxco, a leading actionable insights platform that is trusted by 450+ clients in 40+ countries. Sumit brings strong leadership to Voxco, with his experience founding companies and working at International Monetary Fund, Bank of America, Merrill Lynch, and Houlihan Lokey. Throughout his career, he's worked at the intersection of technology, finance, and data.

Sumit's mission at Voxco is building the next-gen, AI-powered experience management platform to unlock the growth potential of medium-sized enterprises.

He holds an MBA from the Yale School of Management, an MS in Financial Engineering from the Claremont Colleges Consortium, and a BE in Electrical Engineering from Punjab Engineering College.

WHY THEY LANDED ON THE LIST:

Sumit recently took over Voxco, a 45-year old global leading provider of omnichannel survey software. Since then, he's fearlessly made big decisions to strategically pivot the company from a data collection provider to an actionable insights company.

SALAM BEASAN

Director of Product, Panel Operations, **Similarweb** *(Israel)*

LinkedIn: www.linkedin.com/in/salam-beasan

Forging her way forward through creative thinking and passion, Salam is a leader of multidisciplinary industry-shaping insights products. She is hyped about coupling technology with behavioral research, and aspires to build and nurture sustainable products with a global reach within the digital insights realm.

An alumna of the Technion, the Israel Institute of Technology, Salam holds a BSc in Industrial Engineering and Management and an MBA degree, with a career spanning various roles in successful companies including Toluna, eBay, and, most recently, Similarweb: the definitive official measure of the digital world.

WHY THEY LANDED ON THE LIST:

As a thoughtful and intentional product leader, Salam has a record in shipping successful data-driven products, adding value to the insights industry through digital intelligence and benchmarking for decision-makers at all levels.

GREENBOOK FUTURE LIST HONOREES

GARETH BOWDEN

Head of Operations, **FlexMR** *(United Kingdom)*

LinkedIn: www.linkedin.com/in/gareth-bowden-1aa9291a2

As Head of Operations at FlexMR, Gareth strategically manages the firm's team of research experts, insight managers, and support agents. An experienced researcher who brings an academic and practical perspective to FlexMR, Gareth has previously worked on tough challenges facing governments, NGOs, and public institutions.

Gareth is highly analytical and well-coordinated, and he seeks to bring out the best in every member of staff. He expertly matches team members with research projects and is laser-focused on operational success. Since joining FlexMR, Gareth has managed a series of successful, insight-led projects for the firm's clients, whilst also spearheading new internal working policies focused on wellness, community engagement, and personal development.

WHY THEY LANDED ON THE LIST:

Despite his recent entry into the sector, Gareth has already left a lasting impact at FlexMR. In just two years, he has improved the company's D&I initiatives, social responsibility and professional development programmes, and client satisfaction.

ADAM COLASANTO

Director of Consumer Intelligence, **Vizit** *(United States)*

LinkedIn: www.linkedin.com/in/adam-colasanto-42a58565

Adam leads Vizit's Client and Professional Services teams, overseeing all analytic work and client relationships. Adam came to Vizit with more than a decade of experience leading consumer intelligence, market research, and data insight teams at agencies like ICUC, Edelman Intelligence, and Crimson Hexagon. He has built Vizit's client services programs on what he believes are the core tenets of any successful client partnership: Being customer obsessed and data-driven. Adam is currently defining and bringing to marketing a new kind of research KPI which is 'visual intelligence' - allowing brands and marketers the ability to quantify the appeal or engagement of content for unique consumers.

WHY THEY LANDED ON THE LIST:

Adam is playing a vital role in introducing large brands and clients to a new era of visual intelligence technology. His ability to package visual AI in a digestible and actionable format for customers is helping transform Vizit's business.

GREENBOOK FUTURE LIST HONOREES

TIMOTHY J CORNELIUS

Director, Audience Operations, **QuestionPro** *(United States)*

LinkedIn: linkedin.com/in/timothyjcornelius | Twitter: @P3_TimC

Tim Cornelius was born on the banks of the Mississippi River in 2019 when he accepted his first ResTech role at Lucid, a Cint Group Company. A fire sparked within him and with it grew ideas that continue to be transformed into tangible products and services. Tim is the Director of Audience Operations at QuestionPro and Founder/CEO of P3 Technology. Under Tim's leadership at QuestionPro, the Audience team has consistently grown >151% YOY. Tim has ideated, created, and launched many products which elevate the insights community, improve data quality, and exponentially increase the speed to insights. At P3, Tim's solutions give a voice to those with disabilities, both physical and cognitive, in market research. Tim strives to be 1% better each day and to improve the lives of everyone he meets.

WHY THEY LANDED ON THE LIST:

Through his company, P3 Technology, Timothy is tackling inequality in our industry by thoughtfully reducing discrimination in research sample. He has fought for and secured over $100,000 of rewards for those who would have been marked inactive due to inaccessible content, as well as helping brands who were unknowingly discriminating against those with disabilities or low socioeconomic status.

KATHERINE DUONG

Sr Insights Manager, **Target** *(United States)*

LinkedIn: www.linkedin.com/in/duongkatherine

Katherine is a purpose-driven design researcher who applies Human Centered Design to complex societal problems. Katherine's current role as Senior Insights Manager at Target involves learning from communities whose stories often go untold, for example, historically underinvested Black neighborhoods. Prior to Target, Katherine worked at Kaiser Permanente's Innovation Consultancy, City of Austin's Innovation Office, and Worrell.

She's led insights projects across an array of topics. In Austin, TX, she worked on issues like Recycling and Homelessness. In healthcare, her portfolio ranges from Transgender Patient Experiences to Aging in Place to Hip Replacement Technologies.

Katherine studied Architecture at the University of California, Berkeley and now lives in Minneapolis with her husband.

WHY THEY LANDED ON THE LIST:

Katherine's dedication to understanding human truth is shaping the future of the Target brand. Before joining the Target team, she left a lasting impact on the City of Austin. Her qualitative research on the lived experience of homelessness impacted the city's budget and resources allocation, leading to pilot programs and creative solutions.

GREENBOOK FUTURE LIST HONOREES

SASCHA EDER

CEO, **NewtonX** *(United States)*

LinkedIn: www.linkedin.com/in/saschajeder

Sascha leads NewtonX and co-founded the company in 2017 with the vision of leveraging automation and AI to create the world's leading B2B research company. Prior to co-founding NewtonX, Sascha was a management consultant spending time at both McKinsey & Company and the Boston Consulting Group, and worked at P&G as a financial analyst. Sascha holds a Master's in Management from MIT and HEC Paris. Originally from Germany, Sascha was a member of the German national track and field team and is still a passionate runner.

WHY THEY LANDED ON THE LIST:

Sascha co-founded NewtonX in 2017 because he was frustrated with the process of finding niche professionals. He has since pioneered technology in the custom recruiting space, and his team now reaches 1.1 billion professionals across 140+ industries.

GIOVANNA FORTUNA

Senior Data Analyst, **Big Sofa Technologies** *(United Kingdom)*

LinkedIn: www.linkedin.com/in/giovanna-fortuna-3bb77bba

Giovanna is a senior data analyst specializing in using Python and Excel to extract data and make sense of unstructured datasets. Since joining Big Sofa (winners of MRS' Research Live Award for Innovation of the Year 2021), she has led the evolution of the company's data offer to develop industry-first data points through the application of advanced analytics to behavioral data. She has six years of experience delivering insights to financial services and consumer goods clients, having worked at the Gerson Lehrman Group and at Streetbees.

WHY THEY LANDED ON THE LIST:

As the first and only (self-taught) Data Analyst at BigSofa, Giovanna has turned video into a quantitative dataset and single-handedly built the company's entire data analysis process. Her tangible contributions have helped BigSofa move from having quantitative video data components in 10% of projects to over 90% in just 18 months.

GREENBOOK FUTURE LIST HONOREES

LAURA JETT

Fitbit Insights Lead, **Google** *(United States)*

LinkedIn: www.linkedin.com/in/laurajett

Laura's career has been defined by an ability to identify consumer pain points and complex business problems and creatively - yet intuitively - uncover how to solve them. She approaches market research the same way you would approach a mathematical problem: identifying the desired outcome, considering the variables, and ultimately solving with an answer that is both actionable and insightful. Laura applies this same approach in her drive to elevate the voices of all consumer groups, including spearheading recent efforts within Fitbit to drive towards more inclusive and diverse research efforts. Laura holds an MBA from the Drucker School of Management at Claremont Graduate University and a BS in Mathematics with minors in Statistics and Business Management from Sweet Briar College.

WHY THEY LANDED ON THE LIST:

Laura has championed the customer voice for two large acquisitions. By infusing consumer insights and perspective into the process, she has created long-term value for multiple large, well-loved brands in the midst of change.

DANA KIM

CEO, **Highlight** *(United States)*

LinkedIn: www.linkedin.com/in/dana-kim-44920135/ | Twitter: @danak1m

Dana Kim is Founder and CEO of Highlight (letshighlight.com), an agile in-home product testing platform. Dana spent five years at a boutique insights agency as a qualitative and mixed-method researcher for years, where she saw firsthand the difficulty of product testing. Determined to build a solution, Dana then got her MBA at The Wharton School, where she built Highlight: a high-growth research tech startup disrupting the in-home usage test and physical product research space. Highlight's platform streamlines everything from recruitment to data set, including all the logistics of getting your product to your target customers. It boasts 90% survey completion rates, can get product into hands in days, and seamlessly collects targeted feedback at scale.

WHY THEY LANDED ON THE LIST:

Dana is one of the most disciplined innovators in our industry. She pursued an MBA to gain the entrepreneurial resources and network to build the world's first D2C product testing platform.

GREENBOOK FUTURE LIST HONOREES

HANNAH KIRK

Senior Innovation Executive, **Blue Yonder Research** *(United Kingdom)*

LinkedIn: www.linkedin.com/in/hannah-kirk-ab494b181

Hannah is a true innovator, already transforming the way in which our industry captures insight. Her success is driven by her passion for putting people at the heart of everything she does; whether that's having the respondent experience front and center in the innovation she develops or capturing the essence of what a client needs, her ability to translate business need into real world relevance is second to none. The power of her approach is seen in Clickscape and AlertYa, innovations that she has seen from concept to profit generation in two years.

WHY THEY LANDED ON THE LIST:

Hannah's intrapreneurial inclinations have created an immense impact at Blue Yonder. Her idea for AlertYa (Blue Yonder's unique respondent interaction platform) was borne from a client conversation. She was awarded funding from the senior team and turned it into a final product that has changed the face of Blue Yonder's consumer communication.

JOSIPA MAJIC

Founder and CEO, **Tacit** *(United Kingdom)*

LinkedIn: www.linkedin.com/in/josipamajic/ | Twitter: @JosipaMajic

Josipa Majic is the founder and CEO at Taci.tech, a London-based company with offices in the EU that collects and analyses biometric data. Tacit is group of computer scientists, neuroscience experts, MDs, psychologists, researchers, and hardware and software engineers that have been working on research products with a range of universities, research institutions, and corporate customers since its incorporation in 2013. Josipa is the main visionary behind Tacit's products and overall strategy, responsible for successful customer relationships with Fortune 100 clients globally. Josipa was a keynote speaker at the Global Entrepreneurship Summit, and has appeared on the BBC, Fox News, WSJ, Forbes, CNN, and many others.

WHY THEY LANDED ON THE LIST:

As a female founder, Josipa has built a biometric start-up within an uneasy tech market - Croatia. Her perseverance has led Tacit to influence the lives of many people worldwide, serve a global clientele, and employ young, local teams. Her commitment to bettering the lives of children is demonstrated in her current work, past work, and charitable endeavors.

GREENBOOK FUTURE LIST HONOREES

GRACIE MCKINSTRY-SMITH

Senior Manager, Marketing Guest Insights, **Target** *(United States)*

LinkedIn: www.linkedin.com/in/graciemckinstrysmith

Gracie McKinstry-Smith is a Senior Manager in Marketing Insights at Target. In her role, she leads innovative research projects that play an essential role in championing the guest voice, empowering enterprise leaders to make guest-first business decisions. Some of her most impactful projects include testing concepts for new brands, facilitating immersive sessions, and running the "Seasonal Guest Mindset", a major initiative that captured how consumers, think, behave, and shop throughout a full calendar year. She has also co-founded a Generation Z advisory council to act as a sounding board for senior leadership and served as the president of a marketing non-profit. Gracie aspires to be a leader who continues to make an impact at the intersection of marketing, business, and creativity.

WHY THEY LANDED ON THE LIST:

Besides being a rising leader on her team, Gracie has co-founded two important groups - a Generation Z advisory board at Target and Emerging Professionals in Corporate Insights ("EPIC Insights"). She also assembled a team to help one of the nation's largest food banks redesign its volunteer experience using insightful research.

CLARA MUNDIA

Director Location Analytics, **Dalberg Research** *(Kenya)*

LinkedIn: linkedin.com/in/claramundia

Dr. Clara Mundia is the Location Analytics Director at Dalberg Research, where she drives evidence-based analysis to address research project objectives across development sectors. With over 15 years' experience in the application of geospatial analytics, Clara's work focuses on implementing innovative analytics techniques and creative ways to use data to answer questions that align with a strong humanitarian mission. She is passionate about the power of data to inform and lead development in low and emerging countries, particularly in advancing strategies around gender equality, human rights, climate change, and environmental sustainability. Clara holds a PhD in Environmental Resources and Policy and a MS in Geography and Environmental Sciences from Southern Illinois University.

WHY THEY LANDED ON THE LIST:

Dr. Clara Mundia and her team push the boundaries of applying geo-spatial data in impact-focused market research.

GREENBOOK FUTURE LIST HONOREES

MELINA PALMER

CEO, **The Brainy Business** *(United States)*

LinkedIn: www.linkedin.com/in/melinapalmer/ | Twitter: @thebrainybiz

Melina Palmer is an applied behavioral economist and keynote speaker who provides consulting to companies of all sizes and industries from around the world. She is the host of The Brainy Business podcast, which has downloads in over 170 countries. Melina also teaches applied behavioral economics through the Human Behavior Lab at Texas A&M University, is a columnist for Inc.com, has contributed to the Association for Consumer Research, and is the author of 'What Your Customer Wants and Can't Tell You', which was a finalist in two categories for the International Book Awards.

WHY THEY LANDED ON THE LIST:

Melina founded and hosts the first podcast on behavioral economics and business in the world. She spans the academic and entrepreneurial worlds, bringing value and inspiration to both clients and students.

MARK RESNICK

Sr. Director, Business Development, **Zappi** *(United States)*

LinkedIn: linkedin.com/in/mdresnick

Mark drives change at the largest consumer insights, marketing, and brand departments by implementing agile technologies to conduct world-class innovation and advertising market research. Mark is not afraid to disrupt standard practices within the industry and has redefined solutions facing insights teams. Academia and thought leadership hold a place close to Mark's heart. After completing his Master's in Market Research from Michigan State, he has continued to mentor students entering the market research industry.

WHY THEY LANDED ON THE LIST:

Mark built a dedicated New Business team at Zappi where he leads a team of seasoned researchers as the front door to Zappi, while simultaneously being a top performer and earning a Master's in MRX.

GREENBOOK FUTURE LIST HONOREES

CHLOE RUSSELL-SHARP

Data Scientist, **Brandwatch** *(United Kingdom)*

LinkedIn: www.linkedin.com/in/chlo%C3%AB-russell-sharp-511607161

Chloe is a Data Scientist at Brandwatch, a leader in the Digital Consumer Intelligence space, who provides a suite of products aiding querying, exploring, and augmenting online conversation. She is particularly passionate about building web app dashboards that communicate her team's projects outside of Data Science, facilitating transparency and accessibility of their work. As a keen advocate for gender diversity in STEM subjects, Chloe has given presentations at various events, hosted data-related workshops, spoken on panels, and mentored other women in her field. Chloe holds a BSc in Psychology with some final year Neuroscience from King's College London.

WHY THEY LANDED ON THE LIST:

Chloe is passionate about creating a new generation of female tech professionals, who will join a pipeline to becoming leaders in our industry. Her enthusiasm is reflected in technical workshops, talks, panels, and mentor relationships; all aimed at advocating for diversity in tech.

ROGAYEH TABRIZI

Founder and CEO, **Theory+Practice** *(Canada)*

LinkedIn: www.linkedin.com/in/rogayeh-tabrizi

Rogayeh Tabrizi is a tech leader helping Fortune 100 companies connect with their customers to create delight and value. Rogayeh earned her Master's in experimental particle physics at Simon Fraser University in Vancouver and worked on the ATLAS Detector at CERN. Rogayeh earned her PhD in economics, focusing on social and economic networks and game theory as a more effective way to engender positive change in the world.

Rogayeh saw the need for large enterprises to understand their data to connect with their customers in a meaningful and personalized way. So, she founded Theory+Practice, a company deploying AI tools in Retail and Finance to create intelligent interventions which drive value.

WHY THEY LANDED ON THE LIST:

Rogayeh is a true visionary. She blends game theory, behavioral economics, and big data to help complex, multinational companies ask better questions and answer them using data they already have. The team she has built is both academically and culturally diverse, with 50% of science roles held by women.

GREENBOOK FUTURE LIST HONOREES

ROB TURNBULL

Senior Research Analyst, **Twitter** *(United Kingdom)*

LinkedIn: www.linkedin.com/in/robert-turnbull-471a223a | Twitter: @RobDTurnbull

Rob helps brands and agencies understand Twitter better. He is passionate about finding meaningful answers to questions about society and culture online.

As an innovator with a background in analytics, he is an expert in combining first- and third-" party data to provide insight that informs decision making. In his six years with the marketing insights and analytics function at Twitter, he has driven the use of internal data in thought leadership and audience research.

Rob has been featured in Impact Magazine and was a finaliast for the UK's Market Research Society & Mediatel Rising Star awards.

WHY THEY LANDED ON THE LIST:

Rob is a researcher of the future: a true collaborative, multi-" skilled leader. His technical skills allow him to find, extract, and analyze large amounts of data, while he also can tell captivating stories with insights, marry data with traditional methods, and lead his team at Twitter to success.

JESSICA WONG

Senior Director of Research, **ViacomCBS** *(United States)*

LinkedIn: www.linkedin.com/in/jessica-wong-0796b556

Dr. Jessica Wong is a Senior Director of Research at ViacomCBS, supporting the digital division across Entertainment, Sports, and News. Her research incorporates various quantitative and qualitative methodologies to guide product development, position ViacomCBS in the ad marketplace, and inform business strategy. Her projects include thought leadership, audience profiling, competitive intelligence, and ad effectiveness. Prior to ViacomCBS, Jessica was a researcher at an insights firm in NYC. She received her PhD in cognitive psychology from the University of Chicago and published several peer-reviewed journal articles. Jessica enjoys applying her research training and knowledge of the human mind and behavior to uncover consumer insights that lead to innovative business solutions.

WHY THEY LANDED ON THE LIST:

In the infancy of her career, Jessica has increased the research department's visibility across the digital division at ViacomCBS. Her work has been recognized with rapid promotions and additional team members.

FINAL THOUGHTS

In the Foreword of this edition of GRIT there is a paragraph that sums of up some of the major themes: "...we can tell you that the speed of transformation has increased across almost every aspect of the industry, largely accelerated by the disruptive force of the pandemic. No segment has been untouched, and now we can see what the calamities of 2020 have meant for the past year and will mean for the future. We do our best to highlight our take on what that means throughout this report."

That is a start, but there is more that we see throughout the report, mainly about the continuing disruption brought by technology to our space, but also about the ongoing long-tail impact of Covid-19 and related changes in consumer behavior, economic factors, and evolving business processes that will continue to reshape our industry. Of course, we also see an in-depth view of the unprecedented growth and concomitant volume of M&A/Investment activity targeting our industry and what that means for the future as well. However, we are not done with the full distribution of existing disruptions such as automation of virtually all aspects of the operational processes of research, insights democratization, applied behavioral science at scale, the conversion to digital qual, and practical usage of unstructured data analysis.

Overall the take seems to be that while 2021 was an exciting year, 2022 likely holds more of the same!

But our goal here in the Final Thoughts is to look forward, so what signals do we detect on where things go from here? As much as we'd like to be considered prescient, really all we can do is make some educated guesses, so here are our best guesses on what we'll start exploring in future editions.

The next wave of early-stage innovation will align with broader trends that will shape the future; AR/VR and the metaverse, Web 3.0 distributed and decentralized architecture, DeFi, the redefinition of work and the explosion of the "gig economy," data privacy and sovereignty, the DAO model of collaborative ownership and decision-making, and yes, the rise of AI and robotics in both physical and virtual forms. Those things will drive the next decade of human innovation, so pioneers in the insights and analytics space will increasingly be focusing on their pragmatic applications in the years ahead.

Those may seem a bit far out, but a few years ago so did research automation, digital qual, big data analytics, and nonconscious measurement tools at scale. Even mobile research seemed like a pipe dream ten years ago! However, the more things change (and they will continue to change at an ever accelerating rate), the more they stay the same. One of the themes we have also seen for many years is the ongoing need for humans to be central to the research process: the ability to think, understand, connect and explain insights is the core of the industry and all the technology developments we see today and predict for tomorrow will only highlight that need, while driving more scale and efficiency in the processes that support it.

As we look at the results of this study and imagine where they point in the future, it's almost comforting to know that humans are, and will remain, at the center of the insights and analytics industry. That is truly something to look forward to!

Gregg Archibald
Managing Partner, Gen2 Advisors

APPENDIX
METHODOLOGY AND SAMPLE

For those interested in understanding the sample the GRIT is based on, the following detailed breakdown will provide you with the necessary information.

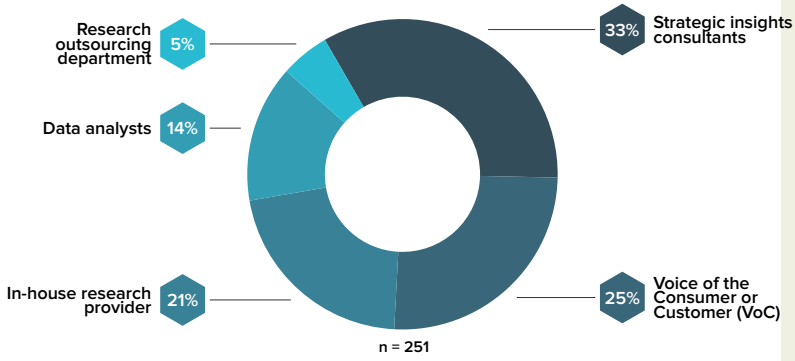
As previously stated throughout the report, while we do not claim GRIT is a census or perfectly representative of the global industry (if such a feat is even possible in a rapidly changing and fragmented business category like insights and analytics), we do consider it strongly directional in terms of the overall trends associated with the topics we explore.

SEGMENT COMPOSITION

The total sample size for this wave of GRIT is 1,323, including 254 self-identified buyers of insights and analytics, 1,002 self-identified suppliers, and 67 who participate in the industry in other ways. Further, we have applied our segmentation model developed over the past several waves via the GRITscape/ Lumascape to these groups.

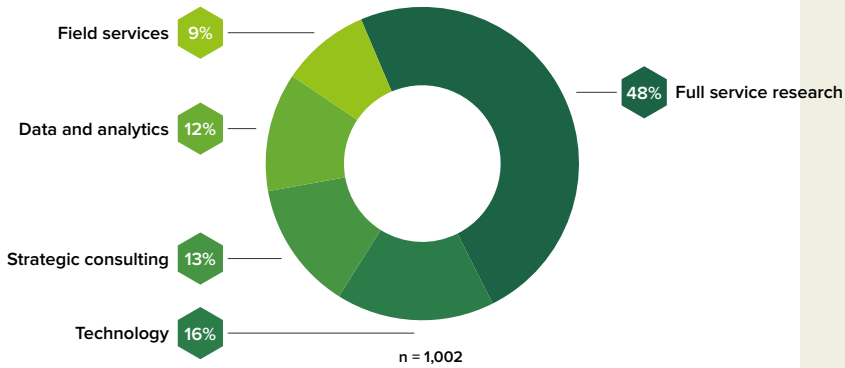
For this wave the largest buyer segment was represented by respondents that described their organizations of strategic consultants (33%), followed by Voice of the Customer (25%), in-house research providers (21%) and data analysts (14%). All other segments constituted less than 5% each.

BUYER SEGMENT IDENTIFICATION/MOST IMPORTANT ROLE (BUYER)



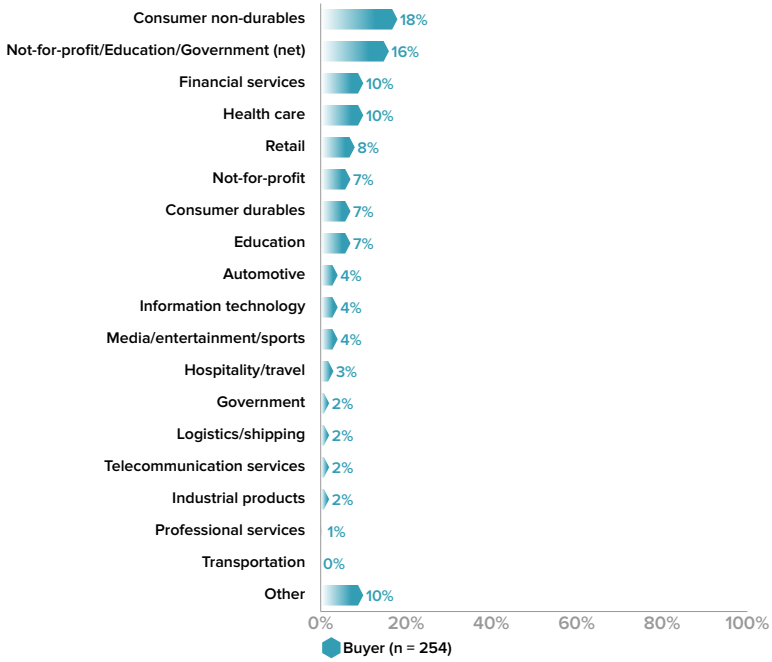
For suppliers, 48% define themselves as full service research providers, 16% as technology providers, 13% as strategy consultancies, 12% as data and analytics providers, 9% as field services providers and 1% as "other" specialists.

SUPPLIER PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)



ORGANIZATIONAL AFFILIATION

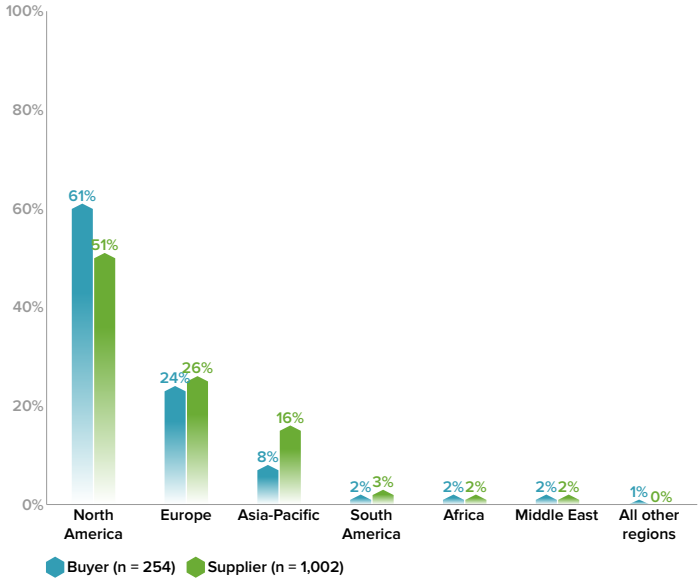
BUYER PARTICIPANTS BY VERTICAL (BUYER)



In looking only at self-identified buyers of research, we have a well-rounded sample of respondents from many sectors, ensuring a wide breadth of experience and views are represented from our client-side colleagues.

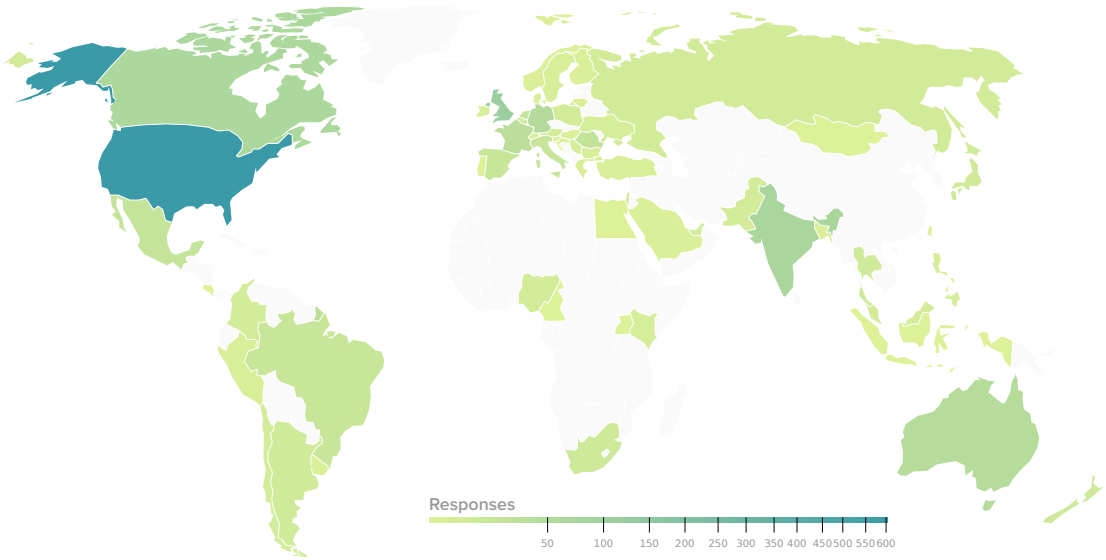
GLOBAL REGION

PARTICIPANTS BY REGION: BUYER AND SUPPLIER



Regional sample sizes remained relatively consistent with earlier GRIT waves, with minor variances within each region. As previously noted, North American respondents comprised 53% of the sample, with Europe at 25%, Asia at 14% and other regions making up the balance. We see little differences in the regional breakout in buyers versus suppliers.

In exploring the physical location of GRIT participants via IP matching, we find that 68 different countries are represented within the sample, up from 60 compared to the last year's GRIT Insights Practice Report. Respondent density by country is shown in the map below.

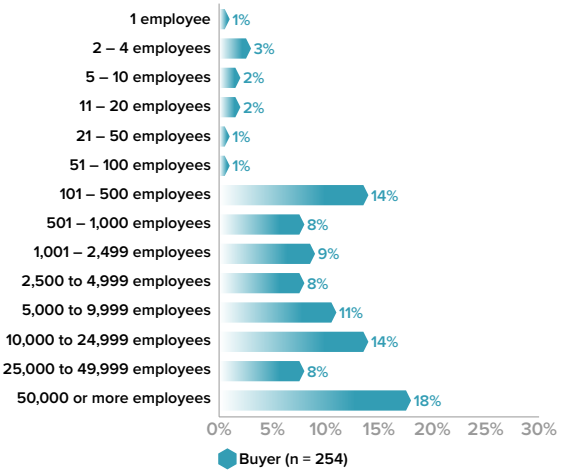


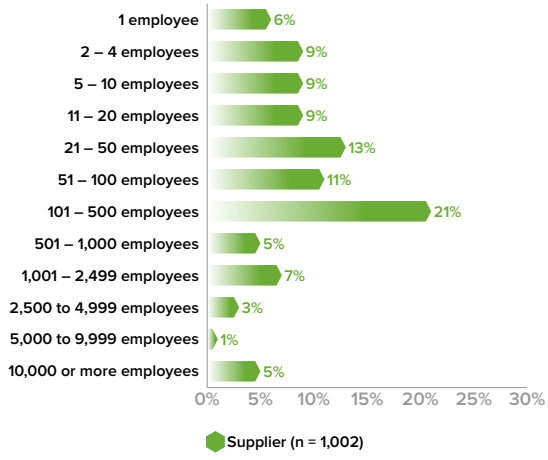
SIZE OF ORGANIZATION

GRIT respondents generally fall into three camps: slightly less than half of suppliers work within small organizations (under 50 people), a quarter in mid-sized organizations (51 to 500 people), and the remainder in large organizations with over 501 employees.

The median company size for buyers is 5,000 to 9,999 employees, with 18% having 50,000 or more. For suppliers, the median is 51 to 100 employees, and only about 6% exceed the median buyer size.

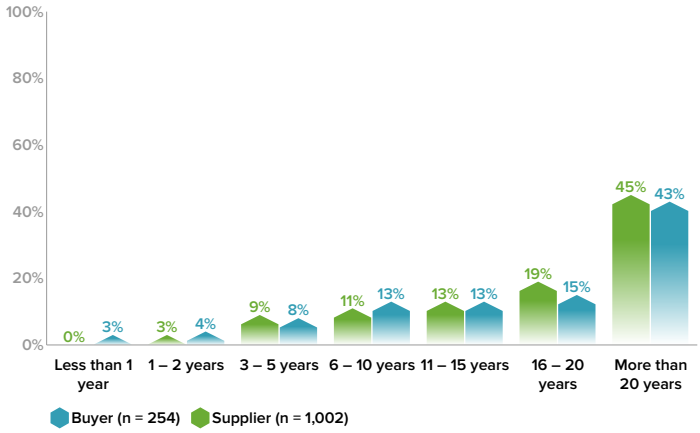
PARTICIPANTS BY SIZE OF ORGANIZATION: BUYER AND SUPPLIER





PARTICIPANT SENIORITY

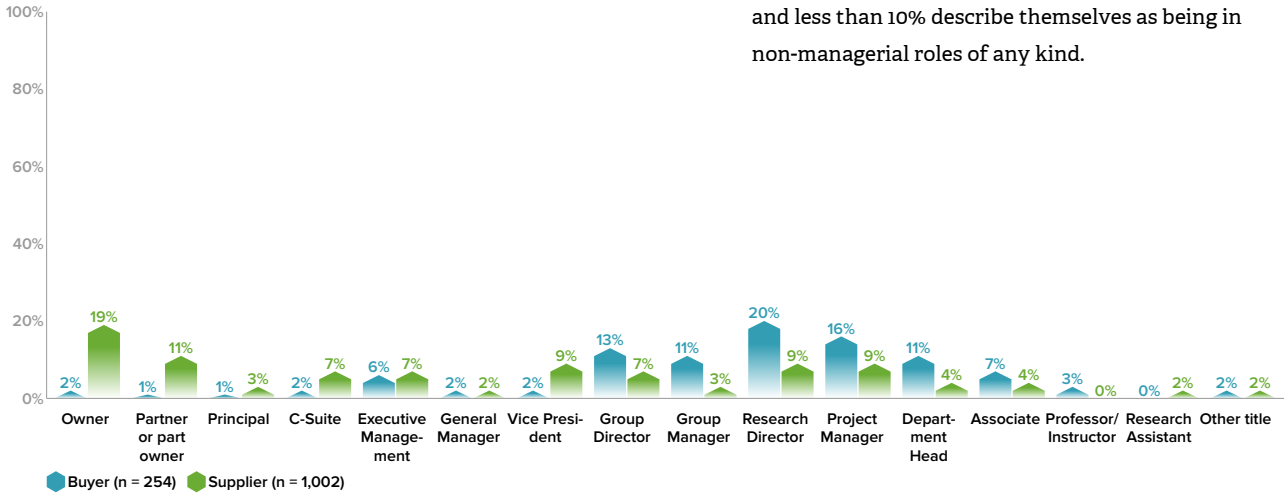
SENIORITY/YEARS IN AN INSIGHTS-RELATED ROLE: BUYER AND SUPPLIER



In analyzing other firmographic questions, the GRIT sample is comprised of largely senior level research professionals. Over 40% of both buyers and suppliers have worked in the industry for more than 20 years, with less than a quarter overall reporting working in an insights role for less than ten years.

PARTICIPANT TITLES

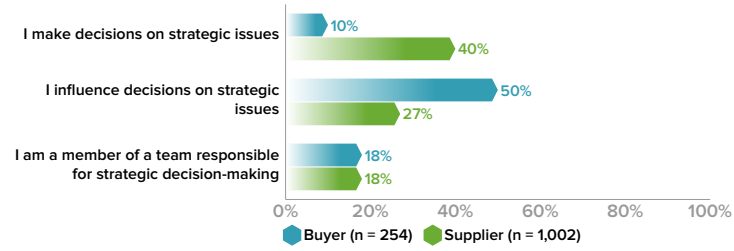
SENIORITY/YEARS IN AN INSIGHTS-RELATED ROLE: BUYER AND SUPPLIER



Concomitantly, the majority of GRIT respondents are in senior-level roles within their organizations, and less than 10% describe themselves as being in non-managerial roles of any kind.

DECISION-MAKING ROLE

STRATEGIC DECISION MAKING ROLE: BUYER AND SUPPLIER



Unsurprisingly based on the tenure and seniority of many GRIT respondents, a majority have primary responsibility for or actively participate in their research group's strategic decisions within both buyers and suppliers, with 40% of suppliers claiming to be the key decision maker (as opposed to 10% buyers). Conversely, 50% of buyers are key influencers on strategic issues. Overall, the sample of GRIT is broadly global while reflective of the order of size of market spend, and is largely comprised of very experienced and senior-level individuals from a spectrum of business sizes, types, and verticals.

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AYTM – Ask Your Target Market
Canvs
Displayr
Gen2 Advisors
Idea Highway
Infotools

Data Collection & Processing
AYTM – Ask Your Target Market
Canvs
Displayr
Infotools

Data Access
Infotools

Infographic
AYTM – Ask Your Target Market

Publication
GreenBook

Commentary Providers
AYTM
Bloomfire
Canvs
Disqo
Dynata
GutCheck
IMOTIONS
Keen as Mustard
Lucy.ai
Pulsar
Qualitrics
Recollective

Advertisers
Civicom
Gutcheck
Qualitrics
Recollective
Schlesinger Group
WebMD/Medscape Market Research

Sample Partners
1Q
A.C. Nielsen Center for Marketing Research (at The Wisconsin School of Business)
ACEI
AEDEMO
AIM
AMAI
AMC Global
American Marketing Association New York
APRC
ARIA
Australian Market & Social Research Society (AMSRS)
AYTM – Ask Your Target Market
Azure
Bakamo Social
BAQMaR
BVA
Cint
Consensus Point
Cranbrook Search
CTR
Cubic Index
CX Network
Dynata
G3 Translate
Gen2 Advisors
Harpeth Marketing
Hotspex
IIeX LATAM
Insights Association
Insights Now
Knowledgehound
Lightspeed
Llittle Bird Marketing
Lynx Research Consulting
Maru/Matchbox
Michigan State University
MROC Japan
MRS
mTAB
Multivariate Solutions
NewMR
Newristics
Next Gen Market Research (NGMR)
OdinText
OfficeReports
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Provokers
PureProfile
PureSpectrum
Qualitative Research Consultants Association (QRCA)
Research Strategy Group
Researchscape International
SampleCon
Stakeholder Advisory Services
System One Group
The Research Club
Toluna
Triggerpoint
University of Georgia | MRII
University of Texas
What Next Strategy
Women In Research
Zappi

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Idea Highway

www.id-highway.com

Idea Highway is a strategic design studio with offices in Bucharest, Romania and Linz, Austria.

Infotools

www.infotools.com

Infotools is an award-winning software and services provider, with particular expertise in processing, analyzing, visualizing and sharing market research data. We have almost three decades of experience working with both in-house corporate insights teams as well as market research agencies. Our powerful cloud-based software platform, Infotools Harmoni, is purpose-built for market research data. From data processing through to analysis, reporting, visualization, dashboards, distribution, and data alerts – Harmoni is a true 'data-to-decision-making' solution. We also offer data experts who can help with things like research design and management, data design and organization, and insights discovery, analysis, visualization and reporting.

Keen As Mustard

mustardmarketing.com

Founded in 2006, Keen as Mustard is the only specialist global communications agency in data, research and insight and is dedicated to making insights famous through strategy, communications and design.

COMMENTARY PROVIDERS

AYTM

www.aytm.com

Put plainly, we're an InTech (insights technology) company. But we're not all that plain. For some, we're a consultant. For others, we're a secret weapon. To us, we're an automation platform, a technology innovator, a self-serve insights engine, a global community, and so much more. Satisfy your curiosity and find out what true automation can do for you.

Bloomfire

bloomfire.com

Bloomfire is a knowledge engagement platform that enables and empowers teams to tap into their organization's collective intelligence. Bloomfire gives organizations one centralized, searchable place to collect, find, and democratize knowledge and insights. Its purpose-built knowledge solution makes it simple for brands like Jackson Hewitt, Conagra, DraftKings, PennyMac, and Lubrizol to find, contribute to, and manage company knowledge so that employees have the information they need to do their jobs.

Canvs

canvs.ai

Canvs AI is the easiest, fastest and most accurate insights platform for analyzing open ended text from virtually any source, including surveys, customer reviews and social media. Canvs is used by some of the world's most admired brands, research agencies, and media & entertainment companies to accelerate time-to-insights, reduce cost, and deepen understanding of consumers. For more information or to request a customized demo, please visit https://canvs.ai/ or email sales@canvs.ai.

Disqo

www.disqo.com

DISQO is a consumer insights platform connecting what people think and do across brand experiences and consumer journeys. With fully permissioned data on brand sentiment and outcomes from a single source, DISQO's clients deeply understand consumers and create a competitive advantage. Founded in 2015 and headquartered in Los Angeles, CA, DISQO is recognized as a fast-growing technology firm and a great place to work, now with 400 team members. Learn more at www.DISQO.com.

Dynata

www.dynata.com

Dynata is the world's largest first-party data platform for insights, activation and measurement. With a reach that encompasses over 62 million consumers and business professionals globally, and an extensive library of individual profile attributes collected through surveys, Dynata is the cornerstone for precise, trustworthy quality data. Dynata serves more than 6,000 market research, media and advertising agencies, publishers, consulting and investment firms and corporate customers in North America, South America, Europe, and Asia-Pacific.

GutCheck

www.gutcheckit.com

We are the Agile Human Experience Intelligence company. Building on our agile principles of speed and cost-efficiency, we leverage innovative technologies and human expertise to bring brands closer to authentic, contextualized human experiences, so they can confidently make the key decisions to drive growth through better innovation and brand building.

COMMENTARY PROVIDERS

IMOTIONS

imotions.com

Founded in 2005 and headquartered in Copenhagen, iMotions, a SaaS company, developed the world's leading human behavior software platform. More than 1,300 organizations around the world - from leading universities to global brands - use iMotions to access real-time and nonconscious emotional, cognitive and behavioral data. By integrating and synchronizing all types of sensors into a single platform, iMotions provides access to deeper and richer insights - and the most complete picture of human behavior.

Keen as Mustard

mustardmarketing.com

Keen as Mustard is specialist communications agency working with data, technology and insight clients to help them get impact from insights. Clients include Purina, BIC, Merck and Coca-Cola and agencies buzzback, Nepa and Rainmakers.

Lucy.ai

www.lucy.ai

Lucy is a one-stop AI-powered knowledge platform for all the data an organization owns and licenses. She was shaped by the needs of our clients and she continues to evolve with the market. Lucy exists to amaze, delight, and empower people with knowledge.

Pulsar

pulsarplatform.com

Pulsar is the leading AI-powered audience intelligence platform, combining conversational and behavioral signals from the world's leading digital destinations to help brands understand their audiences and create messages that matter to them. It is part of the AIM-listed Access Intelligence Group.

Qualtrics

Qualtrics.com

Qualtrics, the leader and creator of the Experience Management (XM) category, is changing the way organizations manage and improve the four core experiences of business—customer, employee, product and brand. Over 13,500 organizations around the world use Qualtrics to listen, understand and take action on experience data (X-data™)—the beliefs, emotions and intentions that tell you why things are happening, and what to do about it. To learn more, please visit qualtrics.com.

Recollective

recollective.com

Recollective Inc. is an enterprise software company focused on the development of innovative solutions for online research. Launched in late 2011, the Recollective platform combines the social interactions of an online community with a professionally designed suite of both qualitative and quantitative research tools. Each site can be custom branded and supports small or large populations for any duration required.

Sentient Decision Science, Inc.

www.sentientdecisionscience.com

Sentient Decision Science is a globally recognized behavioral science organization, known for advancing the theories, tools and technology to quantify and measure human emotion.

The leader in quantifying emotion for organizations, Sentient Decision Science advances the knowledge of the drivers of behavior to increase empathy to improve the human condition.

Made up of distinct divisions: Sentient Decision Science, Sentient Insights and Sentient Labs that are advancing the methods and technology needed to understand the human experience.

REPORT AND QUESTIONNAIRE CONTRIBUTORS

Gregg Archibald – Gen2 Advisors

Gregg Archibald is a marketing researcher and strategist dedicated to helping the research industry benefit from the consumer and technology changes that are making the field both more challenging and more exciting. He is the Managing Partner for Gen2 Advisors – a strategy and consulting firm for the marketing research industry. Gen2 Advisors works with both client side organizations and supplier organizations to capitalize on the changes for business transformation and success. Working with several Fortune 100 organizations has framed the vision of the future in client needs and opportunities.

Lukas Pospichal – GreenBook

I lead GreenBook towards its goal of providing insights professionals with engaging, useful, and forward-looking resources. During my tenure as Managing Director, we have transformed GreenBook from its origins as a business directory into a leading marketing, content, and community platform serving the global insights industry. I received my graduate degree in management from the University of Economics in Prague and completed a marketing program at HEC in Paris. I love mountains, good beer, and refilling energy on hikes and bike trips with my family.

Leonard Murphy – GreenBook

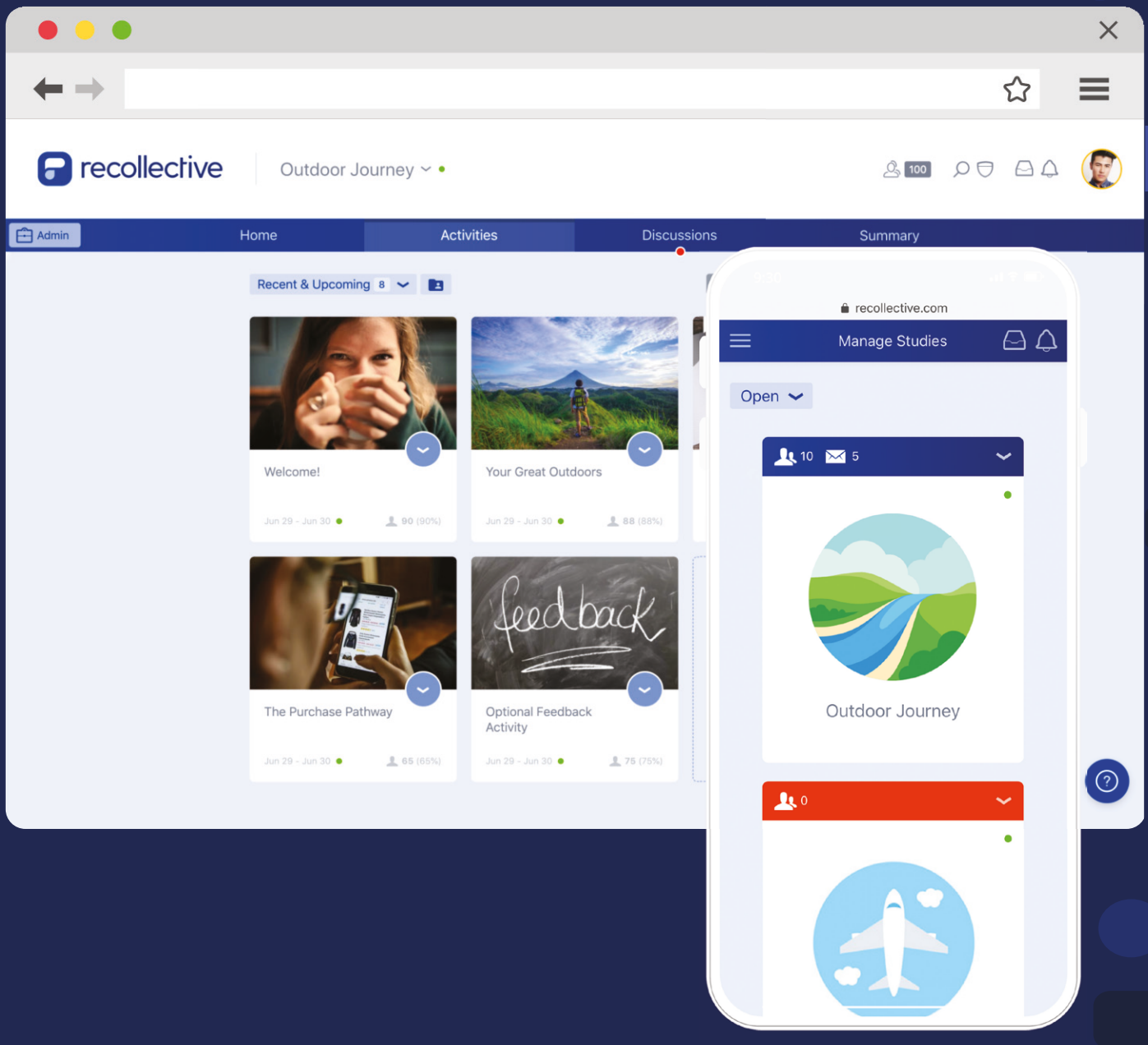
Leonard Murphy is the executive editor and producer at GreenBook: guru in residence, influencer-in-chief and product mad scientist. Over the last 15 years, Lenny has served in various senior level roles, including CEO of full service agency Rockhopper Research, CEO of tech-driven BrandScan360 and Senior Partner of strategic consultancy Gen2 Advisory Services. His focus is on collaboration with organizations to help advance innovation and strategic positioning of the market research industry, most prominently as the Editor-in-Chief of the GreenBook Blog and GreenBook Research Industry Trends Report, two of the most widely read and influential publications in the global insights industry.

Nelson Whipple – GreenBook

Nelson brings over 30 years of market research experience to his consulting projects and role as Director of Research for GRIT. Much of his career has involved quantifying, analyzing, and simulating customer preferences to inform product development and marketing decisions in B2C and B2B markets such as mobile devices, personal financial services, CPG, industrial equipment, telecom services, and retail.

Recollective is the qualitative research platform trusted by thousands of agencies and brands worldwide.

From self-paced activities, online journals and forums, to video IDIs and group video chat, Recollective provides researchers with a complete suite of leading edge research capabilities all in one platform.



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