



GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT

INSIGHTS PRACTICE EDITION 2020

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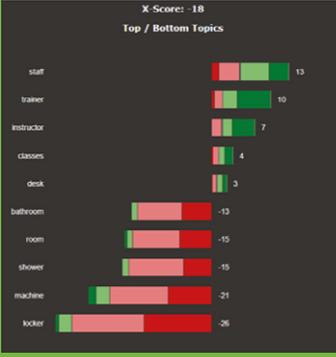
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FOREWORD



Welcome to the 28th edition of the GreenBook Research Industry Trends Report, the **Insights Practice** edition, using data collected in Q4 of 2020.

This is the first report that captures the totality of the changes impacting the insights and analytics industry and profession because of the COVID-19 pandemic. For years, we have reported on a fairly slow evolution, but that is decidedly not the case in 2020. We used to be an industry approaching a tipping point of being redefined through technology. In 2020, we not only tipped, but did so with incredible speed. Reflecting this “new normal”, our findings will help both buyers and suppliers to navigate 2021 successfully and capitalize on the potential opportunities inherent in times of rapid disruption.

This report tackles the nuts and bolts of the insights industry, exploring a variety of topics, some new and some that our readers have already come to depend on GRIT to cover. These include adoption of emerging methods, use of traditional methods, satisfaction levels with suppliers, drivers of supplier selection, investment priorities, business outlook and spending, evolving role and activities of researchers, buzz topics, in-demand skill sets, and changes in organizational focus on the buyer side. And, of course, we investigate in detail the implications of COVID-19 to provide strategic direction for the year ahead.

The result is a report that is more focused, more actionable, and more important than ever before. Even compared to previous editions, this one is truly a “must read” for insights and analytics professionals. Regardless of your role or seniority level, the 2020 GRIT Insights Practice Report is going to equip you with information you won’t find anywhere else.

And there is more: for a different kind of perspective, do not miss the popular GRIT Future List with profiles of 18 emerging leaders who are making an impact in our industry today.

GRIT is a community effort and our authors, commentary providers, sample partners, advertisers, and most especially research partners make it all possible. Special thanks go out to AYTM, Gen2 Advisors, Infotools, Insights Association, KnowledgeHound, Potentiate and Displayr. We couldn’t do what we do without their generous contributions of time, energy, and expertise.

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Note on naming conventions: Throughout this report we refer to previous GRIT editions using the publication year and whether it was the first or second wave that year. For example, 19W1 refers to the first GRIT wave in 2019 (with data collection usually in Q1 or Q2), while 17W2 refers to the second GRIT wave in 2017 (with data collection usually in Q3 or Q4).

Go to
WWW.GREENBOOK.ORG/MR/GRIT
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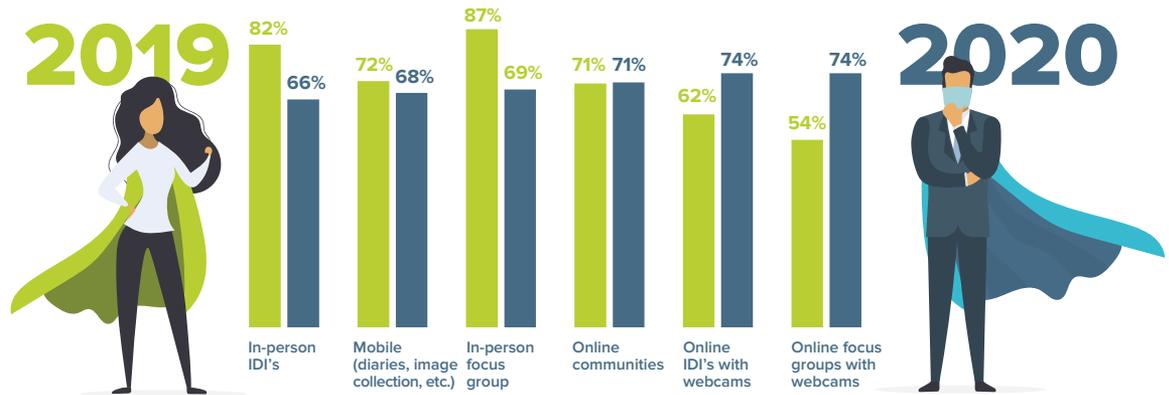


EXECUTIVE SUMMARY



2019 VS. 2020 ALL QUAL USAGE

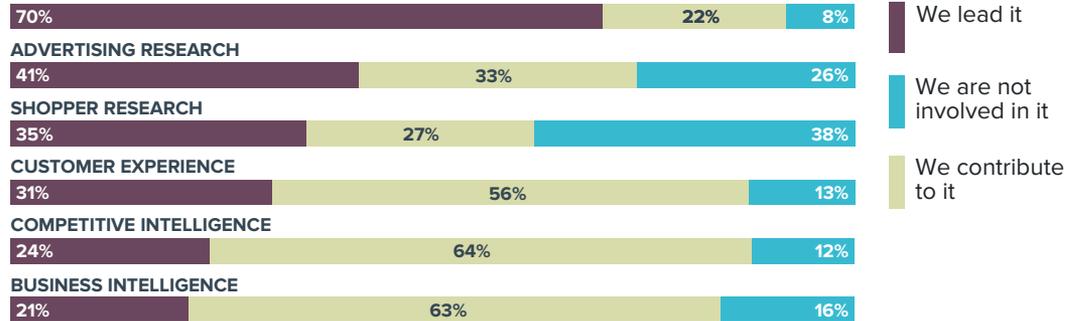
2020 profoundly impacted how we conduct Qual, with digital methods now in the lead vs. in-person. However, in-person is not out of the game despite market challenges so 2021 will be a year of finding new equilibrium between these two models.



ROLE OF INSIGHTS DEPARTMENT (BUYER)

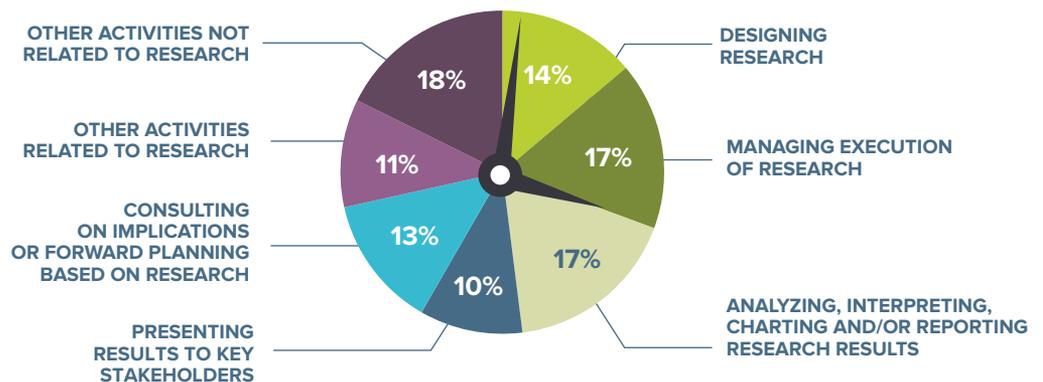
Buyer side insights organizations are becoming more focused on a smaller subset of business issues, while other related functions are moving to adjacent departments. The days of Market Research owning everything to do with understanding customers seems to be rapidly coming to a close, creating new opportunities and challenges for both Buyers and Suppliers.

CONSUMER MARKET INSIGHTS

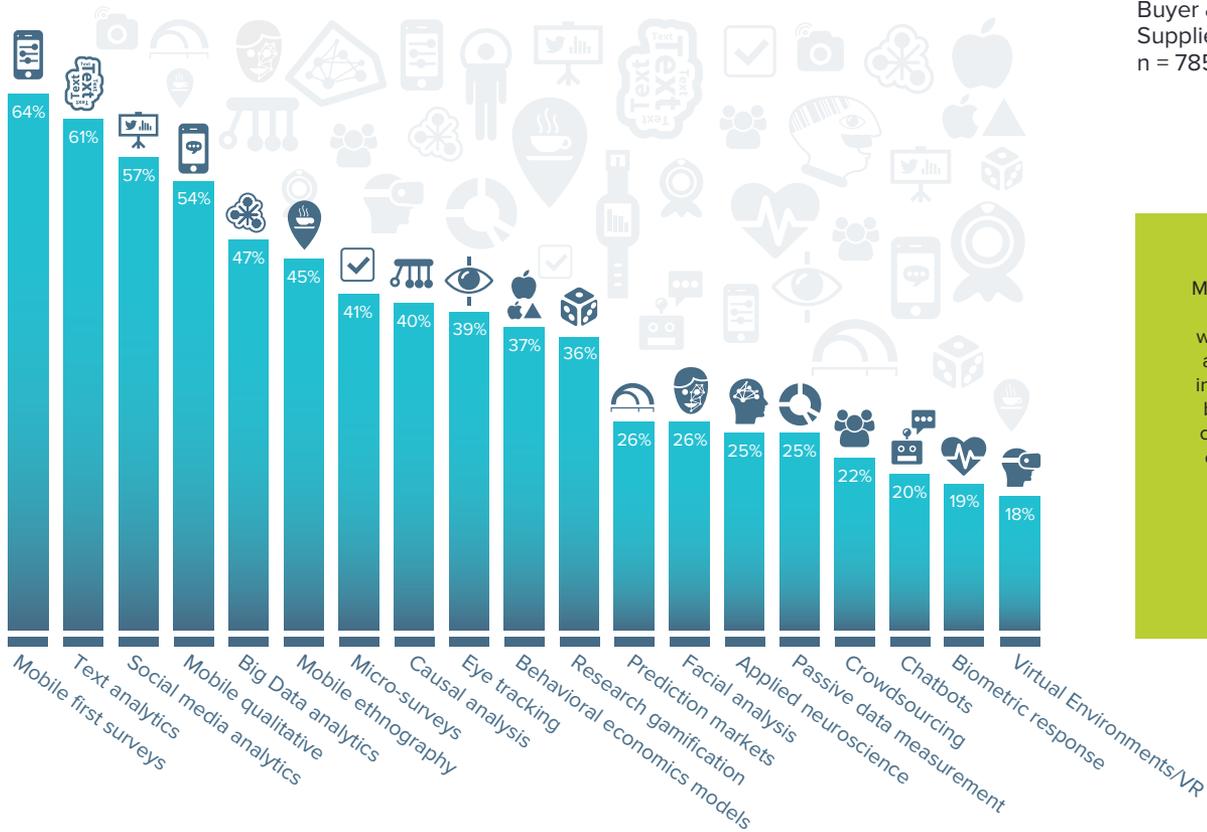


TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES

Insights & Analytics pros are busy people, spending almost half their time in tasks related to collecting and analyzing data and the remainder split between non-research specific tasks and communicating and implementing research findings. To be successful in this industry a wide range of skills are required.



EMERGING METHOD ADOPTION



Many emerging methods have now reached widescale adoption and are "go to" tools in the insights pro toolbox, led by mobile-centric data collection and a variety of analytical solutions.

SUPPLIER PROFESSIONAL FOCUS

Revenue trends



We all knew 2020 was a hard year, but now we know just how hard for Strategic Consultancies and Full & Field Service Providers who have seen startling levels of decreasing revenue and staffing. However, Technology Providers are booming, and to a lesser degree Data & Analytics providers too. However, everyone continues to invest in technology as a means of creating new speed, cost, and business impact.

NEGATIVE IMPACT OF COVID-19 ON BUYERS AND SUPPLIERS

ABILITY TO MEET YOUR ORGANIZATION'S GOALS



VOLUME OF CLIENT PROJECT WORK / OVERALL RESEARCH VOLUME



STAFF SIZE



INVESTMENT IN TECHNOLOGY, RESEARCH-SPECIFIC SOFTWARE OR AUTOMATION TOOLS



Negative impact of COVID-19 on the supplier

Negative impact of COVID-19 on the buyer

COVID-19 created many challenges for both Buyers and Suppliers, although Suppliers report more negative impacts than Buyers. Whether those trends continue in 2021 is anyone's guess, but it appears we reached a point of stabilization in 2020 so perhaps 2021 will see a return to more positive trends.

METHODOLOGY AND SAMPLE

GRIT respondents are recruited via GDPR-compliant, opt-in email lists and a variety of social media channels by GreenBook and partner organizations. These lists are comprised of both research suppliers and buyers. Respondents from the United States comprise most of the survey participants.

The analysis is based on 1,071 completed interviews after rigorous data cleaning. For some questions, base sizes may be lower due to skip patterns, rotations, routing, and other factors. To shorten the survey without sacrificing depth of exploration of topics, 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.

Some regional differences across countries exist as well; we call out relevant differences in our analysis when that appears to be a significant factor in results. Overall, we see the composition of the sample remaining relatively stable compared to previous waves.

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

Because of our unique sampling approach, we use a rigorous cleaning process once data collection is completed. We remove surveys that are only partially completed and delete ones that are clearly poor quality or not from someone who is legitimately in the insight industry.

As usual for GRIT, the mix of respondents varies slightly wave on wave, but within narrow bands. For this edition, 72% of respondents identified themselves as suppliers (n=769) and 26% identified themselves as buyers (n=274). We also captured some respondents who identified themselves as “providing other services” (e.g., non-research insights services). Due to its small size and lack of substantive findings, this group has not been called out separately, but is represented in industry totals.

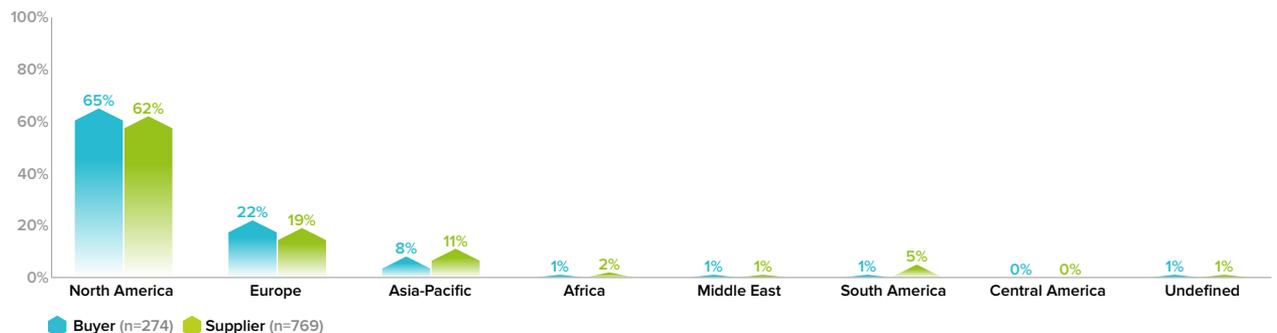
For this edition, 72% of respondents identified themselves as suppliers (n=769) and 26% identified themselves as buyers (n=274)



GRIT 20W2 SAMPLE BY SEGMENT, TABLE 1

Buyer	26%	274
Supplier	72%	769
Other services	3%	28
Total sample n = 1,071		

PARTICIPANTS BY REGION: BUYER VS. SUPPLIER





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ADOPTION OF EMERGING METHODS

Prior to 2020, we saw a relatively slow but consistent growth in adoption of emerging methods. In 2020, however, there has been a marked acceleration in adoption of some methods, primarily related to analytics and digital data collection.

CHANGES IN ADOPTION, USAGE, AND INTEREST

Each year, GRIT tracks the interest among insights and analytics professionals in a variety of methodologies considered to be “emerging”. The “interest” metric is defined by the extent to which each methodology is in use or under consideration and provides clear direction as to where the industry is headed. As we all continue to find our way through the challenges imposed by the COVID-19 pandemic, it is critically important to understand which of these less established methodologies industry professionals believe can help them survive and thrive moving forward.

A quick note on changes to the related survey questions. As always, GRIT evolves to reflect changes in the industry, and the 2020 questionnaire has adapted to the new realities. In the previous wave of the Insights Practice Report (designated as 19W2) answer choices included “In use” and “Under Consideration”. In this wave (20W2) we modified the response choices so “In use” is now “use regularly, use occasionally, and trying it out” and “Under consideration” is now “Considering it”. These changes were implemented to allow a more nuanced exploration of the topic and to increase compatibility with other survey sections.

Of the 19 emerging methods examined, mobile-first surveys lead in usage (64%, Table 1) as it has since its introduction to GRIT in 17W2 (Table 2; in 17W2

and 18W2, it was second to online communities, but online communities are now considered an established methodology.) Usage of mobile-first is up 8% from 56% in 2019, double its previous largest adoption rate. In addition, 13% say they are considering mobile-first surveys, bringing total interest to 76%. Considering the rapid shift to “everything digital” in 2020, this growth is not a surprise. Indeed, it is a story that we see repeated throughout this wave of the report in various ways.

In addition to mobile-first surveys, seven other methods are in use by at least 40%, two more than last year. These divide neatly into two groups: analytics and digital data collection. The “analytics” methods are all about realizing more value and efficiency from data via analytical approaches, and include text analytics (61% use, + 11% from 19W2), social media analytics (57%, +7%), Big Data analysis (47%, +3%) and a new entrant: causal analysis (40%, +10%). Digital data collection methods, on the other hand, are all about using new tools to enable more efficient and agile digital data collection. Mobile qualitative (54%, +6%), mobile ethnography (45%, +4%) and the other new entrant: micro-surveys (41%, +5%). These findings fit well with other learnings in this report regarding how technology-driven research exploded in 2020, clearly becoming the core driver of the industry.

Considering the rapid shift to “everything digital” in 2020, this growth is not a surprise



ADOPTION OF EMERGING METHODS, TABLE 1

Rank	Emerging Method	In Use	Under Consideration	Interest
1	Mobile-first surveys	64%	13%	76%
2	Text analytics	61%	18%	80%
3	Social media analytics	57%	17%	73%
4	Mobile qualitative	54%	17%	71%
5	Big Data analytics	47%	19%	65%
6	Mobile ethnography	45%	18%	63%
7	Micro-surveys	41%	19%	59%
8	Causal analysis	40%	11%	51%
9	Eye tracking	39%	13%	52%
10	Behavioral economics models	37%	19%	56%
11	Research gamification	36%	22%	58%
12	Prediction markets	26%	15%	41%
13	Facial analysis	26%	14%	40%
14	Applied neuroscience	25%	15%	39%
15	Passive data measurement	25%	20%	45%
16	Crowdsourcing	22%	17%	38%
17	Chatbots	20%	17%	37%
18	Biometric response	19%	13%	32%
19	Virtual Environments/VR	18%	19%	37%
	Buyer & Supplier, n = 785			

Before diving deeper, it's useful to address an obvious question: "For those seven methodologies, 40% looks strong, but what is it 40% of?" The simple answer: it's 40% of the buyers and suppliers in the GRIT sample. This leads to the next obvious question: "How should we interpret these results?" The simplest answer: as general trends, not as specific market penetration metrics. The magnitudes of responses across methodologies are meaningful, and the changes from wave to wave are meaningful. For example, we are confident that mobile-first is the most popular of these methodologies and that its usage accelerated this year. We would not say that an audit of any random set of insights professionals would prove that 64% use mobile-first surveys. Because of its unique recruiting process, the GRIT survey sample includes a wide range of buyers and suppliers, but probably leans toward those who are likely early adopters of technology. If we tried to

project these numbers to the industry as a whole, we would expect it to overstate usage and interest, but we don't support those kind of projections.

Seven methods reached or maintained a high level of overall usage, but nearly all methods that GRIT tracks as "emerging" grew in 2020, evidence of the industry's significant adoption of new technologies and approaches to adapt to the disruptions of the pandemic. The 'In Use' data from 2014 to 20W2 clearly indicate atypical jumps across virtually all methods this year. For three of these, usage jumped 10 points or more: the aforementioned text analytics (61%, +11%) and causal analysis (40%, +10%), plus research gamification (36%, +11%). (Table 2 also documents some of the changes to the GRIT survey, including items that are no longer asked and the three methods introduced in 2019, passive data measurement, causal analysis, and chatbots.)

Nearly all methods that GRIT tracks as "emerging" grew in 2020, evidence of the industry's significant adoption of new technologies and approaches to adapt to the disruptions of the pandemic



This rapid across-the-board acceleration in adoption left out two key areas: applied neuroscience and Virtual Environments/VR.

Applied neuroscience declined by 4%, losing nearly half of its gains from 19W2 but still exceeding usage in every other year. This decline could reflect the challenges of availability, scale, speed, and cost of these methods as the industry increasingly demands more nimble and cost-effective solutions. Or, the decline could be significantly driven by losses for particular methods that require in-person interaction, a near-impossibility by the end of 2020. We would expect to see a new round of innovation

in the future driving integration of applied neuroscience approaches into the platforms that rose to the occasion as new enablers of research in 2020.

Virtual Environments/VR also failed to accelerate; it is still a niche approach hobbled primarily by low consumer adoption of the enabling tech. However, it will be interesting to see if the phenomena of lockdowns, travel restrictions and social distancing drive greater consumer adoption of these devices as more immersive and engaging entertainment alternatives. If so, research adoption will surely follow as the industry continues to adapt to new consumer behaviors and buyer need.

ADOPTION OF EMERGING METHODS, TABLE 2

Use of Method	2014	15W2	16W2	17W2	18W2	19W2	20W2	12 Month Change	5 Year Change
Mobile-first surveys	–	–	–	50%	54%	56%	64%	8%	–
Text analytics	40%	38%	46%	46%	51%	50%	61%	11%	23%
Social media analytics	46%	43%	52%	43%	49%	50%	57%	7%	14%
Mobile qualitative	37%	34%	42%	44%	43%	47%	54%	7%	20%
Big data analytics	32%	34%	38%	38%	45%	44%	47%	3%	13%
Mobile ethnography	30%	31%	33%	35%	38%	41%	45%	4%	14%
Micro-surveys	25%	25%	35%	34%	33%	35%	41%	6%	16%
Eye tracking	34%	28%	35%	34%	38%	35%	39%	4%	11%
Behavioral economics models	25%	21%	29%	29%	32%	30%	37%	7%	16%
Causal analysis	–	–	–	–	–	30%	40%	10%	–
Applied neuroscience	13%	15%	16%	21%	20%	29%	25%	-4%	10%
Research gamification	23%	20%	25%	25%	26%	25%	36%	11%	16%
Passive data measurement	–	–	–	–	–	20%	25%	5%	–
Facial analysis	18%	18%	24%	20%	24%	20%	26%	6%	8%
Prediction markets	19%	17%	24%	19%	21%	19%	26%	7%	9%
Crowdsourcing	17%	12%	16%	15%	18%	19%	22%	3%	10%
Virtual environments/VR	17%	10%	14%	11%	17%	17%	18%	1%	8%
Chatbots	–	–	–	–	–	14%	20%	6%	–
Biometric response	13%	10%	12%	12%	16%	12%	19%	7%	9%
Mobile surveys	64%	68%	75%	–	–	–	–	–	–
Online communities	56%	50%	59%	60%	59%	–	–	–	–
Webcam-based interviews	34%	33%	43%	47%	51%	–	–	–	–
Internet of things	12%	9%	14%	12%	15%	–	–	–	–
Sensor/usage/telemetry data	–	7%	11%	11%	13%	–	–	–	–
Wearables-based research	7%	8%	10%	9%	9%	–	–	–	–
n=	465	1,022	1,580	1,533	1,260	1,117	785		

At the other end of the spectrum, research gamification made big strides. After years as a “buzzy” topic with only niche usage, perhaps 2020 was a tipping point for new thinking about the applicability of gamification approaches, just as it was for many other “consumer-centric” methods. Like our hypothesis regarding VR’s future, gamification can create more engaging and rewarding user experiences during a time of emotional turmoil and distraction, but with a lower tech ante than VR. The challenges of the pandemic have spurred more empathetic creativity on behalf of researchers, and gamification was poised as a viable solution to help address that imperative. We look forward to monitoring this in the future to assess whether this approach has a sustainable growth path.

Next, let us look at 2020 in more detail.

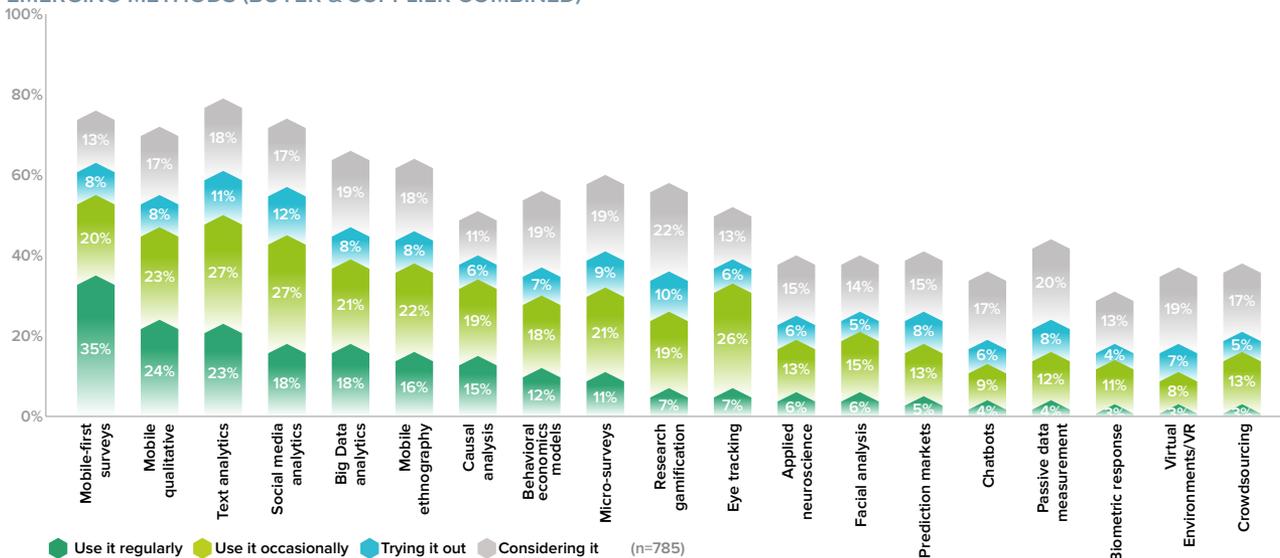
In terms of regular usage, mobile-first surveys clearly lead all these methods (35%), mobile qualitative (24%) and text analytics (23%) are distant second and third. Six methods are used occasionally by 20% or more: text analytics (27%), social media analytics (27%),

eye tracking (26%), mobile qualitative (23%), mobile ethnography (22%), Big Data analytics (21%), and mobile-first surveys (20%). Three methods are in trial by 10% or more: social media analytics (12%), text analytics (11%), and research gamification (10%). Two methods are under consideration but have not been tried yet by 20% or more: research gamification (22%) and passive data measurement (20%).

If a method is in trial or under consideration by a higher percentage than who use it, it might be approaching a surge in adoption. These methods include research gamification, applied neuroscience, prediction markets, chatbots, passive data measurement, biometric response, Virtual Environments/VR, and crowdsourcing. Of course, any of these may also have a stronger barrier to adoption than others that prevent them from going from consideration to use. If we look at only those methods that showed acceleration since last year (increases of, say, 5 points or more), the list of potential accelerators is pared down to research gamification, prediction markets, chatbots, passive data measurement, and biometric response.

Gamification can create more engaging and rewarding user experiences during a time of emotional turmoil and distraction, but with a lower tech ante than VR

EMERGING METHODS (BUYER & SUPPLIER COMBINED)



All in all, 2020 must be considered a good year for adherents and providers of emerging methods. Although there are clear winners that “went mainstream” this year, and certainly some who grew more than others, it appears that necessity did

indeed breed invention and many of the innovators of the past few years saw their hard work pay off by being able to address the systemic challenges this year produced.

BUYER AND SUPPLIER DIFFERENCES

As in previous years, the differences between buyer and supplier segments may be best summed up simply as: buyers are more interested in analytics and suppliers are more focused on data collection. Buyers seem to be more focused on things that generate actionable insights, while suppliers are more focused on creating the “data supply chain”

that powers insight generation. In some respects, this naturally reflects the traditional ecosystem, but for an industry that strives mightily to “earn a seat at the table”, we continue to see a significant gap between supplier aspirations and buyer buying behavior.

ADOPTION OF EMERGING METHODS, TABLE 3

Use of Method	Buyer & Supplier	Buyer	Supplier	Buyer – Supplier
Mobile qualitative	54%	46%	57%	-10%
Research gamification	36%	29%	38%	-9%
Mobile ethnography	45%	39%	48%	-9%
Mobile-first surveys	64%	59%	65%	-6%
Facial analysis	26%	23%	27%	-4%
Prediction markets	26%	26%	27%	-1%
Eye tracking	39%	39%	39%	0%
Text analytics	61%	62%	61%	1%
Chatbots	20%	21%	20%	1%
Virtual Environments/VR	18%	19%	18%	1%
Passive data measurement	25%	26%	24%	2%
Causal analysis	40%	43%	39%	4%
Applied neuroscience	25%	28%	24%	4%
Crowdsourcing	22%	25%	20%	5%
Micro-surveys	41%	44%	39%	5%
Biometric response	19%	23%	17%	6%
Big Data analytics	47%	51%	45%	6%
Behavioral economics models	37%	42%	36%	6%
Social media analytics	57%	69%	53%	16%
n =	785	207	578	

The big differences are social media analytics and Big Data analysis. In both cases, there are more buyers using the techniques than there are suppliers providing these services. This gap has existed for several years and does not show any signs of narrowing. The data continues to suggest that many buyers are buying their social media and Big Data analysis from non-market research

suppliers and/or they are conducting the analyses internally. However, trends among GRIT suppliers suggest that more of them may be able to provide a viable analytics alternative: use of text analytics has increased from 49% in 19W2 to 61%, social media analytics from 43% to 53%, causal analysis from 30% to 39%, and Big Data analytics from 39% to 45%.

SUPPLIER PROFESSIONAL FOCUS

The term “suppliers” includes a wide range of organizations, with different areas of focus. To enable a more detailed analysis of suppliers, they self-selected from five segments: Technology

Providers, Full Service Providers, Field Service Providers, Data/Analytics Providers, and Strategic Consultancies. Table 4 shows the use of emerging technologies by these segments.

ADOPTION OF EMERGING METHODS, TABLE 4

Use of Method	Technology Provider	Full Service	Field Service	Data & Analytics	Strategic Consultancy
Text analytics	80%	65%	29%	60%	56%
Mobile-first surveys	76%	70%	54%	57%	59%
Big Data analytics	60%	47%	21%	51%	38%
Social media analytics	54%	55%	43%	44%	53%
Mobile qualitative	52%	65%	61%	36%	50%
Micro-surveys	52%	36%	29%	50%	37%
Research gamification	48%	38%	32%	39%	38%
Mobile ethnography	38%	55%	46%	28%	45%
Causal analysis	38%	41%	21%	50%	34%
Chatbots	36%	18%	14%	21%	20%
Facial analysis	30%	29%	50%	22%	22%
Prediction markets	28%	27%	11%	32%	28%
Crowdsourcing	26%	20%	14%	11%	27%
Eye tracking	26%	46%	50%	32%	30%
Behavioral economics models	26%	39%	32%	33%	34%
Applied neuroscience	20%	24%	21%	19%	28%
Passive data measurement	18%	27%	25%	24%	22%
Virtual Environments/VR	14%	22%	11%	10%	17%
Biometric response	10%	18%	21%	19%	17%
n =	50	305	28	72	115

For each row the largest value is highlighted in green and the smallest value in pink.

Despite the previously noted gaps in the analytics category of methods between buyers and suppliers, it appears that the Technology Provider segment is leading the charge in adoption of these techniques, likely as components of their core offerings to

create greater efficiency and “stickiness” of their tools. Other segments are adopting these as well, except for self-described Field Services companies that lag significantly behind. In general, however, we see broad increased usage of all methods across

Technology is reshaping the industry: more suppliers are retooling their skill sets to move past general data collection to leverage specific capabilities



all supplier segments, albeit to differing degrees. These differences seem to be in alignment with the category positioning: the more data collection focused the category, the greater the emphasis on exploring new approaches that address needs around engaging and understanding consumers and in creating efficiencies in generating insights. The more service-focused the segment is, the more emphasis it seems to place on maintaining parity with trends in data collection, but also in applying

depth of insights via human understanding to their engagements.

The key takeaway from this analysis dovetails with the overarching findings that technology is reshaping the industry and suppliers are looking for ways to differentiate between generally collecting data in many ways, in order to focus more on leveraging specific capabilities that are aligned with their own unique positioning and value proposition.

REGIONAL DIFFERENCES

There are few interesting differences by global region; the main message is that the advanced market research world is essentially a homogeneous one. The only standout difference is that text analytics has lower adoption outside of the three

major regions, perhaps due to slower development of the technology for some languages.

Table 5 shows the data for North America, Europe, and Asia-Pacific regions, with all other areas rolled into "Rest of the World".

ADOPTION OF EMERGING METHODS, TABLE 5

Use regularly or occasionally	Buyer & Supplier	North America	Europe	Asia-Pacific	Rest of World
Mobile-first surveys	64%	61%	63%	75%	69%
Mobile ethnography	45%	46%	45%	34%	55%
Mobile qualitative	54%	54%	52%	55%	55%
Research gamification	36%	35%	45%	28%	27%
Applied neuroscience	25%	22%	28%	26%	35%
Virtual Environments/VR	18%	18%	17%	22%	18%
Crowdsourcing	22%	23%	15%	28%	21%
Social media analytics	57%	54%	63%	68%	52%
Big Data analytics	47%	49%	44%	49%	37%
Micro-surveys	41%	40%	40%	45%	44%
Causal analysis	40%	40%	35%	50%	37%
Text analytics	61%	63%	62%	64%	44%
Eye tracking	39%	37%	47%	41%	40%
Facial analysis	26%	25%	29%	22%	32%
Prediction markets	26%	25%	27%	33%	31%
Biometric response	19%	17%	21%	14%	29%
Chatbots	20%	19%	18%	32%	19%
Behavioral economics models	37%	35%	48%	37%	31%
Passive data measurement	25%	23%	26%	32%	23%
n =	785	498	149	76	62

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As we have seen consistently this year, most changes can likely be attributed to adaptation to forced market changes due to the pandemic, and since COVID-19 is a global issue, it makes sense to see relative consistency across geographies. Those

approaches that most effectively address the needs to engage consumers in new, digitally centric ways have gained traction as have those that power greater efficiencies (speed/cost savings) as well as business impact.

THE BIG PICTURE

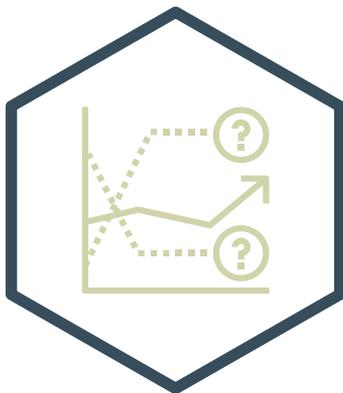
2020 saw almost all emerging methods grow in usage across all relevant analyses, presumably in response to market dynamics as a result of COVID-19. The industry was well positioned for this acceleration; the key question now is where do we go from here? Will we see a long tail of steadily increasing adoption as the world settles into a “new normal”, or will there be some level of “snap back” to previous states as things stabilize?

We don't know the answer to that yet, but history may point to some logical predictions. Disruptive change that sticks in our industry seems to have three primary ingredients:

- Technological advancement that hasn't reached wholesale adoption yet
- Economic conditions that force a change in buying behavior to address those pressures
- Rapid change in consumer behavior that drives a need to both understand the changes and to align with new consumer engagement expectations

The Great Recession was the last period of significant disruption for our industry, and we saw those conditions play out with the initial shift to digital data collection, immense price pressures on suppliers, and consumer adoption of mobile and social media platforms. Those changes continued to play out over the last decade. Arguably, we are now in a similar scenario and the GRIT data seems to indicate it is reasonable to expect the dynamics now playing out will have a long-term impact and will likely force us to shift many of these “emerging methods” into the “established methods” camp as they become the norm. It will be fascinating to track which methods make that leap and what new ones innovators will introduce to replace them as the next set of emerging methods.

In the interim, quantifying these changes via GRIT will help the industry understand where we are and make reasonable bets on where things are going. Understanding use of emerging methods is a critical and pragmatic component of forecasting that.



GRIT data seem to indicate that it is reasonable to expect the dynamics now playing out to have long term impacts



TRACKING YOUR BRAND'S HEALTH IS AT THE HEART OF YOUR SUCCESS

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It's a new year, the perfect time to resolve to build your brand's health, the best way to ensure your brand's survival into the next year and well beyond. Brands that don't remain relevant, innovate or add value to consumers' lives could literally disappear, to be speedily replaced by brands that have secured their place in the marketplace.

If you want to remain top-of-mind in the marketplace, you need to be constantly monitoring your brand's vital signs and taking immediate steps to repair any weaknesses that could impact future brand performance.

The First Step is Recognition

Vigilant brand marketers and C-level executives in every industry have begun to recognize the key role brand health plays in their company health. According to a recent Gartner poll, 33 percent of CMOs cite building brand strategy as their most vital competency, a dramatic move upward from the near bottom of the list in prior years.

These marketers have realized that a healthy brand is central to a company's performance, driving higher levels of buyer consideration, recommendation, and trust. Most importantly, a healthy and vibrant brand impacts overall corporate health by boosting company value and reputation.

But some companies are abandoning brand tracking programs that they fear are not delivering sufficient ROI. Here's why some marketers are taking this drastic step, when an ultra-competitive marketplace demands constant brand monitoring.

Many Tracking Programs Stuck in the Past

Too many tracking programs have failed to keep pace with an ever-evolving marketplace. This is because traditional brand models are based on measuring current and past success rather than determining whether the brand has the vitality and momentum to move forward and ensure continued success. These programs

measure awareness, familiarity, consideration, and usage, creating a one-way, linear framework which worked perfectly in an age where messages were pushed through mass media and communication was one way. Those days are gone.

A New Brand Tracking Model to Plan for the Future

It almost goes without saying that today's market has been completely transformed. Consumers have constantly increasing influence on the market, asserting more control on brands than ever before. This trend is certain to escalate, giving consumers even more powerful tools to exert pressure on brands. Technology disruption—continues to blur the boundaries between brands and consumers, as these new approaches fill the market.

A completely new model for capturing brand insights is necessary to respond effectively to this new dynamic. It must:

- Assess future relevance and brand vitality.
- Ensure a brand is fit for the future and to fight competitive threats.
- Enable impactful decisions faster to ensure the future health of your brand and in-market success.
- Produce a more holistic perspective by looking beyond just static metrics.

Only a model with these capabilities will enable brands to grow with consumers. Delivered as an online platform with automated solutions, this model enables faster, cost-effective brand insights using structured equation modelling to apply the pillar scores and overall score in real time. This is an entirely new way of monitoring brand health and making complex content simpler and more actionable.

This is the ideal tool to deal with the consumer-dominated marketplace, ensuring brand health now and well into the future. Transitioning into this model is the perfect way to ring in the new year on a high note for your brand and business health.

USAGE OF ESTABLISHED METHODOLOGIES

While 2020 witnessed significant changes in usage of established methodologies, especially the shift from in-person qualitative to online qualitative, the overall mix between qualitative and quantitative remained relatively stable. The initial shock of the pandemic created a need to quickly and

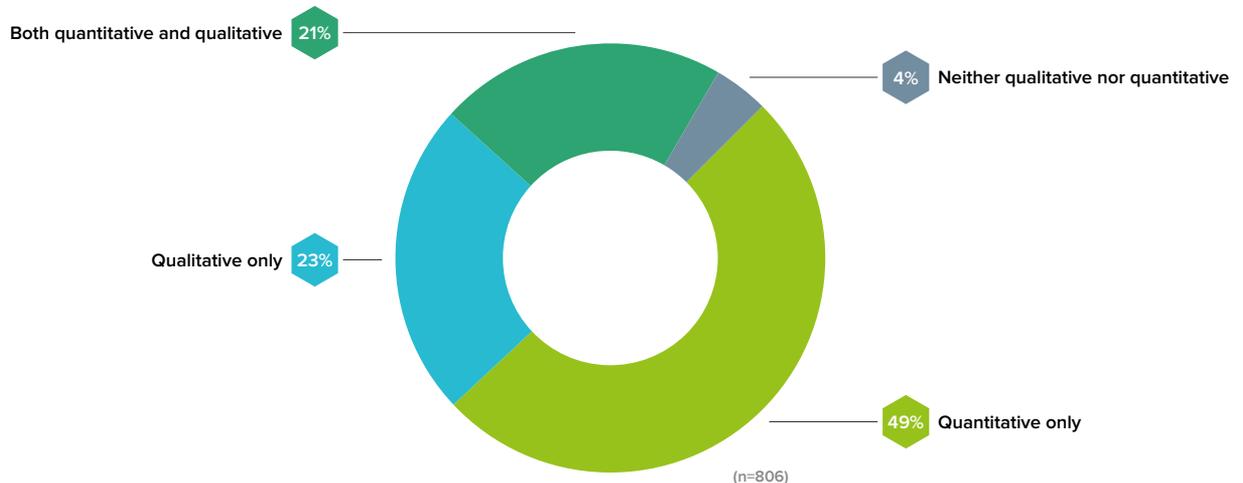
cost effectively understand the impact on consumers, driving – fairly predictably – use of quantitative research. Very soon afterward, a need emerged to conduct foundational research to better grasp the longer-term business implications of the pandemic, driving use of qualitative research.

BALANCE BETWEEN QUALITATIVE AND QUANTITATIVE

Complementing our review of trends across emerging methodologies, we now look at how the insights industry uses techniques which we consider, by contrast, as “established”.

Across buyers and suppliers, the vast majority of organizations use both qualitative and quantitative research; 85% are using qualitative research, 92% are using quantitative, and just 2% using neither qualitative nor quantitative. This is in line with 19W2 findings.

AVERAGE PROJECT ALLOCATION ACROSS QUANT AND QUAL (BUYER & SUPPLIER)



From other sources (e.g., ESOMAR GMR), we know that quantitative research accounts for roughly 80% of annual spend on established methods and qualitative research is only 20%. However, looking at average allocation of projects (rather than spend) across quantitative and qualitative makes it clear

that qualitative methods are essential to insights work. For the average buyer or supplier organization, less than half of projects are quantitative only (49%). The remaining 51% of projects, on average, are split across both quantitative and qualitative (21%) or qualitative only (23%); 4% do not use either.

DIFFERENCES BETWEEN GROUPS

This dual usage pattern in terms of whether quantitative and/or qualitative research is used is consistent across all of the regions, i.e., there are no significant differences between the regions. The pattern of usage between buyers and suppliers is also consistent with just save for significant

difference: 91% of buyers say they use qualitative research compared with 83% of suppliers, but it is still the vast majority of each.

When we divide the suppliers into five sub-categories (reflecting their specific roles), we see some significant differences, shown in Table 1.

For the average buyer or supplier organization, less than half of projects are quantitative only (49%)



USAGE OF ESTABLISHED METHODOLOGIES, TABLE 1

Used in the Last 12 Months	All Suppliers	Technology providers	Field Service	Full Service	Data/Analytics	Strategic consultancy
Any quantitative approach	92%	88%	92%	94%	91%	92%
Any qualitative approach	83%	67%	85%	90%	61%	89%
Neither of these	2%	4%	4%	0%	5%	0%

n=806 (Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in pink.)

The key difference is that the technology providers and data and analytics providers tend to use qualitative research less frequently, which certainly makes sense considering the focus on quantitative data collection within those segments. However, even in these groups, more than 60% used

qualitative approaches in the last twelve months. Again, these findings are almost exactly in line with those from 19W2.

In terms of the percentage of projects that are quantitative or qualitative or both, there are a few significant differences summarized in Table 2.

USAGE OF ESTABLISHED METHODOLOGIES, TABLE 2

Used in the Last 12 Months	Base	% of Base	Group	Group %
Quantitative only	Buyer & Supplier	49%	Buyer	45%
			Supplier	51%
	Supplier	51%	Data/Analytics	63%
			Strategic Consultancy	40%
Qualitative only	Buyer & Supplier	23%	Europe	18%
	Supplier	23%	Data/Analytics	10%
	Neither Quantitative nor Qualitative	Buyer & Supplier	4%	Buyer
Supplier				2%
Supplier		2%	Rest of World	1%
			Full Service	0%
			Strategic Consultancy	0%

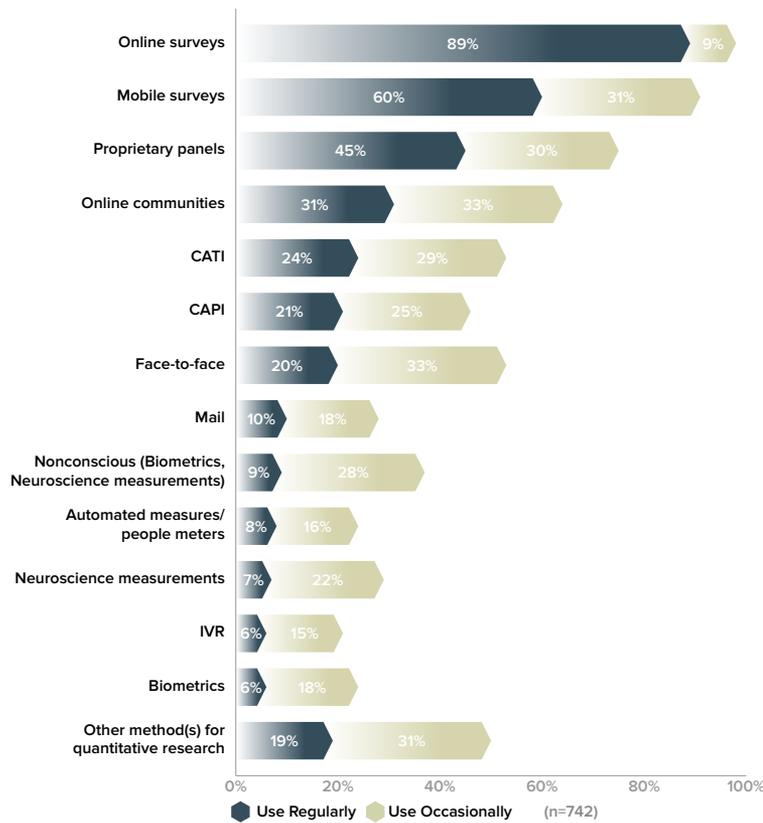
n=806 (Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in pink.)

The message from the earlier table is amplified here. Data and analytics suppliers are more likely to do quantitative only projects, and the strategic

consultancies and buyers are more likely to include qualitative in the mix.

QUANTITATIVE DATA COLLECTION OPTIONS

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY (BUYER & SUPPLIER WHO USE QUANT METHODS)



Anyone who said they used quantitative methods was asked to indicate which they used regularly and which occasionally. As has been true for many years, online surveys are the dominant data collection method, with 89% saying they use these regularly, and a further 9% using them at least occasionally. Second (also not surprisingly) are mobile surveys, with 60% saying they use mobile surveys regularly and a further 31% using them occasionally.

Rounding out the top tier, proprietary panels are used regularly by 45% of respondents, with an additional 30% using them occasionally and online communities with one-third using them regularly and another third using them occasionally – placing online communities fourth overall in quantitative method usage.

Stalwarts CATI, CAPI and (surprisingly during the era of social distancing and lockdowns) face-to-face make up a middle tier of regularly used approaches with frequent use between 20% and 24%.

The data make it clear that mail, automated measures/people meters, and biometrics/neuromarketing are used by a relatively small proportion of organizations, although significant niches exist and based on signs in the emerging methods analysis may be poised for growth.

The unsurprising finding here is that the majority of quantitative methods used most frequently are digitally focused; this was true prior to 2020 and remains so this year.

Online surveys are the dominant data collection method, with 89% saying they use these regularly, and a further 9% using them at least occasionally





USE OF TRADITIONAL METHODOLOGIES: THE CLASSICS ENDURE... AND EVOLVE

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In so many ways, 2020 peeled us back to our most essential selves. The pandemic made us more attentive and appreciative of the basics in our lives—food, shelter, community, the ability to breathe deeply. Our behaviors shifted. We shopped in fewer, bigger trips. We ordered more online. We connected with family, friends, and colleagues on Zoom. We drove less and walked more. We spent more time with our pets—or spent time appreciating other peoples' pets online. Our behaviors shifted, but at the core, our basic needs remained consistent.

That same pattern played out across GRIT's 2020 data on the usage of traditional methodologies. The initial shock of the pandemic created a pause for many, which quickly evolved into the need to understand the consumer impact of all that was happening. We gained new perspective on the essential status of both quantitative and qualitative—at the same time recognizing some behavior shifts in how we used them.

In the quantitative space, the long-term category pressure to be faster/better/cheaper/more intensified. Many long-steady categories awakened to sudden new realities. Consumers scurried for toilet paper and disinfecting wipes. People increasingly stayed home. At AYTM's Insigner conference, Heather Dallam of ExxonMobil explained the impact for her team:

"I joined ExxonMobil in November 2019... I had a great onboarding experience and put a great plan in place. Then things took a left turn. Oil prices dropped to the lowest they've been in many years. We had some budget cuts, and tragically, COVID-19 hit, leaving people with no option but to stay home.

This is when we started discussing agile market research, specifically how we could do it faster, better, and more frequently. We decided that it was best to adopt a blend of research approaches due to our budget cuts."

Meanwhile, in the qualitative space, there was a tremendous need to check in with consumers and understand their shifting worlds. Like everything else in 2020, there was a transition from face-to-face to screen-to-screen. This came with some new opportunities—suddenly, instead of sitting around a table in a room with a one-way mirror, interviewers were transported into peoples' homes. In L&E Research's webinar on the Future Trends of Market Research and Technology, Barry Jennings of Microsoft explained:

"Usually, if I needed to go talk to IT people, I'd ask someone on the team to get on an airplane, fly to New York, Chicago, San Francisco, Dallas. They're scaled there, it makes sense.

We did some [online] groups about digital transformation because of COVID and there was somebody from Kentucky, Atlanta, New York, Chicago at the same time. And that's powerful. If our corporate mission is to empower everyone in every organization to achieve more, bringing in more diverse voices geographically has been huge. Getting all of those [voices] helps us message better, it helps us build better."

As I reflect on what we learned in 2020, I believe our future is likely to be more of a hybrid—a new normal that delivers on our basic needs but in new ways that are more digitally enabled, agile, contextual and technology driven.

USAGE OF ESTABLISHED METHODOLOGIES, TABLE 3

	%Use Regularly (Buyer & Supplier Who Use Quant Methods, All Regions)	Region	%Use Regularly (Buyer & Supplier, Single Region)
CATI	24%	Rest of World	49%
		North America	18%
CAPI	21%	Rest of World	47%
		Asia-Pacific	46%
		North America	13%
Face-to-face	20%	Rest of World	51%
		Asia-Pacific	40%
		North America	11%
Mail	10%	Rest of World	29%
		North America	6%
Nonconscious (Biometrics, Neuroscience measurements)	9%	Rest of World	19%
Biometrics	6%	Rest of World	14%

n=742 (Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in pink.)

REGIONAL DIFFERENCES – QUANTITATIVE METHODS

There are a few significant differences by region. Table 3 shows all of the cases where there are significant differences between a region and the other regions in terms of approaches used regularly.

In general, North America uses fewer of the non-digital methods; conversely Asia-Pacific and the Rest of the World use more of the more traditional ones, as well as more “nonconscious” approaches.

USAGE OF ESTABLISHED METHODOLOGIES, TABLE 4

	%Use Regularly (All “Suppliers Who Use Quant Methods)	Supplier Type	%Use Regularly (Specific Type)
Online surveys	88%	Full Service	92%
Mobile surveys	63%	Full Service	70%
		Strategic Consultancy	50%
CATI	27%	Full Service	32%
CAPI	22%	Full Service	28%
		Strategic Consultancy	9%
Automated measures/ people meters	8%	Data & Analytics	17%

n=533 (Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in pink.)

SUPPLIER PROFESSIONAL FOCUS – QUANTITATIVE METHODS

There are a few significant differences between the five types of suppliers, in terms of the quant approaches they use regularly, as shown in Table 4.

Generally speaking, the Full Service suppliers are less likely to use the non-online data collection options, and the Strategic Consultancies are more likely, reflective of the difference of the role of data collection in the business model between these two groups.

In general, North America uses fewer of the non-digital methods



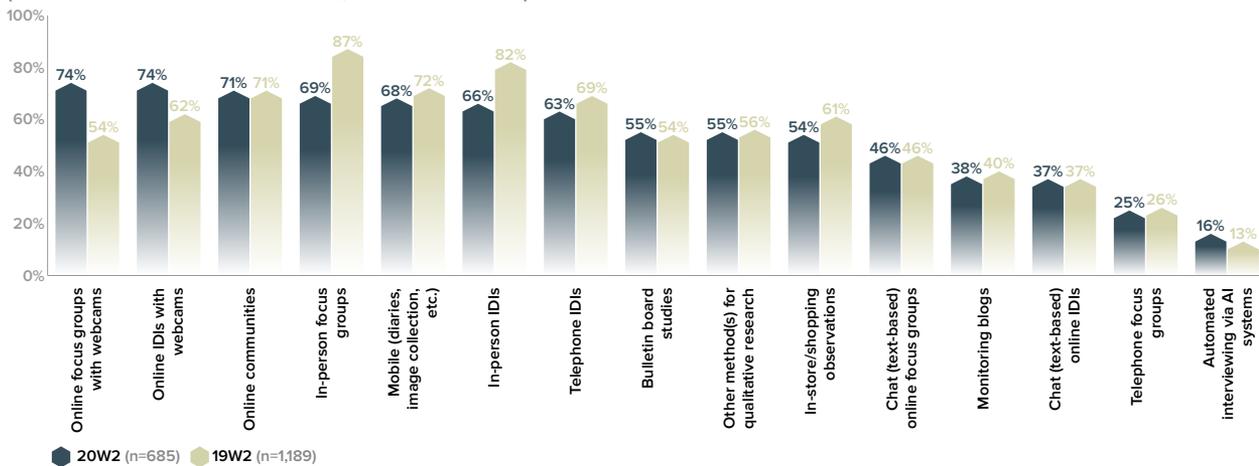
QUALITATIVE DATA COLLECTION OPTIONS

Perhaps the most obvious and immediate impact of the pandemic has been its impact on qualitative research. We have all likely been aware of the anecdotal evidence, but in this wave of GRIT we were able to quantify those changes.

Before we dive into the specifics for 20W2, the overall changes can perhaps best be summed up in this comparison. When we combine “Use Regularly”

and “Use Occasionally” for all methods we track and compare 19W2 to 20W2 results we see just how startling the impact of COVID-19 has been on the qualitative sector. For years online methods have grown slowly and steadily while in-person has been the leading choice of qualitative methodologies, but COVID-19 abruptly changed that with online focus groups and IDIs now taking the lead.

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY: 20W2 VS. 19W2 (BUYER & SUPPLIER WHO USE QUANT METHODS)



However, there is a silver lining here since in-person approaches show surprising resiliency so perhaps reports of the demise of in-person research have been greatly exaggerated. What we don't capture is the nature of the business issues each method is being selected to address; it is certainly reasonable to assume that any qualitative research that is “experiential” in nature (dependent on touching, tasting, smelling, or using something) cannot currently easily be replicated in digital methods and that could constitute a significant portion of qualitative work in general. That foundation may provide a path for suppliers heavily invested in physical facilities to adapt, while simultaneously incorporating more digital approaches into their offerings.

What has always been interesting about qualitative research is that some aspects of projects don't change regardless of the medium: recruiting, project management and moderation for instance

don't change much whether it is online or in-person and many of the tools that have emerged to create more efficiency in qualitative research such as video recording, facial coding, automated transcription, text analytics and report automation are equally applicable in both modes.

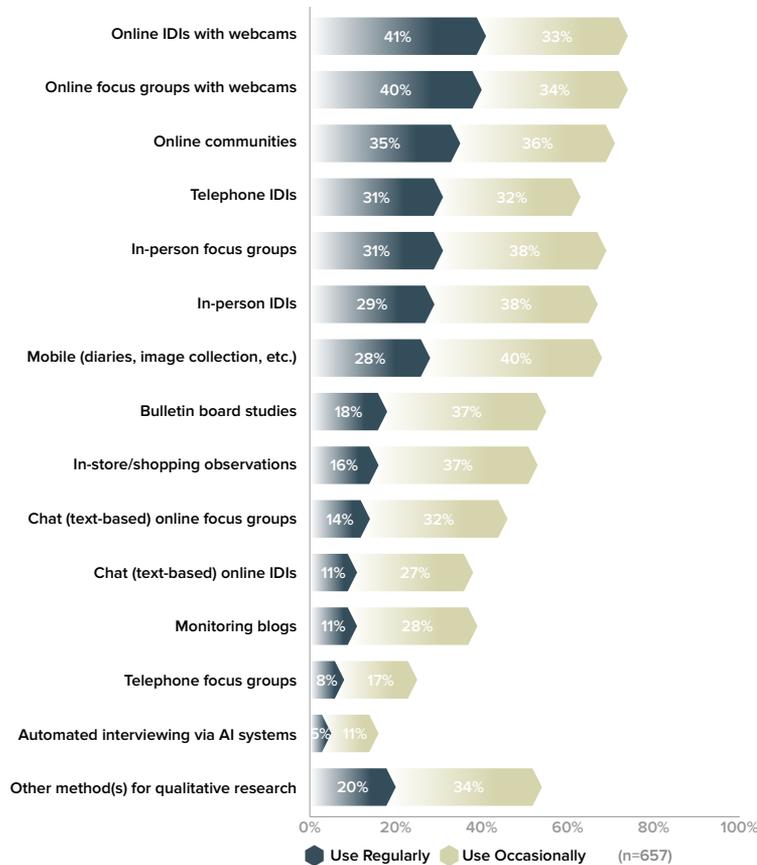
Under the pandemic, buyers have adopted new methods out of necessity and now realize that online methods are not merely stopgaps to survive the crisis, but offer enduring advantages. Online methods deliver methodological flexibility and tangible pragmatic advantages such as travel cost savings, risk and liability mitigation, diverse recruitment options, schedule flexibility, and general speed and cost efficiencies. It is safe to assume what we will see is a long tail of growth continue to play out even as the pandemic recedes. This is certainly something we will pay close attention to in the future.

When we track and compare 19W2 to 20W2 results we see just how startling the impact of COVID-19 has been on the qualitative sector. For years online methods have grown slowly and steadily while in-person has been the leading choice of qualitative methodologies, but COVID-19 abruptly changed that with online focus groups and IDIs now taking the lead



QUALITATIVE DATA COLLECTION IN 2020

QUALITATIVE METHODS USED REGULARLY OR OCCASIONALLY (BUYER & SUPPLIER WHO USE QUAL METHODS)



Switching gears to focus on the details of 2020 usage, we see some important nuances that flesh out the story of the change in qualitative more fully. The survey asked all of those who used qualitative methods to indicate which they used regularly and which occasionally.

The data illustrate that qualitative researchers have adopted a wide range of tech-enabled options while also highlighting the continued importance of face-to-face qualitative research despite the challenges of conducting them during a global pandemic with all the disparate restrictions in place.

As with quantitative methods, the importance of online communities also stands out among qualitative. In a qualitative context, 35% are using communities regularly and a further 36% use them occasionally, making online communities the third most used medium for both qualitative and quantitative research, a position unchanged from 19W2. Of buyers and suppliers who use online communities at least occasionally for both types of research, online communities continue to be a foundational element of their research process, giving credence to the arguments of suppliers of those solutions that the community should be considered as the hub for research.

In terms of online qualitative research, it is clear that asynchronous techniques (e.g. online communities, online diaries, and bulletin board studies) continue to be important tools for researchers, although interestingly as seen in the year-on-year comparison those solutions did not significantly change in usage as a result of COVID-19 impacts.

Automated AI interviewing systems have, at present, low usage rates, although they are growing. We expect the evolution of chatbot technology and “macro qual” AI solutions to continue to push these methods forward in adoption.

The data illustrate that qualitative researchers have adopted a wide range of tech-enabled options while also highlighting the continued importance of face-to-face qualitative research



REGIONAL DIFFERENCES – QUALITATIVE METHODS

There are a few regional differences, and Table 5 highlights significant differences with respect to the percentage regularly using a qualitative method.

The key difference is that North America is far less likely to regularly use in-person focus groups, whereas the Rest of the World is more likely to use these in-person techniques. Conversely, it appears that automated interviewing is more widely adopted outside of North America, which is an interesting dichotomy when considering that they also use in-person techniques more frequently.

USAGE OF ESTABLISHED METHODOLOGIES, TABLE 5

	%Use Regularly (Buyer & Supplier Who Use Qual Methods, All Regions)	Region	%Use Regularly (Buyer & Supplier, Single Region)
In-person focus groups	31%	Rest of World	54%
		North America	24%
Automated interviewing via AI systems	5%	Rest of World	14%

(Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in red.)

BUYER AND SUPPLIER DIFFERENCES – QUALITATIVE METHODS

The difference between buyers and suppliers in terms of the numbers using various qualitative techniques is summarized in Table 6. Lower proportions of buyers report using every technique listed, which is reflective of the buyer focus on

achieving research objectives using a variety of tools versus specializing in methodologies, which is much more the purview of the supplier community. However, in both groups we clearly see the current primacy of online approaches.

North America is far less likely to regularly use in-person focus groups



USAGE OF ESTABLISHED METHODOLOGIES, TABLE 6

	%Use Regularly (Buyer & Supplier Who Use Qual Methods)	Group	%Use Regularly (Specific Group)
Online IDs with webcams	41%	Supplier	44%
		Buyer	34%
Online focus groups with webcams	40%	Supplier	44%
		Buyer	31%
Mobile (diaries, image collection, etc.)	28%	Supplier	33%
		Buyer	17%
Bulletin board studies	18%	Supplier	22%
		Buyer	9%
Chat (text-based) online focus groups	14%	Supplier	17%
		Buyer	7%
Chat (text-based) online IDs	11%	Supplier	13%
		Buyer	5%

(Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in pink.)

DIFFERENCES BY SUPPLIER PROFESSIONAL FOCUS

There are several differences between the types of suppliers regarding the qualitative approaches they use regularly, as shown in Table 7.

The key message in the data is that the differences are largely driven by the Technology Providers. The Technology Providers are more likely to use many of the online qual tools, and less likely to use in-person tools.

USAGE OF ESTABLISHED METHODOLOGIES, TABLE 7

	%Use Regularly (All Suppliers Who Use Qual Methods)	Supplier Type	%Use Regularly (Specific Type)
In-person focus groups	32%	Full Service	41%
In-person IDIs	29%	Full Service	35%
Online communities	37%	Technology Provider	63%

(Note, values that are significantly higher are shown in green, and those that are significantly lower are shown in red.)

THE BIG PICTURE

Most suppliers and most buyers use both qualitative and quantitative approaches, with less than 50% of the average buyer or supplier's projects being quantitative only. The main qualitative methods are online surveys and mobile surveys, with many of the studies being carried out via proprietary panels and online communities.

In terms of qualitative research, traditional methods like in-person focus groups and in-person IDIs are no longer the most used approaches. Online groups and online IDIs are now the most used. This shift certainly has been driven by the pandemic, but the key question is will it stick or will we see a snap back to the "old normal"? Only time will tell, although we are skeptical of a full return to the pre-Covid status quo.

All in all, the traditional approaches continue to play important roles in methodology selection for researchers, although the growing role of technology-based approaches (and suppliers) is indisputable and should serve as a strong signal for where the industry is going. As one colleague told us when discussing these findings "MR is now a suburb of Silicon Valley". We think that is as succinct a summary of the major trends as possible based on these results.

As one colleague told us when discussing these findings "MR is now a suburb of Silicon Valley"





A COSMIC PERSPECTIVE: AI CAN HELP US UNDERSTAND COLLECTIVELY INTELLIGENT COMMUNITIES

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Over the life of the universe, the way matter is arranged and information is processed has grown in complexity. This progress has been the result of a small number of transformations of cosmic significance. Over billions of years, four have taken place.

Fundamental particles combined to form single atoms. Many atoms combined to form single molecules. Many molecules combined to form single cells. And finally, many cells combined to form single humans. In each transition, many individual entities combined to form a new entity that was greater than the sum of its parts.

It is truly remarkable that in just four such transitions the universe was able to turn fundamental particles into the humans reading this article.

Now we are in the midst of the fifth transition of cosmic significance. And the consequences for businesses and the insights they rely on are profound.

* *

Since their emergence, humans began connecting, communicating, and coordinating within increasingly larger societies. Religions, governments, and economies helped scale trust beyond the confines of the family unit. Large groups began to function increasingly as a community.

Now, technology has made interacting from any distance fast, easy, and nearly ubiquitous. Humans today are connected and communicating in real-time across the globe within networks of remarkable complexity. What neurons did for cells, the internet is doing for humans.

As a result, the fifth transition is taking place, where massive groups of humans are combining to create collectively intelligent communities. Single entities who think, create, react, and evolve as a unit. Who seek agency and strive for independence. Entities who are greater than the sum of their parts.

As a single unit, the wants, needs, views and priorities of a collectively intelligent community can change at nearly the speed of a single person. And just a few collectively intelligent communities can comprise a whole market. The result is that entire markets may be won or lost in the time it used to take to win or lose just a single customer.

Understanding and keeping up with customers is only going to get harder. And more important. To survive and thrive businesses will need to evolve quickly.

Market research rooted in the assumption that “the whole” can be understood by experiments involving the “sum of its parts” will become increasingly misleading and need to be abandoned. At the same time, insights will grow stale faster and faster. The refresh rate of research will need to increase until snapshots of understanding become more like a live stream.

Businesses need new tools and playbooks built around engaging and understanding the collectively intelligent communities they depend on.

Thankfully the same forces driving these changes are giving rise to new technology to address them. Chief among these is Artificial Intelligence. It is enabling new paradigms we would have never thought possible. But like any superpower, it’s all about how you use it.

The leaders of businesses which dominate the next decade will be those who best leverage AI to do the right things.

To identify the collectively intelligent communities your business serves, develop a relationship with them like you would a person, engage in real dialogue. Stay up-to-date on their needs, thoughts, values, and goals. Build their trust by being honest. And build their loyalty by adapting with them to meet their needs.

We are building Remesh for these leaders. For those who see engaging and understanding the collectively intelligent communities they serve as a key to their organization’s future.

BUZZ TOPICS: HYPE VS. ADOPTION

Dominated by technology-driven approaches outside of traditional research methodologies, the topics that have been top of mind for insight professionals prior to 2020 continue to show strength, often with room for further growth. Although

it is difficult to discern clear a “COVID effect”, we assume the challenges of 2020 have only reinforced the trend of market pressures forcing the insights and analytics industry to embrace technology for efficiency and impact.

WAVE-ON-WAVE TRENDS

Measuring sentiment around new concepts and topics as they enter the insights and analytics industry has continued to be an effective tool in predicting their traction and adoption. We have seen early stage “buzz topics” move from interesting ideas to growing parts of the industry toolkit and a basis on which whole companies are being developed (AI, chatbots, and blockchain come to mind), while others remain interesting but with still relatively “niche level” adoption.

Previously we tracked these as both verbatim comments and using a scale based an overall perception of usefulness and of “buzz.” Beginning with 19W2 wave, we decided to use a similar model as we do in emerging methods and look at actual adoption stages, and we continued that in 20W2. In this wave we continued to tweak the question as some topics were added based on the frequency of verbatims we saw in 20W1 and as others migrated to the emerging methods question set. We also continued to evolve the scales used to more effectively capture actual usage as a measure of adoption traction.

New in 2020 were two topics: data integration and alternatives to panel samples. We also reworded some topics based on previous wave verbatims such as “new approaches to CX/UX design”, “Artificial Intelligence (AI)/Machine Learning” and

“Automation/Research Automation”. In addition to these changes, we migrated “Big Data (including synthesis of multiple data sets/types)” and “Virtual Reality/Augmented Reality” to the emerging methods question.

Table 1 shows a wave-on-wave trend of current buzz topics using both a Top 2 Box (In Use/Plan to Use) and a ranking to facilitate comparisons.

Our hypothesis going into this wave is that we would see more “COVID-19 effects” in this area like what we have seen in other questions related to technology adoption, and we interpret these data as confirming that.

Clearly storytelling and data visualization continues to reign as the “buzziest” topic among GRIT respondents, however agile research, data integration and automation are also very much top of mind and show strong growth.

The only topic to decline is CX/UX, down from 71% to 50%, a drop so steep that any question is rendered moot regarding whether the surge of the past few years, driven by multiple technology platforms which power customer-centricity, has begun to level off. The fall off has to be attributable to conditions imposed by the COVID-19 pandemic.

It’s also interesting to note the strong debut of alternatives to panel samples at 43%, perhaps underscoring ongoing concerns regarding quality

Measuring sentiment around new concepts and topics as they enter the insights and analytics industry has continued to be an effective tool in predicting their traction and adoption



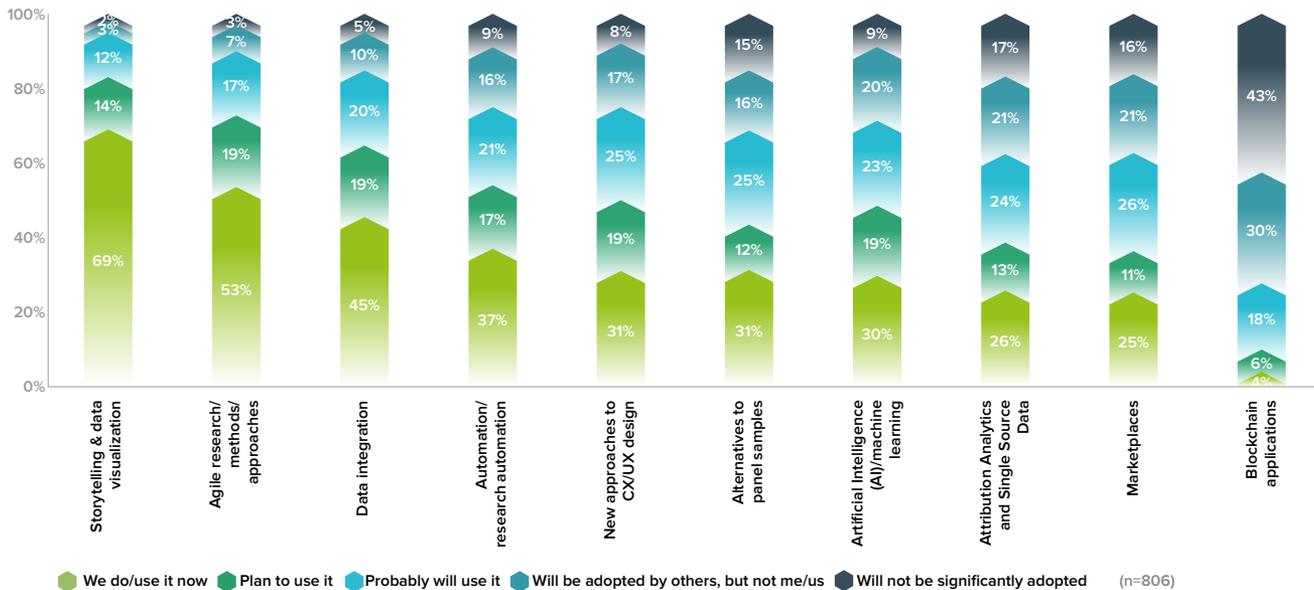
BUZZ TOPICS: HYPE VS. ADOPTION, TABLE 1

Waves	In Use/Plan to Use (Top 2 Box)					Rank				
	Y16W2	Y17W2	Y18W2	Y19W2	20W2	Y16W2	Y17W2	Y18W2	Y19W2	20W2
Storytelling & data visualization	78%	83%	84%	81%	83%	2	1	1	1	1
Agile research/methods/approaches				66%	72%				3	2
Data integration					64%					3
Automation	74%	66%	76%	51%	54%	3	3	3	5	4
Customer experience (CX)/user experience (UX)				71%	50%				2	5
AI (Artificial Intelligence)	47%	51%	72%	48%	49%	6	4	4	6	6
Alternatives to panel samples					43%					7
Attribution analytics and single source data	52%	36%	41%	36%	39%	4	7	7	7	8
Marketplaces (such as for sample, talent, software, etc.)	49%	37%	42%	34%	36%	5	6	6	8	9
Blockchain applications			29%	10%	10%			8	10	10
n=	1,534	1,533	1,260	1,116	806					

or cost, exposure due to data privacy legislation, and the seemingly unstoppable commodification of sample. It will be interesting to watch this one in the future for sure.

All other topics remain relatively flat, meaning they have their adherents but have yet to breakthrough as being considered “mission critical” to insights organizations.

INTENTION/ATTITUDE TOWARD BUZZ TOPIC (ALL)



Storytelling and Data Visualization continues to reign as the “buzziest” topic among GRIT respondents



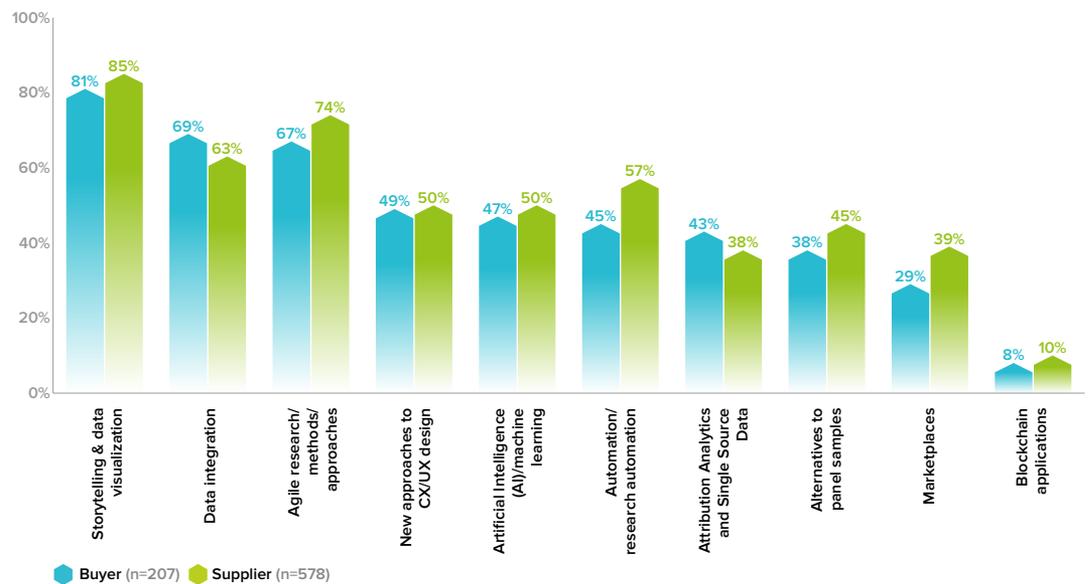
If we only look at “we do/use it now”, it may be time to move storytelling/data visualization, agile, and data integration into emerging or established methodologies next year; they clearly have reached mainstream adoption. All others are still growing as evidenced by the combined “plan to use it” and “probably will use it” responses, although blockchain remains at the beginning of its adoption curve.

In last summer’s GRIT webinar, panelists challenged the 20W1 finding that storytelling has reached a high level of adoption because they have not seen much first-hand evidence of it. More

than likely, this controversy reflects the lack of a consistent definition of “storytelling,” ranging from very casual to highly specific in terms of practices and methods.

Differences between buyers and suppliers jibe very well with previous observations: data integration leads more with buyers while more “process innovations” such as AI, automation and marketplaces lead with suppliers. Storytelling and Data Visualization and CX/UX are roughly equal among both groups.

“BUZZ” TOPICS DOING NOW OR PLANNING TO DO: BUYER VS. SUPPLIER



THE BIG PICTURE

As we observed last year, if these results are directional guidance for potential areas to focus on investing time and resources in the year ahead, clearly storytelling and data visualization, agile research/methods/approaches, data integration and automation should be at the top of the list for consideration. All other areas show room for growth so perhaps should be part of long-term strategic planning while the aforementioned are priorities for immediate action.

Multiple data points in this wave of GRIT reinforce this conclusion, so we are confident we will continue to see growth in these areas. More importantly, understanding the interrelationship of these data to other insights we have captured, 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. This section serves as a vital part of that set of directions.



THE EVOLVING RESEARCH ROLE REQUIRES TECHNICAL SAVVY AND CONSULTATIVE SKILLS

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When asked in the most recent GRIT wave what one skill they would add to their organization in their next hire, buyer and supplier-side researchers agreed: technical skills are most in demand.

The demand for tech-savvy researchers doesn't come as a great surprise. Technology in the market research industry has advanced dramatically in the last decade, with artificial intelligence and machine learning enabling research teams to automate repetitive and time-consuming tasks like data cleaning, reviewing pools of survey participants, and analyzing raw data. The modern market researcher needs to understand how to leverage this technology to improve efficiencies and increase the speed of insight delivery.

However, while technology fluency is incredibly valuable to market research teams, it shouldn't overshadow critical thinking and communication skills. Ultimately, the goal of technology should be to reduce or eliminate time spent on simple and repetitive tasks, allowing market researchers to spend more time on complex tasks, such as prioritizing data-based decisions and delivering insights to stakeholders in impactful ways.

In a recent insights conference keynote presentation, Reed Cundiff, CEO of Kantar North America, stressed that even with technology providing robust analytics, human input is still necessary to make meaning out of data. According to Cundiff, "That human layer will always be critical when you need to go from insight to action."

It's interesting to note that when drilling down to the open-ended GRIT survey responses about the most in-demand skills, the top three skills for the buyer segment are "ability to synthesize data and information," "market research knowledge/comprehension," and "communication skills." These skills combine technical knowledge, critical thinking, and an understanding of how best to deliver insights to decision-makers. This mix of hard and soft skills is essential for market research teams to advance from a reactive function to a proactive, strategic partner.

Combining Technology and Market Research Expertise: A Real-World Example

One of Bloomfire's customers, Lubrizol, is an excellent example of a company that drives action from insights by combining technology with a market research team that serves a consultative, strategic role. When the COVID-19 pandemic began, the organization recognized they needed to leverage technology to track and share rapidly changing information while also relying on their market research team members to smartly disseminate that information and communicate its implications.

As part of the technology component, Lubrizol is using Bloomfire as their centralized research hub, allowing stakeholders to search for and access research along with industry and company news. Lubrizol's market research team also contributes their own knowledge to the hub by documenting their perspectives and recommendations, encouraging stakeholders to engage in a collaborative dialogue with them, and tailoring different calls to action to different stakeholder groups. According to Dan Stradtman, VP of Consumer and Market Research at Lubrizol, "Removing points of friction and making insights immediately actionable gets stakeholders one step closer to using the insights."

While Lubrizol's market research tech stack serves as a powerful toolkit, it's the knowledge and expertise of their team members that ultimately provide a competitive advantage for the business.

In Summary

Technical skills will continue to be in demand in the market research industry, and researchers will always benefit from familiarizing themselves with tools that simplify the processes of collecting, parsing, and synthesizing data. However, as leaders build their market research teams, it's important not to lose sight of the human knowledge and soft skills that will allow the team to be a true strategic partner to their organization.

THE EVOLVING RESEARCHER ROLE & SKILLS

The profile of skills that insights organizations are looking to bring into the fold is consistent with the past several waves of GRIT, with “technical skills” outpacing all other types across both buyer and supplier categories. This is further evidence

of the growing role of technology in the industry and, even more importantly, of the ability to use technology to drive business impact.

IN-DEMAND SKILLS

For researchers looking to future-proof their careers, demonstrating competence in a variety of technical skills is far and away the most effective approach



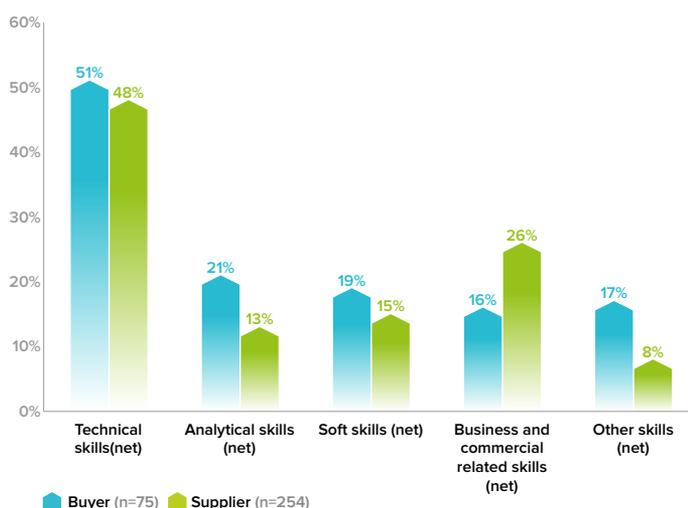
As researchers and students of market research, our field is constantly evolving as new technology is developed and methods improve and evolve. We have witnessed and documented this change in GRIT for several years, and the stark reality is that the in-demand skills of today are different than those of just a few years ago, and almost unrecognizable as core hiring criteria from the early part of this century. In order to ensure both experienced practitioners and new hires are up to speed we must constantly keep a pulse on what employers and clients are looking for, and who and what they will find valuable long term.

With that in mind, GRIT continues to explore the topic of the skills that are in demand and the changing role of the researcher, and, in this wave, some compelling new insights present themselves.

For the past few GRIT waves, we have asked respondents to tell us (open-ended) what one skill they would add to their organization in their next hire. The results this year are very consistent with what we saw last year: for researchers looking to future-proof their careers, demonstrating competence in a variety of technical skills is far and away the most effective approach, followed by analytical skills. Remarkably, we see technical skills as the most in-demand skill in all types of organizations, whether we are talking about buyer organizations, suppliers of all size and type of business, and in all regions. The “general researcher” of the past, whose main competency was in being able to read the significance notes in tabs will have a hard time staying relevant in the near future.

Beyond technical and analytics skills, the “softer” skills related to being an effective consultant, and business and commercial skills are seen as important for new hires, with the latter growing in importance this year, especially for suppliers. As we have been saying in GRIT for the past few years, some companies are moving more in a consulting direction, and these skills are critical to success in this area.

IN-DEMAND SKILLS: BUYER VS. SUPPLIER



BUYER AND SUPPLIER DIFFERENCES

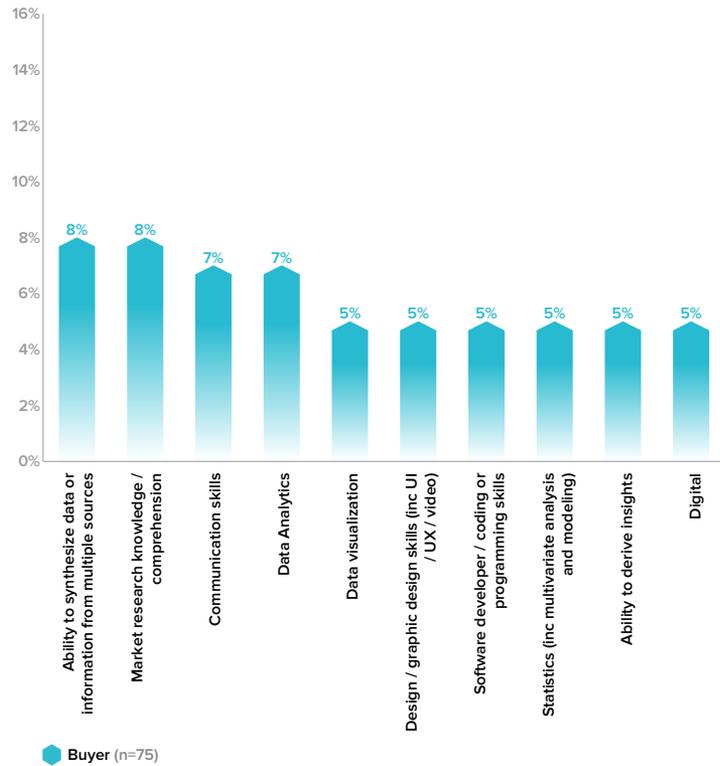
We thought it would be instructive to also look at buyers and suppliers separately while breaking the aggregate skill categories into specific skills mentioned by respondents. The charts that accompany this section show all skills that were mentioned by 5% or more.

It's clear that buyers place a premium on skills focused on leveraging data effectively, either technically (data synthesis, analytics, statistics) or from a consulting perspective (market research knowledge, deriving knowledge, communication skills). We read this as consistent with other findings in this wave that buyers are far more focused on creating and activating insights than on the mechanics of collecting it.

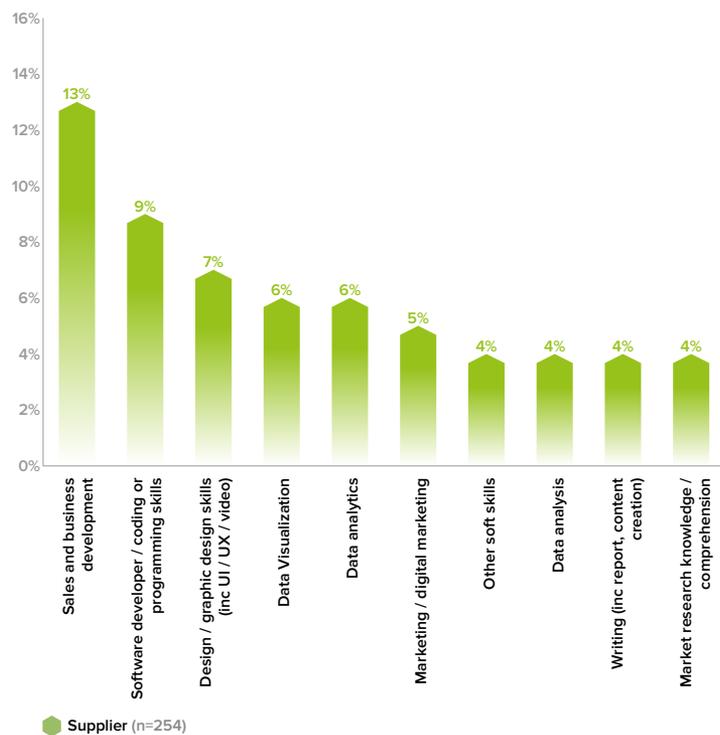
Suppliers are looking for similar skill sets as buyers, although it's not a surprise to see the difference in emphasis on sales and business development, as well as a different prioritization of other skills. Across GRIT waves, sales and business development are perennial factors in revenue decreases and increases, and frequently cited as solutions to rectifying revenue shortfalls.

Finally, we wanted to look at the overlap, as well as the non-overlap, in demand for skill sets to truly understand the differences in hiring priorities between buyers and suppliers. Table 1 below shows this clearly, organized around the delta between buyers and suppliers.

IN-DEMAND SKILLS (BUYER)



IN-DEMAND SKILLS BREAKOUT (SUPPLIER)



It's clear that buyers place a premium on skills focused on leveraging data effectively



THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 1

	Buyer	Supplier	Delta
Sales and Business Development	0%	13%	13%
Software Developer / Coding or Programming Skills	5%	9%	4%
Writing (inc Report, Content Creation)	0%	4%	4%
Marketing / Digital Marketing	1%	5%	4%
Data Analysis	1%	4%	3%
Creativity	0%	2%	2%
Design / Graphic Design Skills (inc UI / UX / Video)	5%	7%	1%
Data Visualization	5%	6%	1%
Quantitative Research (including Sampling, Instruments)	1%	2%	1%
Presentation Skills	3%	2%	-1%
Data Analytics	7%	6%	-1%
Data Science	4%	3%	-1%
Storytelling	4%	3%	-1%
Business Acumen and Commercial Awareness	4%	3%	-1%
Project Management	4%	2%	-2%
Ability to derive insights	5%	3%	-3%
Digital	5%	2%	-3%
Statistics (inc Multivariate Analysis and Modeling)	5%	2%	-4%
Market Research Knowledge / Comprehension	8%	4%	-4%
Ability To Synthesize Data Or Information From Multiple Sources	8%	2%	-6%

N=329

In all, there are twenty skills that are in demand across both groups, although the two ends of the spectrum show the most differences with suppliers focusing on sales and business development as well as software development (again demonstrating the increasing importance of technology within that segment) while, perhaps surprisingly, buyers

are more significantly looking for market research knowledge and data synthesis. This gap could indicate an opportunity for more classically trained supplier-side researchers to find roles within buyer organizations, while suppliers increasingly look towards technologists as key to driving their future.

THE BIG PICTURE

Fundamentals such as research design, moderation, applied statistics, proficiency with statistical packages etc. surely are still useful but are not necessarily attention-grabbing on a resume



As previously mentioned, the profile of the in-demand skills for job candidates in the insights and analytics space is changing in specific ways, with an emphasis on applying a variety of technical skills focused on data and technology usage as well as a variety of soft skills that have generally been associated with business and strategy consultants more so than with traditional researchers. Fundamentals such as research design, moderation, applied statistics, proficiency with statistical packages etc. surely are still useful but are not necessarily attention-grabbing on a resume.

Arguably this is a trend that has been in play for some time, but based on these data this is the dominant theme rather than an emerging trend.

The implication is clear; if you have been in the industry longer than ten years, building these skill sets is likely a requirement for career growth. If you are a prospective entrant, these are the skills necessary to be successful in standing out in the consideration set. On the other hand, sales and business development skills may offset for other considerations for suppliers.



DO NOT LOSE THE PLOT: THE LOUDEST VOICE AT THE TABLE

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This is an exciting time for insights, as we live at the intersection of extraordinary access to people and data. Insights teams play an essential role, helping key stakeholders navigate the decision-making journey. “Vision 2020” strategies certainly did not anticipate the year that just passed, but well-positioned insights leaders helped sift through an array of unknowns during a global crisis to enable critical decisions.

Insights teams help businesses grow, providing guidance on how to delight existing customers and acquire new ones. They bring to life the stories of a wide variety of people – what they are feeling, thinking, saying, and doing. They build organizational expertise to improve intuition and drive higher-level strategies and essential day-to-day decisions. An adaptive understanding of customer needs and desires allows organizations to make the right products accessible to the right people in the right places and ways. By solving problems and offering experiences that delight, the best companies create long-term consumer relationships amidst this complex and fragmented marketplace.

The Boston Consulting Group published a significant benchmark study in 2009 entitled “The Consumer’s Voice – Can Your Company Hear It?” It portrayed the opportunity for consumer insights to be a key source of competitive advantage and measurable value. How far have we come in twelve years? Several clients have told us they are just trying to keep up with terabytes of data, waves of digitalization, complex marketing ecosystems, tighter timelines and budgets, and insatiable and fragmented audiences. As we are immersed in these forces of change, we need to be careful to not lose the plot.

People, problems, and opportunities are not templated, nor should the resulting insights solutions. Many insights leaders rely on age-old norms, metrics, and one-size-fits-all outputs, at a time when market

complexity demands more. To some, agile research is viewed as quick and cheap, often forcing trade-offs and limits. Agile workflows and decision-making require a research design chain that is timely and flexible to get to the heart of what matters most. It is about being adaptive to help decision-makers answer key questions, with confidence, in the right way at the right time.

Some of those questions are open-ended and complex, and many are binary. This brand or that? This audience or that? This ad or that? This product or that? This GRIT report indicates that the average insights buyer impacts approximately nine key business issues, ranging from advertising and product development to understanding attitudes and opinions that drive customer satisfaction and loyalty. 42% of respondents identify as “hybrid” functions, capturing a range from strategic consultant to in-house research providers. Only 9% identify specifically as the “voice of the customer.”

Amidst industry complexity and significant innovation, it is important to remind ourselves that the fundamental role of research has not changed. Whether our focus is on exploring, prioritizing, building, or communicating, we are ultimately focused on taking an empathic approach to customer relationships to drive growth. It is not about the tech and the data, it is all about measuring what matters, how it matters, and when it matters.

Agile research, done properly, provides innovators and marketers the story of people and their personalities, frustrations, desires, and the forces that drive loyalty and enable change. In the end, people choose products and services from brands that demonstrate they “Get Me.” Our view is that the insights function within a business should represent the customers’ voice at the proverbial decision-making table, and that success comes to those who ensure that voice is the loudest.

A DAY IN THE LIFE OF A RESEARCHER

How do the changes impacting the industry as a whole reflect in how researchers actually spend their time? Perhaps surprisingly, not as much as we might expect. That being

said, the most salient trend we have seen over the past several years – growing divergence between how buyers and suppliers use their time – clearly continues.

HOW DO RESEARCHERS SPEND THEIR TIME?

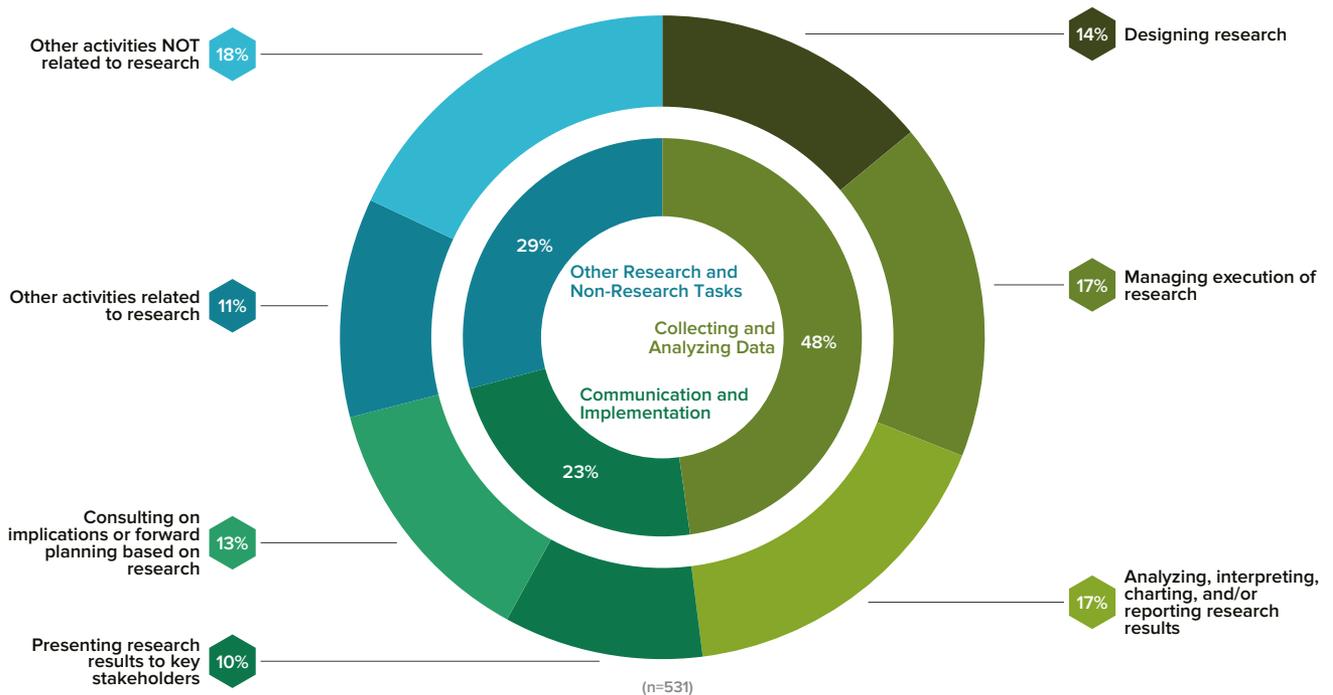
While how time is spent may not have changed much this year, we can speculate that what researchers actually do in some of these buckets has shifted over time



Even in these pandemic times, the average insights professional spends about half of their time conducting research, be it designing, managing, or analyzing the results. About a quarter of their time is spent presenting and consulting, and the rest is dedicated to other research and non-research tasks. This basic pattern is similar for suppliers and buyers, and hasn't shifted significantly from previous waves

of GRIT. While how time is spent may not have changed much this year, we can speculate that what researchers actually do in some of these buckets has shifted over time based on other trends we've seen in GRIT, e.g. the trend toward DIY changes and what "managing the execution" of projects actually means, especially for buyers.

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES (ALL)



Make the shift to agile, in-house market research

All-in-one market research platform



Buyer & Market Knowledge



Product Development

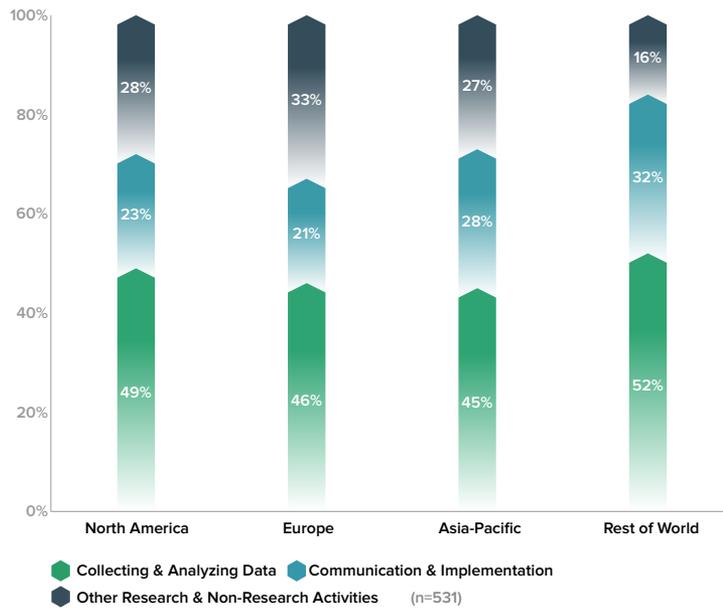


Brand & Creative Analysis



Powered by our global panel, SurveyMonkey Audience

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES BY GLOBAL REGION (ALL)



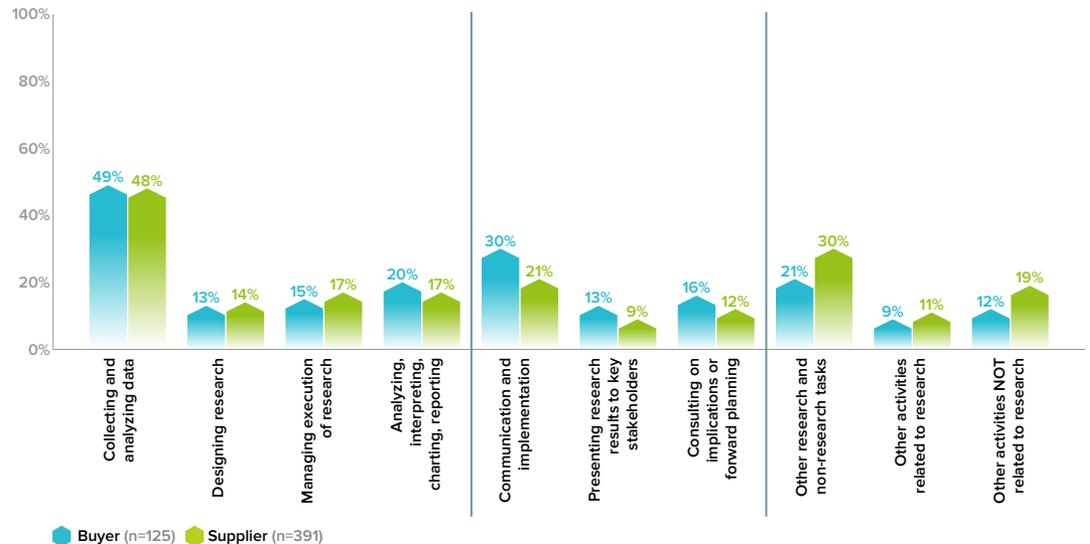
This pattern is similar around the world, with one significant exception: Europeans spend less time than others presenting results to key stakeholders or consulting on implications moving forward.

The overall time allocation is similar across buyers and suppliers, although there are a few differences which are consistent with previous waves. Buyers spend somewhat more time presenting and consulting, while suppliers, especially those at higher levels within their organizations, spend more time on non-research operations (the latter have businesses to run, after all). As we've noted in past reports, this difference may correspond to some differences we see in satisfaction and investment priorities. Some buyers may want suppliers to be more active with respect to presenting and consulting, but find that this need goes unfulfilled. On the other hand, many buyers may consider themselves the face of research internally and want to take on more of the presenting because they know the business issues better and can put results in the context of other data pertinent to those business issues.

As we've noted in past reports, this difference may explain some differences we see in satisfaction and investment priorities



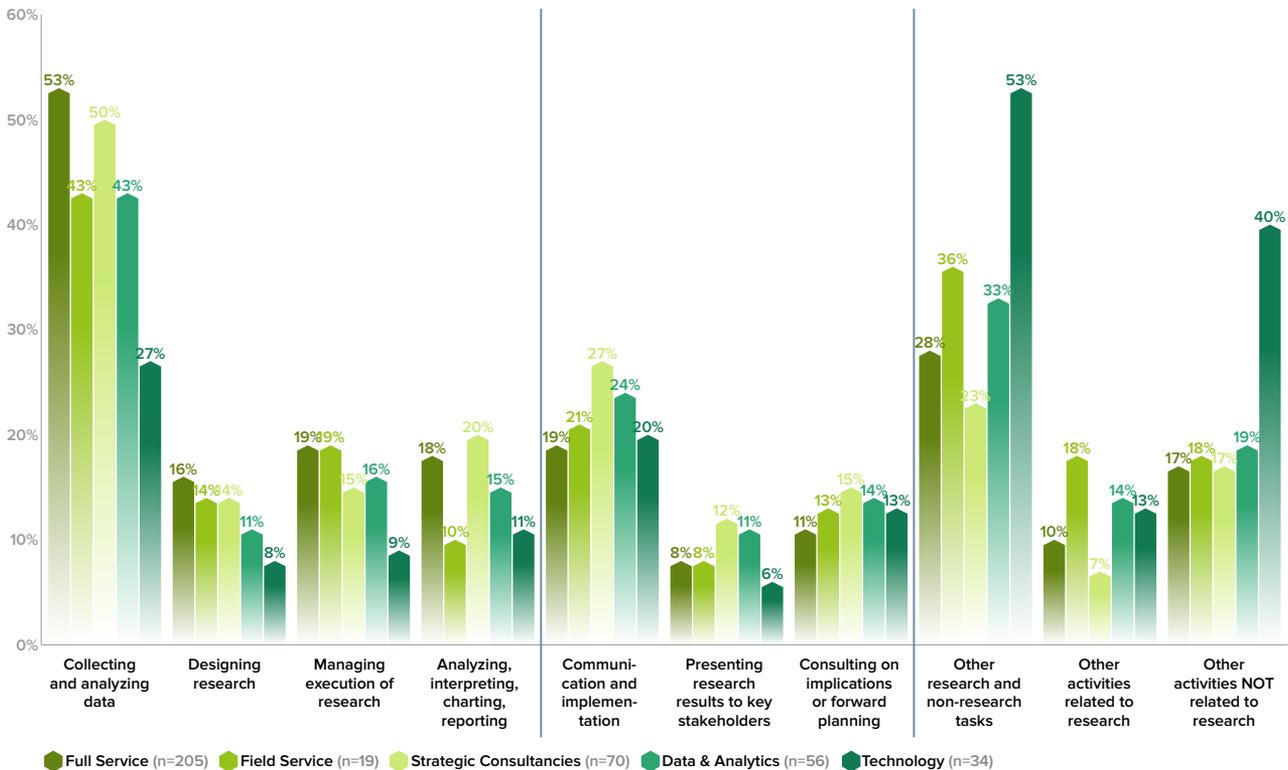
% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES: BUYER VS. SUPPLIER



Across professional focus segments, supplier differences are intuitive. Compared to other types of suppliers, technology providers spend less of their time on the design, execution, and analysis of research, including a whopping 40% on non-research activities, presumably minding and developing their platforms. Strategic consultancies spend a bit more time on consulting, but not terribly much more than other types of suppliers. Possibly, what self-defined “strategic consultancies” regard as “consulting”

differs from other suppliers’ notions, but that is beyond the scope of this report. Even in strategic consultancies, about half the time is spent on the “core” of research – designing it, executing it, and analyzing it, which is basically the same as everyone else. This suggests that even the “higher end” types of suppliers may still struggle to give buyers the types and amount of consulting they claim to want. Consulting is a key activity for the industry to further define and deliver.

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



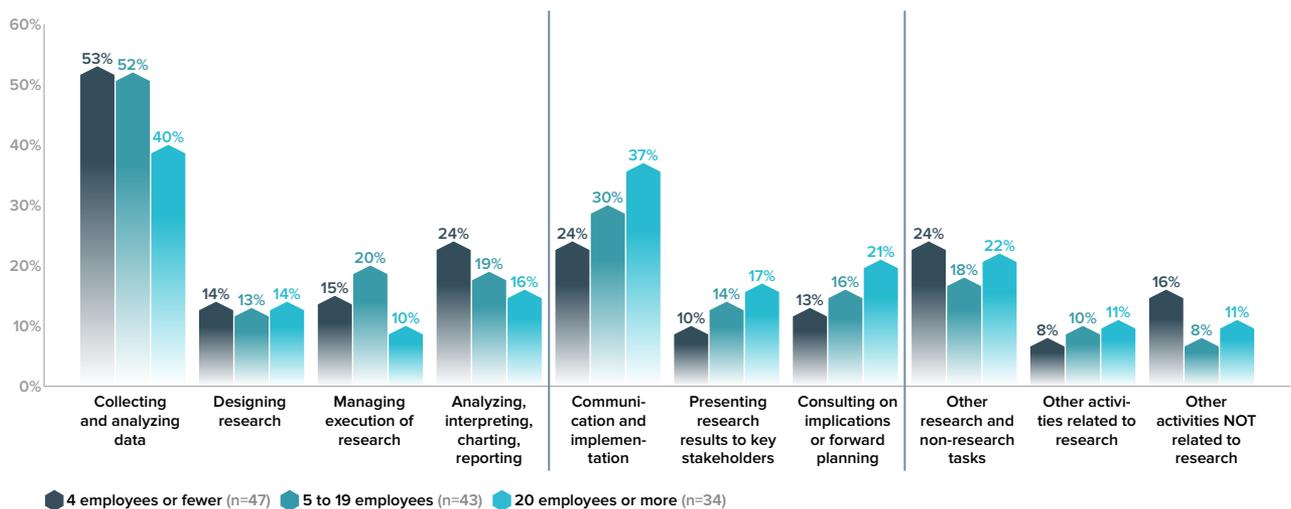
Even the “higher end” types of suppliers may still struggle to give buyers the types and amount of consulting they claim to want



Finally, when we look at department size for different buyer organizations, we see some striking differences. Those in small (4 employees or fewer) or medium-sized departments (5-19 employees) spend considerably more time than do those in larger departments in collecting and analyzing data. Correspondingly, those in larger departments spend more of their time presenting, communicating, and consulting with end users within their organizations. We may be seeing that those in smaller or medium-

sized departments are acting more as internal suppliers than as internal consultants, executing with DIY platforms. From a career perspective, those in smaller departments may struggle to upskill if they are “stuck” in execution, and either need to work with internal partners in HR or marketing for training/opportunities to go beyond execution, or seek new positions in larger departments that can give them that.

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES BY DEPARTMENT SIZE (BUYER)



THE BIG PICTURE

While the “how” has changed, the “what” of activities researchers do has not changed nearly as much



The pandemic has certainly upended much in life, both personal and professional. Working remotely from home has meant relying on technology to do many activities that one always did in person. While the “how” has changed, the “what” of activities researchers do has not changed nearly as much. 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. We hope that over the course of 2021, as vaccines defeat the pandemic and the larger business environment settles down, researchers and insights professionals will continue to take advantage of changes in how their work gets done and do a better job of delivering the business value that will drive the industry forward.



WHY YOU NEED AN AGILE CONSUMER INSIGHTS PROGRAM

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According to the [third annual State of Agile Marketing](#), agile marketing adoption increased from 32% in 2019 to 42% in 2020. These findings, of course, are not surprising.

Even before 2020, the demand for consumer insights and the ability to gather it had permeated through entire organizations. The need for consumer feedback no longer exists solely within the four walls of insights functions, and brand marketers are just one of many business teams looking for fast and reliable consumer insights.

But this growing demand leaves research teams with more and more complex questions to answer and a never-ending pile of insights to dig through -- and even more pressure to instantly share what they have learned.

Researchers, historically able to spend days, weeks, or even months conducting studies or surveying panel participants, now need to be as fast as possible when turning around analysis and recommendations for business teams. And because brands need to be in constant communication with their consumers, they cannot wait days, weeks, or even months to learn what the research team uncovered.

That is where Agile research tools come in.

Agile research, when brands conduct their own qualitative and quantitative market research using online tools or subscription-based platforms, has exploded in popularity over the past year.

But the growth of these platforms and tools has opened an interesting debate in market research circles. One side sees a huge opportunity to democratize and spread access to consumer research. Others believe it places an increased burden on internal resources and insights teams and bogs them down in tactical work when they should be focusing on the strategic side of the business.

It is worthwhile to explore the organization-wide benefits of Agile research tools and how, when set up properly, the benefits of these tools often outweigh the costs for research teams.

These days, as consumer trends and behaviors constantly change, it is essential to include consumers in every step of the decision-making process. That means tapping into consumer feedback at the exact moment you need it, not only during select phases of project development.

There are more ways than ever before to engage and connect with consumers, and Agile is just one alternative to traditionally complex or lengthy research processes of the past. Agile is quicker, cheaper, and more efficient; one major perk of these tools is that they limit the number of research agencies, firms, consultants, and external vendors that brands must communicate, liaison, and collaborate with.

One would assume that makes a market researcher's job obsolete. Quite the opposite. Because anything at scale would require the technical expertise and strategic mindset of a researcher.

Instead of focusing on communicating findings to teams or administrative burdens, such as scheduling meetings, producing timelines, or reviewing reports, researchers can instead place a heightened focus on strategy. Think predictive modeling, guiding research best practices and internal procedures, identifying opportunities for revenue growth and client retention, tracking brand health, and developing key messaging and communication channels.

Agile research platforms, alongside tools that allow for research guardrails and automated data collection, will be the way forward in 2021. Because while there is no debating that right now Agile research solves for speed, the true benefit of an Agile consumer research program will lie in a brand's ability to build a consumer sample that reflects the exact category they sell to.

ROLE OF INSIGHTS GROUP

The supplier side of the industry has seen increased fragmentation and specialization across a range of business issues and categories, but what about the buyer segment? Have some areas that we consider now to be “adjacent”, such as CX, UX, web analytics, CI, BI, and shopper insights, drifted away from buyer-side insights organizations? The answer is yes... and no, with some differences among buyer segments.

While the size of the hybrid segment has fluctuated up and down, the other segments seem to be trending in particular directions

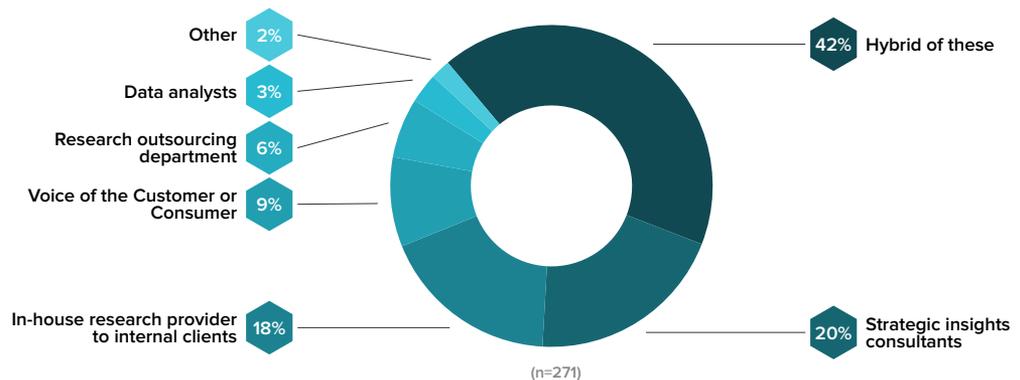


The GRIT Report covers a wide range of topics related to research and insights, but until this year, it has never directly addressed how insights impact the buyer’s business. The 20W1 report discussed how different functional areas engage with insights work and which participate in the selection of partners and suppliers. The current report explores which business issues are most impacted by insights work and the role the insights department plays in various kinds of research and insight development activities.

As this is the first GRIT Report to explore insights activities that might occur outside the insights department, this section may seem somewhat less developed than others; for example, we have no previous waves against which to benchmark these results. So please consider this discussion an introduction to the secret life of insights within corporation at large.

THE INSIGHTS FUNCTION SEGMENTATION

BUYER SEGMENT IDENTIFICATION

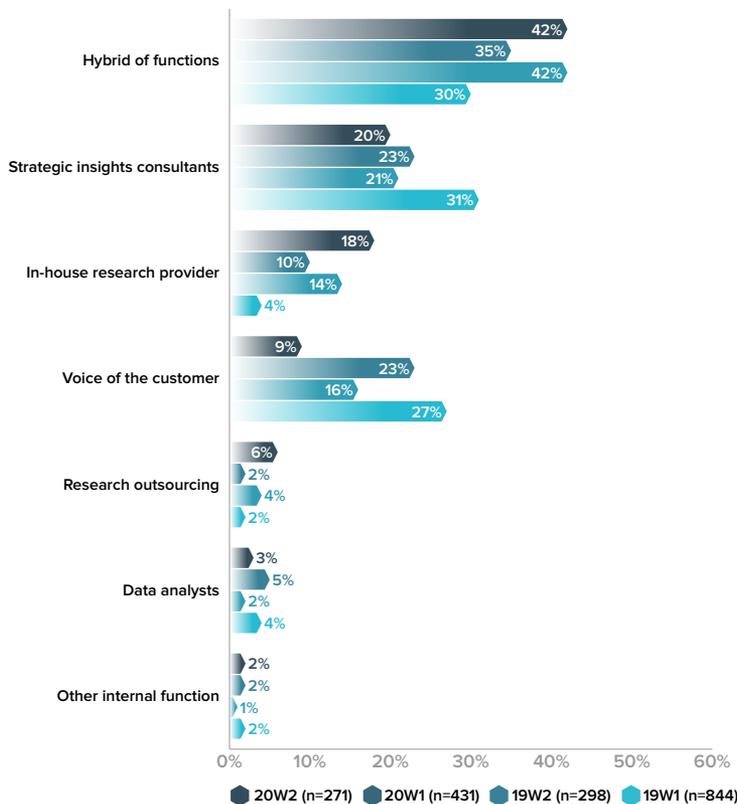


GRIT typically segments buyers according to their department’s primary role: data analysts, in-house research provider, research outsourcer, strategic insights consulting, Voice of the Customer (or Consumer), or a hybrid of these. In 20W2, the most significant roles are a hybrid of functions (42%), strategic insights consulting (20%), and in-house

research provider (18%). Since GRIT began tracking these in 19W1, hybrid has almost always been the largest segment, ranging from a low of 30% to a high of 42%. Except for 19W1, when it edged hybrid as the largest segment, strategic consulting has always been the second largest-segment, with a size ranging from a low of 20% to a high of 31%.

While the size of the hybrid segment has fluctuated up and down, the other segments seem to be trending in particular directions. Strategic consulting has been trending downward, enjoying its peak in 19W1 and reaching its lowest point in the current wave. Voice of the Customer also has been trending smaller, from its peak of 27% in 19W1, to its lowest point, 9%, currently. In-house researchers have grown from 4% in 19W1 to 18% today, and research outsourcers, once the smallest segment, seem to be on a mini upward swing, from 2% in 19W1 to 6% today. The two smallest segments, data analysts and “other” functions, seem essentially flat. Data analysts have ranged from 2% to 5% with no clear trend, and “other” functions have been consistently in the 1% to 2% range.

RELATIVE SIZES OF BUYERS SEGMENT: GRIT WAVE (BUYER)



HOW INSIGHTS FUNCTIONS IMPACT THE BUSINESS

Insights departments impact the business on a variety of issues in a variety of ways. When asked which business issues were most directly affected by their insights work (up to 3), at least 20% of buyers indicated a variety of brand, product, customer focus, and opportunity assessment issues:

- Advertising or media (32%)
- Brand positioning (29%)
- Product or service development – early stage (28%)
- Customer satisfaction or loyalty (24%)
- Attitudes and opinions (24%)
- Brand tracking (23%)
- Product or service development – later stage (23%)
- Market size or opportunity (20%)

Overall, the average buyer pointed to 8.6 issues that were directly impacted by their insights work. More than half of them said that insights work influenced the following ten business issues:

- Attitudes and opinions (71%)
- Brand positioning (68%)
- Brand tracking (61%)
- Segmentation (59%)
- Advertising or media (58%)
- Market size or opportunity (57%)
- Product or service development – early stage (58%)
- Competitive assessment (57%)
- Customer satisfaction or loyalty (55%)
- Product or service development – later stage (51%)

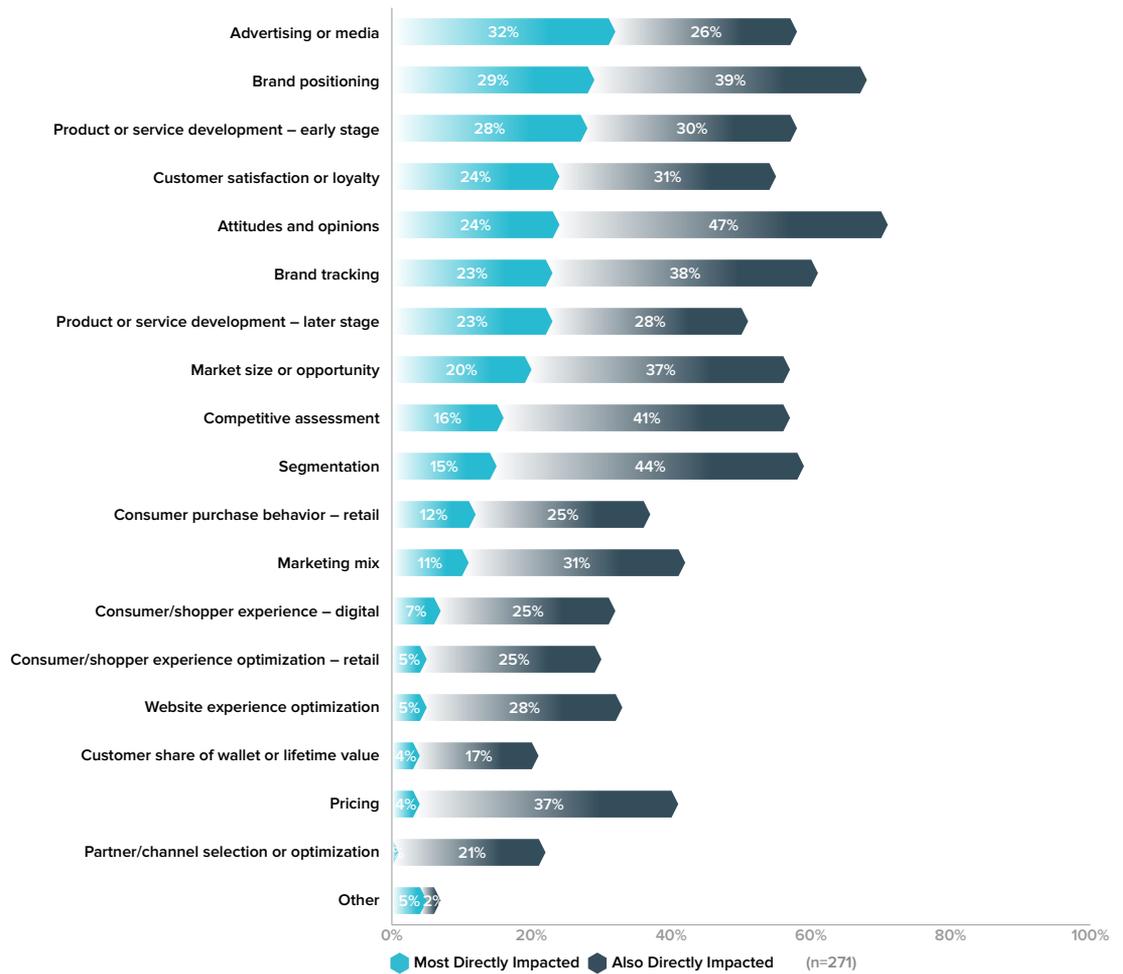
Overall, the average buyer pointed to 8.6 issues that were directly impacted by their insights work



Some of the less impacted issues include consumer/ shopper experiences in the digital and material worlds. Another set involves topics that relate to

finances or economics in some way, such as customer value, pricing, and marketing mix.

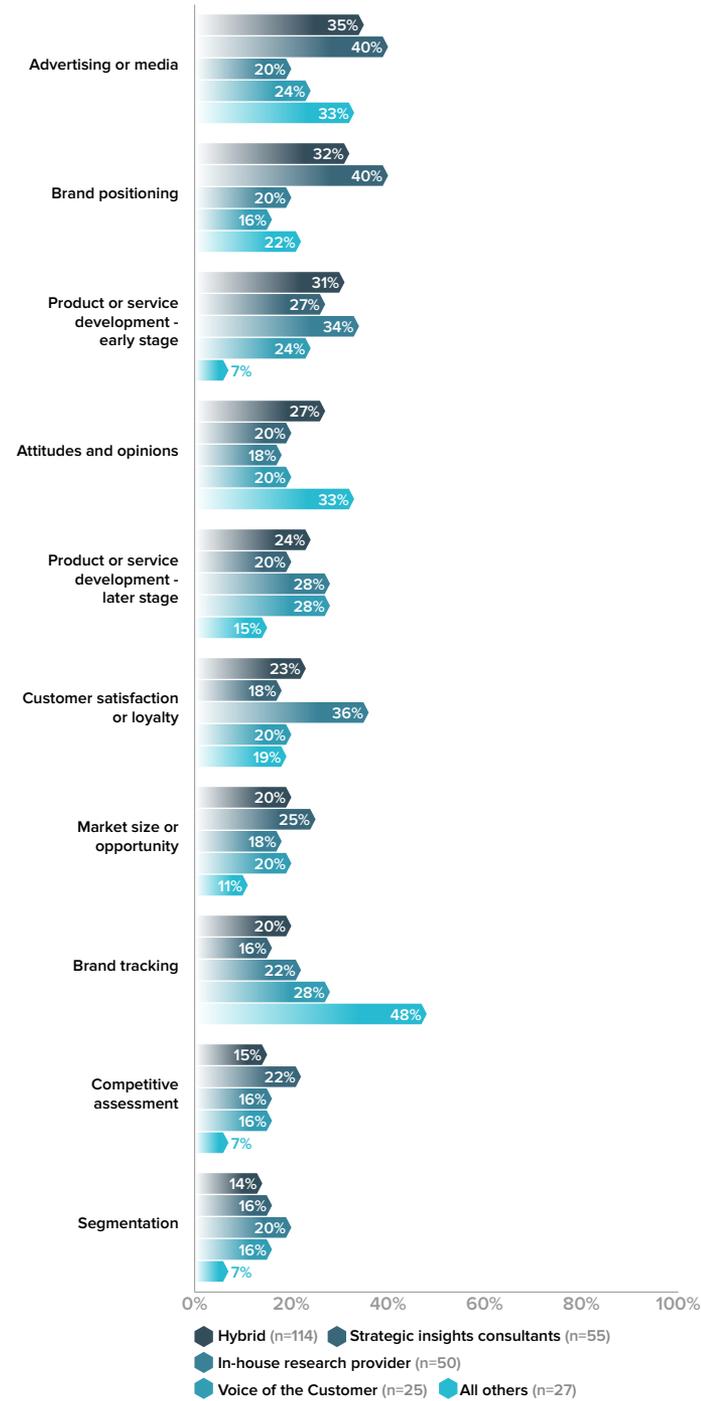
AREAS DIRECTLY IMPACTED BY INSIGHTS WORK (BUYER)



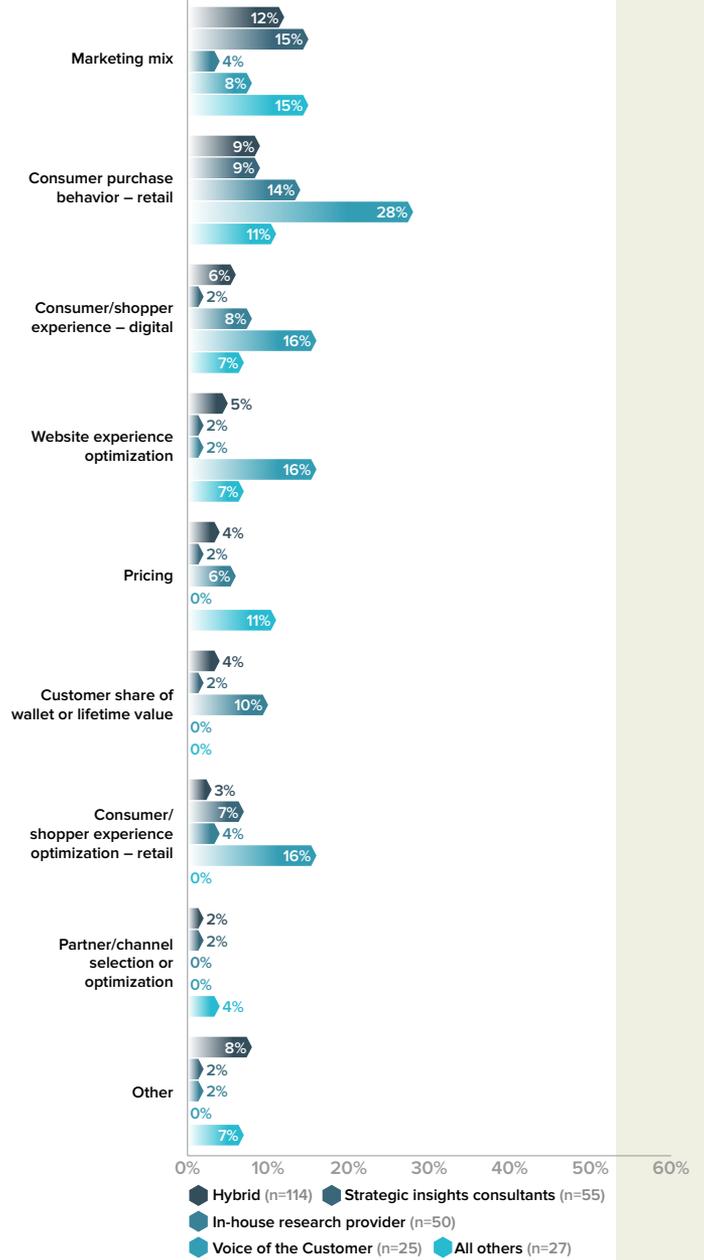
The insights department's primary function is related to which issues they are likely to impact the most. Buyer segments and the business issues they are more likely to impact include:

- Hybrid: as a group, appear to be more generalist
- Strategic consultants: advertising or media, brand positioning, market size or opportunity, competitive assessment, customer share of wallet/lifetime value
- In-house researchers: customer satisfaction or loyalty
- Voice of the Customer: consumer purchase behavior (retail), consumer/shopper experience (digital), website experience optimization, consumer/shopper experience optimization (retail)
- Other (which includes data analysts and outsourcers): brand tracking

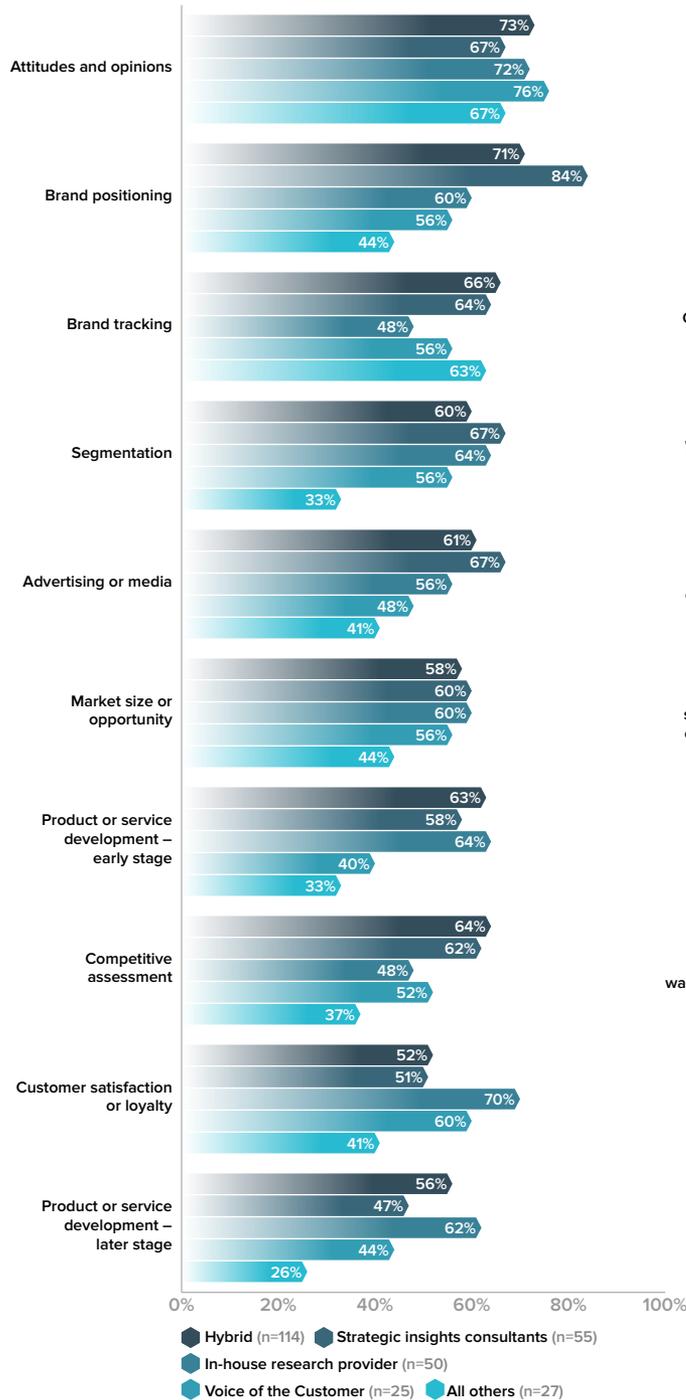
AREAS MOST DIRECTLY IMPACTED BY INSIGHTS WORK (TOP 10): BUYER SEGMENT



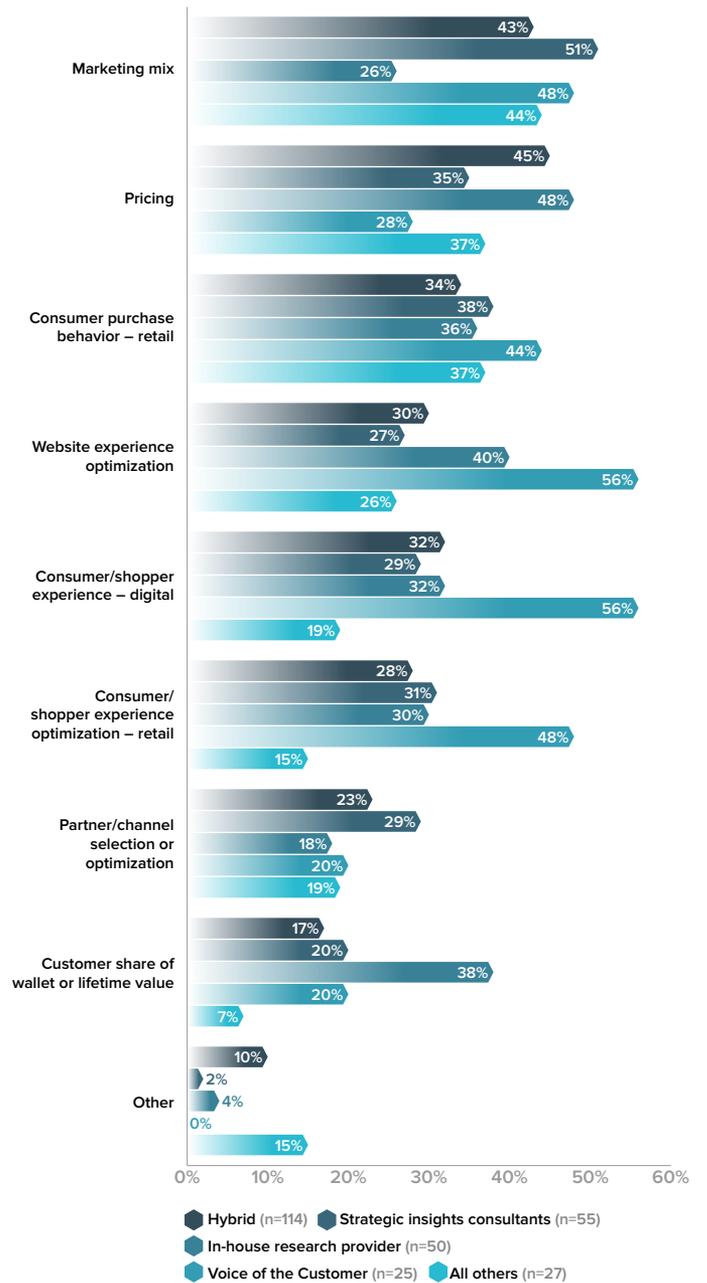
AREAS MOST DIRECTLY IMPACTED BY INSIGHTS WORK (BOTTOM 9): BUYER SEGMENT



ALL AREAS DIRECTLY IMPACTED BY INSIGHTS WORK (TOP 10): BUYER SEGMENT



ALL AREAS DIRECTLY IMPACTED BY INSIGHTS WORK (BOTTOM 9): BUYER SEGMENT



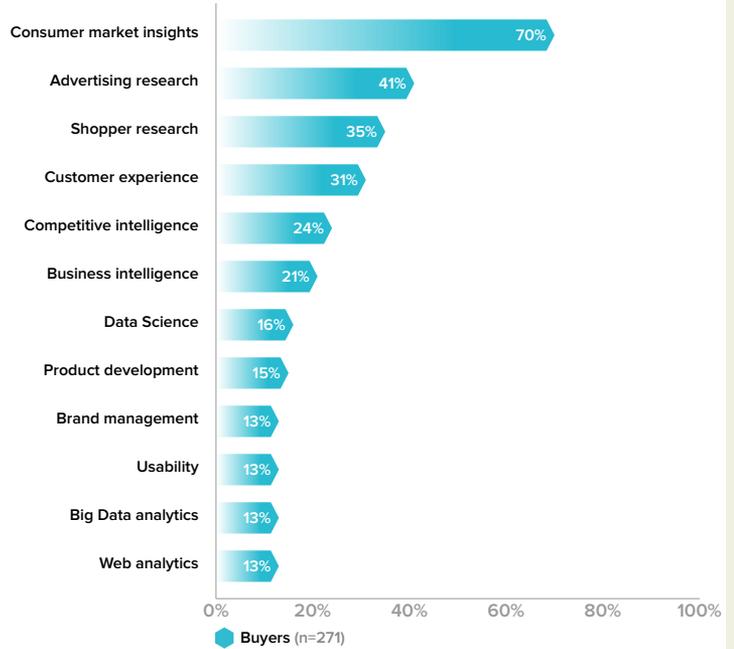
Regarding the role played by the insights function (leading, contributing, or not involved), unsurprisingly, most – but not all – take a leading role in consumer market insights (70%). After that, they are most likely to lead advertising research (41%), shopper research (35%), and customer experience (31%).

Most departments at least contribute to each kind of research effort; they are *least* likely to be involved in web analytics (49% not involved), shopper research (38%), Big Data analytics (36%), and data science (31%).

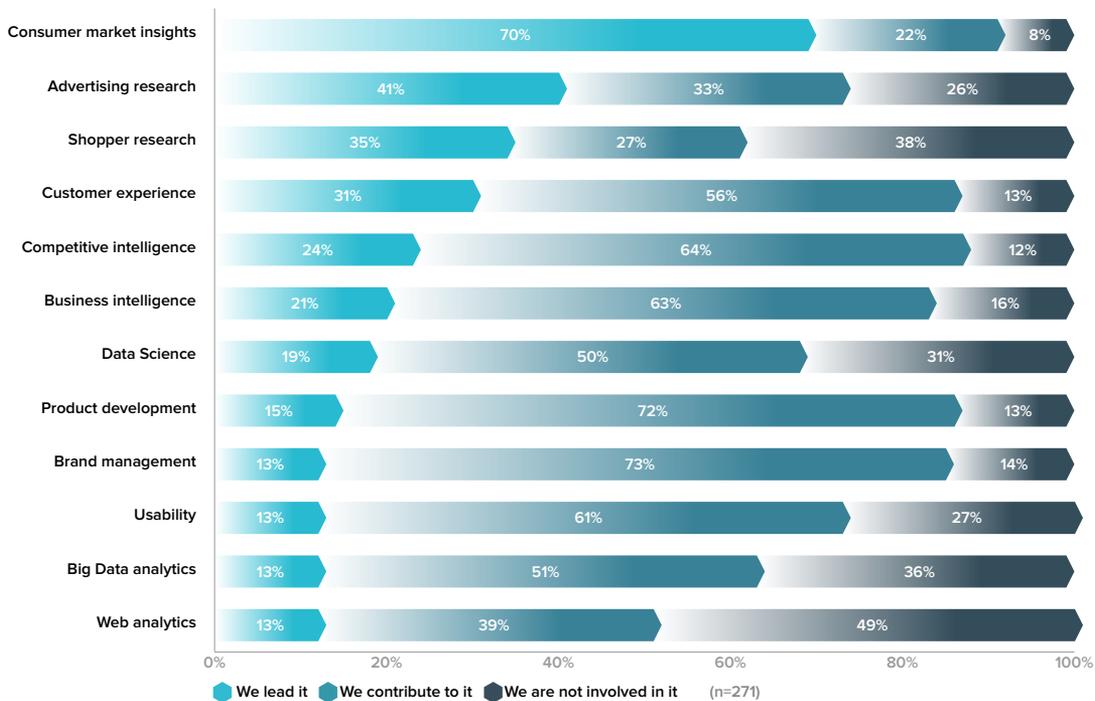
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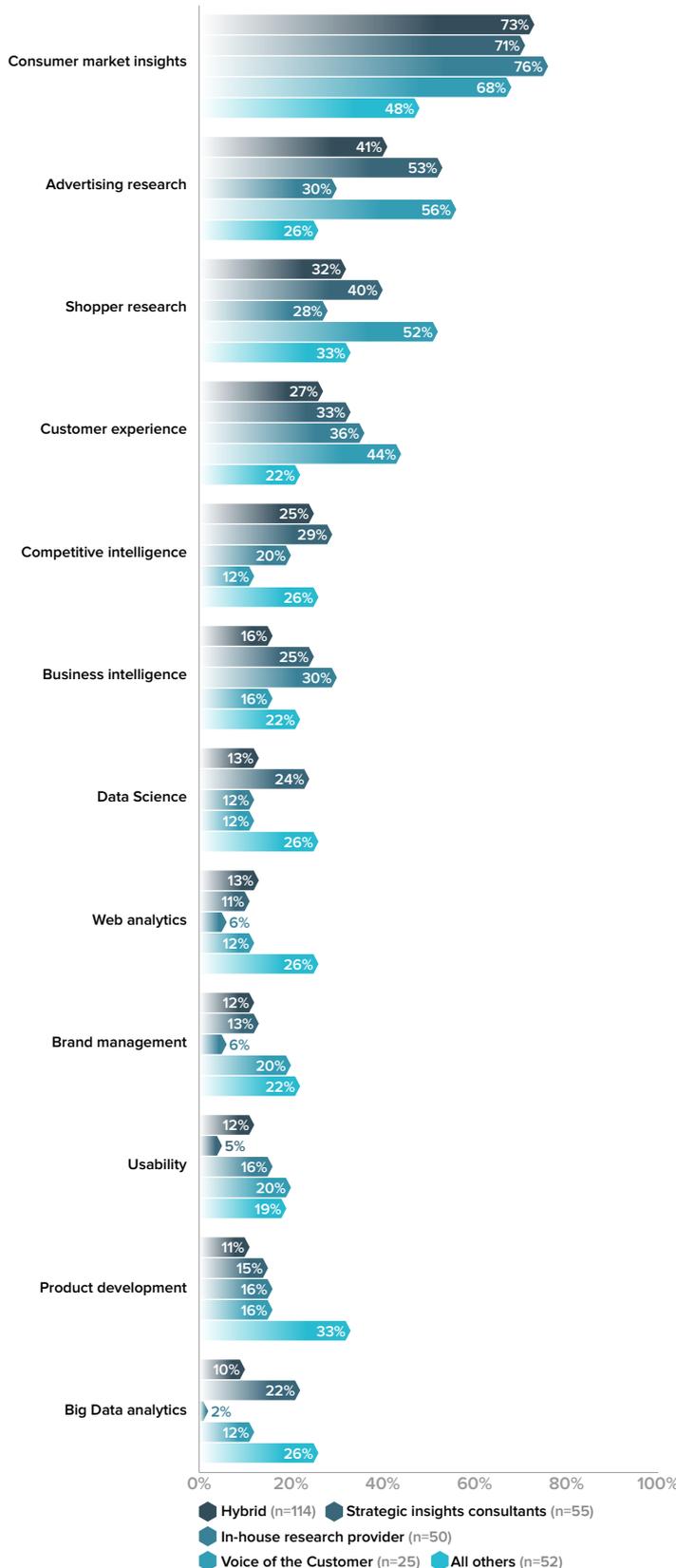
AREAS LED BY INSIGHTS DEPARTMENT (BUYER)



ROLE OF INSIGHTS DEPARTMENT (BUYER)



AREAS LED BY INSIGHTS DEPARTMENT: BUYER SEGMENT



By buyer segment, certain functions are more likely to lead certain areas:

- Hybrid: more generalist
- Strategic consulting: advertising research, competitive intelligence, data science, and Big Data analytics
- In-house researchers: business intelligence
- Voice of the Customer: advertising research, shopper research, customer experience, and brand management
- Other (including data analysts and outsourcers): competitive intelligence, data science, web analytics, brand management, product development, and Big Data analytics

THE BIG PICTURE

The insights function touches a wide range of business issues and activities that cross departmental boundaries. Departments that see themselves functioning as hybrids seem to be generalists or simply members of a large segment that needs to be broken down further. When buyers reveal their primary role to be more specific, such as in-house research or Voice of the Customer, that identity is confirmed by the type of business issues they impact and the kinds of insights activities in which they participate.

We have seen evidence of the broad reach of the insights function, but, from a different perspective, we have seen that there are some kinds of insights activities that do not involve the insights department. For suppliers, this is a reminder to learn more about buyer companies because there may be additional pockets of opportunity for your services beyond your immediate corporate contacts.

Finally, we know that the GRIT buyer segmentation is meaningful because the self-identified segments logically impact specific business issues. However, we also know that these segments are evolving, and some may be growing, while others may be declining. Going forward, this will be an important situation for GRIT to tease apart so we can better understand the composition of the large and fluctuating “hybrid” segment, the dynamics shaping the evolution of the insights department, and how corporate insights activities reverberate across departmental boundaries.



MANAGEMENT STRATEGIES

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As the topline of this report underscores, 2020 has had an impact on the research business as well as the strategies agencies need to embrace to manage their own businesses. To varying degrees, change and uncertainty are the constants clients and agencies alike now see in their businesses. So “how will we manage?” is a highly relevant question.

It is tempting to point to the pandemic as the key factor in whatever position research agencies find themselves in the early months of 2021. If we are honest, the COVID-19 pandemic simply accelerated changes that were already in play.

In our area of expertise, shopper marketing and the consumer path to purchase, we have seen firsthand that shopping behavior has become decidedly digital, which forces clients to rethink how they are going to win in retail, both brick-and-mortar and online.

The research methods and technologies we rely on have also gone digital. Digital tools are becoming increasingly important to uncovering and making sense of what motivates consumer behaviors. These new digital research solutions are simply more efficient and cost effective. If coupled with the right category expertise, they can yield results that deliver exactly what clients are looking for: agile, reliable solutions to make quick and more strategic decisions about their shopper marketing investments.

It may seem counterintuitive for a research agency in the current environment to lean into investing in the digital technologies that support these newer methods. We believe that the agencies who double down on investment in tech and solution innovation (or who have already done so) who will likely prosper, versus those who hunker down and hope that we will all go back to a “better time.” This is especially true as most indicators suggest that NOTHING is going back to the way it was before, for brands or agencies, and we will all continue to feel the effects of the pandemic permanently.

Maybe we are a bit simplistic, but our management strategy has always come down to, “what do our clients really need?” This has always been true and no more so than now. Consumers’ behaviors have changed and therefore our clients’ businesses have changed, so it is simply logical that agencies must evolve and invest in the future with them.

What we have seen in the past year in our own research practice is that clients may have reduced budgets, but they still see the necessity and the value of research to inform their decision making. Ironically, even in this unprecedented year, we see clients often willing to spend significantly on research if their own strategic decision warrants it. They simply need the certainty and confidence that the research they do now is cost effective, and reliably predictive of behaviors that consumers will likely continue as circumstances evolve and change yet again.

The cautionary tale for agencies making strategic bets on their own businesses is that in 2021, the mental calculus for clients choosing suppliers no longer depends on a long-standing relationship in their favor. Clients will take a chance that a new agency partner, with the right set of tools and understanding of what motivates consumer behavior, can unseat an incumbent who has failed to invest in solutions that are fit for newer purposes. They will miss their long-standing suppliers for sure. But more so, they know they will regret the opportunity to make a 2021 decision based on the right research solution, the right tech, and proven category expertise.

On the other hand, what we have seen is that clients value the trusted research partners who have taken the long view and invested in tech and digitally based methods that will serve their future, rather than relying on what worked in the past.

Change and uncertainty are now the new constants. To win, market research agencies must align their management strategies accordingly.

MANAGEMENT STRATEGIES

Strategies for managing insights determine how decision makers invest in technology, choose methodologies and approaches, and select suppliers and partners. Like everything else, 2020 has impacted the level of technology investment and influenced investment priorities, while preserving overall continuity: investment remains strong, and analytics continues to be the highest priority. 2020's influence on selection of methodologies and suppliers has

been more subtle. The challenge of conducting insights work during the pandemic seems to have led buyers to pursue novel ways to address their needs, resulting in a rearrangement of priorities for selecting methodologies and approaches. In turn, this reprioritization has had an impact on how suppliers and partners are chosen, as some buyers seem more willing than before to trade off established relationships to find the right approach for their current situation.

THE RESILIENCE OF TECHNOLOGY INVESTMENT

While some buyers and suppliers have decreased their technology spending, more than twice as many have increased it



Technology investment, including research-specific software or automation tools, is clearly a pillar of managing the insights function. Since GRIT began tracking it in 17W2, the percentage of buyers or suppliers who decreased technology spend has never exceeded 10%, and the percentage who increased spending has never been lower than five times those who decreased. Until now.

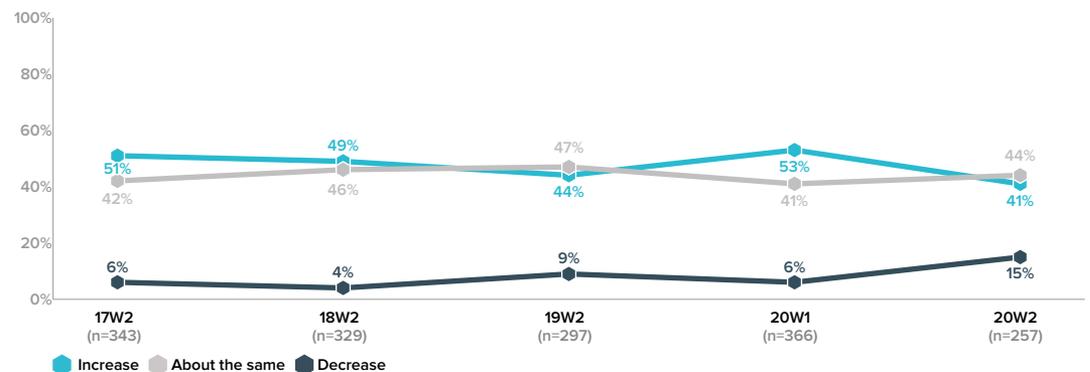
In the current GRIT wave, the percentage of buyers or suppliers who increased technology spending is the lowest ever recorded in GRIT. Since 19W2, the percentage who have decreased

technology spending has nearly doubled among buyers and nearly tripled among suppliers. While some buyers and suppliers have decreased their technology spending, more than twice as many have increased it. Clearly, the technology spend trend is resilient while other metrics, such as project spending or revenue, are more vulnerable to changing conditions in the insights industry. In fact, technology spending tends to increase when times are good (e.g., a need to increase productivity in order to manage a higher volume of work) and when times are bad (e.g., to make the most of scarce resources).

33% of buyers and 26% of suppliers claim that the pandemic has had a positive impact on spend

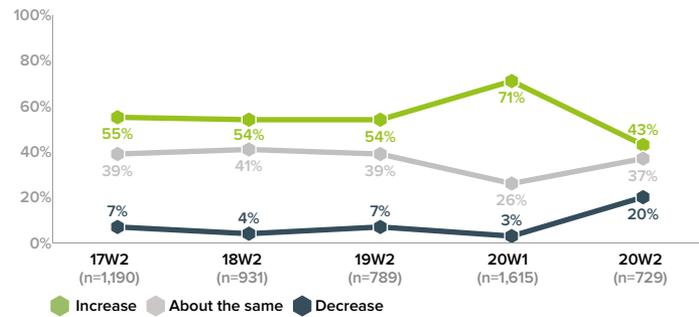


CHANGE IN TECHNOLOGY SPEND: GRIT WAVES (BUYER)

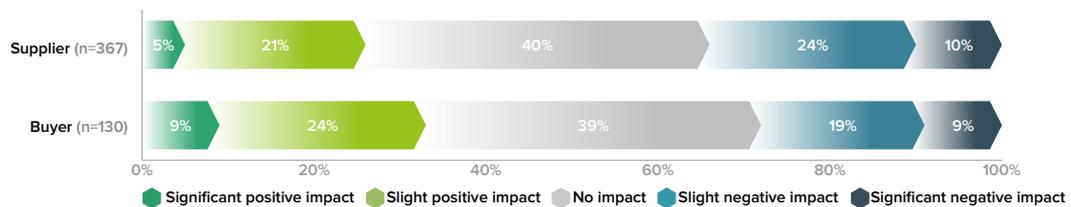


Industry responses to the devastating COVID-19 pandemic demonstrate this resilience. Among buyers, 28% said the pandemic has negatively impacted technology spend; among suppliers, 34%. Yet, 33% of buyers and 26% of suppliers claim it has had a positive impact on spend; the positives cancel out the negatives (in terms of GRIT population; the net dollar impact is unknown). So, fewer organizations have increased tech spend and more have decreased it, but overall the trend remains on the side of increasing.

CHANGE IN TECHNOLOGY SPEND: GRIT WAVES (SUPPLIER)



IMPACT OF COVID-19 ON INVESTMENT IN TECHNOLOGY, RESEARCH-SPECIFIC SOFTWARE, OR AUTOMATION TOOLS (BUYER AND SUPPLIER)



TECHNOLOGY INVESTMENT PRIORITIES

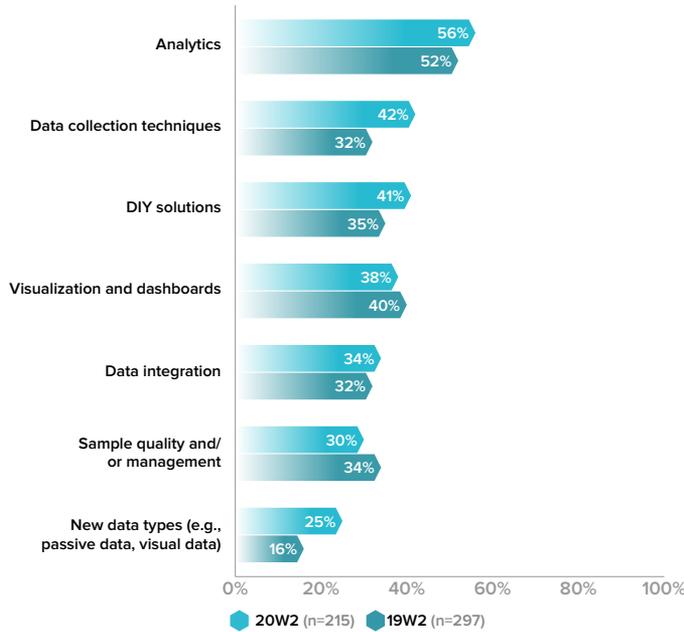
Priorities for tech investment have changed somewhat compared to 19W2. Among buyers, analytics remains the area of tech investment most frequently cited as a key priority (56%), up slightly from 19W2 (52%). Three other areas also increased, and these may indicate an increased need for efficiency or self-reliance, especially around data: data collection techniques (42%, up from 32%), DIY solutions (41%, up from 35%), and new data types (25%, up from 16%). The rank order of priorities changed slightly as data collection techniques leapfrogged visualization and dashboards (38%), DIY solutions, and sample quality and/or management (30%) to move from fifth place to second. DIY solutions moved into third, passing visualization and dashboards, and data integration (34%) moved into fifth, ahead of sample quality.

While some of the movement is minor, the overall pattern suggests a greater priority on the front end – getting data to analyze – and stable interest in the middle and the back end – analytics and visualization and dashboards. The increased priority on data collection techniques and new data types, the enduring importance of analytics, and the relatively reduced priority of sample quality suggests that buyers are more aggressively pursuing data solutions that are not sample dependent. For example, they may be moving away from surveys and qualitative interviews toward data that may be more pertinent or easier and cheaper to acquire in large quantities.

The increased priority on data collection techniques and new data types, the enduring importance of analytics, and the relatively reduced priority of sample quality suggests that buyers are more aggressively pursuing data solutions that are not sample dependent



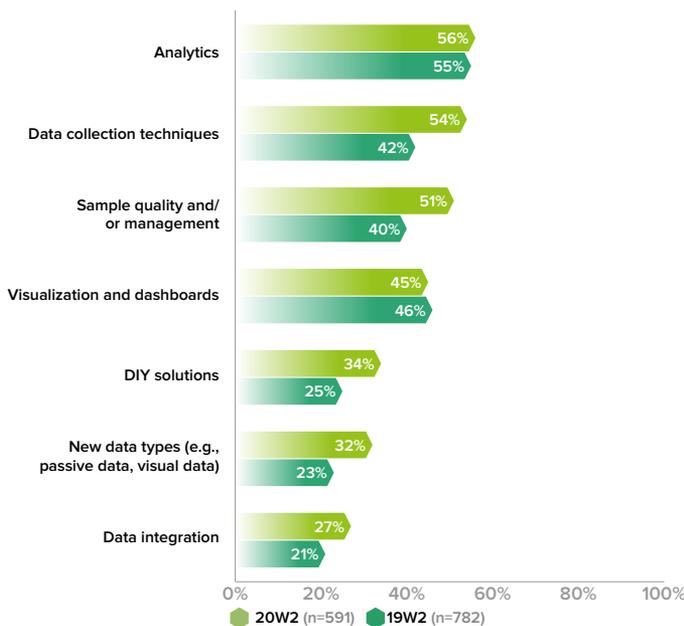
KEY PRIORITIES FOR TECH SPENDING: 20W2 VS. 19W2 (BUYER)



Suppliers share some of these priorities: analytics is still their top priority (56%); they have increased focus on data collection techniques (54%, up from 42%), DIY solutions (34%, up from 25%), and new data types (32%, up from 23%); and the importance of visualization and dashboards is static (45% versus 46%, fourth place, down from second). However, they also have increased their priority on the remaining investment areas: sample quality and/or management (51%, up from 40%) and data integration (27% up from 21%).

The shared priorities with buyers make sense because they align with buyer priorities. The differences also make sense. Suppliers are more likely than buyers to have direct responsibility for sample quality; tech investment would be more significant for them because they have to execute on it while buyers are probably more concerned with evaluating the outcome. Data integration makes sense as a concern for suppliers, both from their own heightened need for efficiency and cost-effectiveness and for alignment with buyer priorities. Although buyer priority of data integration did not increase appreciably, it remained at a healthy 34%.

KEY PRIORITIES FOR TECH SPENDING: 20W2 VS. 19W2 (SUPPLIER)

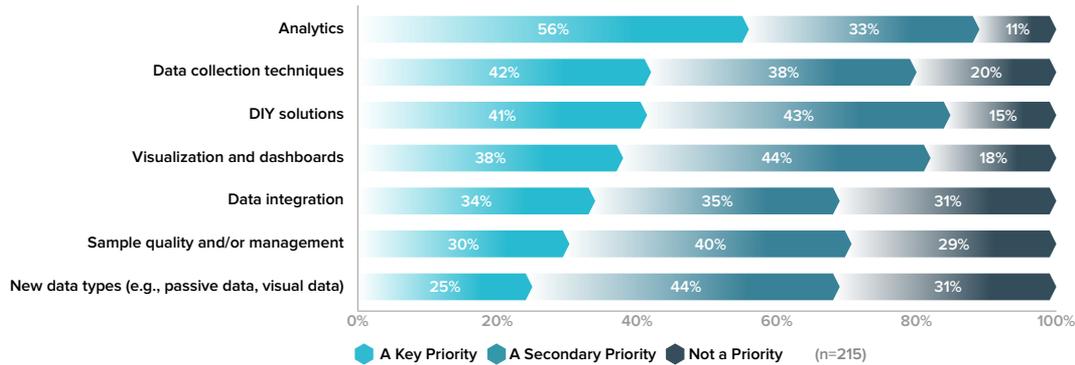


Directionally, tech investment priorities differ according to how a buyer insights department classifies its function

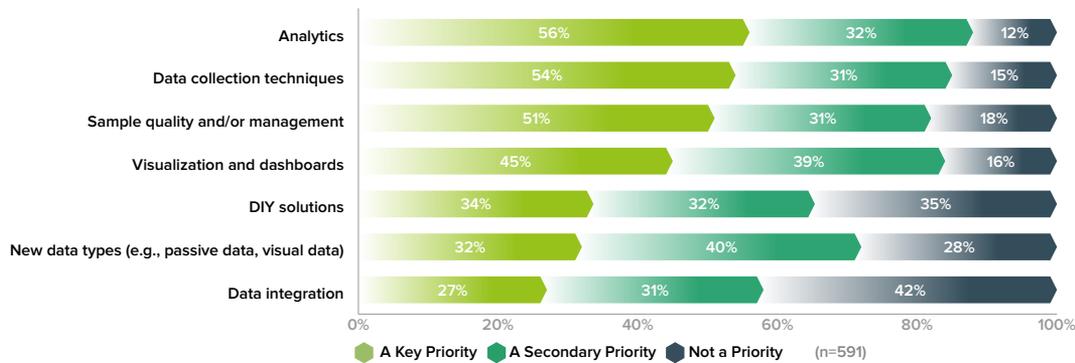
In fact, if secondary priorities are included, 69% of buyers place at least some importance on tech spending for data integration, along with 58% of suppliers. Each of these areas is on the

investment radar for most buyers and suppliers, a fact that underscores the resilience of tech spending wave after wave and its importance to the insights function.

PRIORITIES FOR TECH SPENDING (BUYER)



PRIORITIES FOR TECH SPENDING (SUPPLIER)



Directionally, tech investment priorities differ according to how a buyer insights department classifies its function. All functions place a high priority on analytics, with those acting as strategic consultants perhaps emphasizing it more strongly than others. As for other areas, at this point:

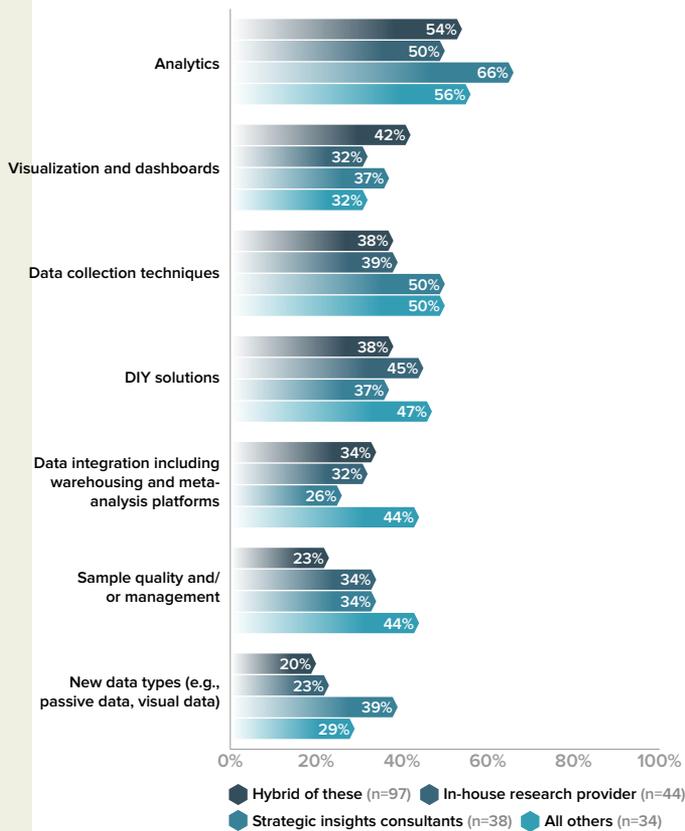
- Visualization and dashboards are a higher priority among hybrids; lower among in-house researchers and others (including data analysts and outsourcers)
- DIY is a higher priority among in-house researchers and others
- Data collection techniques are a higher priority among strategic consultants and others
- Data integration is a higher priority among "others;" lower among strategic consultants
- Sample quality is a higher priority among "others;" lower among hybrids
- New data types are a higher priority among strategic consultants; lower among hybrids and in-house researchers

Investment priorities are more varied across supplier professional focus areas than they are across buyer functions. Priorities of generalists, full-service suppliers, and strategic consultancies are not very distinctive. Specialists, however, differentially emphasize certain areas of investment:

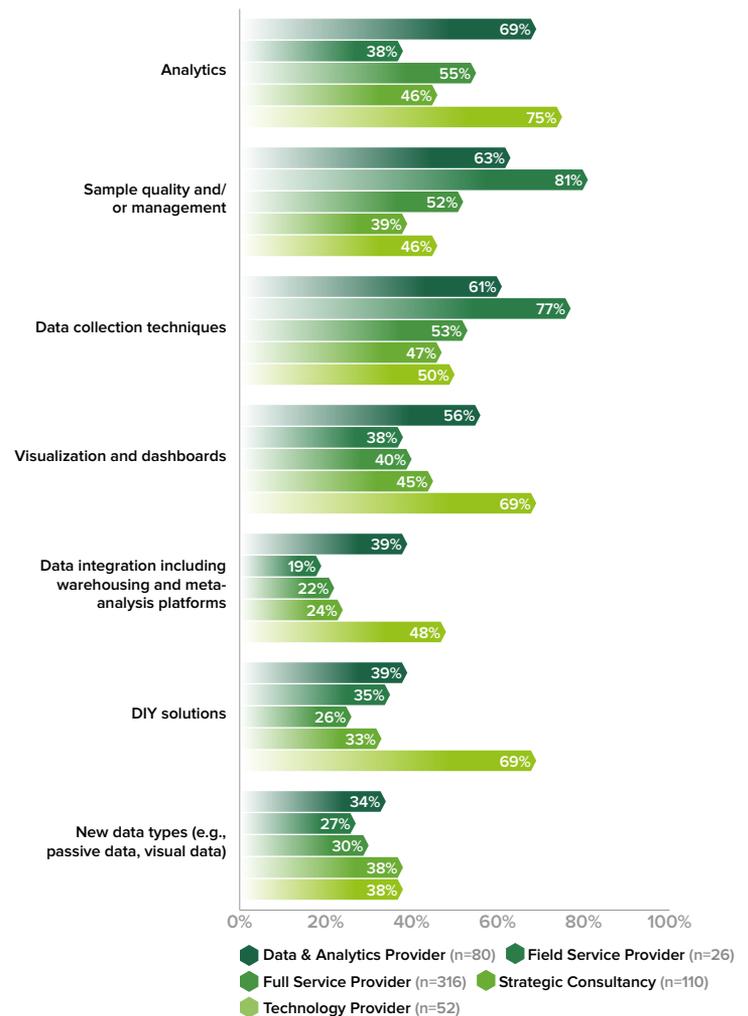
- Field service: data collection techniques, sample quality
- Data & analytics providers: analytics, data collection techniques, sample quality, visualization & dashboards, and data integration
- Technology providers: analytics, visualization and dashboards, DIY solutions, data integration

For specialists, technology investment in particular areas is crucial to growing their chosen area of expertise. However, the importance of tech spending is not unique to supplier specialists: it is dyed into the fabric of the insights industry.

KEY PRIORITIES FOR TECH SPENDING: BUYER SEGMENT



KEY PRIORITIES FOR TECH SPENDING: SUPPLIER PROFESSIONAL FOCUS





3 KEY TECH PRIORITIES FOR 2021

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There's no doubt the post-pandemic world will be very different than the pre-pandemic. Lifestyles and habits have been forever altered. The impact of the pandemic on sales, marketing, distribution, audiences, and brand affinity continues to evolve. Businesses needed to react quickly to stay competitive. This is driving organizations across industries to search for technology to better support their teams, consumers, and business goals. In our work with insights and research teams, there are three key areas that are having the most impact.

WFH Enablement

Though the dramatic shift to work from home won't be permanent, there will be long-term changes to how and where many people work. The pandemic changed employee habits and how they define the quality of life. To recruit and retain, businesses need to be prepared to provide for more portability and remote work than in the past.

This has a profound impact on how people work together and collaborate. Working remotely puts an increased challenge on accessing the company's tools and knowledge as there is a loss of organic "water cooler" talk or the option to turn to a colleague to ask a quick question. Running into the domain expert or leaving a meeting together and catching up have been lost.

To fill this gap, businesses need to deploy technology that empowers employees to virtually share knowledge, collaborate and independently find answers.

Automation

Organizations that implement technology for employees to do their job faster and better will gain an obvious advantage. Capabilities for automation today have vastly improved from just five years ago. Surveys, reporting, data collection, visualization, sampling, and social listening can all be done quicker, at scale, and for less cost with the right technology. New AI tools exist that automate data gathering, tagging, and access.

One warning when looking at automation tools—make sure you aren't trading one burdensome task for another. Ask vendors how onboarding and ongoing management works. "What's the time ramifications to my team?"

Investing in tech that eliminates time-consuming research tasks will enable your team to quickly respond to ever-changing demands of the market.

Data Democratization

Organizations have vast repositories of data, millions of pages of PPT, PDF, Word, and more. We have seen that as much as 95% of organizational data is never accessed again after 90 days from creation. Imagine the expense and effort to create these decks, reports, plans, and insights, just to become permanent shelfware. Worse, imagine the same work repeated simply because it wasn't known that someone else in the enterprise already did the work.

In the past, the goal of data democratization has been sabotaged by the struggle of navigating through too many files, systems, and tools to find what's needed.

This is why so many large enterprises are now investing in next generation knowledge portals capable of linking together answers from internal documents, subscriptions, data visualizations, and other critical tools.

Building this powerful platform relies on working with data providers who openly partner with you and other vendors to build your vision. For our work in making Lucy a GPS to clients' knowledge, we've worked with many vendors who value this importance—Zappi, Voxpopme, KnowledgeHound, Black Swan, Mintel, and Insider Intelligence to name a few.

This isn't about finding one system that does it all. It's about bringing all of your best-in-breed data solutions together to create a one-stop-shop for knowledge.

Investing in the right technology will be key for businesses staying ahead of the curve in 2021 and beyond. Cheers to a new year (Happy to ring out 2020!) and to us all thriving in the new normal.

CRITERIA TO PRIORITIZE METHODS AND APPROACHES

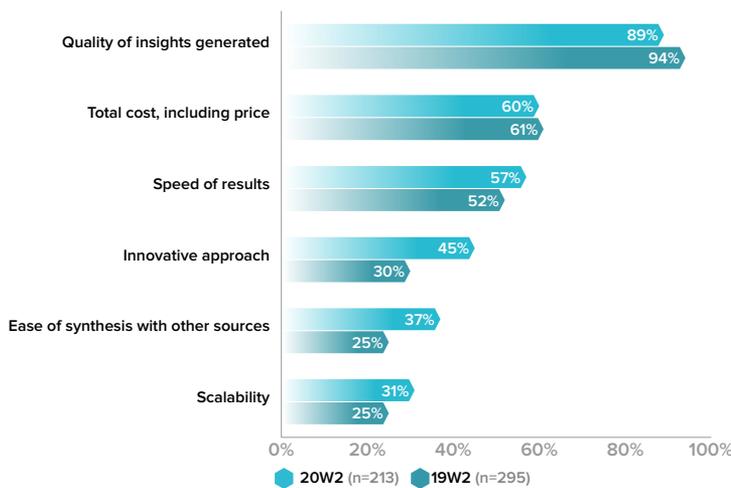
When buyers or suppliers choose methods or approaches, it is no surprise when their top priorities are “better”, “cheaper”, then “faster.” For buyers, these criteria in this order remain the same as they were in 19W2, although speed may be somewhat more urgent (57% key priority, up from 52%) and quality a little less (89%, down from 94%; still dominant). Total cost is similar to 19W2 (60% vs. 61%), but innovative approach (45%, up from 30%), ease

of synthesis with other data sources (37%, up from 25%), and scalability (31%, up from 25%) have ticked up in importance. All the pressures and constraints of the pandemic seem to have placed more urgency on maximizing the value and scope of each method and approach, especially if it can be delivered faster.

Among buyers, there is a clear hierarchy across criteria considered as key priorities. When secondary priorities are considered, the hierarchy is less clear. Everyone considers quality to be some kind of priority, but the “other criteria” cluster within a narrow band between 80% and 94%. Key priorities for methods and approaches vary across buyer segments. Each type of function seems to be best distinguished by which criteria they de-emphasize compared to other functions:

- Hybrid functions: innovative approach, ease of synthesis with other sources
- In-house researcher: speed of results, ease of synthesis with other sources, and scalability
- Strategic insights consultants: quality, cost
- Others (including data analysts and outsourcers): quality

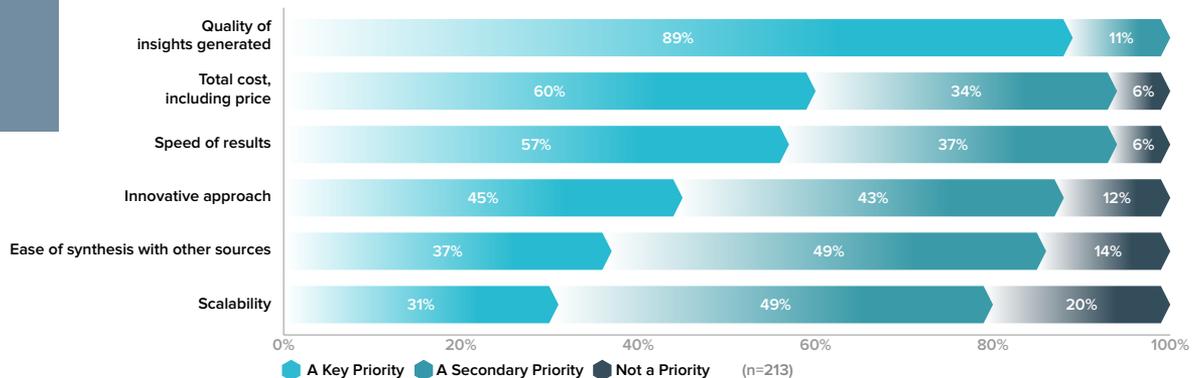
KEY PRIORITIES FOR METHOD SELECTION: 20W2 VS. 19W2 (BUYER)



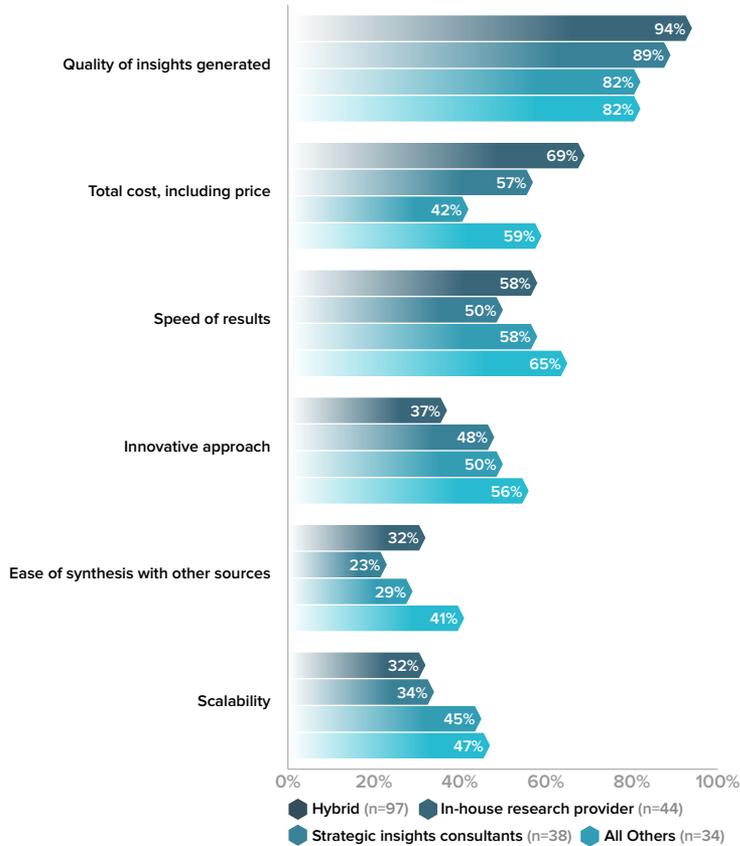
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PRIORITIES FOR METHOD SELECTION (BUYER)



KEY PRIORITIES FOR METHOD SELECTION: BUYER SEGMENT

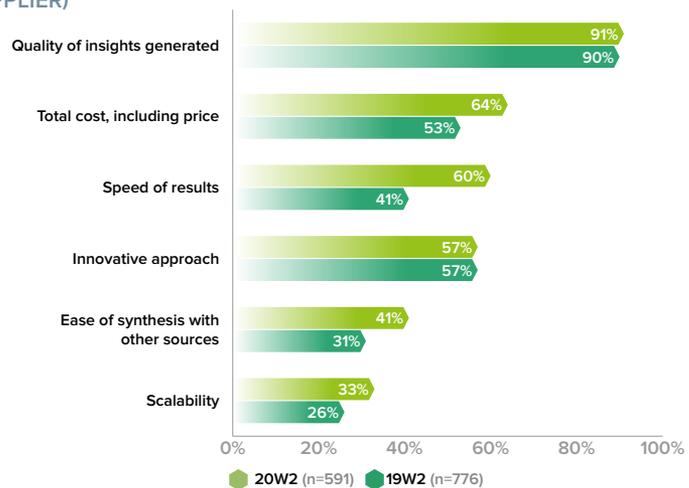


Each type of function seems to be best distinguished by which criteria they de-emphasize compared to other functions



On the supplier side, 19W2 priorities were as predictable as can be: “better” (90%) “cheaper” (57%), then “faster” (53%). Along came 2020, and their order of priority has changed: “better” (91%), “faster” (64%), “innovative” (60%, up from 41%), then, finally, “cheaper” (57%). The percentage of suppliers who say cost is a key priority has not changed, but cost has been eclipsed by speed of results and innovative approach. Scalability (41%, up from 31%) and ease of synthesis with other sources (33%, up from 26%) have also ticked up in importance. Suppliers know they have to deliver high-quality insights and meet price points dictated by clients and the competition. They also need to manage their own costs when they execute methodologies and approaches as well as develop solutions more quickly than competitors. Scalability can help with cost and speed, and innovation can impact all these criteria as well as provide differentiation in the market.

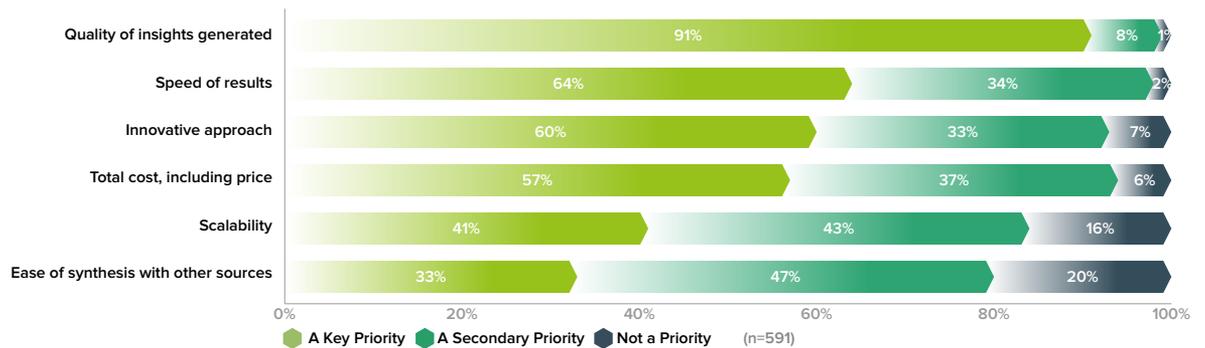
KEY PRIORITIES FOR METHOD SELECTION: 20W2 VS. 19W2 (SUPPLIER)



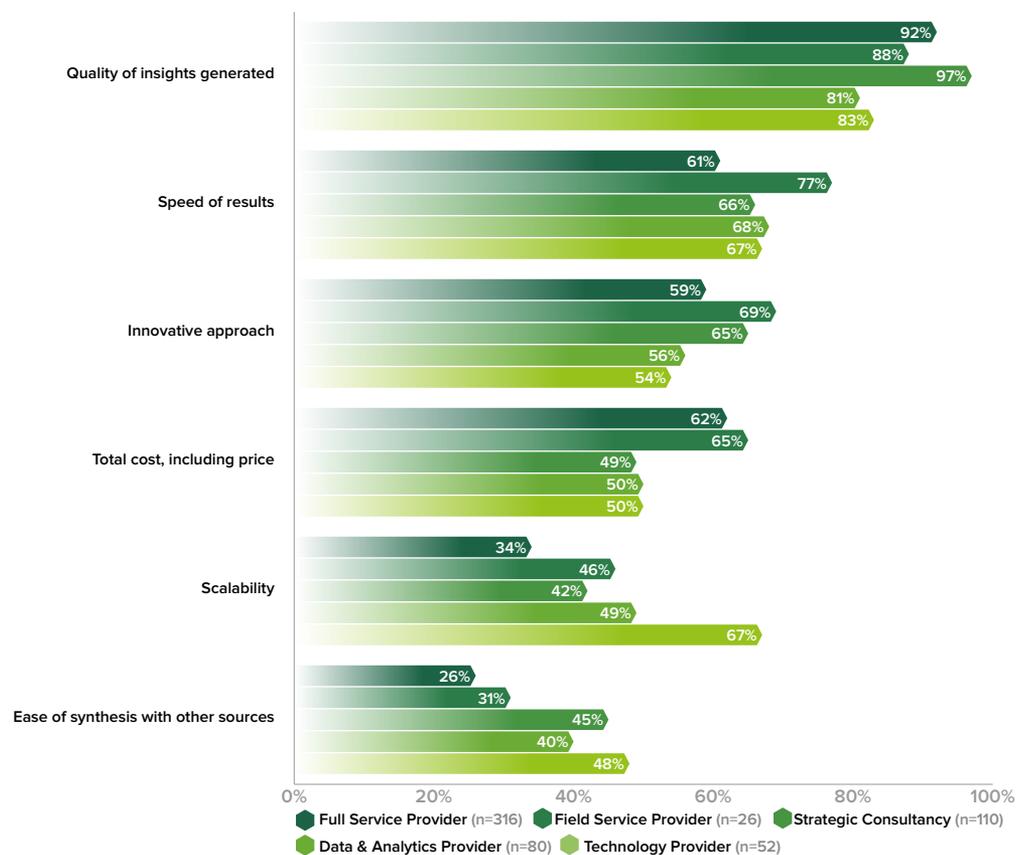
For suppliers, when secondary priorities are considered, virtually everyone agrees that quality and speed are important, and the other criteria cluster in a narrow band between 80% and 94%. Key priorities for methods and approaches vary across supplier professional focus areas. Each supplier focus area is distinguished by how it prioritizes these criteria:

- Full service: quality of insights and cost
- Field service: quality of insights, cost, speed of results, and innovative approach
- Strategic consultancy: quality of insights and innovative approach, and ease of synthesis with other sources
- Data and analytics providers: no unique priorities
- Technology providers: scalability and ease of synthesis with other sources

PRIORITIES FOR METHOD SELECTION (SUPPLIER)



KEY PRIORITIES FOR METHOD SELECTION: SUPPLIER PROFESSIONAL FOCUS

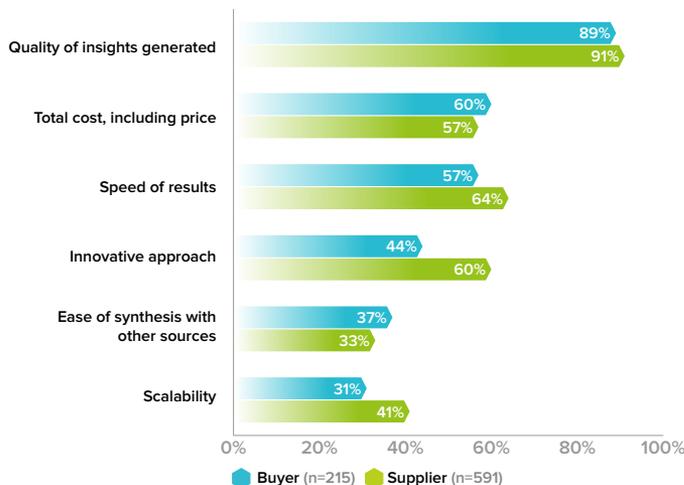


The percentage of suppliers who say cost is a key priority has not changed, but cost has been eclipsed by speed of results and innovative approach



Overall, buyers and suppliers place similar emphasis on quality of insights and total cost, and these are key priorities for most of each group. Suppliers place more emphasis than buyers do on innovative approach, speed of results, and scalability, and, unlike buyers, innovative approach and speed of results receive slightly more consideration than total cost. The relative prioritizations reflect the fact that, in general, buyers have to be concerned with end results while suppliers must be concerned with end results, too, but also the means to those ends.

KEY PRIORITIES FOR METHOD SELECTION: BUYER VS. SUPPLIER



CRITERIA FOR SUPPLIER AND PARTNER SELECTION

Even though the criteria for methodologies and approaches seem to have raised the bar for their selection, criteria for selecting partners and suppliers remains as it was in 19W2. Three criteria were added (“support for social issues and causes,” “diversity of staff,” and “use of technology for communication and sharing”), and one was modified (“use of technology” to “use of technology in research and analysis”).

Despite the modifications to the survey question and despite changes in the industry, very little changed in the prioritizations.

For buyers, data quality (80%) and service levels (56%) are still clearly the top priorities. Relationship with my organization changed the most (37%, down from 50%), falling from third place to sixth. The next largest changes were thought leadership (38%, down from 44%), data quality (80%, down from 85%), general pricing (41%, down from 46%), reputation (37%, down from 42%), local to me (8%, down from 13%). The only criterion to increase in importance is use of technology in research and analysis (30%,

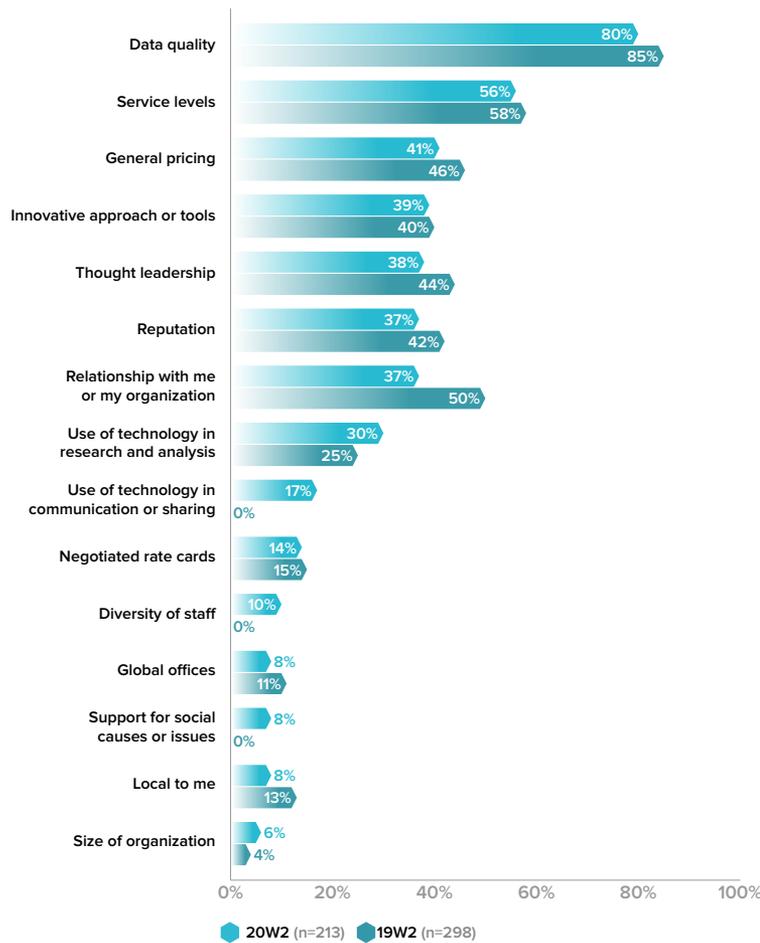
up from 25%). The three new criteria were not disruptive to the established order, placing ninth (use of technology for communication, 17%), eleventh (diversity of staff, 10%), and thirteenth (support for social causes or issues, 8%). Of the fifteen criteria, relationship is the only one that stands out as different from 19W2.

The relatively minor changes in supplier/partner selection criteria suggest that the selection of methodologies and approaches, which had more dramatic changes, has increased in importance relative to the supplier/partner decision. In other words, it may be that buyers are looking for new methodologies and approaches to solve their new problems and are willing to give up things like relationships to get them. This is not to say that supplier and partner selection is unimportant relative to methodology, but perhaps the scales have tilted slightly more toward methodology and approach.

Buyers have to be concerned with end results while suppliers must be concerned with end results, too, but also the means to those ends.



KEY DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS: 20W2 VS. 19W2 (BUYER)

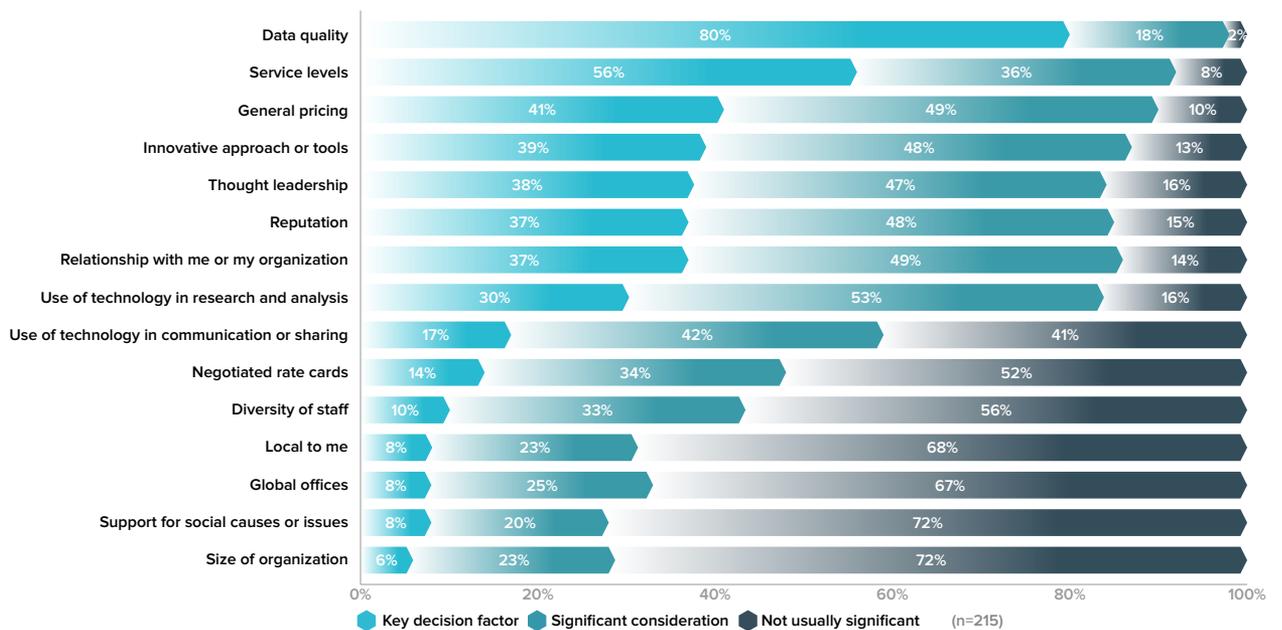


In this light, we can understand why some supplier/partner criteria dropped slightly in priority: some buyers are more willing to change their evaluation process to get a new solution. The sharp drop in the priority of relationship is the strongest clue because it suggests that some buyers are more open to working with new suppliers and partners. The next strongest clue may be the modest increase in the importance of the use of technology in research and analysis; as the only criteria to increase, it suggests that some buyers are looking for new solutions in these times and will factor that into their selection process.

Looking at the percentage of buyers who named each criterion as either a key decision factor or significant consideration, eight criteria stand out, each considered significant by more than 80% of buyers:

1. Data quality
2. Service levels
3. General pricing
4. Innovative approach or tools
5. Relationship with me or my organization
6. Thought leadership
7. Reputation
8. Use of technology in research and analysis

DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS (BUYER)



Each buyer segment places a similar emphasis on data quality as the top criteria when selecting suppliers or partners. After that, some buyer functions place more emphasis on different criterion:

- Hybrid: data quality and service levels are as important to them as to others, but no other criteria stand out
- In-house researcher: general pricing and innovative approach or tools
- Strategic insights consultant: innovative approach or tools and thought leadership
- Others (including data analysts and outsourcers): general pricing, reputation, thought leadership, relationship, use of technology in communicating or sharing, support for social issues or causes, local to me, and size of the organization

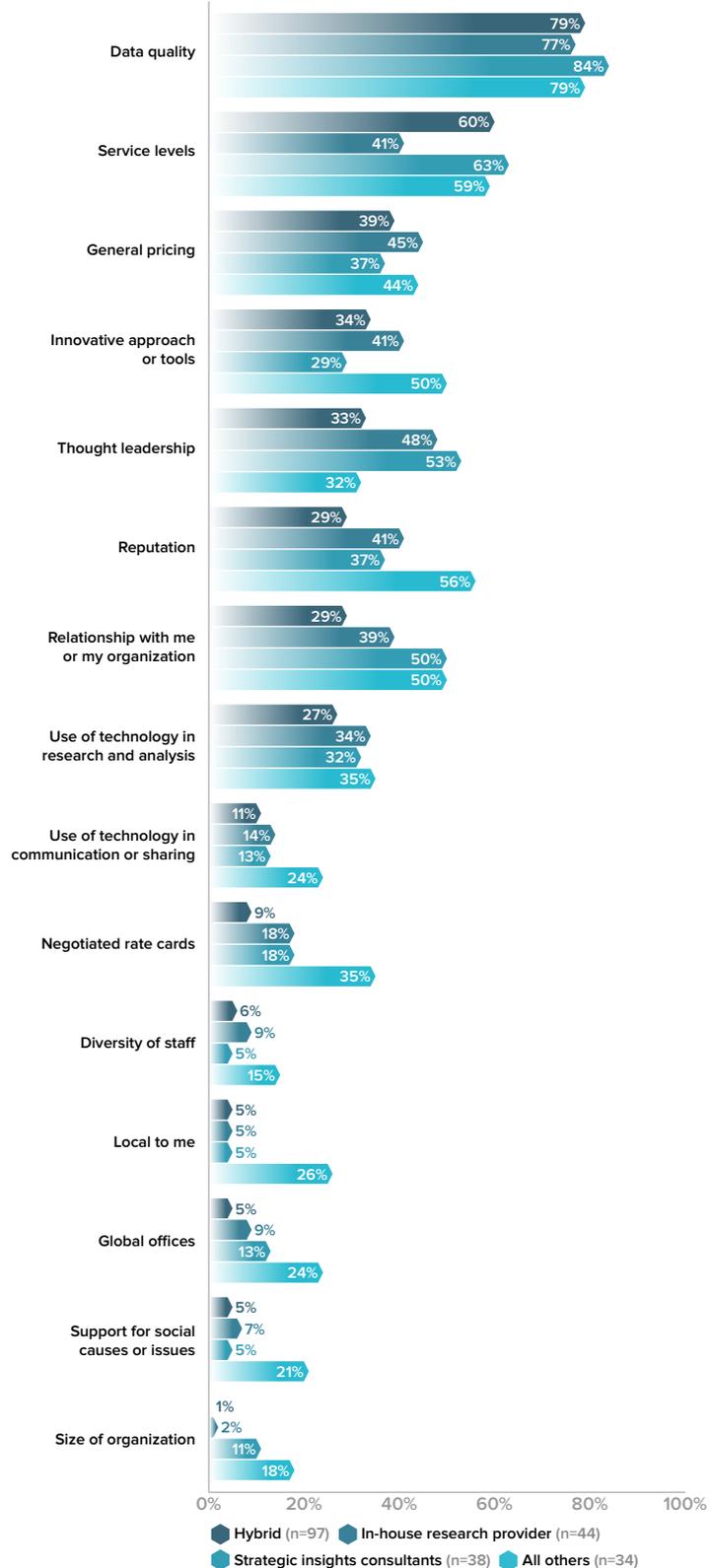
Each buyer segment places similar emphasis on data quality as the top criterion when selecting suppliers or partners



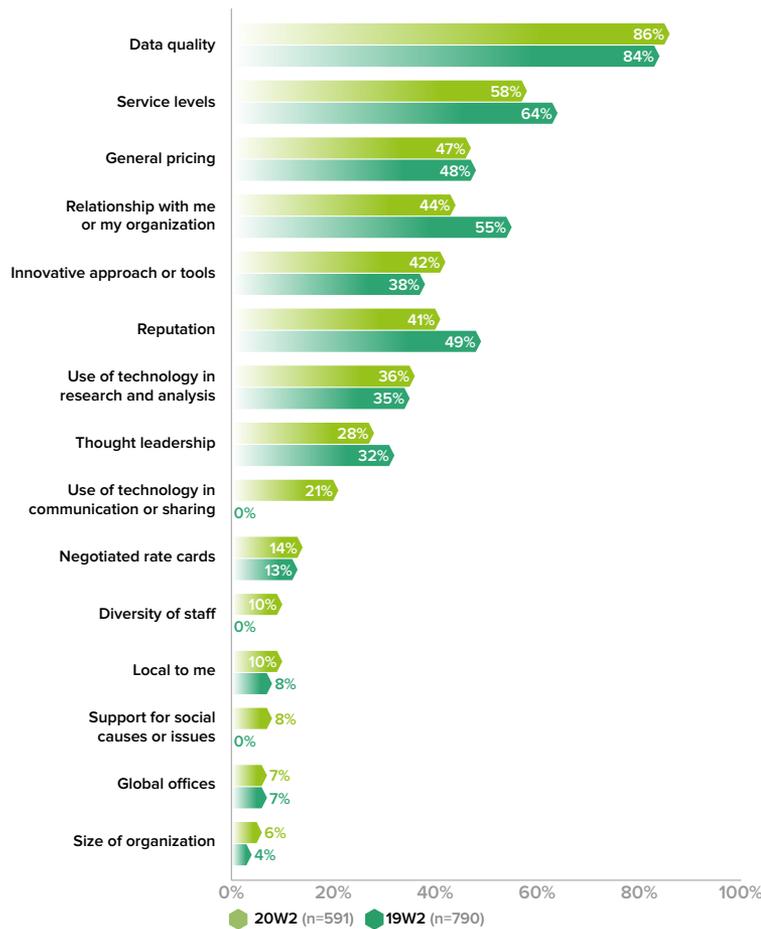
As with buyers, data quality and service levels are clearly the two most important criteria



KEY DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS: BUYER SEGMENT



KEY DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS: 20W2 VS. 19W2 (SUPPLIER)

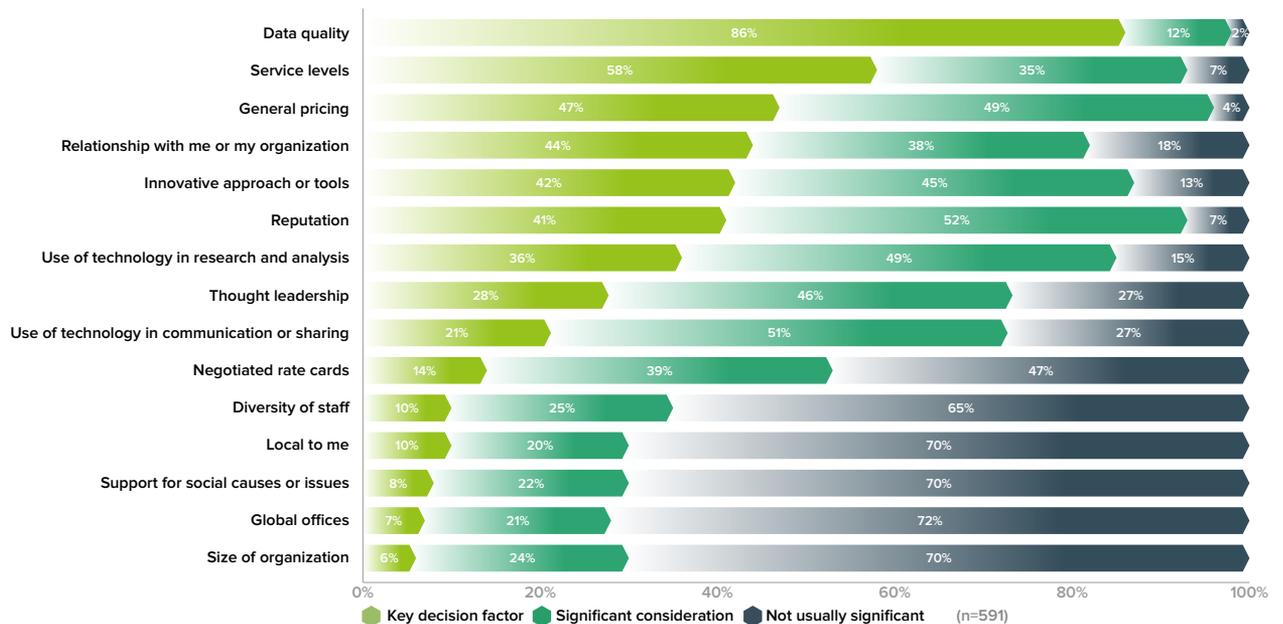


When suppliers prioritize criteria for selecting partners and suppliers, the trend is similar to the buyer pattern. Similar to buyers, data quality and service levels are the two most important criteria. As with buyers, relationship plunged, from a solid third ranked to sixth in 20W2 (44%, down from 55%), but reputation also fell from fourth to eighth (49%, down to 41%). After those two, the biggest change was service levels (58%, down from 64%), but no other changes are noteworthy. The new criteria debuted almost identically to their positions for buyers; use of technology for communication and sharing was ninth (21%); diversity of staff, eleventh (10%), and support for social causes and issues, thirteenth (8%).

For suppliers, nine criteria stand out, each considered significant by more than 70%:

1. Data quality
2. Service levels
3. General pricing
4. Relationship with me or my organization
5. Innovative approach or tools
6. Reputation
7. Use of technology in research and analysis
8. Thought leadership
9. Use of technology in communication and sharing

DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS (SUPPLIER)



By primary professional focus, the following criteria are higher priority for suppliers:

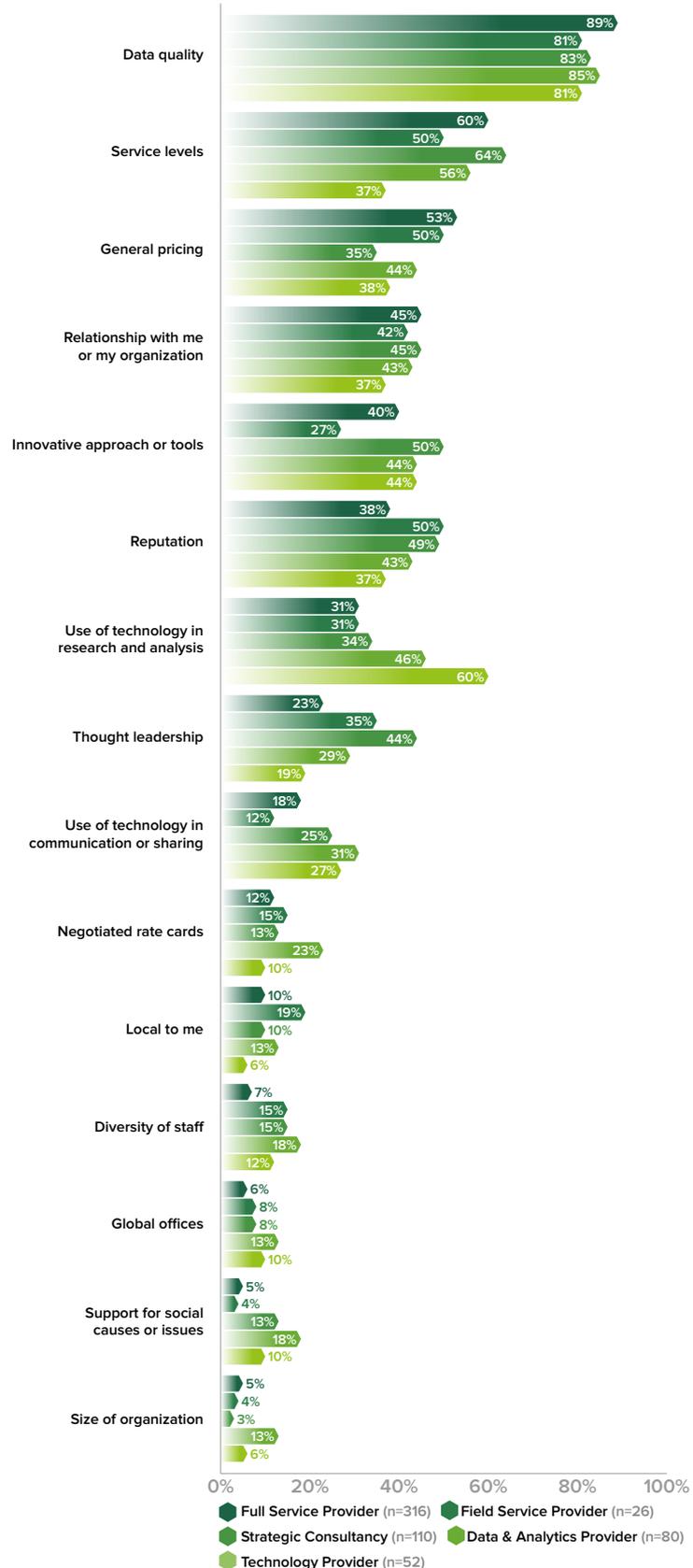
- Full service provider: data quality, service levels, and general pricing
- Field service provider: general pricing, reputation, thought leadership, and local to me
- Strategic consultancy: service levels, innovative approach or tools, reputation, and thought leadership
- Data and analytics provider: use of technology in communication and sharing, negotiated rate cards, size of organization, and support for social causes and issues
- Technology provider: use of technology in research and analysis

Key decision factors for selecting suppliers and partners do not differ substantially between buyers and suppliers

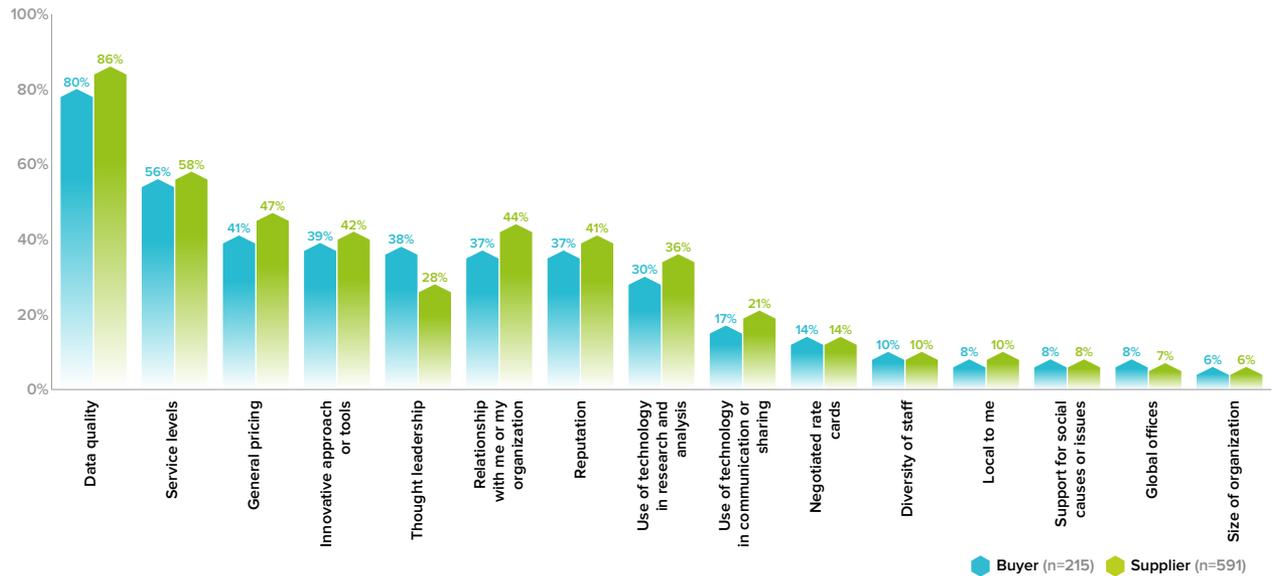


Key decision factors for selecting suppliers and partners do not differ substantially between buyers and suppliers. For suppliers, higher priority is given to data quality (86% to 80%), general pricing (47% to 41%), relationship (44% to 37%), and use of technology in research and analysis (36% to 30%). Buyers place more emphasis on thought leadership (38% to 28%). None of these differences, however, make a difference in the order of priority.

KEY DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS: SUPPLIER PROFESSIONAL FOCUS



KEY DECISION FACTORS WHEN CHOOSING POTENTIAL PARTNERS OR SUPPLIERS: BUYER VS. SUPPLIER



THE BIG PICTURE

It should surprise no one that management of insights work, whether as a buyer or supplier, becomes more and more technology-dependent as time marches on, or that managers prefer approaches that are better, cheaper, and faster, as difficult as it is to maximize all three dimensions at once. It may be surprising, however, that investment in technology continues to increase in spite of the challenges of the pandemic, and that “innovation” has crashed the “better, cheaper, faster” party, at least from the supplier perspective.

In every GRIT wave, increases in tech spending far exceed decreases in tech spending, including this one. However, whereas previous waves measured a 5:1 ratio of increases to decreases, the ratio is “only” 2:1 for this wave. The number of buyers and suppliers who claim the COVID-19 pandemic has had a positive impact on tech spend balance out with those who claim it has had a negative impact. While analytics remains the most critical tech investment priority, buyers seem to have increased their emphasis on “front end” activities, such as data collection, while maintaining a strong emphasis on “middle” (e.g., analytics) and “back end” (e.g., visualization and dashboards) activities. Similarly, suppliers have increased priorities on front end activities while

maintaining focus on the middle and back end. However, as their front end activities tend to be broader than the typical buyer’s, they have increased the priority of a wider range of these activities.

With respect to the selection of methodologies and approaches, buyers still place better, cheaper and faster at the top of the list, but other concerns, such as innovation, have increased in significance. For suppliers, the importance of innovation has increased so much that it has cracked the top three criteria. The findings suggest that the pandemic has influenced buyers to look for new ways to accomplish their goals, giving suppliers increased motivation to innovate in order to meet these needs and distinguish themselves from the competition.

Because buyers (and suppliers) are looking for innovative ways to address new challenges, they have had to reassess how they evaluate suppliers. The old criteria they used to select suppliers who offered familiar methods, such as relationship, are less relevant if they don’t have relationships with suppliers who offer new solutions to new problems. This situation creates new opportunities for suppliers who innovate and greater risks for those who do not.

Because buyers (and suppliers) are looking for innovative ways to address new challenges, they have had to reassess how they evaluate suppliers





THE PATH TO SUCCESS IS PAVED WITH FEEDBACK: LISTEN, LEARN, AND GO BEYOND “MEH”

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Let us get the obvious out of the way first. 2020 was an incredibly challenging year for everyone on the planet – and 2021 will continue to test our collective resolve. Buyers and suppliers in the research industry, like so many others, have been forced to adapt to largely unforeseen circumstances. If we were playing a drinking game where we had to drink every time someone said “pivot,” no one would have been sober enough to get any actual work done. But we did get a lot done – by working together.

The partnership between buyers and suppliers is critical, especially when working in a rapidly changing environment. But this is, of course, not new news. Far be it from me to say that we should not focus on trends in a report that is largely focused on trends. But let us zoom out and look not just at 2020 but also at past years with a slightly different lens. What if I told you that about half of buyers when asked about how they view suppliers, shrugged their shoulders, and essentially said “meh?” The GRIT Report is a persistent wake-up call for buyers to press their suppliers to improve and for suppliers to better meet the needs of their customers.

The irony in our current situation is that so many suppliers hang their hats on helping their clients better know their audience, getting closer to customers, and incorporating customer feedback into their strategy. But are we, as industry suppliers, taking our own medicine? I would argue that in many instances, we are not.

The outcomes of this are manifold, but I want to focus on one. Research (not just access to, but also active participation in) continues to be democratized, extending beyond the closed domain of research teams, and that is by and large a positive movement. But with this

democratization comes the need for suppliers to support not just researchers, but also business stakeholders who need access to and want to conduct their own research. And to put it simply, the needs of researchers and non-researchers hungry for relevant and actionable data are often different.

As a company originally founded to fuel agile product teams with the research, they need to continually make decisions, to test and learn using consumer feedback, Feedback Loop has a unique perspective on the problem. Over the past six years as we have built a platform designed to be used by both researchers and non-researchers – technology that helps them collaborate – we have seen the differing needs of these groups and the tensions between them firsthand. What drives satisfaction in one group may not in the other. Ignoring these differences is perilous.

Finding the sweet spot(s) in meeting the needs of people with varying needs and perspectives on various teams – insights, UX, product, innovation, marketing, and the list goes on – is a persistent challenge. If you are on the buyer side, be vocal. Be direct and open about what your suppliers/partners can do better. Push them – continually – whether you are asked or not. And suppliers, keep top of mind that the path to success is often paved with customer feedback – not just end customers, but *yours*. Continually talk with, learn from, and collaborate with buyers. Do not sit around and wait for them to come to you when things go wrong. Whether you are a full-service agency or a tech provider, a global company or a boutique shop, you need to understand directly not just what satisfies, but what delights increasingly diverse stakeholders who need research. Do not wait for the GRIT Report to tell you that. And do not be satisfied with “meh.”

SUPPLIER PERFORMANCE

Since 19W2, buyer satisfaction with suppliers has decreased overall and on important aspects, such as understanding the issue to be researched, conducting the research, and implementing the research plan. Reduced satisfaction may be due, in part, to the fact that buyers are working with a reduced set of suppliers because of financial pressures

arising from the pandemic. Deprived of the ability to match preferred suppliers to specific situations, buyers may be settling for the service and deliverables they can afford instead of the service and deliverables to which they are accustomed.

Generally speaking, buyers and suppliers have similar views of supplier performance. However, they are not aligned on some of buyers' key satisfaction drivers, and suppliers need to evaluate

whether those particular buyer expectations apply to their professional focus area or not, and, if so, determine what gaps need to be closed.

BUYERS WORK WITH “PORTFOLIOS” OF SUPPLIERS

In the GRIT survey, before buyers were asked for their overall satisfaction with their insights/research providers, they were prompted for how frequently they worked with different types so that they would have their full portfolio in mind. Each buyer rated their particular portfolio of suppliers as a group, ensuring that the object of their ratings was relevant and meaningful to them. Because the GRIT survey covers a wide range of topics, it is impractical to ask buyers to rate specific suppliers or even specific types of suppliers. Instead, GRIT captures buyers' aggregate satisfaction with the insights and research work they commission based on each buyer's particular experiences. Knowing each respondent's particular portfolio of suppliers enables some limited analysis by supplier type.

Most buyers work regularly with full-service providers, but it is a slight majority (53%). At the other end of the spectrum, fewer than one in five

(18%) work regularly with strategic consultants. Most buyers work with each supplier type at least occasionally: with qualitative researchers, 82%; full-service providers, 81%; data and analytics providers, 71%; technology providers, 71%; strategy consultants, 64%; and field service providers, 63%. The lack of a universal regular partner and the relative pervasiveness of occasional use of every type of provider suggests that the “portfolios” of providers used can vary greatly from buyer to buyer.

Compared to 19W2, regular use of each type of supplier declined: full service by 9%, qualitative researchers by 10%, data and analytics providers by 11%, technology providers by 11%, and strategy consultants by 5%. This trend is consistent with the observations that end users of research are taking more work in-house and supplier's volumes and revenues have fallen.

This trend is consistent with the observations that end users of research are taking more work in-house and supplier's volumes and revenues have fallen



SUPPLIER PERFORMANCE, TABLE 1

Types of Provider	Buyer					
	19W2			20W2		
	Work With Regularly	Work With Occasionally	Rarely or Never Work With	Work With Regularly	Work With Occasionally	Rarely or Never Work With
Full-Service Provider*	62%	26%	12%	53%	28%	19%
Qualitative Research Provider	54%	32%	15%	44%	38%	18%
Data & Analytics Provider	40%	36%	23%	29%	42%	29%
Field Service Provider	N/A	N/A	N/A	27%	35%	37%
Technology Provider	37%	37%	26%	26%	45%	29%
Strategy Consultant	23%	42%	34%	18%	46%	36%
	n = 295			n = 271		
<i>*Asked as "Full/Field Service" in 19W2</i>						

In 19W2, overall satisfaction was highest among buyers who worked regularly with strategy consultants (74%). Since then, overall satisfaction within that group has dropped 15%, to 59%. Those who work regularly with strategy consultants are still more satisfied than anyone else, but the

difference is negligible as all supplier types but data and analytics providers are clustered within 3% of each other. Satisfaction among those who regularly use data and analytics providers also dropped 15%, from 61% in 19W2 to 46%.

SUPPLIER PERFORMANCE, TABLE 2

Type of Provider Regularly Worked With	Overall Satisfaction (Top 2 Box)		
	19W2	20W2	Delta (20W2 – 19W2)
Strategy Consultant	74%	59%	-15%
Technology Provider	60%	58%	-2%
Qualitative Research Provider	64%	58%	-6%
Full-Service Provider*	60%	57%	-5%
Field Service Provider	N/A	56%	N/A
Data & Analytics Provider	61%	46%	-15%
<i>*Asked as "Full/Field Service" in 19W2</i>			

For some buyers the potentially critical synergy derived from using a strategy consultant in tandem with a data and analytics provider may not have been sustainable in 2020



What happened? Did strategy consultants and data and analytics providers suddenly start providing poor results, poor service, and/or poor value for the cost? It's possible. Suppose the constraints imposed upon them by the pandemic prevented them from providing a valuable service; e.g., they no longer had the staff to support projects or clients could no longer put in the effort or provide the access needed to conduct successful projects. Perhaps clients could not afford the level of project they were used to receiving and bought watered-down versions from their incumbent providers or poor work from cut-rate ones. Maybe the evolution of supplier categories discussed in previous GRIT Reports has resulted in diluted offerings as data and analytics providers try to take on full-service work, full-service providers add data analytics or reposition themselves as strategy consultants, and so on. These are possible explanations for the precipitous drops in satisfaction.

However, there is a much more plausible hypothesis: in GRIT, buyers express their satisfaction with their portfolios of suppliers, and portfolios that included regular use of strategy consultants and data and analytics providers may have collapsed in 2020. In 19W2, 71% of portfolios that included regular use of strategy consultancies also included regular use of data and analytics providers; in 20W2, only 59% included regular use of them. Similarly, 45% of 19W2 portfolios that included regular use of data and analytics providers also included regular use of strategy consultants; in 20W2, only 37% did. This is a simple example of how for some buyers the potentially critical synergy derived from using a strategy consultant in tandem with a data and analytics provider may not have been sustainable in 2020, and the use of one without the other may not have provided sufficient value. There are other possible combinations that were affordable before the pandemic but not sustainable after it hit, combinations that needed each of its components in order to meet client needs.

BUYER SATISFACTION WITH SUPPLIERS

After an uptick in 19W2, overall satisfaction has regressed almost to its 18W2 level, 51% top two box currently versus 49% two years ago. The aggregate score for aspects classified as “strategic” are essentially the same as 19W2 (52% to 51%), and those classified as “tactical” are up three points from last year (53% to 50%). The aggregate scores, calculated with equal weight given to each aspect, do not tell the whole story.

On the positive side, four aspects improved by 4 points or more: managing scope or project specification changes (53% to 59%), value for cost (34% to 39%), reporting research results (45% to 49%), and recommending business actions based on the research (27% to 31%). However, although each of these scores is at or near its all-time high, only

managing scope changes ranks in the upper half of the front-end, suggesting these have low impact on satisfaction.

On the negative side, three aspects lost 4 points or more from last year: understanding the issue to be researched (63% to 56%), implementing the research plan (70% to 66%), and conducting the research (74% to 70%). These were the top three aspects in 19W2, and decreased satisfaction on the three most prominent aspects could be enough to trigger a reduction in overall satisfaction.

A new aspect, adjusting to COVID-19 impact, was added for this GRIT wave and scored a relatively respectable 63%, placing it as the third most satisfying aspect of supplier service.

SUPPLIER PERFORMANCE, TABLE 3

	Aspects sorted by change in score	Scope	16W2	17W2	18W2	19W2	20W2	Delta %	Top 2 Box Rank
	Overall satisfaction	Overall	–	–	49%	55%	51%	-4%	
	Overall satisfaction with strategic aspects	Strategic	46%	50%	47%	51%	52%	1%	
	Overall satisfaction with tactical aspects	Tactical	39%	51%	54%	50%	53%	3%	
	Managing scope or project specification changes	Tactical	–	62%	63%	53%	59%	6%	5
	Value for cost	Tactical	30%	35%	40%	34%	39%	5%	13
	Reporting research results	Strategic	42%	40%	35%	45%	49%	4%	11
	Recommending business actions based on the research	Strategic	25%	29%	20%	27%	31%	4%	14
	Understanding their business	Strategic	40%	45%	40%	42%	44%	2%	12
	Data visualization	Tactical	22%	24%	23%	27%	29%	2%	15
	Designing the research plan	Strategic	–	62%	57%	58%	60%	2%	4
	Project management/service	Tactical	–	62%	65%	57%	58%	1%	6
	Interacting with senior management	Strategic	–	43%	46%	52%	52%	0%	10
	Data analysis	Tactical	51%	51%	52%	54%	54%	0%	9
	Timeliness of deliverables	Tactical	52%	54%	64%	59%	56%	-3%	7
	Conducting the research	Strategic	70%	74%	70%	74%	70%	-4%	1
	Implementing the research plan	Tactical	–	71%	69%	70%	66%	-4%	2
	Understanding the issue to be researched	Strategic	53%	58%	58%	63%	56%	-7%	8
	Adjusting to COVID-19 impact	Tactical	–	–	–	–	63%	–	3
	n= (maximum)		321	333	321	295	199		

 Project management related  Research relevant to organization  Data analysis and reporting  Value for cost

BUYER SATISFACTION AND SUPPLIER PORTFOLIO

All the overall satisfaction scores are tightly clustered around 56%, with the exception of data and analytics providers at 46%



To get a more granular understanding of buyer satisfaction with types of suppliers, satisfaction ratings were broken out by portfolios that contain different supplier types. Two sets of comparisons were made: portfolios in which each supplier type was used “regularly” and portfolios in which each were used only occasionally.

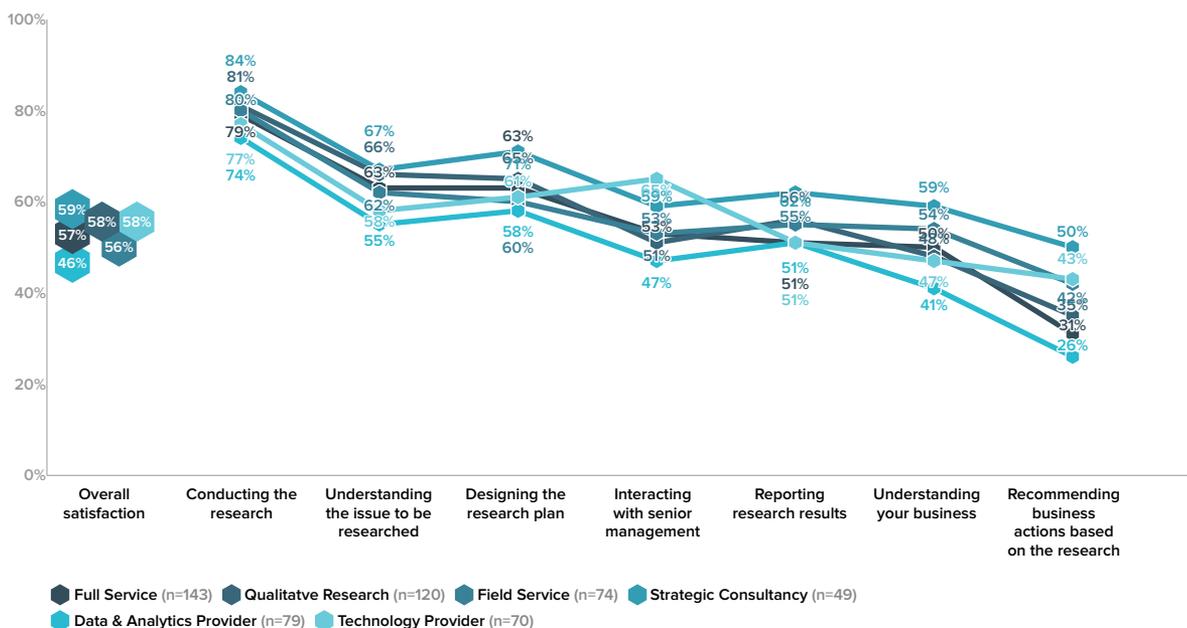
The chart titled *Satisfaction with Suppliers on Strategic Aspects: Type Work with Regularly* shows the buyer ratings of suppliers for each of the seven strategic aspects broken out by buyers who work regularly with each type of supplier. Of course, if a buyer regularly works with more than one type of supplier, the response will count for multiple types, making it more difficult to find differences, but not impossible.

The left side of the chart shows information already covered, the overall satisfaction by portfolios in which each supplier type is used regularly. The overall satisfaction scores are tightly clustered around 56%, with the exception of data and analytics providers at 46%. The line chart on the

right displays the scores for each type of portfolio on each strategic aspect, from the highest to lowest score. Some takeaways:

- Strategy consultant portfolios stand out positively on designing the research plan, reporting research results, understanding your business, and recommending business actions
- Technology provider portfolios stand out positively for interacting with senior management
- Data and analytics provider portfolios are generally the lowest scoring on each aspect, especially conducting the research, understanding the issue to be researched, interacting with senior management, understanding your business, and recommending business actions
- Generally, performance is more similar across types of portfolios for the aspects with higher ratings, and more differentiated for understanding their business and recommending business actions, which have the lowest.

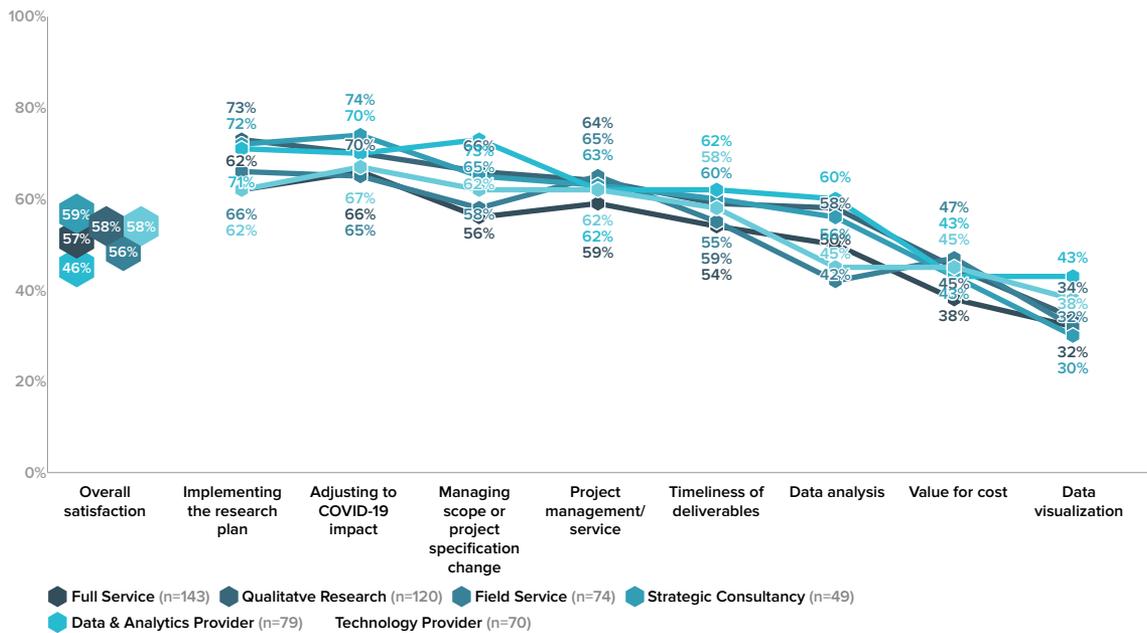
SATISFACTION WITH SUPPLIERS ON STRATEGIC ASPECTS: TYPE WORK WITH REGULARLY (BUYER, % TOP 2 BOX)



The next chart shows similar information for the tactical aspects, with a few highlights:

- Strategy consultant portfolios stand out positively for managing scope or product specification changes
- Data and analytics provider portfolios tend to be lower rated, especially for implementing the research plan and managing scope or product specification changes
- Technology provider portfolios are lower rated on implementing the research plan
- Field service provider portfolios are lower rated on data analysis
- The most differentiating tactical aspects are managing scope or product specification changes and data analysis

SATISFACTION WITH SUPPLIERS ON TACTICAL ASPECTS: TYPE WORK WITH REGULARLY (BUYER, % TOP 2 BOX)



This analysis by regular use shows that when strategy consultants are a regular part of the mix, good (or, at least, better) things are more likely to happen. However, only 18% of buyers work with them regularly, implying that most buyers are not getting the best supplier experience available.

Looking at satisfaction on strategic aspects when each supplier type is used occasionally yields some observations:

- Overall satisfaction with a portfolio is generally lower when its only defining characteristic is occasional use of a supplier type
- Overall satisfaction is highest when data and analytics providers are used occasionally; the opposite finding from when they are used regularly

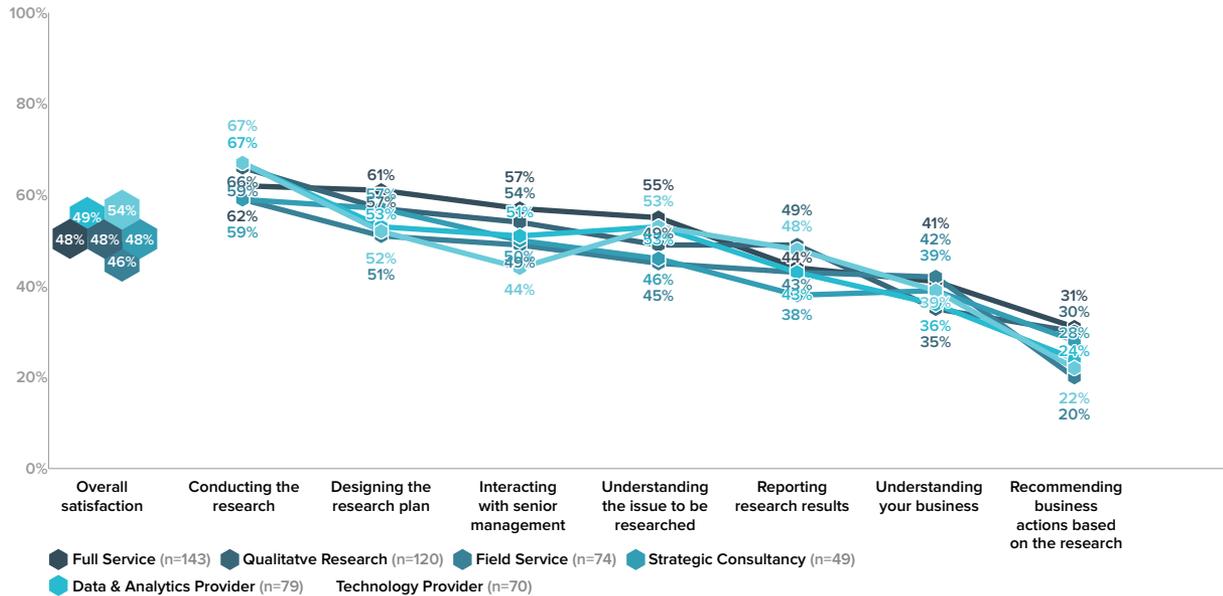
- Portfolios in which data and analytics providers are used occasionally have higher satisfaction with designing the research plan and interacting with senior management
- The most differentiating strategic aspect is managing scope or product specification changes

These findings do not necessarily mean that data and analytics providers are good at designing the research plan and interacting with senior management. For example, they might mean that another type of supplier, such as a strategy consultant, led the project and decided to include a role for a data and analytics provider in the research design.

This analysis by regular use shows that when strategy consultants are a regular part of the mix, good (or, at least, better) things are more likely to happen



SATISFACTION WITH SUPPLIERS ON STRATEGIC ASPECTS: TYPE WORK WITH OCCASIONALLY (BUYER, % TOP 2 BOX)

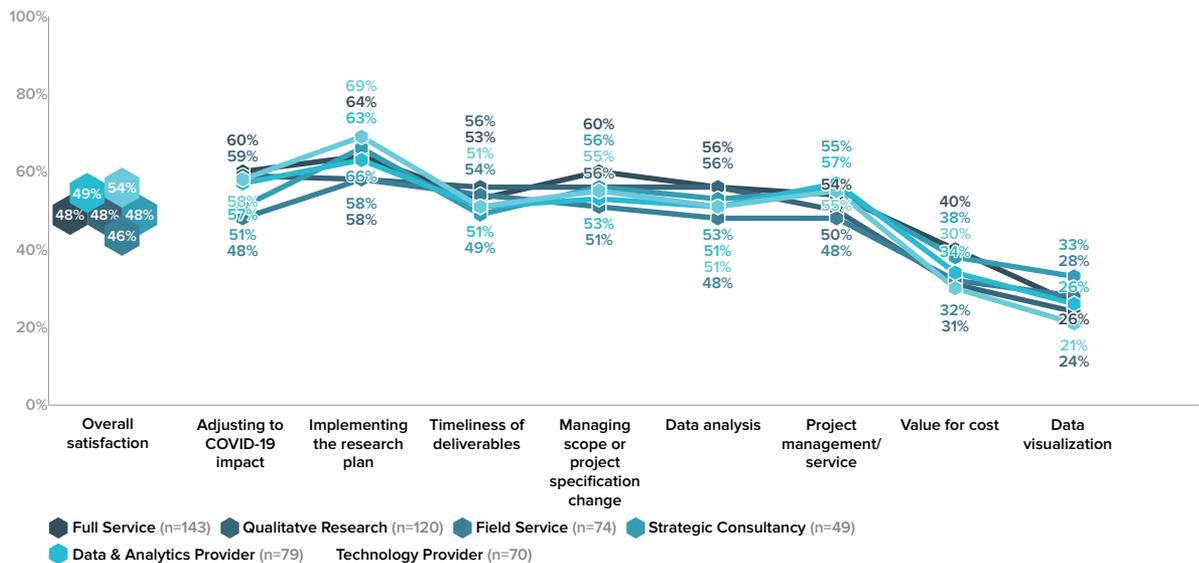


With respect to tactical aspects, a couple of observations about portfolios in which suppliers types are used occasionally jump out:

- Adjusting to COVID-19 impact has the widest satisfaction range, with portfolios that occasionally use field service and/or qualitative research providers on the low end
- The next widest range occurs with data visualization; portfolios that occasionally use qualitative researchers are on the high end and those that occasionally use technology providers are on the low end

Insights work that includes field service or qualitative research may have the highest potential for in-person human interaction. It's possible that buyers are less satisfied with how these projects have adjusted to COVID-19 because they don't like how the human interaction has been handled or replaced. Another possibility is that the providers have introduced more restrictions on the work, making it more difficult or expensive to execute.

SATISFACTION WITH SUPPLIERS ON TACTICAL ASPECTS: TYPE WORK WITH OCCASIONALLY (BUYER, % TOP 2 BOX)



This analysis has presented very simple examples of supplier portfolios defined by one supplier type and one level of usage. Though portfolios with multiple supplier types and different levels of usage are clearly more in line with reality. Perhaps fully specifying portfolios along these dimensions would discover even stronger relationships between satisfaction and how suppliers are used. Short of that, the analysis is consistent with the hypothesis

that satisfaction with suppliers may be driven more by the configuration of a portfolio than by experience with any particular supplier or supplier type. For example, the analysis suggests that satisfaction may be enhanced in certain situations when occasional use of a data and analytics provider complements use of other suppliers in the portfolio, but perhaps not when a data and analytics provider is used regularly.

The analysis is consistent with the hypothesis that satisfaction with suppliers may be driven more by the configuration of a portfolio than by experience with any particular supplier or supplier type



DRIVERS OF BUYER 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, it will not be a significant driver (even though it may, in fact, be critical). 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 focused on the aspects classified as "strategic." The strongest driver was conducting the research, which is pretty much table stakes for a research supplier (though irrelevant to insights suppliers who do not conduct research). Next strongest was understanding the issue to be addressed, and, unfortunately, these two aspects

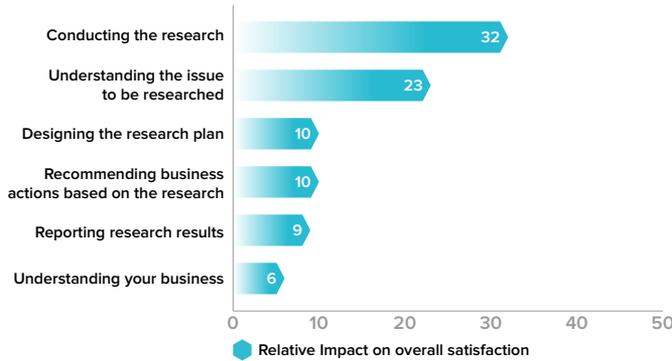
had the biggest drops in satisfaction since 19W2, 7 points and 4 points, respectively. With this insight, it is easier to understand why overall satisfaction declined in spite of increases on many aspects: the declines on these two aspects made more of a difference to buyers' overall satisfaction than the improved aspects made.

The second tier of strategic drivers included recommending actions, designing the research plan, reporting research results, and understanding their business (interacting with senior management did not drive overall satisfaction in this analysis). As alluded in the preceding paragraph, these aspects do not apply to every type of supplier, and the analysis accounts for that fact. For example, a buyer may not expect a sample provider to deliver business recommendations based on the completed research. If such a case were to occur, the buyer could indicate in the survey that this was not expected of their suppliers instead of providing a satisfaction rating. Therefore, this analysis does not penalize suppliers for not providing benefits that are outside of their scope of services.

The apparent importance of making adjustments for COVID-19 is a good example of how drivers can change from time to time

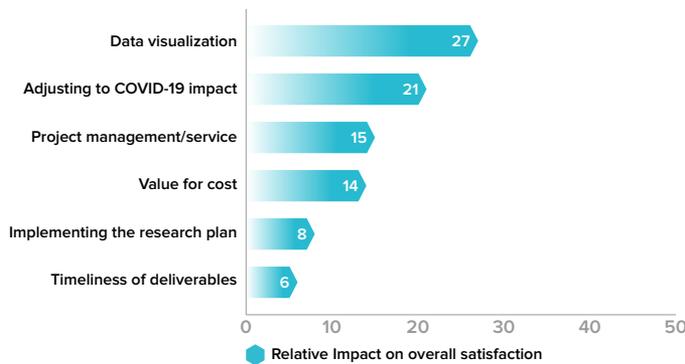


SUPPLIER PERFORMANCE DRIVERS: STRATEGIC ASPECTS (BUYERS)



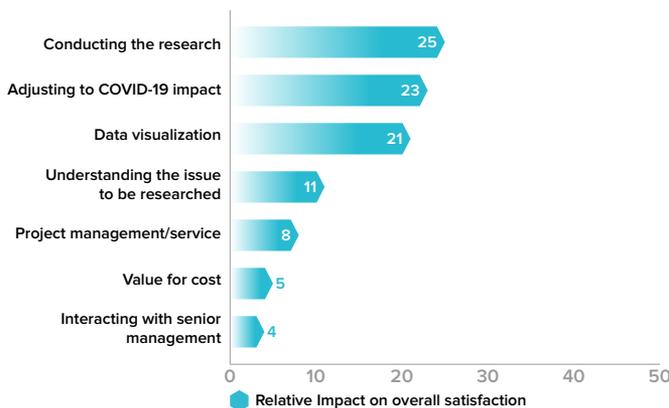
A similar analysis of the tactical aspects found data visualization to be the strongest driver of satisfaction with supplier performance. Followed by, somewhat surprisingly, adjusting to the COVID-19 impact. The apparent importance of making adjustments for COVID-19 is a good example of how drivers can change from time to time: we can assume this would have had no significance in 19W2. The finding immediately leads to the question, what do buyers observe that differentiate between excellent and sub-par adjustment to COVID-19? Unfortunately, the GRIT study did not probe that issue.

SUPPLIER PERFORMANCE DRIVERS: TACTICAL ASPECTS (BUYERS)



The next tier of tactical drivers consists of project management and service and value for cost. The final tier includes implementing the research plan and timeliness of deliverables. Data analysis and managing scope and project specification changes did not drive overall satisfaction in this analysis.

SUPPLIER PERFORMANCE DRIVERS: ALL ASPECTS (BUYERS)



Finally, a driver analysis was conducted which included all aspects, strategic and tactical. When it was completed, seven of the fifteen aspects were found to influence overall satisfaction. The top three drivers were conducting the research (which led the strategic drivers), adjusting to the impact of COVID-19 (second among the tactical drivers), and data visualization (first among tactical drivers). The final four were understanding the issue to be researched (second among strategic drivers), project management and service (third on the tactical list), value for cost (fourth on the tactical list), and interacting with senior management, which was not among the strategic drivers but became relevant in this context.

SUPPLIERS' PERCEPTIONS OF PERFORMANCE

Suppliers were asked their opinion of how well suppliers who share their professional focus meet client needs overall and on the same 15 aspects evaluated by buyers. Overall, full and field service providers gave their segments higher ratings (60% and 65% completely meet needs/meet needs very well, respectively) than strategy consultants (52%), data and analytics providers (46%) and technology providers (38%).

With respect to strategic aspects, full-service providers see themselves as performing well when the research is the main focus, strategy consultants see themselves as strong across the board, and the other supplier types don't seem to see themselves as very strongly positioned on strategic aspects. Higher self-ratings went to:

- Full-service providers: conducting the research, designing the research plan, reporting research results, and understanding the issue to be researched
- Field service providers: none
- Strategy consultants: all

- Data and analytics providers: none
- Technology provider: none

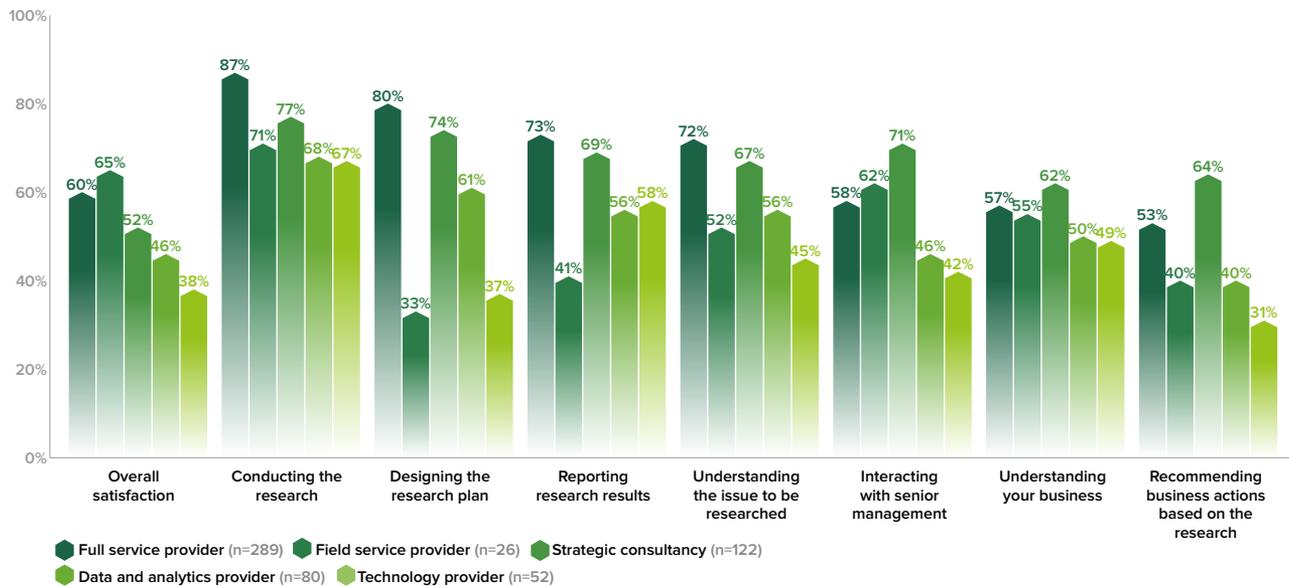
Notable lower self-ratings come from specialists on aspects in which they would not normally be expected to participate:

- Field service providers: designing the research plan, reporting research results, understanding the issue to be researched, and recommending business actions based on the research
- Data and analytics providers: interacting with senior management, understanding their business, and recommending business actions based on the research
- Technology providers: designing the research plan, understanding the issue to be researched, interacting with senior management, understanding their business, and recommending business actions based on the research

With respect to strategic aspects, full-service providers see themselves as performing well when the research is the main focus, strategy consultants see themselves as strong across the board



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



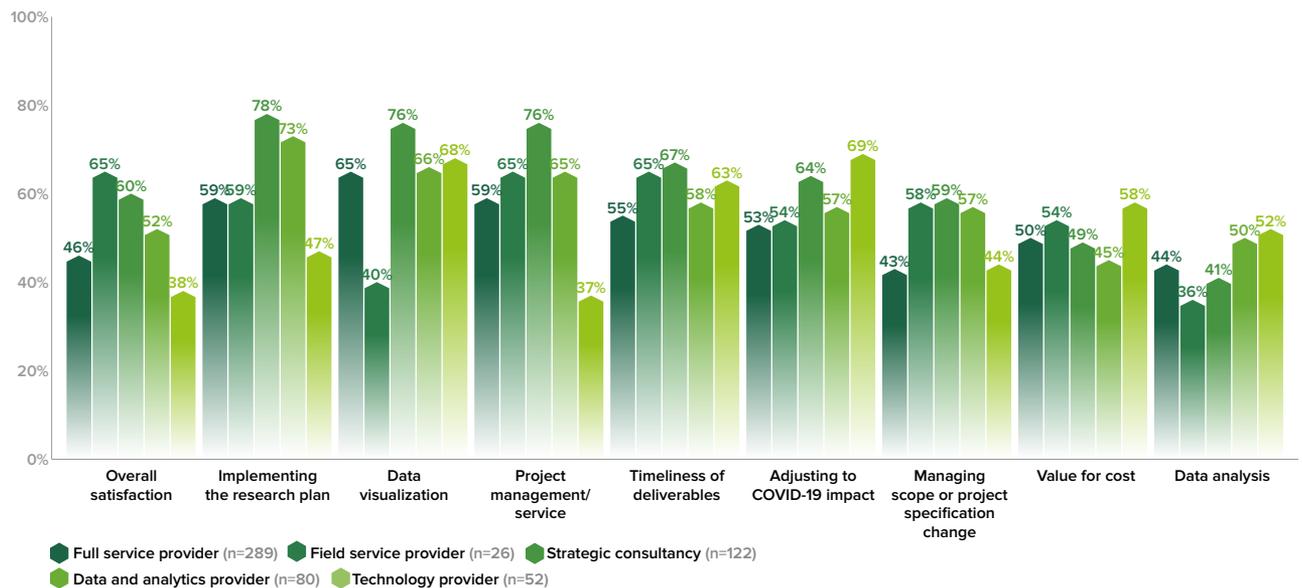
With respect to tactical aspects, higher self-ratings went to:

- Full service providers: implementing the research plan, data visualization, and project management and service
- Field service providers: implementing the research plan, data visualization, and project management and service
- Strategy consultants: implementing the research plan
- Data and analytics providers: none
- Technology provider: value for the cost

Lower self-ratings included:

- Full service providers: data analysis
- Field service providers: data analysis
- Strategy consultants: timeliness of deliverables, adjusting to COVID-19 impact
- Data and analytics providers: implementing the research plan, project management and service, timeliness of deliverables, adjusting to COVID-19 impact, and managing scope or project specification change
- Technology provider: implementing the research plan, project management and service, and managing scope or project specification change

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



Supplier self-ratings align with buyer ratings in some ways, but diverge in others. Table 4 shows top 2 box scores for buyers and suppliers; however, because they answered different questions, it may be more relevant to compare the rank order.

First, taking the top 2 box scores at face value, we'll revisit previous GRIT Reports which subtracted the buyer scores from the supplier scores. Interestingly, the overall ratings are fairly close, 51% for buyers to 55% for suppliers. In this analysis, positive differences are considered to be areas where

suppliers are over-confident and negative scores reflect under-confidence. Table 4 is sorted from most over-confident to most under-confident.

By far, the biggest area of over-confidence is data visualization with a gap of 41%. A possible driver of this difference may be various interpretations of what data visualization means, and buyers may have a more sophisticated view than most suppliers. The next biggest areas of over-confidence are recommending business actions (20%) and reporting research results (18%). Other

By far, the biggest area of over-confidence is data visualization with a gap of 41%.



areas with a gap of 10% or more are understanding their business (12%), designing the research plan (11%), value for cost (10%), and conducting the research (10%). Unfortunately, three of these are satisfaction drivers for buyers: data visualization, conducting the research, and value for cost.

At the “under-confident” end of the scale, the only aspect that jumps out is data analysis. However, some types of suppliers do not do much data analysis; this gap may be irrelevant if the suppliers who are more responsible for it are aligned with buyers.

With respect to the rank order, buyers and suppliers are aligned on conducting the research (both #1), implementing the research plan (both #2), designing the research plan (#4 versus #3), project management and service (both #6), timeliness of deliverables (#7 versus #8), understanding the issue to

be researched (#8 versus #7), interacting with senior management (both #10), understanding their business (#12 versus #11), and recommending actions (#14 versus #13). Buyers and suppliers are perfectly aligned on the top two areas of performance and well aligned on five other aspects in the buyers’ top 10.

However, there are aspects which are misaligned, and the most danger for suppliers is to over-estimate performance where buyers think they do poorly. These areas are data visualization (dead last for buyers, #4 for suppliers) and reporting research results (#11 versus #5). Suppliers should take a moment to consider whether these are aspects on which they are expected to deliver. Then evaluate how well they are aligned with client expectations of visualization and reporting.

SUPPLIER PERFORMANCE, TABLE 4

	Top 2 Box %					
	Scope	Buyer	Supplier	Delta (Supplier – Buyer)	Buyer Rank	Supplier Rank
Overall satisfaction	Overall	51%	55%	3%		
Data visualization	Tactical	29%	70%	41%	15	4
Recommending business actions based on the research	Strategic	31%	51%	20%	14	13
Reporting research results	Strategic	49%	67%	18%	11	5
Understanding their business	Strategic	44%	56%	12%	12	11
Designing the research plan	Strategic	60%	71%	11%	4	3
Value for cost	Tactical	39%	49%	10%	13	14
Conducting the research	Strategic	70%	80%	10%	1	1
Understanding the issue to be researched	Strategic	56%	66%	9%	8	7
Project management/service	Tactical	58%	67%	9%	6	6
Timeliness of deliverables	Tactical	56%	63%	7%	7	8
Interacting with senior management	Strategic	52%	58%	7%	10	10
Implementing the research plan	Tactical	66%	71%	5%	2	2
Adjusting to COVID-19 impact	Tactical	63%	61%	-3%	3	9
Managing scope or project specification changes	Tactical	59%	55%	-4%	5	12
Data analysis	Tactical	54%	44%	-9%	9	15
<i>n= (maximum)</i>		199	574			

THE BIG PICTURE

Suppliers think they perform well on data visualization and reporting, but buyers are not impressed with their performance



After an uptick in 19W2, buyer satisfaction with supplier performance is down overall and on some fundamental service aspects that also happen to be important drivers of buyer satisfaction: understanding the issue to be researched, implementing the research plan, and conducting the research. Further, suppliers think they perform well on data visualization and reporting, but buyers are not impressed with their performance. In normal times, we might tick off the list of areas for improvement, admonish suppliers for their poor performance, and sternly give them free advice that is much more easily given than implemented.

But, as we are all too well aware, these are not normal times, and there is more at work here than suppliers misreading buyer needs. In this report's section on Management Strategies, we discuss how priorities have changed or, perhaps more precisely, *grown*, and how these changes suggest some buyers are looking for new suppliers to help them meet new challenges. In this section, we have touched on how buyers may not be able to afford to work with their normal palette of suppliers, and thus may be relying on a smaller set of suppliers to perform outside of their comfort zones. And let's not forget that many suppliers are working with reduced staff and other resources and may not be able to meet all buyer expectations all the time.

Buyers working with new suppliers using new methods to address new challenges, buyers possibly working with a reduced set of suppliers, and suppliers struggling to muster the resources to meet buyers' and their own standards... should we be asking why satisfaction is down, or should we be asking why isn't satisfaction down *more*?



Should we be asking why satisfaction is down, or should we be asking why isn't satisfaction down more?

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BUSINESS OUTLOOK

The starkest indications of the profound impact of 2020 on the insights and analytics industry can be found in our analysis of the business outlook. Throughout this report we have shown how the role of technology in reshaping the practice of research has accelerated, but herein we demonstrate how that

transformation is significantly impacting the business itself. Buyers are doing more with less and often doing it themselves. Traditional suppliers are scrambling to find new business models and value propositions, and technology providers continue to gain strength while redefining mainstream insights work.

THE OPTIMISM INDEX

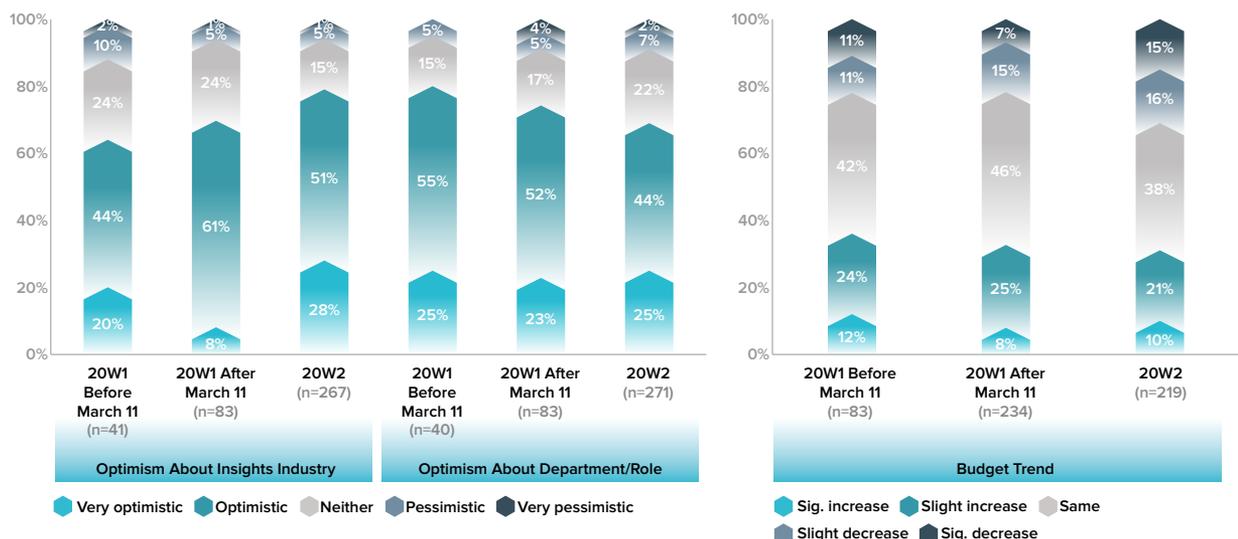
It appears that buyers are more confident about the world around them than in the spring, but more concerned about their security in it



For the Business Outlook section of the GRIT Business Innovation Report published last summer, we declined to ignore the obvious and began with a discussion on what we could understand from the impact of the COVID-19 pandemic on the insights industry. A week into the fieldwork, 11 March, the pandemic hit a sort of tipping point when it became nearly impossible for even the most stubborn skeptic to dismiss its significance. These circumstances created the morbid opportunity to compare responses collected prior to 11 March to those collected after.

To that comparison, we now add responses collected this fall. In the spring, there were minor differences among buyers with respect to optimism or annual research project budget. This was not very surprising because the full impact of the pandemic was not well understood. The budget looks back over the past 12 months so budgets were unlikely to have been affected yet. The current data, however, indicates that optimism about the industry is up while optimism about their role at their company is slightly less optimistic. The budget data also shows a more pronounced decline in research project spending. It appears that buyers are more confident about the world around them than in the spring, but more concerned about their security in it.

OPTIMISM, BUDGET, & COVID-19 EFFECT (BUYER)



Suppliers have experienced something quite different. Similar to buyers perspective in the spring on budgets, suppliers didn't see much change in revenue because it was a 12 month look back. Their optimism about the insights industry didn't change, but they became less optimistic about their company. As with buyers, optimism about the insights industry rebounded strongly in the fall. However, supplier revenue fell off a cliff, and optimism about their company grew even weaker.

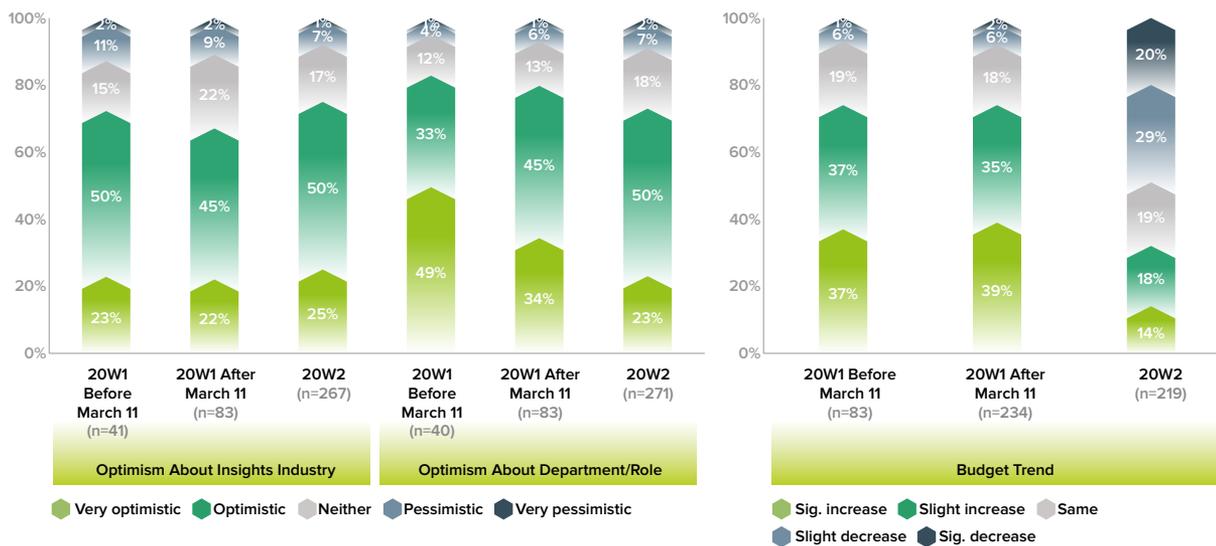
The revenue downturn is sobering. If the number of suppliers reporting a revenue decrease was only half of this amount, it would still be unprecedented In the GRIT Report. Wave after

wave, the GRIT Report, without fail, shows supplier revenue increases more than doubling decreases. The suspicion is that GRIT would never see a lower ratio because suppliers who consistently lose revenue eventually disappear, but 2020 has been an endless series of bad surprises. The revenue trend pattern suggests that many suppliers are running on fumes, trying to outlast the pandemic. Yet, if that were the case, optimism about their company wouldn't have weakened, it would have collapsed. This leads one to speculate that the reason why there is any optimism at all is because the supplier employees most at risk are already gone while a few mildly relieved survivors remain.

The revenue downturn is sobering. If the number of suppliers reporting a revenue decrease was only half of this amount, it would still be unprecedented In the GRIT Report



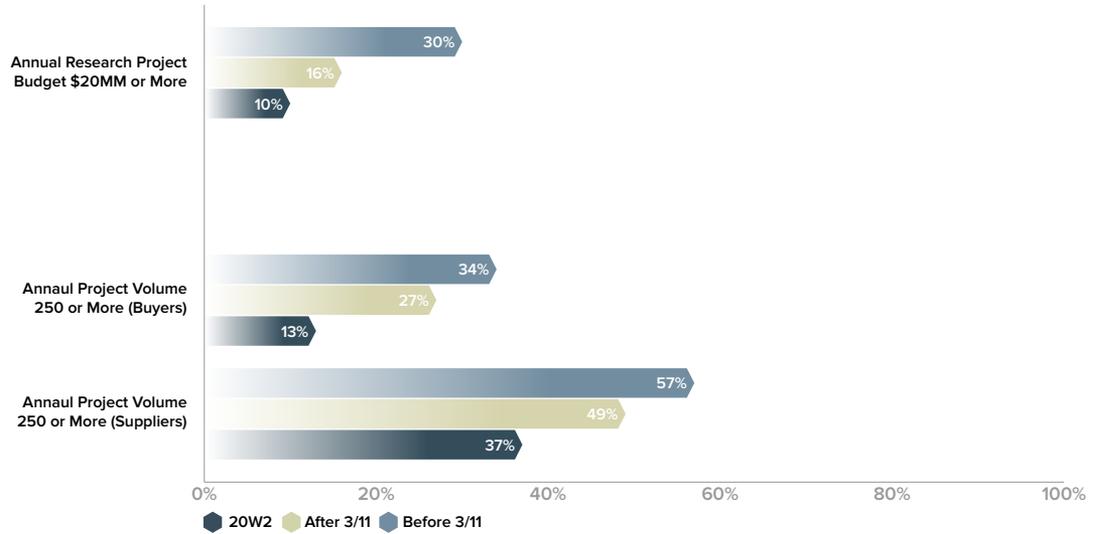
OPTIMISM, REVENUE, & COVID-19 EFFECT (SUPPLIER)



The 20W1 analysis did not identify any downturn in project spending or supplier revenue, but there were some clues about what was to come. Buyers surveyed after the COVID-19 tipping point were only about half as likely to have annual project budgets of \$20MM+ as buyers who took the survey earlier. The percentages of buyers and suppliers reporting annual research project volumes of 250 or more also declined. These may be spurious results caused by uneven sampling across different points

in time, but each of these trends continued with the fall wave. Instances of research project budgets of \$20MM or more are one-third of what was measured in early March, and the instances of buyer project volumes exceeding 250 have declined at a similar rate. (Caveat: it can be difficult to compare budgets reported in the spring to budgets reported in the fall, and GRIT usually compares spring to spring and fall to fall).

ANNUAL RESEARCH PROJECT BUDGETS, PROJECT VOLUMES, & COVID-19 EFFECT (BUYER & SUPPLIER)

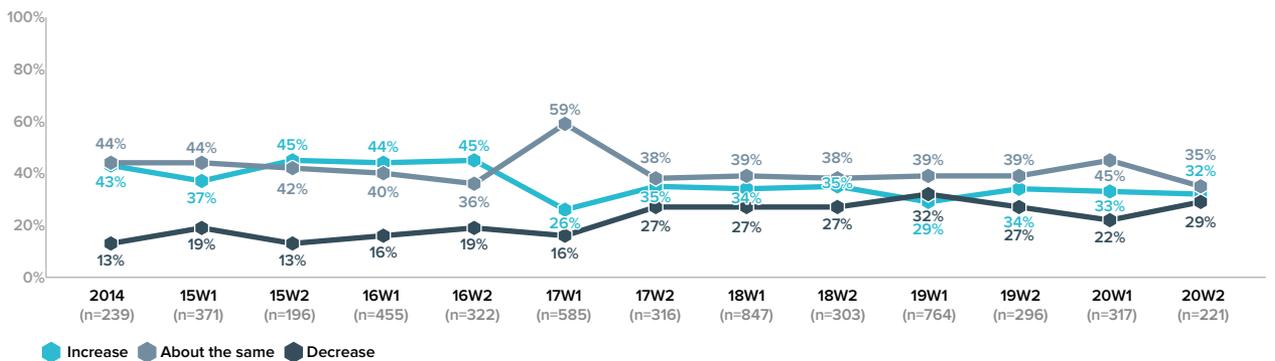


RESEARCH PROJECT SPENDING TRENDS

When diagnosing the health of the insights industry, the trend in research project spending is the first metric GRIT considers. Increases in research spending generally means that buyers are busy and suppliers have more revenue available to them. Busy buyers spending on research and supplier revenue gains lead to more employment within the industry, and all these developments will be healthy. Perhaps this is a simplistic view, but it is a starting point and it's only one metric.

It may seem counter-intuitive given the times, but annual research project budget increases and decreases are pretty much in the same range as they have been for seven consecutive waves starting with 17W2: about one-third of buyers (32%) have seen increases and nearly as many have seen decreases (29%). Perhaps this represents a kind of equilibrium. A company experiencing bad times might invest in insights as a way to get back on track, while a company in a better circumstance might need less to do the same or more work because they have invested in efficiency.

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



While the percentages of buyers who increase and decrease, research budgets is one of GRIT's oldest metrics and provides a snapshot of what research professionals as a population are experiencing, we know that all budgets are not equal and there is more to the story. As mentioned earlier, the percentage of large budgets (\$20MM or more) appears to have decreased dramatically in the COVID-19 era, and it would take a lot of individual increases from smaller budgets to replace that spending.

Focusing on the second GRIT wave of each year since 17W2, the percentage of small budgets (\$1MM) fluctuates more than any other category. In this GRIT wave, it is the largest recorded percentage yet (43%). The largest budget category shown in the accompanying table and chart, more than \$10MM, fluctuates the least, but has declined gradually and consistently since 17W2, from its high of 16% to its new low of 12%. Compared to last year, the proportions of budgets in categories above \$3MM are stable; the under \$1MM category has grown at the expense of the \$1MM to \$3MM category.

Compared to last year, the proportions of budgets in categories above \$3MM are stable; the under \$1MM category has grown at the expense of the \$1MM to \$3MM category

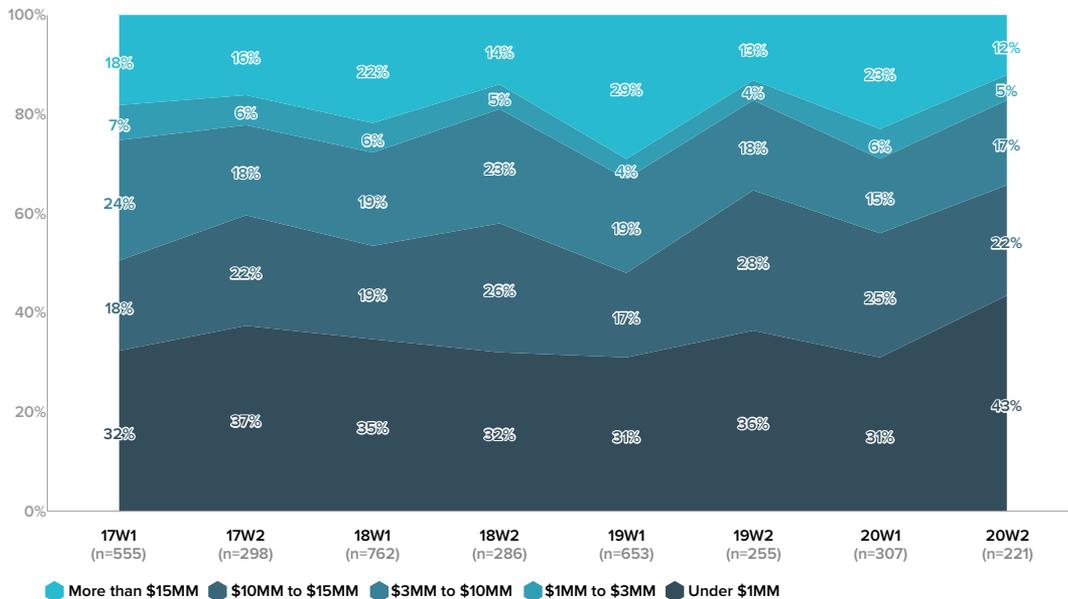


BUSINESS OUTLOOK, TABLE 1

Annual Research Project Budget Size Category	Category Size (% of Buyers, Fall GRIT Waves*)			
	Smallest	Largest	Range	Net Change since 17W2
Under \$1MM	32%	43%	11%	6%
\$1MM to \$3MM	22%	28%	6%	0%
More than \$3MM to \$10MM	17%	23%	6%	-2%
More than \$10MM to \$15MM	4%	6%	2%	-1%
More than \$15MM	12%	16%	4%	-4%

*This analysis focuses on the fall waves to enhance measurement consistency. Annual budgets can change throughout the year, and aggregate fall budgets may not track well with aggregate spring budgets.

ANNUAL RESEARCH PROJECT BUDGET SIZE: GRIT WAVE (BUYER)

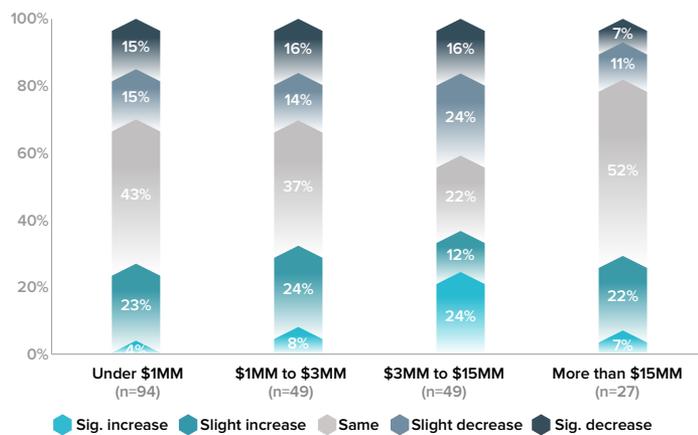


In fact, 30% of buyers with budgets under \$1MM experienced a budget decrease, and it is likely that most of these were in the \$1MM to \$3MM category last year, accounting for the shift in category size. The same proportion of buyers with current budgets of \$1MM to \$3MM saw decreases, and we do not know how many of these were in the same category last year versus how many were in a larger budget category.

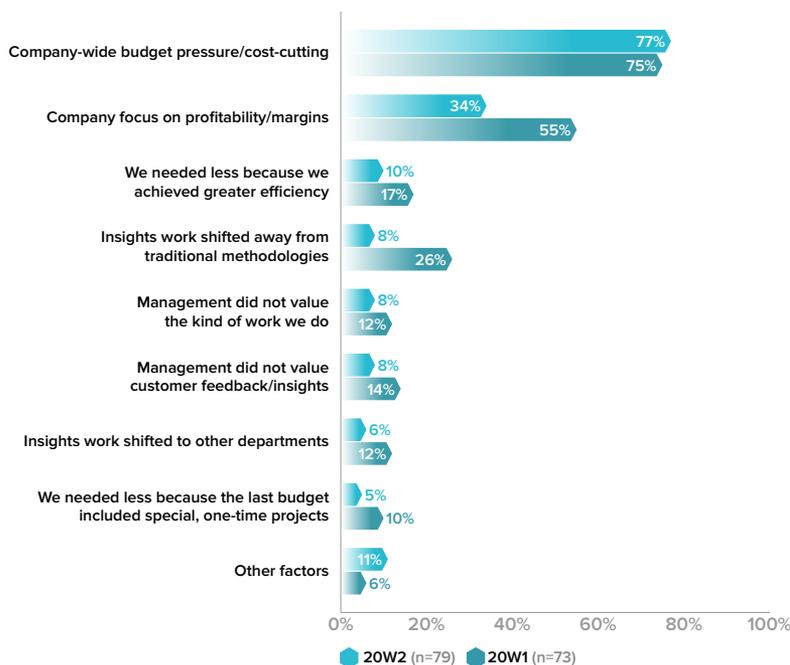
The stability of the sizes of the two largest categories may not be as reassuring as it seems at first glance. In the \$3MM to \$15MM category, 36% saw budget increases, but a larger percentage (40%) experienced decreases. We don't know how many of these decreases were formerly in the more than \$15MM category last year; these could represent moderate losses to the industry or they could represent large dollar amounts, depending on the average magnitude. It's potentially encouraging to see that the category with the largest budget amounts saw more increases (29%) than decreases (18%), but, again, we don't know the magnitudes of each. However, in 19W2, decreases far exceeded increases, so the 20W2 findings are encouraging, if not conclusive.

The two most significant factors behind budget decreases usually reflect company-wide strategies that also affect other budgets and are not specific to insights departments. In 20W1, company-wide budget pressure and cost-cutting was the most significant driver (75% of decreases) followed by company focus on profitability and margins (55%). On average, buyers cited 2.3 significant drivers of budget decreases. In 20W2, the two most significant drivers are the same, but buyers only cited 1.7 significant drivers on average and company-wide budget pressure is clearly the primary driver. As in 20W1, three-quarters of buyers who experienced decreases cited company-wide budget pressure and cost-cutting, but only 34% cited company focus on profitability and margins, compared to 55% in the last GRIT wave. Other drivers were also cited less frequently, particularly the shift of insights work to other departments, cited by only 8% versus 26% in the preceding GRIT wave. The pattern suggests that many buyers have had to put certain initiatives on hold while they focus on trying to stop the bleeding.

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



SIGNIFICANT FACTORS BEHIND BUDGET DECREASE (BUYER)



In the \$3MM to \$15MM category, 36% saw budget increases, but a larger percentage (40%) experienced decreases

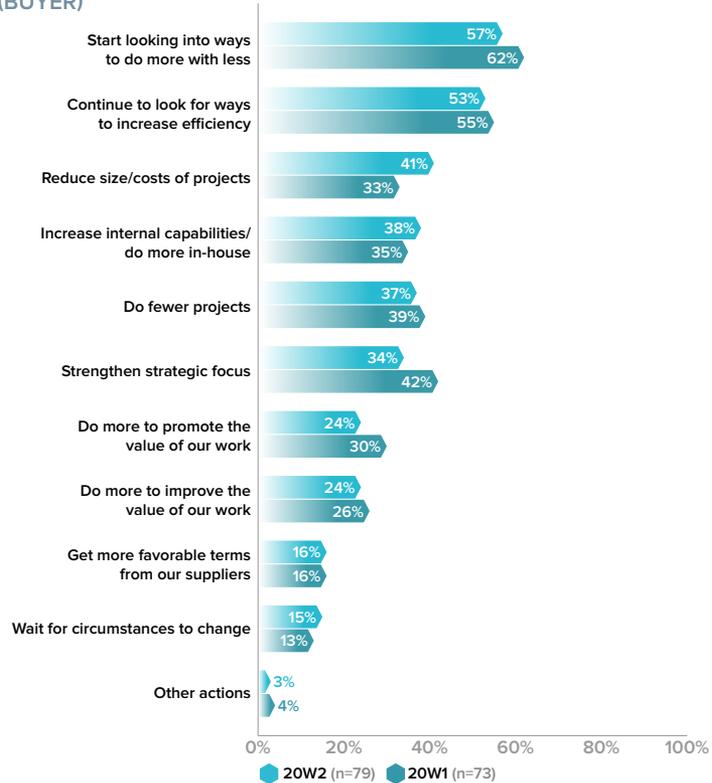


Insights departments will respond to budget decreases similarly to how they would in the past. In both 20W1 and the current wave, buyers named about 3.5 ways in which they will respond, most saying they will start looking for ways to do more with less and continue to look for ways to increase efficiency. The main difference between the two GRIT waves is that fewer will strengthen their strategic focus (34% versus 42%) and more will reduce the size and costs of their projects (41% versus 33%). There was not a surge in buyers looking to reduce their project volume (37% versus 39%), do more in-house (38% versus 35%), or demand more favorable terms from suppliers (16% in each wave). It looks like the major blowback on suppliers is smaller projects generating less revenue, plus the larger reality that more buyers have less money to spend.

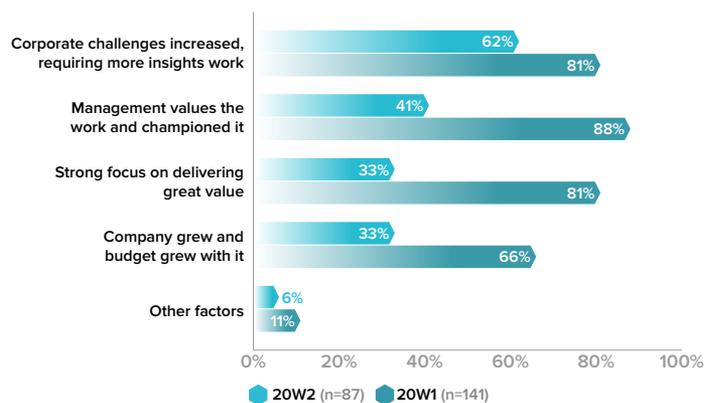
On the other end of the spectrum, nearly one-third of buyers saw their research project budgets increase. In 20W1, buyers cited an average of 3.3 significant factors behind the increase, and more than 80% attributed the increase to an increase in corporate challenges, management valuing and championing the work, and their strong focus on delivering great value. In addition, two-thirds said the company grew and the budget grew with it.

In 20W2, buyers named an average of only 1.8 drivers. Most said the increase was driven by increased corporate challenges (62%), but no other driver was mentioned by a majority. Management valuing and championing the work was the second most significant driver (41%), followed by company growth and strong focus on delivering great value (33% each). In better days, budget increases may be driven by multiple factors. When times are tough, however, the main driver of budget growth seems to be the belief that these challenges can be addressed via insights work, and it doesn't hurt if management already believes that.

HOW INSIGHTS FUNCTION WILL RESPOND TO BUDGET DECREASE (BUYER)



SIGNIFICANT FACTORS BEHIND THE BUDGET INCREASE (BUYER)



When times are tough, however, the main driver of budget growth seems to be the belief that these challenges can be addressed via insights work, and it doesn't hurt if management already believes that



SUPPLIER REVENUE TRENDS

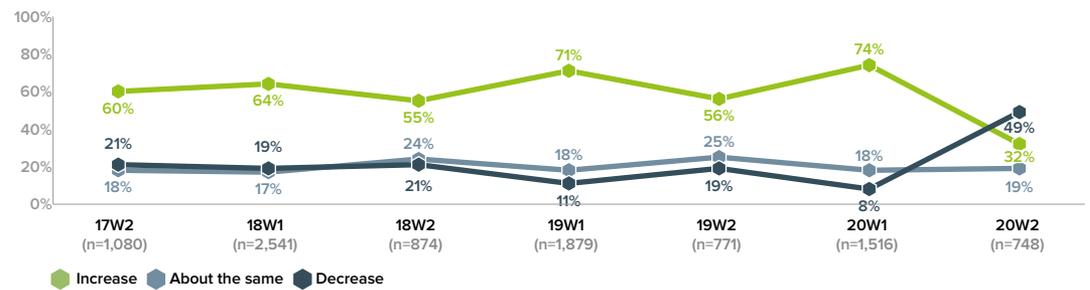
The supplier revenue trend is unprecedented, perhaps even apocalyptic



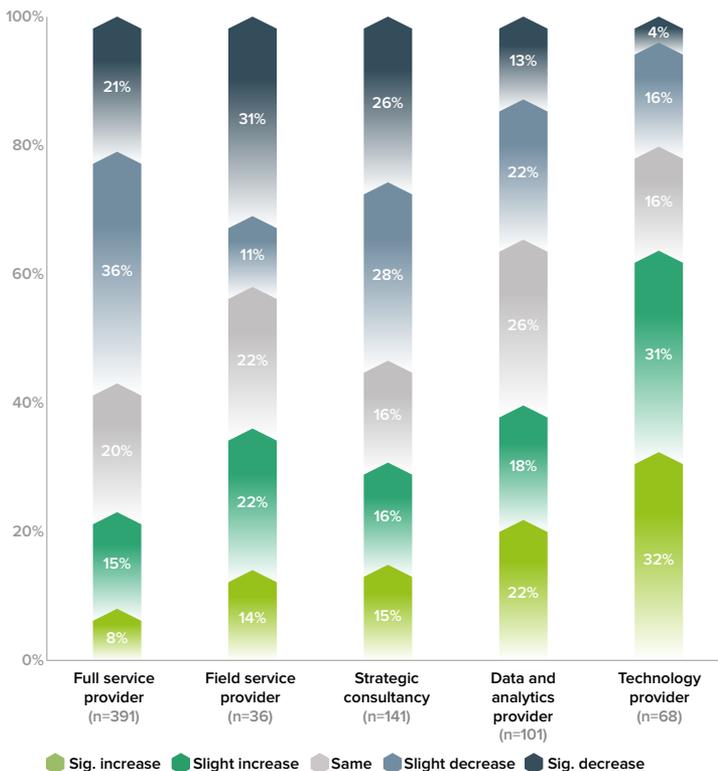
Although the research project spending trend looks pretty much the same as it has since 17W2, the supplier revenue trend is unprecedented, perhaps even apocalyptic. For the first time, the ratio of supplier revenue increases to decreases is less than 2.6 to 1; in fact, it is less than 1 to 1 because for the

first time, the revenue decreases outnumber the revenue increases (49% versus 32%). Given these circumstances, it's not hard to hypothesize that the average research project spending decrease is much larger than the average increase.

REVENUE TREND: GRIT WAVE (SUPPLIER)



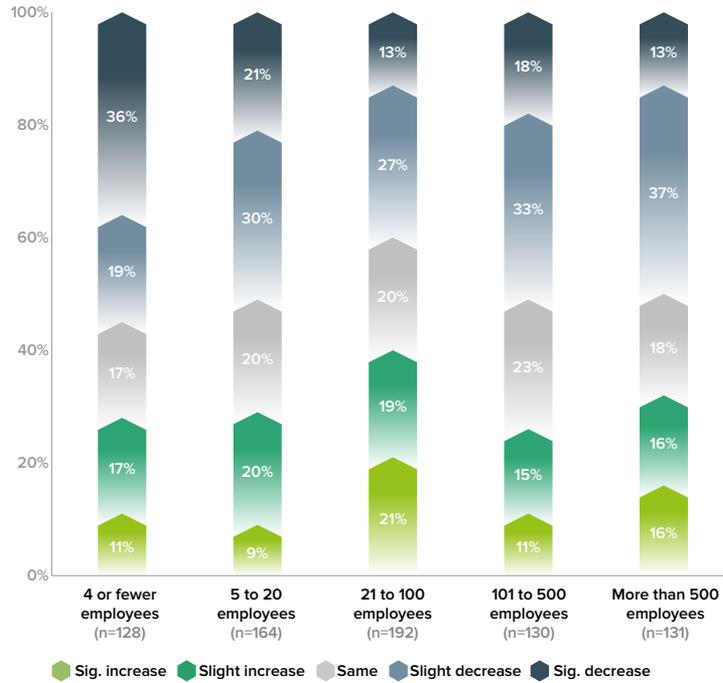
REVENUE TREND: SUPPLIER PROFESSIONAL FOCUS



The devastation has not been equally distributed across the industry because some professional focus areas were better positioned to succeed under the conditions of the pandemic. Generally speaking, the more specialized the supplier, the better the chance of thriving. Put another way, suppliers tended to be more successful when they offered necessary services that buyers could not easily take in-house. Most technology providers have done well; their revenue trend looks very much like the trend lines from every other GRIT Report. Data and analytics providers have not done as well as technology providers, but they have done a lot better than generalists (full-service providers and strategic consultancies). The next most specialized supplier type, field service providers, have also done better than the generalists, though not nearly as well as data and analytics providers. If one accepts the argument that strategic consultancies are more specialized than full-service providers, the rule still applies. Among technology providers, 63% experienced revenue increases while only 20% had decreases. At the other end of the spectrum, only 23% of full-service providers increased revenue while 57% saw their revenue decrease.

As discussed in past GRIT Reports, downturns often hit the smallest companies hardest, but that is less the case during the pandemic. Among companies with 4 employees or fewer, 28% experienced revenue increases while 55% had decreases; for suppliers with more than 500 employees, the percentages are similar, 32% and 50%. These magnitudes are consistent across all size categories except suppliers with 21 to 100 employees; their numbers are 40% increases versus 40% decreases. Although companies across size categories have suffered, a closer look suggests that, as so often happens, smaller companies are suffering more. For 36% of companies with 4 or fewer employees, revenue decreased significantly, and we don't know how many of these suppliers disappeared altogether, at least from GRIT data. In the adjacent size category, this number was only 21% and the other three categories were each below 20%.

REVENUE TREND: EMPLOYEE SIZE (SUPPLIER)

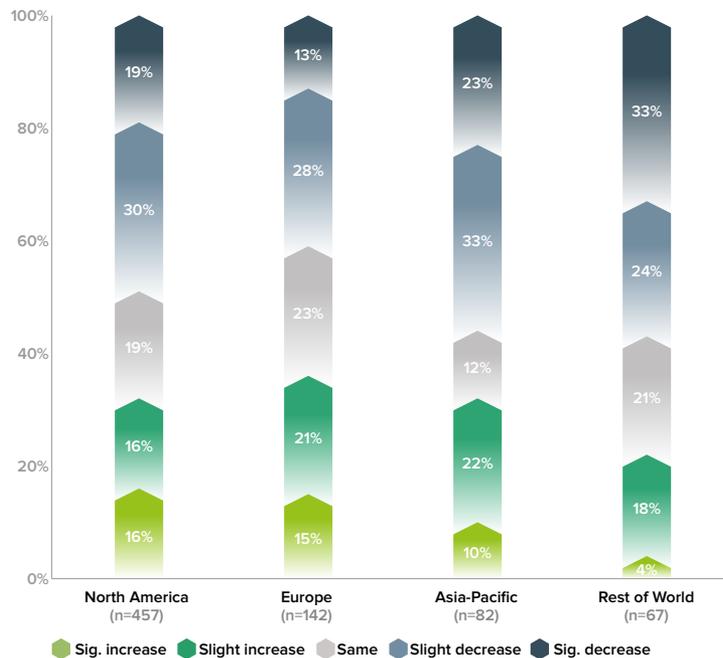


Suppliers tended to be more successful when they offered necessary services that buyers could not easily take in-house



The pandemic did not spare any region of the globe; in North America, Europe, Asia-Pacific, and the rest of the world, at least 41% of suppliers suffered revenue decreases. Europe has been most resilient with the highest amount of revenue increases (36%) and the lowest amount of decreases (41%). Asia-Pacific (56%) and the rest of the world (57%) have experienced the highest percentages of decreases, and the rest of the world has seen the fewest increases (22%). The rest of the world also has the most significant decreases (33%), ten points higher than Asia-Pacific, the next highest region (23%).

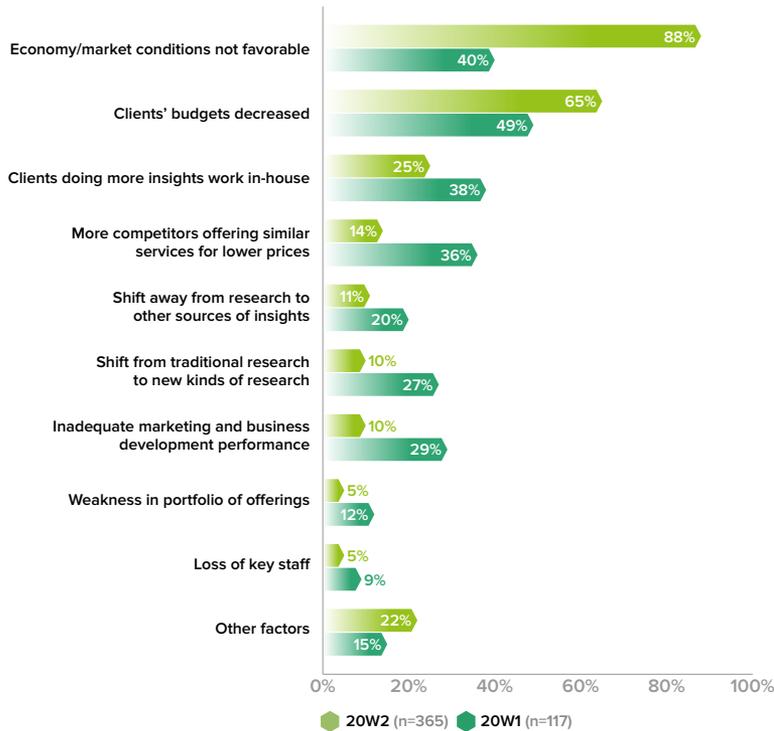
REVENUE TREND: GLOBAL REGION (SUPPLIER)



In North America, Europe, Asia-Pacific, and the rest of the world, at least 41% of suppliers suffered revenue decreases



SIGNIFICANT FACTORS BEHIND REVENUE DECREASE (SUPPLIER)



Most suppliers cited the unfavorable economy and market conditions (88%) and decreases in clients' budgets (65%) as significant drivers of the revenue decrease. In 20W1, less than half as many cited the economy and market conditions (40%) and only 49% pointed to decreased budgets. The top drivers in the spring were client budget decreases, economy and market conditions, clients taking more work in-house (38%), and more competitors with similar offerings at lower prices (36%). The latter two are also among the top four in this wave, though mentioned by only 25% and 14%, respectively. Clearly, the spotlight is on the economy and market conditions, their direct impact on suppliers, and their indirect impact via client constraints.

HOW ORGANIZATION WILL RESPOND TO THE REVENUE DECREASE (SUPPLIER)



Suppliers' expected responses to the revenue decreases are similar to the expected actions in the spring, with two exceptions: fewer think they can address it by improving marketing and business development (50% versus 60%) and more think they have to wait for change (33% versus 22%). The most frequently cited actions are to improve marketing and business development, more vigorously promote the value of their work (48%), strengthen their strategic focus (46%), and improve alignment client and market needs (46%).



IF ONLY YOU COULD HAVE SEEN THE LOOK ON MY FACE

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But you couldn't. It was 2020, and I was wearing a mask. If you passed me on the street, and you gave a friendly vibe, you got an exaggerated eye-smile back from me. If you were acting unpredictably, you got the suspicious eye-squint stare. If you looked menacing, you saw a strong furrow come across my brow. You might be thinking, "Geesh, what street does this guy live on?" But that person wasn't me. It was all of us. And we were all trying to communicate without two-thirds of one of our most communicative tools at our disposal: our face.

Where could we see faces expressing emotion? We saw it in our socially distant backyard barbecues, on our Zoom calls with colleagues and on the newly virtual conference circuit. But that was about it!

When it was obvious that in-person qualitative research was going to suffer mightily in March, our first notion was to launch a "We love Qualies!" campaign and offer our software as a solution. Qualitative research has long known that emotional meaning that can be derived from reactions on the face. Let me tell you, qualitative researchers didn't need our help.

The shift to online qual tools and technologies was swift. Budgets flowed to tech-enabled research, including a 20-point lift in webcam online focus groups, and a 12-point lift in webcam IDIs. Suppliers who were already providing these technologies were well positioned to service the changing market demands.

In fact, one of the most striking findings is how well technology-focused suppliers (+70.6) performed in 2020 relative to full-service firms (-43.6). More than ever, pressure was put on project timing, project budgets (49% reported a decline) and insights that led to direct business actions. For many without tech-enabled solutions, this meant putting an even greater squeeze on operations to get more out of less and in a shorter period of time.

For Sentient, it meant accelerating our product roadmap for an automated, 24-hour, behavioral-science based ad-testing platform. The integration of our implicit and facial expression technology could tell advertisers the moments of ads that were related to the change in perceptions of their brand. Immediate action could be taken to optimize the cut-downs to get more out of less media spend.

Quantifying the human emotional experience and increasing empathy

The success and survival stories of 2020 point to the potential of this moment to be transformative for our industry. An increased demand for data integration from buyers (64%) will demand technology innovation from suppliers. If we do not more fully embrace tech-enabled research services, we will see budgets for Insights functions continue to decline.

A challenge for buyers and suppliers alike will be the integration of a new big data stream. With humans expressing emotion on communication platforms that can now quantify those reactions, suddenly emotion data has become "big emotion data".

Are we ready as industry to systematically quantify this new stream of big emotion data, integrate it with our behavioral and attitudinal data streams and derive human insight?

In 2020, the human race started emoting into screens like never before. We now have technology that can quantify those emotional responses and help communicate our emotional experience to others. Let's use this new stream of big emotion data to become more emotionally intelligent and thereby increase our empathy for the human condition.

I wish you could see the look on my face when I imagine our tech-enabled industry making that kind of impact on the world.

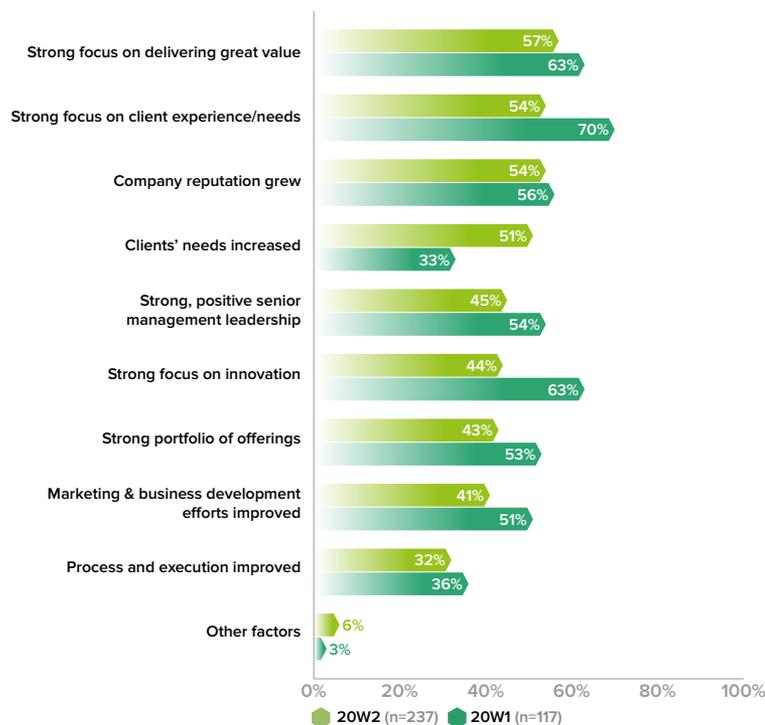
Among the 32% for whom revenue increased, most explained it as the outcome of their strong focus on delivering great value (57%)



Among the 32% for whom revenue increased, most explained it as the outcome of their strong focus on delivering great value (57%), strong focus on client experience and client needs (54%), growth of their company’s reputation (54%), and increased client needs (51%). The main difference from 20W1 was the significance of the increase in client needs (only 33% in 20W1) which jumped from ninth-ranked to fourth most significant. A few other differences are noteworthy:

- Strong focus on client experience and needs dropped from 70% to 54% and first place to second
- Strong, positive senior management leadership fell from 54% to 45% and remained fifth
- Strong focus on innovation dropped from 63% to 45% and tied for second to sixth
- Strong portfolio of offerings fell from 53% to 43% and sixth to seventh
- Marketing and business development efforts improved dropped from 51% to 41% and seventh to eighth

FACTORS BEHIND THE REVENUE INCREASE (SUPPLIER)



Although perhaps multiple narratives could be built from this, one that seems likely, given that we know specialists were the most likely to increase revenue, is that specialists were competing against other supplier categories before the pandemic, but not so much after it became a day-to-day reality. If they offered unique solutions, such as online platforms for quantitative research, the conditions under the pandemic would render the use of traditional suppliers problematic for a number of reasons while exposing the value of their solutions. If a client needed to conduct research but lacked the ability to hire a traditional supplier, the value of the technology solution would become clear to them. Tech providers would no longer have to put significant effort into differentiating their service from more familiar ones, and perhaps new clients would seek them out even if they had not been targeted by the provider.

Such a narrative would explain why factors such as focusing on client experience, strong senior management leadership, and marketing and business development were considered less significant; the client would be mostly pre-sold on the concept. It would also explain why innovation and portfolio were less significant: they no longer needed to differentiate against suppliers and solutions that might not be considered innovative. For prospects who came to them, the traditional solution was no longer an option, and the requirements to close a sale changed.

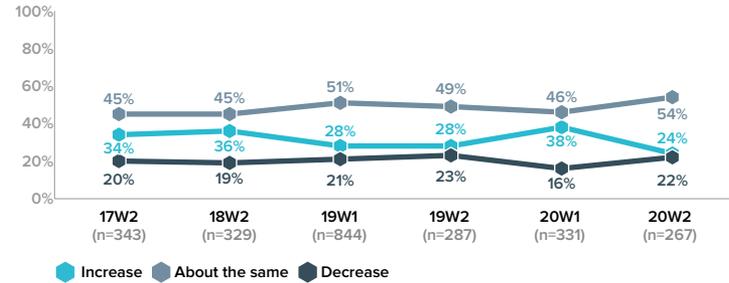
STAFF SIZE TRENDS

Staff sizes are trending downward compared to 20W1, but, somewhat surprisingly, are not much different from previous waves. Among buyers, staff size increases are at their lowest (24%), but the trends for decreases and no changes are very similar to 19W1 and 19W2. The base rate for buyers decreasing staff has hovered around 20% since 17W2, the first measurement. Most of the wave-to-wave movement has been between increases and no change. Comparing this wave to the more bullish 20W1 is not inspiring, but comparisons to earlier waves are not depressing, either.

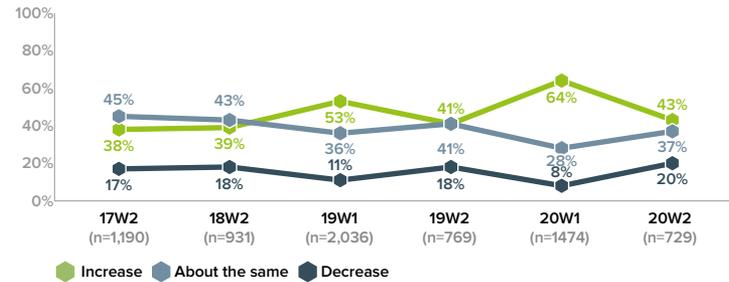
Surprisingly, the story is not much different for suppliers: the proportions of increases, decreases, and no change are similar to pre-20W1 measurements. Among buyers, increases reached their lowest level, and among suppliers, decreases have reached their highest (20%), though not by much, as two waves hit 18% and one hit 17%. In the current climate, these comparisons are encouraging, though we must consider them cautiously. As in the budget discussion, we don't know the magnitude of the average increase and the average decrease, so the bottom line may be better than it looks here or it may be worse.

On the buyer side, the percentage of staff decreases is 15% in each of the small (500 employees or fewer), medium (501 to 9,999), and large (10,000 employees or more) categories. Each size category had more than twice as many increases as decreases. The two differences are that the small and medium categories have more significant decreases than the large category, and the large category has more significant increases than the smaller categories. Of course, we don't know the average magnitude of each increase and decrease, but from this perspective, it seems encouraging to see that there is not a big dark gray skew in the larger size buyers.

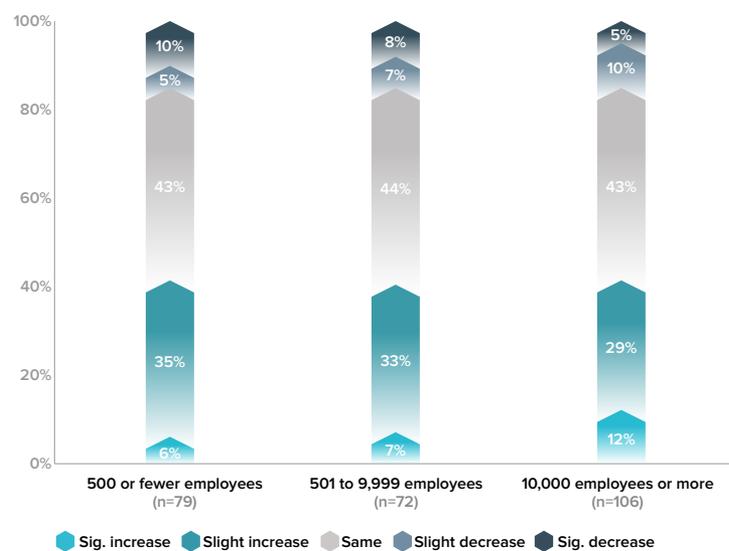
CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS: GRIT WAVE (BUYER)



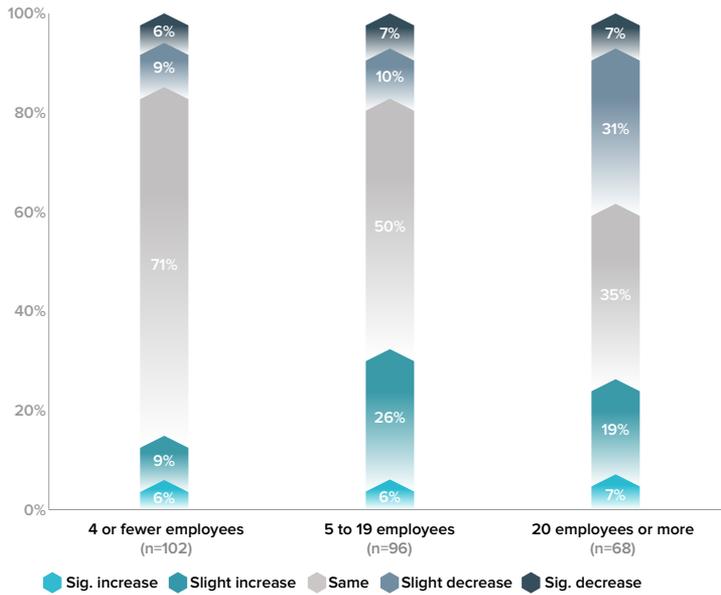
CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS: GRIT WAVE (SUPPLIER)



CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS: EMPLOYEE SIZE (BUYER)



CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS: DEPARTMENT SIZE (BUYER)



The warning signs on the supplier side are impossible to ignore. As company size increases, so does the proportion who lost staff



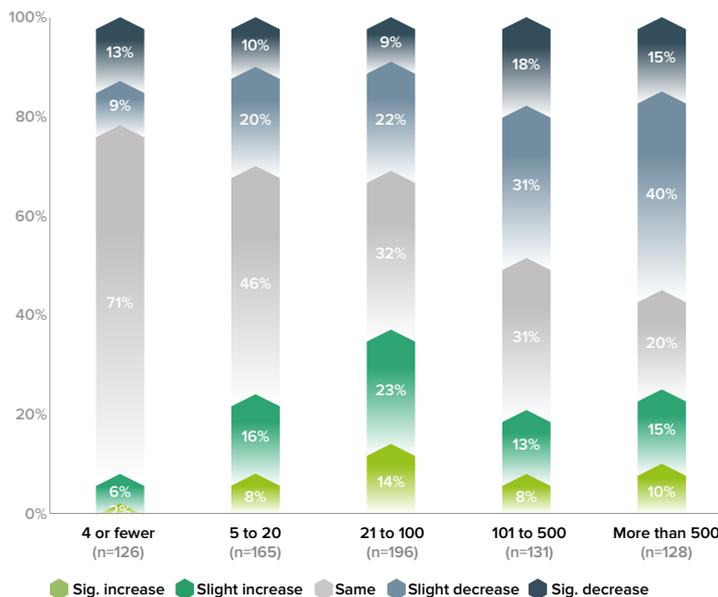
For the first time, GRIT buyer respondents were asked for the size of their department (suppliers were not). Looking at department size trends with the department size as the frame of reference proves to be a bit more unsettling. Departments with 4 employees or fewer were stable; 71% reported no change and increases and decreases are nearly perfectly symmetrical. Mid-size insights departments with 5 to 19 employees have about the same proportion of decreases as the smaller departments (17% versus 15%), but they report more than twice as many increases (32% to 15%). If one considers the proportion of significant increases, the two size categories are even (6% each); the difference is due to “slight increases.” However, a “slight” increase in a larger department might exceed a “significant” increase in a smaller one, so this is very encouraging.

The situation for departments of 20 employees or more, however, is not encouraging. Decreases outnumber increases by 38% to 26%, and 31% experienced slight decreases in full-time staff; only 19% saw slight increases. Again, we don’t know the average magnitude of each type of change, but seeing the largest department sizes soaked in dark gray is a warning sign that the insights industry is losing people.

The warning signs on the supplier side are impossible to ignore. As company size increases, so does the proportion who lost staff. Among suppliers with more than 500 employees, 55% lost staff while only 25% added to theirs. Companies with 101 to 500 employees were not much different as 49% experienced decreases compared to 21% who increased. This seems like a lot of personnel loss.

Earlier, we discussed how companies with 21 to 100 employees were anomalous with respect to revenue trends: 40% increased revenue and 40% decreased. They are similarly anomalous with respect to staff size trends: 37% increased and 31% decreased. Looking at decreases, they fit in with the trend for staff decreases to become more prominent as size categories represent larger companies. On the increase side, however, the middle-sized suppliers represent the apex of staff increases: the categories to either side have fewer.

CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS: EMPLOYEE SIZE (SUPPLIER)



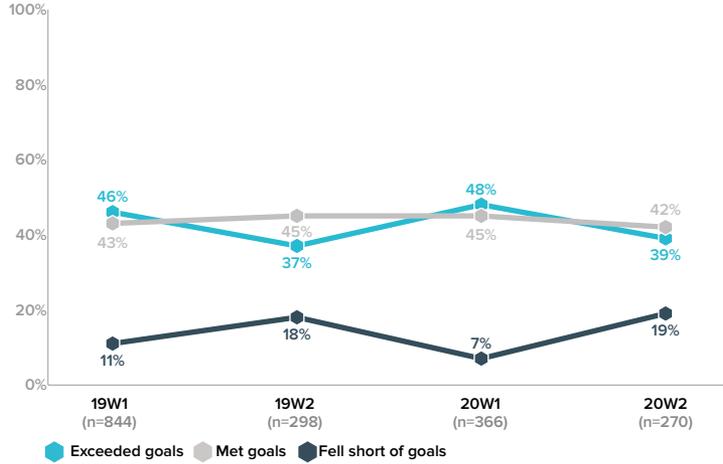
BUYER PERFORMANCE AGAINST GOALS

Despite the challenges posed by the pandemic, buyers met or exceeded their department's goals as much as they did a year ago: 39% exceeded goals this year versus 37%. In 19W2, 42% met goals versus 45% and 19% fell short versus 18%. Possibly, many buyers revised goals earlier in the year so they could be achievable.

As observed in previous GRIT Reports, exceeding goals is generally associated with a budget increases, and falling short of goals is associated with budget decreases – but not always. As usual, we see that some buyers who exceeded their goals experienced budget decreases. This is often the result of departments exceeding goals, one of which may be to increase efficiency and productivity. In this wave, 26% of those who exceeded goals also decreased budgets; in 19W2, the same percentage, 26% decreased budgets. For this same group, 46% increased budgets this wave compared to 42% in 19W2. It looks as though similar dynamics are at work.

Of those who fell short of goals, 42% saw budgets decrease this wave, including 36% whose budgets decreased significantly. In 19W2, these figures were 43% and only 13%. When goals were met, budgets decreased for 29%, including 13% significantly; in 19W2, these figures were 26% and 8%. (For those who exceeded goals this year, 7% decreased budgets significantly versus 5% in 19W2). Overall, the relationship between performance against goals and budget trend is consistent, and the only difference seems to be that the penalty for failing to meet goals is harsher now that budget decreases are more significant.

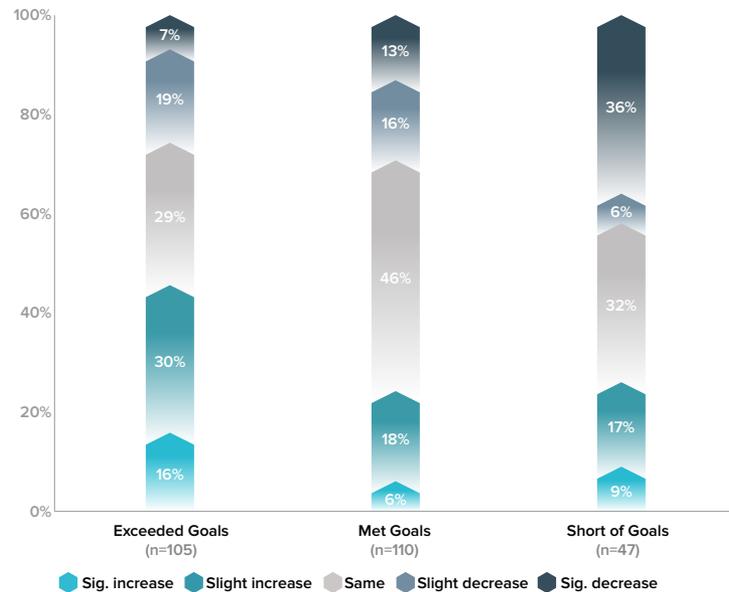
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (BUYER)



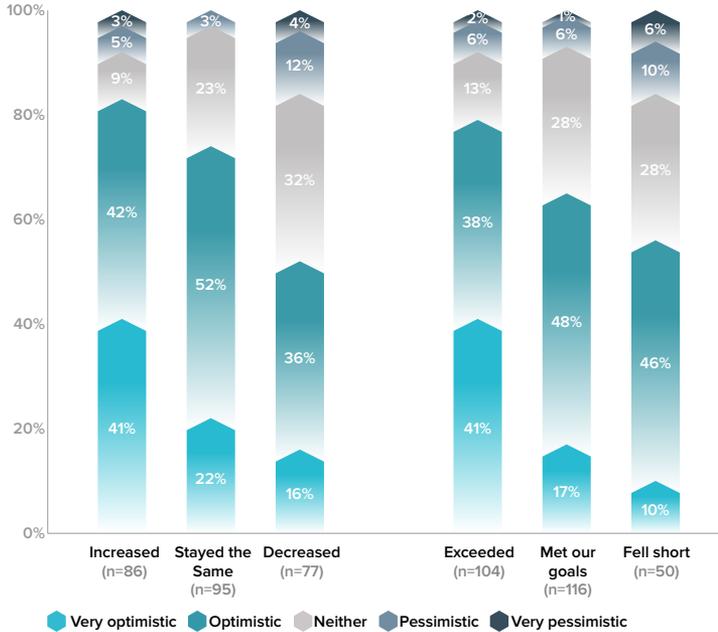
Exceeding goals is generally associated with budget increases and falling short of goals is associated with budget decreases – but not always



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)



OPTIMISM ABOUT ROLE AT COMPANY

Budget trends and performance against goals are related to optimism about the buyer's role at their company. When budgets increase, 83% of buyers are optimistic; when budgets are static, only 74% are optimistic; when they decrease, optimism drops to 52%. When goals are exceeded, optimism is at 79%; when met, 65%; and when departments fall short, 56%. Buyer optimism is clearly associated with budget trends and performance against goals and may be a function of one or both of these. Although budgets and performance against goals are directly related, it is possible that a third circumstance drives all three.

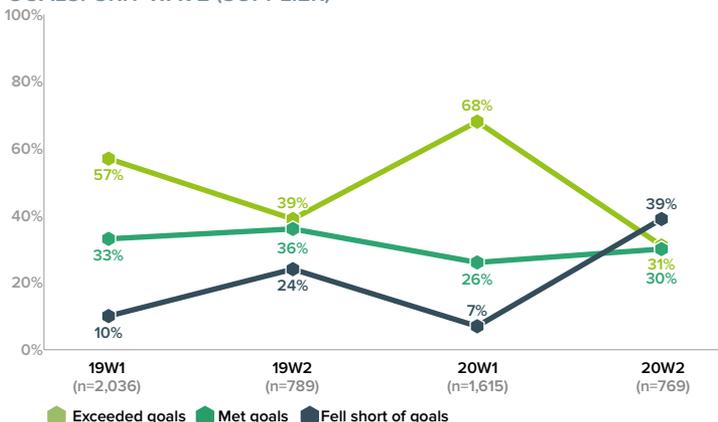
Finally, it is possible that it is more important to employee confidence to exceed goals than it is to increase budgets. The optimism gap when budgets are static versus increased is 9%; between exceeding and meeting goals, it's 14%. On the other hand, a budget decrease may be a stronger signal that employees should be worried, compared to a failure to meet goals. The optimism gap between meeting goals and falling short is 9%; between static budgets and decreases, it's 22%. A budget decrease may be a more tangible, unambiguous milestone than a failure to meet goals.

Budget trends and performance against goals are related to optimism about the buyer's role at their company



SUPPLIER PERFORMANCE AGAINST GOALS

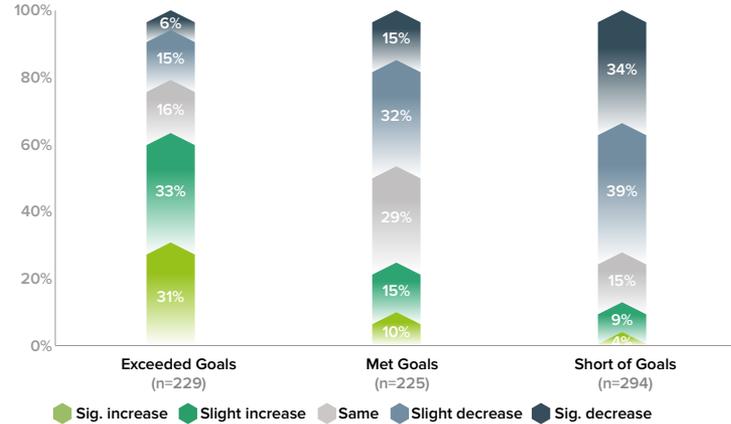
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (SUPPLIER)



In the supplier world, revenue and goals are more directly related than budget trends and goals are for buyers. A decrease in budget may mean one of the goals has been met or exceeded, but a decrease in revenue is almost always directly related to a failure to meet goals. In the current wave, 39% of suppliers failed to meet their goals, a 63% increase over the previous high. For the first time since GRIT started tracking it, suppliers failed to meet goals more often than they met or exceeded them. Of course, it is also the first time that revenue decreases have exceeded both increases and no change.

For suppliers, revenue trends and performance against goals are directly related. When goals were exceeded, 64% of suppliers increased revenue. When they met goals, only 25% increased revenue, and when they fell short, just 13% increased their revenue. The percentage whose revenue decreased is only 21% when goals were exceeded, 47% when they were merely met, and 73% when they were not met. Because of the nature of their business model, supplier goals have to be directly related to revenue generation and revenue performance is often very transparent to employees.

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



OPTIMISM ABOUT ROLE AT COMPANY

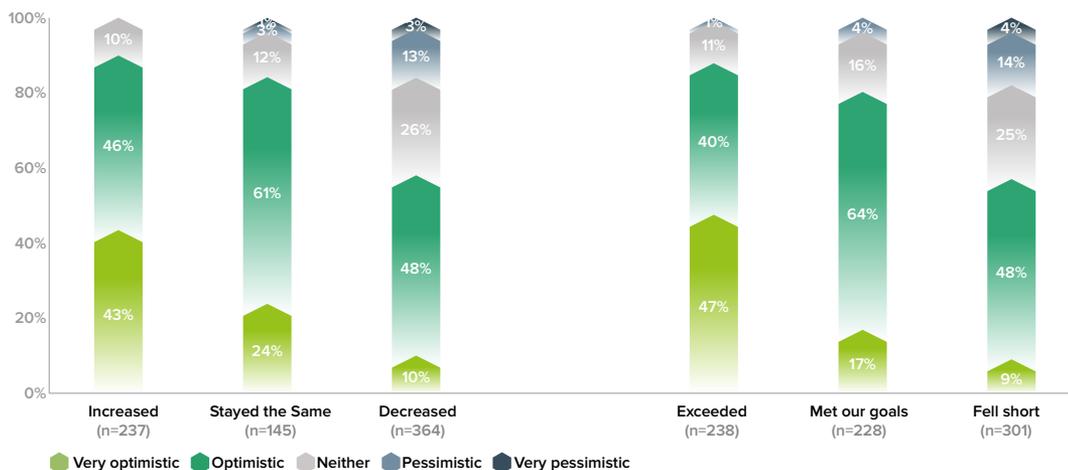
For suppliers, when revenue increases and goals are exceeded, optimism about the company is similar, 89% and 87%, respectively. When revenue stays the same and goals are met, optimism is also similar, 85% and 81%, respectively. While both sets of numbers seem comfortably high, the optimism related to revenue increases and exceeding goals is stronger because they include so many “very optimistic” (top box) ratings compared to

maintaining revenue and meeting goals. Optimism falls apart when revenue decreases or the company falls short of goals. Pessimism and indifference become more pronounced and optimism tumbles to 58% for revenue and 57% for goals. The optimism metrics for revenue and performance against goals are practically mirror images of each other, demonstrating how tightly entwined the two types of milestones are.

For the first time since GRIT started tracking it, suppliers failed to meet goals more often than they met or exceeded them



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



BUYER SEGMENT HEALTH

Taken as a whole, these metrics demonstrate commitment to doing more in-house, especially to increasing its efficiency via technology; tech investment is strong but staff growth is very marginal



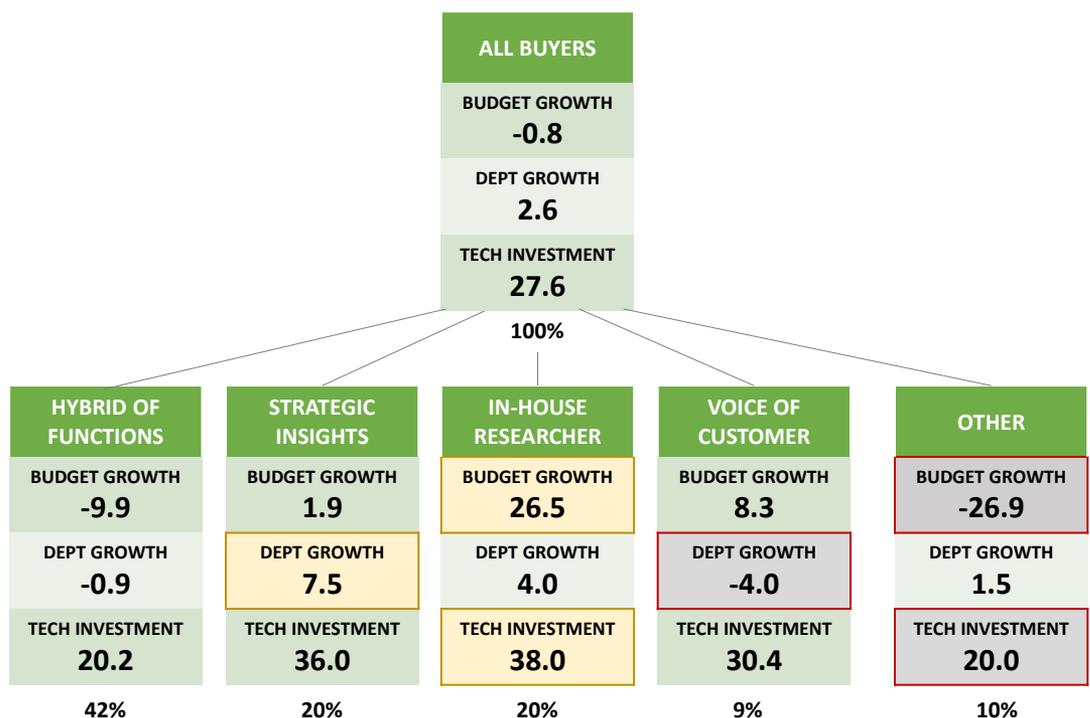
Buyer segments, related to their internal roles, are discussed in more detail in the “Role of The Insights Group” section. The accompanying diagram summarizes buyer “health” metrics for these segments, including budget trends, department staff trends, and technology spend trends. The metrics represent 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; 0 means it was unchanged on average.

The average score for budget growth across all buyers was -0.8, meaning the average buyer indicated it did not change. Department growth was slightly positive at 2.6, but technology investment was much more positive, scoring 27.6.

At the segment level, budgets grew the most for in-house researchers (26.5) and least for “other functions,” which include outsourcers, data analysts, and other miscellaneous insights functions (-26.9). Department growth was strongest for buyers functioning as strategic insights consultants (7.5) and weakest for those functioning as the Voice of the Customer (-4.0). Tech investment was strongest for in-house researchers (38.0) and weakest for those performing “other” functions (20.0), but still positive.

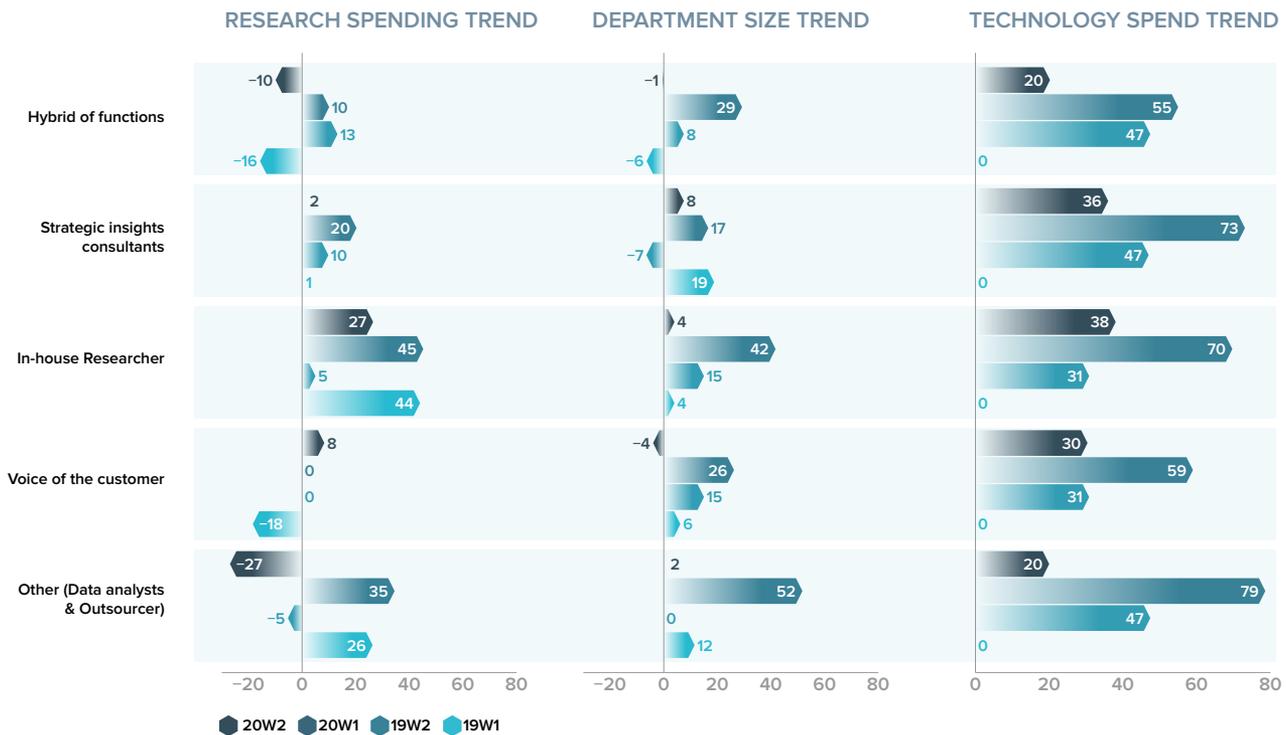
In the “Role of The Insights Group” section, we identified the probable emergence of in-house researchers and the apparent decline of some other functions. Taken as a whole, these metrics demonstrate a commitment to doing more in-house, especially to increasing its efficiency via technology; tech investment is strong but staff growth is very marginal.



For context, the pre-pandemic budget growth trend metric has been as high as 13.2 for hybrids, 20.3 for strategic insights consultants, and 45.2 for in-house researchers, 8.3 for Voice of the Customer, and 34.5 for other functions. Now, they stand at -9.9, 1.9, 26.5,

and -26.9, respectively. Voice of the Customer, which has been shrinking, and hybrid, which fluctuates have had negative scores in the past, possibly a testament to their tenuous staying power.

BUYER TRENDS OVER P12M: BUYER SEGMENT

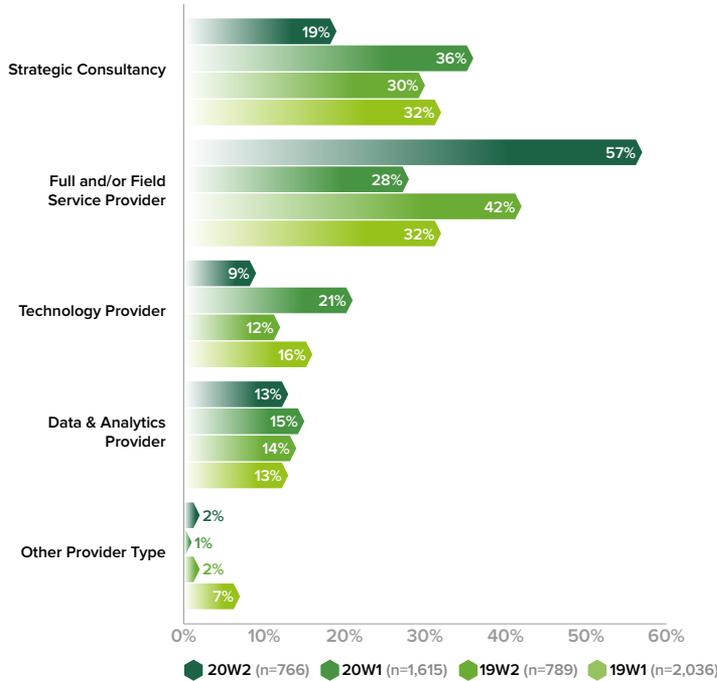


SUPPLIER PROFESSIONAL FOCUS SEGMENTS

The supplier landscape continually evolves, and it is not clear whether 2020 represents the next phase of that evolution or a detour.

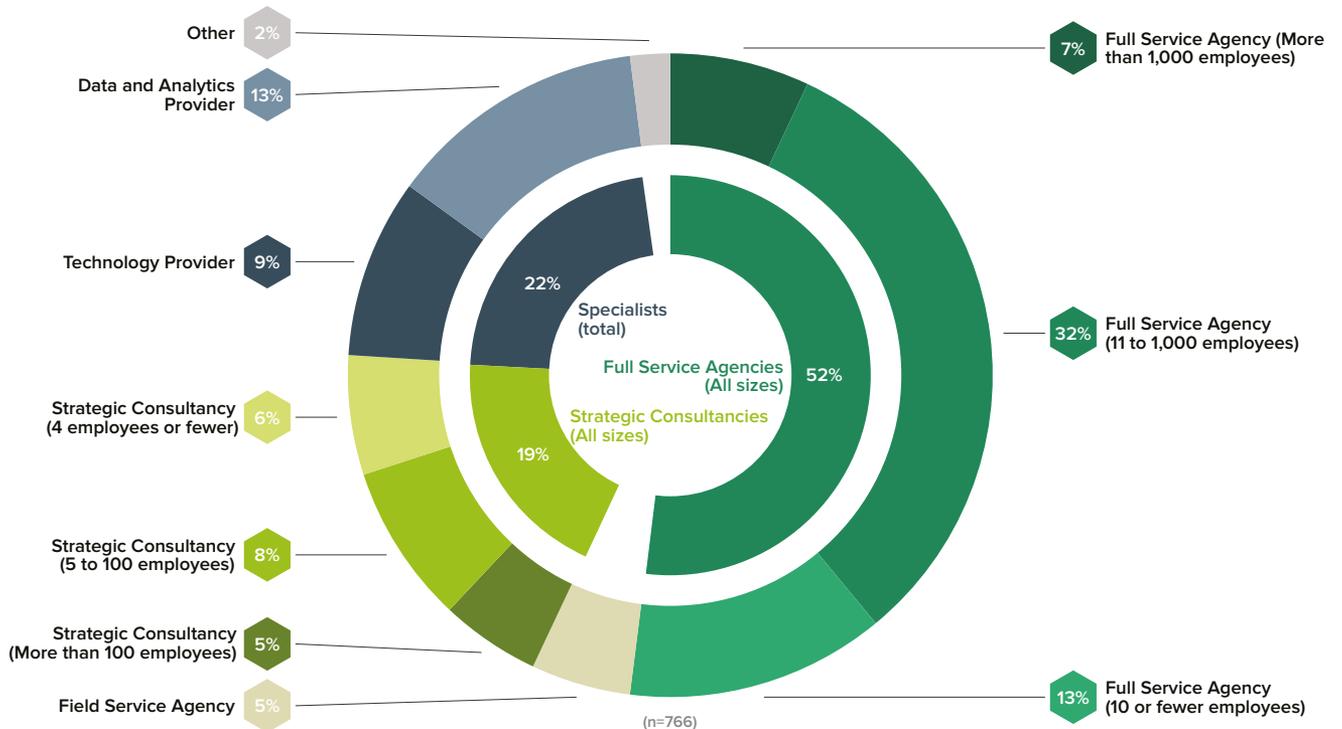
- Data and analytics identify a similar percentage of suppliers as in past waves, 13% in 20W2
- The percentage of suppliers identifying themselves as full/field service has doubled since 20W1; more suppliers may be positioning themselves as generalist during the pandemic in hopes of competing for a broader set of projects
- Fewer suppliers identify themselves as strategic consultancies; historically, there is a lot of overlap and crossover between strategic consultancies and full-service providers, and some of the former may think it is “safer” to position themselves as the latter in order to better position themselves for a lower price range
- Fewer identify themselves as technology providers; they may be repositioning themselves as full service in order to get a larger slice of the budget or this may be the result of mergers and acquisitions

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



Larger suppliers are very different from smaller ones, and it is useful to segment full-service providers and strategic consultancies into smaller, larger, and largest categories.

PROFESSIONAL FOCUS (SUPPLIER)

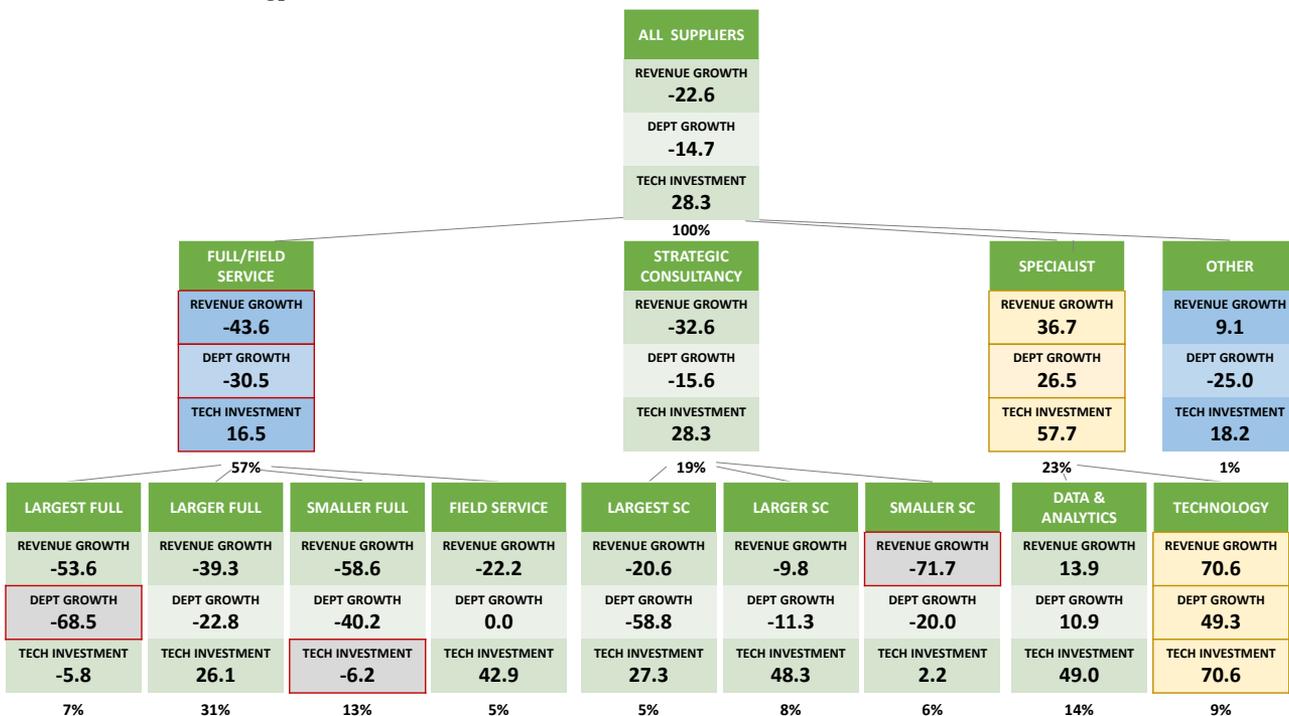


Similar to the buyer segment discussion, a “health tree” diagram is presented that summarizes and compares each supplier professional focus segment on revenue trend, department size trend, and tech investment trend. At the top level, the earlier discussions of revenue and department size trends are clearly summarized: suppliers suffered deep revenue decreases (-22.6) and reductions in staff (-14.7). Technology investment (28.3) remained solid if not robust, and these three metrics suggest that suppliers see the journey upward must be enabled by technology more than by manpower or womanpower.

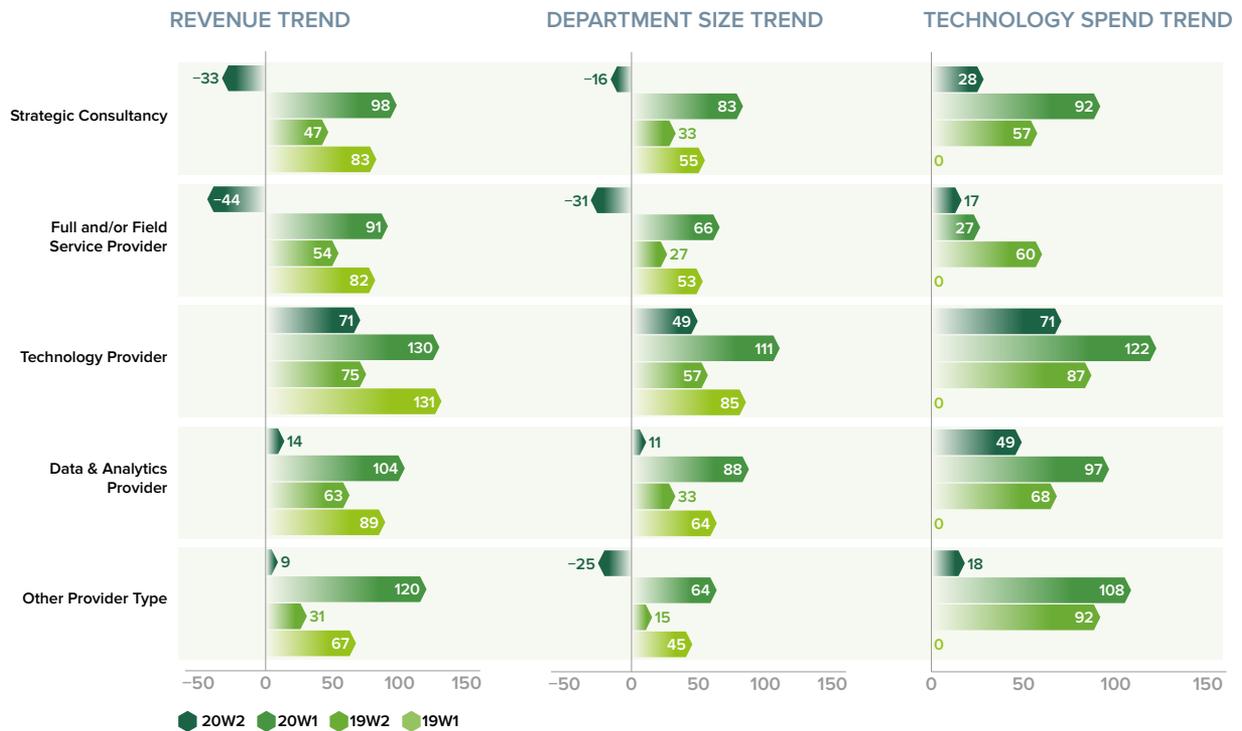
The next level down summarizes other points touched on earlier. Generalists (full/field service providers and strategic consultancies) are experiencing steep drops in revenue and will have to leverage technology to claw their way out of the hole. In other words, any money they can make available is better spent on technology than on people for the near future. Specialists, on the other hand, are seeing very solid revenue increases and can re-invest in both technology and staff.

At the most granular level, we see every generalist sub-segment regardless of size struggling to increase revenue. Mid-size strategic consultants (-9.8) are faring best among them, while smaller strategic consultancies (-71.7) are the worst off. However, that fact provides cold comfort to the largest full-service providers (-53.6) and the smallest (-58.6). The largest full-service providers (68.5) are shedding staff more than any other segment, and the largest strategic consultancies (58.8) are right behind them. Solid investment in technology is still possible for mid-size strategic consultancies (48.3), field service providers (42.9), the largest strategic consultancies (27.3), and larger full service (26.1). Smaller strategic consultancies (2.2) are trading water on tech investment, and smaller full service (-6.2) and the largest full-service providers (-5.8) are falling behind in technology investment.

These three metrics suggest that suppliers see the journey upward must be enabled by technology more than by manpower or womanpower



SUPPLIER TRENDS OVER P12M INDEXES: SUPPLIER PROFESSIONAL FOCUS



The specialist segments, technology providers, and data and analytics providers, are in much better positions. For technology providers, revenue is very robust (70.6), as is department growth (49.3) and technology investment (70.6). Their metrics look nearly identical to pre-pandemic levels. Data and analysis providers are positive, though not exactly thriving. Revenue trends (13.9) and department growth trends (10.9) are positive though modest while tech investment is (49.0) is fairly robust.

To give these numbers more context, we can refer to metrics from the past three waves. Across all full/field service providers, their revenue trend index has been as high as 91.1 and never lower than 54.3; it's currently -43.6. For strategic consultancies, the revenue trend index has been as high as 97.8 and never lower than 46.8; currently, it sits at -32.6. By contrast, the highs for technology providers and data and analytics providers were 131.1 and 103.7, respectively, and never lower than 75.0 and 62.5, respectively; now they are 70.6 and 13.9. Although both types of specialists are better off than generalists, only technology providers are functioning at pre-pandemic levels.

Perhaps the most interesting finding is how the pandemic sometimes cuts both ways: it appears to have enhanced investment in research and technology for some while inhibiting it for others



IMPACT OF COVID-19

By this point in the report, a discussion of how buyers and suppliers responded to direct questions about the impact of COVID-19 almost seems anticlimactic or superfluous: much of the impact is obvious from the other GRIT survey questions.

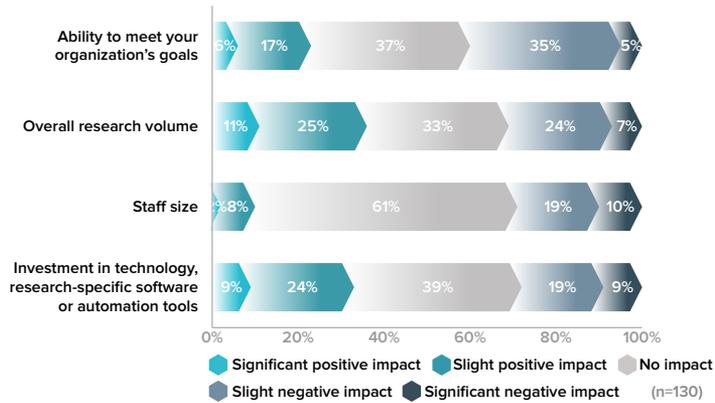
For 40% of buyers, COVID-19 had a negative impact on their ability to meet their organization's goals, the highest number of buyers reporting a negative impact. COVID-19 had a negative impact on overall research volume for 31% of buyers, staff size for 29%, and technology investment for 28%. On every issue tested, more than one-quarter of buyers were negatively impacted.

For 36% of buyers, COVID-19 had a positive impact on overall research volume; it had a positive impact on more buyers than for whom it had a negative impact. Similarly, 33% said it had a positive impact on technology investment, affecting more buyers positively than those who were negatively impacted. Some buyers said staff size was positively impacted (10%), and 23% said their ability to meet their organization's goals was impacted positively. For the latter two topics, buyers who experienced negative impact outnumbered those who experienced a positive impact, but regarding staff size, most buyers said it had no impact (61%).

The results are consistent with the expectation that COVID-19 has been disruptive for many buyers, yet most buyers said each topic was either positively impacted or not impacted; the minority said it was negative. Perhaps the most interesting finding is how the pandemic sometimes cuts both ways: it appears to have enhanced investment in research and technology for some while inhibiting it for others.

If some buyers were able to find a silver lining in the black cloud of the pandemic, suppliers were not so lucky. Most of them have been negatively impacted with respect to their ability to meet their organization's goals (65%), volume of client project work (64%), and ability to attract new clients (54%). Nearly half (45%) said staff size was negatively impacted, while only 34% said there was

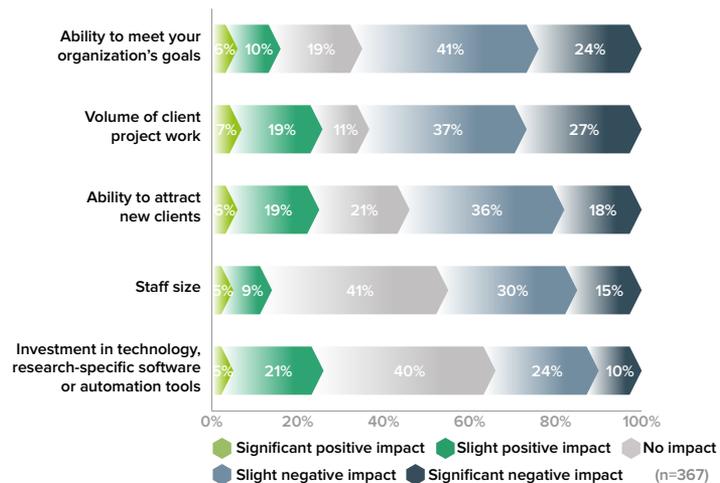
IMPACT OF COVID-19 (BUYER)



Buyers need to do more themselves and have learned that technology providers can help them accomplish that



IMPACT OF COVID-19 (SUPPLIER)



a negative impact on technology investment. The level of negative impact on tech investment among suppliers (34%) was similar to the level among buyers (28%), but only 26% of suppliers said it had a positive impact compared to 33% of buyers.

A deeper analysis might reveal more nuances, but based on the results as presented, there's an apparent disconnect when 36% of buyers say the pandemic had a positive impact on research volume, but only 24% of suppliers said so. COVID-19 had a negative impact on research volume for 64% of suppliers, but only for half that many buyers

(31%). These numbers obviously don't have a 1-to-1 correspondence across buyers and suppliers – i.e., if two buyers increase volume, it doesn't mean two suppliers will also increase volume – but they raise questions, such as whether the gap can be entirely explained by work taken in-house instead of using suppliers.

THE BIG PICTURE

The COVID-19 pandemic has strained buyers and devastated many suppliers. There seems to be less money available for research, less revenue going to suppliers, and fewer openings for insights professionals. The negative impact has been felt across global regions and from the smallest to the largest buyers and suppliers.

Yet, some buyers have seen increased support for research, and specialist suppliers are keeping afloat. Technology providers seem to be thriving, and data and analytics companies are in less dire straits than full-service suppliers and strategic consultancies. Since 20W1, supplier revenue decreases have outnumbered increases for the first time since GRIT began tracking it, and the decreases have been increasingly attributed to smaller client budgets. The use of in-house researchers is trending upward, and their companies are investing in the research budget, staff, and technology for them. In the satisfaction section of this report, evidence was introduced which suggests that clients are moving out of their comfort zones as they reconfigure their portfolios of the types of suppliers they use.

The pandemic seems to have reduced the amount of money available for research and the number of people on staff to do it. It has not reduced the need to conduct research or the belief that research can improve business decisions, and, for many, needs have increased. Insights professionals can no longer take the long road toward doing more with less: they have had no choice but to make that happen now, and many have. For all practical purposes, the suppliers they had come to rely on are no longer alternatives for them because buyers lack the money and many of their incumbent suppliers lack the skills and tools necessary to navigate the challenges of our current reality. Buyers need to do more themselves and have learned that technology providers can help them accomplish that.

The question that hangs over the industry is the same question that hangs over virtually every aspect of our current existence: now that we've adapted, will we ever go back?



TRANSFORMING THE DATA SUPPLY CHAIN HELPS TRANSFORM THE INDUSTRY

James Wilson

CEO, Veriglif

Website: www.veriglif.com | LinkedIn: www.linkedin.com/in/jamespaulwilson/

The topline of the Business Outlook section within this edition of GRIT says:

“The starkest indications of the profound impact of 2020 on the insights and analytics industry can be found in our analysis of the business outlook. Throughout this report we have shown how the role of technology in reshaping the practice of research has accelerated, but herein we demonstrate how that transformation is significantly impacting the business itself. Clients are doing more with less and often doing it themselves, traditional suppliers are scrambling to find new business models and value propositions, while technology companies are moving from strength to strength across the board.”

We at Veriglif could not agree more based on our long experience working within the insights industry we have observed these dynamics unfolding for quite some time. However, one of the factors in this transformation that has not gotten quite as much attention as others has been the over arching focus on collecting and using data in a far more efficient way. Topics such as “Data Synthesis”, “Increasing Marketing Efficiency” and “Exploring Alternatives to Sample” come up over and over in the report from different angles, but fundamentally we see it as a supply issue; the raw material that forms all insights products is data, so as we adapt to the changes in the industry captured in this report a focus on our core supply chain is critical.

To our minds this requires a wholesale restructuring of how we think about our relations with the source of most data: people. However, what is missing is not just a shift in thinking, but also a fundamental reshaping of the value exchange. In short, we need to stop treating data as an easily accessible commodity and start paying for it as a precious resource. We need a new, global asset transaction network to kick-start a new system.

Fundamentally people do things because they get something out of it: we act because it fulfills a need, whether unconscious or conscious. This core motivation is central to every school and application of behavioral science. Game Theory and Behavioral Economics specifically have taught us that a system of incentives and rewards are necessary to engage humans. In general, this system can be boiled down to a few key categories:

1. **Social:** connects us to others for fun and social interactions. Think all the games on Facebook or online game networks.
2. **Financial:** delivers a direct financial reward such as research incentives, discount or deal networks, personal data lockers, or recommendation systems.
3. **Values:** altruism, charitable causes, political or social campaigns or anything else that is aligned to our values.

The ideal system combines all of these, and the market research industry has pioneered quite a few examples in action via the advent of online communities and there is much to learn from that model that could be applied throughout the research industry but also in support of the creation of a personal data economy.

Creating a real, engaging motivational framework for consumers to share their data is a good example of how we can rethink the value of personal data. A multi-dimensional system that has real incentives and rewards that pay consumers for their participation in an accretive way not only is fairer, but it also drives the shift in thinking necessary to support the emergence of the personal data economy. No longer a tactical afterthought, this new approach can be the tip of the spear in leading a transformation in how consumers use their data for their own benefit vs. others using it for their own gain. Direct reciprocity simply changes the game and can help the insights industry secure a far more secure supply chain to power the new era of transformation in the industry.



THE GRIT FUTURE LIST

The Next Generation of Insights Leaders

The GRIT 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

“Recognition is the art of remembering. While our minds might be trained to recall and remember the past, we need to also spend time remembering those who dedicate their energy towards future-proofing our industry. We need to lift up those who are pioneering, experimenting, and evolving the world of insights 1.0 to 2.0” – Bianca Pryor, Future List Judge

GreenBook is proud to announce the third annual GRIT Future List—an awards program to inspire, support, and celebrate young leaders who are driving consumer insights forward in unexpected ways. The List recognizes leadership, professional growth, personal integrity, and a passion for excellence in the next generation of insights leaders. These honors have outstanding multi-disciplinary 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 conferences around the world.

With hundreds of nominations and very impressive submissions, this year’s judging process continues to be a challenging one. 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 direction of our field. We are thrilled to showcase these future leaders.

THANK YOU TO THIS YEAR’S JUDGING PANEL:



Anouar El Haji
Veylinx



Bianca Pryor
BET Networks



Dmitry Gaiduk
CoolTool



Gregg Achibald
Gen2 Advisors



Jamin Brazil
Happy Market Research



Jodie Wang
Midea



Kristi Zuhlke
Knowledgehound



Mario Carrasco
ThinkNow



Roben Allong
Lightbeam
Communications



Zontziy Johnson
Zappi

GRIT FUTURE LIST HONOREES



MARK ALVAREZ

Managing Director Philippines, InSites Consulting (Philippines)

LinkedIn: www.linkedin.com/in/mark-david-alvarez-71557635/

Mark has championed customer-centricity across different research and strategy roles in his 10-year-career. Passionate for research innovation, he started InSites Consulting in the Philippines to pioneer digital research in a highly face-to-face market, introducing digital-first collaboration to help organizations embody a customer-first practice.

FROM THE NOMINATOR:
“Mark innovates with purpose and leads with passion. He is always experimenting with the latest technology & approaches in our industry.”



REBAZ BAHADEEN

Operations Director and Co-founder, Thinkbank (Kurdistan Region of Iraq)

LinkedIn: www.linkedin.com/in/rebaz-nuri-16b9bb15b/

Rebaz co-founded a full-service market research company as his way of giving back to his home region of Kurdistan. Thinkbank’s commercial focus shows that Iraq is more than a country of challenges but a place of opportunity through large-scale quantitative studies. Rebaz holds a Master’s degree in Linguistics from Sheffield University, UK and a BA in English Language and Literature from University of Sulaymaniyah, Iraq.

FROM THE NOMINATOR:
“Rebaz co-founded a research agency in Iraq in 2018—a market full of challenges. His drive and passion to deliver quality, innovation and lead a happy team has led to big wins and a promising future.”



ANDRÉS CARRILES TELLEZ

Marketing & Data Science Director, GfK (Mexico)

LinkedIn: www.linkedin.com/in/andres-carriles-tellez-7a4735ba

Andrés’ unique background in math and statistics allows him to use advanced analytics on market research studies, and text analytics on digital behavioral data to find actionable insights. He believes that sharing the knowledge, and having no black boxes, is the best way to build trust in everyone he works with. Andres is an active member of several industry organizations, including AMAI, IAB, and CIM.

FROM THE NOMINATOR:
“Andrés built and managed a Data Science team by understanding client needs from the data science perspective, adding value to the offers around different kind of solutions. He believes in sharing statistical and technical knowledge within the organization to evolve to better analysis.”

GRIT FUTURE LIST HONOREES (CONT.)



MARY EAPEN

Analytics Manager, Absolutdata Research & Analytics (India)

LinkedIn: www.linkedin.com/in/maryeapen/

Mary has over seven years of experience in driving value for businesses by leveraging data, analytics, models, and products. She enjoys leading new initiatives and applying her analytical background to solving challenging new business problems in the most actionable way. Mary excels at product development through the automation of analytics.

FROM THE NOMINATOR: “Mary has been focused on applying analytics in innovative ways and converting analytical solutions into automated products for the market. Her high performing cross-functional teams developed a suite of proprietary analytics products, reduced turn-around time by 50%, and powered DIY analytical capabilities for clients.”



MELISSA FERERE

Director, Globant (United States)

LinkedIn: www.linkedin.com/in/melissa-ferere-811b6261/

Melissa is a first generation Haitian-American with global academic and professional experiences. Thus, she champions diverse contextual insights to compliment quantitative research when designing technical products. She embeds these insights throughout the development cycle, leading multidisciplinary teams to balance the intersection of customer needs, business goals and technical feasibility. Melissa holds an MBA from the Darden Graduate School of Business.

FROM THE NOMINATOR: “Melissa volunteers as a Master Mentor with the Global STEM Alliance and works with Cornell University leading product design and career development workshops. She constantly seeks opportunities to learn, grow and lead by example, while paving the way for others.”



JULIA GÖRNANDT

Director, DACH Region, SKIM (Germany)

LinkedIn: www.linkedin.com/in/jgoernandt

After some years abroad, Julia went back to Berlin to set up SKIM's first office in Germany. With innovative, methodologically robust approaches she and her growing team deliver high quality insights to leading brands. As a psychologist at heart and by training, she is passionate to shape the future of insights and guide the next generation of researchers.

FROM THE NOMINATOR: “Julia has opened SKIM's Berlin office 2 years ago and has led the team to strong growth, through guiding her clients through their business challenges, always pushing for innovative approaches and working collaboratively with clients and her team.”

GRIT FUTURE LIST HONOREES (CONT.)



STEPHEN GRIFFITHS

Associate Manager, Consumer & Market Intelligence, General Mills (United States)

LinkedIn: www.linkedin.com/in/stephenrgriffiths/

With an insights career spanning Nielsen, P&G and General Mills, Stephen is passionate about helping brands grow. He serves on the advisory board of two market research programs and founded the first client-side market research podcast, Digging for Insights, where he interviews authors and industry leaders.

FROM THE NOMINATOR:

“Stephen has done groundbreaking work at General Mills, hosts an insights podcast, and personally coaches students. He’s been working in insights for 5 years and has influenced many future insights professionals.”



MANUELA ISLIKER

Technology Insights Manager, Colgate Palmolive (United States)

LinkedIn: www.linkedin.com/in/manuela-isliker-22011415/

Manuela is passionate about people, with a mission of making their lives easier and offering delightful experiences through relevant innovation. She is focused on applying unique combinations of consumer science, entrepreneurial methods, agile research & UX research. Manuela aims to challenge the status quo by ensuring people’s needs are truly driving researcher’s innovations.

FROM THE NOMINATOR:

“Manuela is a force of leadership and passion for reimagining the front end of Insights. She is truly a rising star in Insights, combining consumer science, entrepreneurial methods, & user experience research – to create a new expansion of Insights.”



MAYA KANTAK

Consumer Insight Manager, Disney Parks, Experiences and Products (United States)

LinkedIn: www.linkedin.com/in/mkantak/

Maya combines her consumer insights expertise with design thinking to drive growth for industry leaders and beloved brands—leading to her recognition as a 2020 Finalist for a prestigious ‘Outstanding Young Researcher’ Award. Maya is determined to bridge the education gap for students and BIPOC through her ongoing volunteerism and role on the Insights in Color Board.

FROM THE NOMINATOR:

“Maya is an amazing researcher, and I consider myself lucky to have had on her on my team. Maya has improved every part of the research function she has touched, and she has helped take the impact of our department to another level.”

GRIT FUTURE LIST HONOREES (CONT.)



KATRIN KRÜGER

*Senior Project Director, **Happy Thinking People** (Germany)*

LinkedIn: www.linkedin.com/in/katrin-kr%C3%BCger-07203a157/

Katrin's passion is the fusion of tech and qualitative research. She is always open to pushing the boundaries of what's possible and loves experimenting with digital options to make research agile, granular and global. She is a mentor, inspiring and teaching younger researchers looking to start their career in research. Katrin has a Master of Arts from the Freie Universität Berlin in North American Studies.

FROM THE NOMINATOR:

"Katrin is a rising star. She won the coveted 2020 Best Practice Award and her fabulous case study with client Electrolux proved how combining Virtual Reality & Qual Research takes clients to the next level in usability & design insights."



ANIJE LAMBERT

*Founder, **Project Development Consultancy (PDC-Research)** (Guyana)*

LinkedIn: www.linkedin.com/in/anije-lambert-a1900170/

Anije is a lover of all things market research. She is a multi-award-winning entrepreneur and is the founder of Project Development Consultancy (PDC- Research), a market research company she started at the age of 19. She is paving the way forward and promoting market research within her country Guyana and the Caribbean Region.

FROM THE NOMINATOR:

"Anije has single-handedly put Guyana on the research map, creating a company, winning awards, and creating international networks."



KONSTANTIN MORJAN

*CTO, **Phebi Limited** (United Kingdom)*

LinkedIn: www.linkedin.com/in/konstantin-morjan-b06044107/

Konstantin is an experienced and innovative software architect. He has designed and built a number of advanced data integration and analysis systems. A co-founder, Konstantin is responsible for all aspects of the Phebi technology platform and its deployment. He is a pioneer in designing and implementing innovative voice-based applications.

FROM THE NOMINATOR:

"Konstantin is a visionary developer and a rising entrepreneur. I believe that he has already delivered a lot this industry, but has huge potential to be a global leader."

GRIT FUTURE LIST HONOREES (CONT.)



LAUREN MURPHY

Director, Research Scientist, **LRW, a Material Company** (United States)

LinkedIn: www.linkedin.com/in/laurenlisemurphy/

As a Director on the Pragmatic Brain Science team at LRW, a Material Company, Lauren builds on her PhD work in behavioral neuroscience to bring fresh approaches to market research. She leverages academic theories and methodologies to understand the influences of habit, decision making, and attention on consumer behavior.

FROM THE NOMINATOR:
“Lauren’s background in studying primate behavior offers fresh perspectives into consumer psychology at the most human and biological levels.”



LAARNI PARAS

Research Manager, **Sklar Wilton and Associates** (Canada)

LinkedIn: www.linkedin.com/in/laarniparas/

Laarni is passionate about research and innovation for a more inclusive society. She co-created an innovative quali-quant methodology, developed a disruption framework, and co-founded SW&A’s DEI Team & Meditation Program. She’s designed award-winning programs for marginalized communities, a Canada Millennium Award recipient, and a finalist for WIRE’s Diversity Champion Award.

FROM THE NOMINATOR:
“Laarni is hell-bent on doing everything she can to improve the research industry. She is a member of a prestigious university ethics board to ensure research participants are well treated, and she’s pushed her own company to become more inclusive and equitable.”



LYNZIE RIEBLING

VP, Insights & Strategy, **REVOLT** (United States)

LinkedIn: www.linkedin.com/in/lynzie-riebling-61b11a26/

Over the last decade Lynzie has earned her reputation as a creative and effective powerhouse within the insights industry. Specializing in qualitative research, she approaches her work in a way that most don’t—by finding new and unique methods to reach consumers. Her no holds barred approach has garnered the attention of publications such as Forbes, TIME, and Billboard.

FROM THE NOMINATOR:
“Lynzie has long been a force for bringing innovation to market research, rising to become one of the industry’s preeminent thought leaders and best practitioners in mining the Millennial and Gen Z segments. She’s a game changer, and represents the future, now.”

GRIT FUTURE LIST HONOREES (CONT.)



BETH ROGERS

*Sr. Manager, Data Science, **Fruit of the Loom, Inc.** (United States)*

LinkedIn: www.linkedin.com/in/beth-tyrie-rogers/

Beth leads and helped to build the Data Science division at Fruit of the Loom, Inc. She is a strategic data science leader with over 10 years of experience in Retail, Manufacturing, Biology, and GeoScience. She is also a published scientist in marine camouflage research and has performed research in brain imaging and eye-tracking. Beth also holds a MS from Western Kentucky University.

FROM THE NOMINATOR:

“Beth is developing new analyses that change the trajectory of understanding of consumer behavior especially with geolocation capabilities and modeling. She is an excellent team leader and cross-functional collaborator.”



CHRISTOPHER SOUTH

*CEO, **Spot Trender** (United States)*

LinkedIn: www.linkedin.com/in/christophersouth1/

Chris South is a serial entrepreneur, inventor, artist, and advisor based in Silicon Valley, California. His diverse background in Engineering, Business, Finance, Art, and Software is the catalyst for him developing disruptive new solutions. He has five patents with three pending across three companies.

FROM THE NOMINATOR: “Chris is trailblazing solutions to drastically reduce time & cost for product launches leveraging Spot Trender’s platform, resulting in 90% faster & efficient G2M executions for startups & enterprise companies alike. His engineering and business background brings a fresh perspective to the industry.”



LANCE WORLEY

*Manager, Customer & Market Insights, **Salesforce** (United States)*

LinkedIn: www.linkedin.com/in/lworley/

Lance leads insight generation for Salesforce’s customer-centric technology solutions. He is a passionate user and advocate of the fields of UX and behavioral science. Lance believes that deeply understanding customers is essential to giving them rich experiences. He also actively supports the University of Georgia’s MMR program as a mentor, speaker, and board member.

FROM THE NOMINATOR:

“Lance pushes the MR boundaries by integrating techniques from other disciplines – design, behavioral, UX, etc. His holistic view of what research means leads to more impactful work and concrete action.”

FINAL THOUGHTS



Velocity is a combination of a change in speed and a change in direction. For an industry that is often considered slow to change – we are in the middle of a Grand Prix hairpin turn. That might be an exaggeration, but it works for this purpose. Some of the trends that we have seen for several years were accelerated by the pandemic, while other trends were shifted by it. The closer-in causes were driven by the need for faster insights as consumer behavior was changing rapidly during many months of the past year and looking for cost efficiencies as budgets were either declining, frozen, or uncertain. The former made researchers look for creative ways to create insights. The latter, creative ways to use data.

There are a few ways that our industry is fundamentally changing; the nature of client insight organizations, the role of technology, and the direction of where we are headed next.

Client insight organizations are beginning to look internally for many of the research activities that have traditionally been outsourced. The number of buyers that consider themselves in-house researchers has quadrupled in the past year (still modest at 18% – but what a huge delta) This wave of GRIT reflects that many buyers of research are investing in technology that allows them to do more work in-house and looking for the skills to make that technology sing. Telling, is that over 80% of buyers are investing in technology related to analytics, DIY approaches, and/or data collection. Along with that, fewer buyers are working with full-service research suppliers. The motivation is speculative, but the suspicion is that low satisfaction with outsourced research, access to more data for an integrated point of view, and more utilization of various technology-based methodologies have all conspired to create this turn in the industry.

The role of technology is certainly making its mark on our industry. As we all know, online qualitative tools had a banner year due to the pandemic. But there was significant growth in other tech-enabled methods – mobile-first surveys grew by over 10%, text/social analytics had significant growth, as did causal analysis, and Big Data analytics – all that utilize technology to impact insights. Among data, analytics, and tech (all tech focused) providers, about half saw revenue increases compared to full-service or consultancies where about 25% saw increase. Combining the buyer's increasing comfort with the technology providers through almost forced exposure and their investment in technology within their organization, the future

looks difficult for some of the legacy marketing research suppliers.

So, what is next? Here is a guess. Automation will continue the same path it has been on. More and more pieces of the process will be automated with better and better user experience. Visualization will continue on the same path as automation. One thing that will be different is the focus on data integration from multiple sources to tell a more complete picture of the truth. Technology is one tool to help with knowledge management, combining data sets, analytics, etc. – but this is one area that experience will be critical to accurate interpretation and success. Another area of growth will be research conducted with agile principles. As buyers of research were focused on the most important problems during the pandemic, many found that the focus on the “most important” allowed them to get insights aligned to the immediate questions. Then they would focus on the “next most important”. This allowed for efficient use of resources – in both time and money.

2020 was quite a year. This edition of GRIT reflects that in no uncertain terms. Some things will change forever, some may claw back a little. It looks like 2021 will see some high-speed straightaway as we come out of the final turn of the curve of the pandemic. Always exciting.

A handwritten signature in black ink, appearing to read 'Gregg Archibald'. The signature is fluid and cursive.

GREGG ARCHIBALD
Managing Partner,
Gen2 Advisors

APPENDIX METHODOLOGY AND SAMPLE

For those interested in understanding the sample the GRIT Report is derived from, the following breakdown will provide you with the necessary information. Overall, the GRIT sample is broadly global, reflects 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.

While we do not claim GRIT is a census, we consider it strongly directional in terms of the overall trends associated with the topics we explore.

SEGMENT COMPOSITION

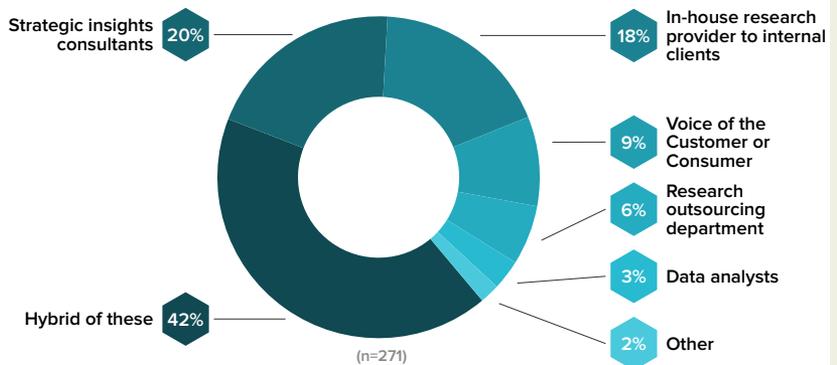
The total sample size for this wave of GRIT is n=1,071: 274 completed interviews by self-identified buyers of insights & analytics, 769 by self-identified suppliers, plus 28 other insights industry professionals.

Further, we have applied our segmentation model developed over the past several waves via the GRITscape Lumascape to these groups.

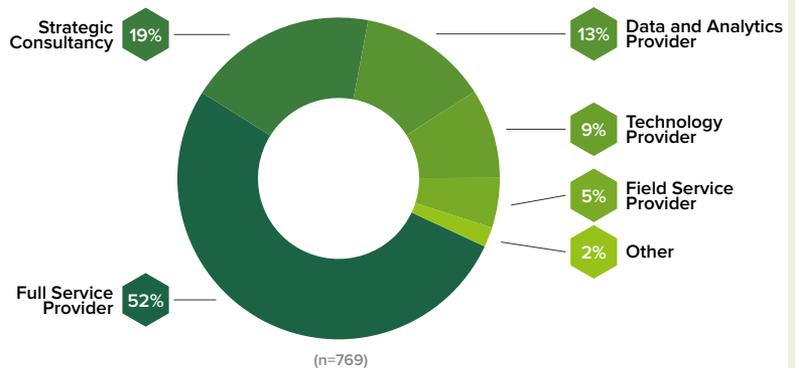
For this wave the largest buyer segment was represented by respondents that described their organizations of hybrids of multiple segments (42%), followed by strategic insights consultants at 20%, Voice of the Customer at 9% and in-house research providers at 18%. All other segments constituted less than 6% each.

For suppliers, 52% define themselves as full service providers, 19% as strategy consultancies, 13% as data and analytics providers, 9% as technology providers, 5% as field services providers and 2% as "other" specialists.

BUYER SEGMENT IDENTIFICATION



SUPPLIER PROFESSIONAL FOCUS

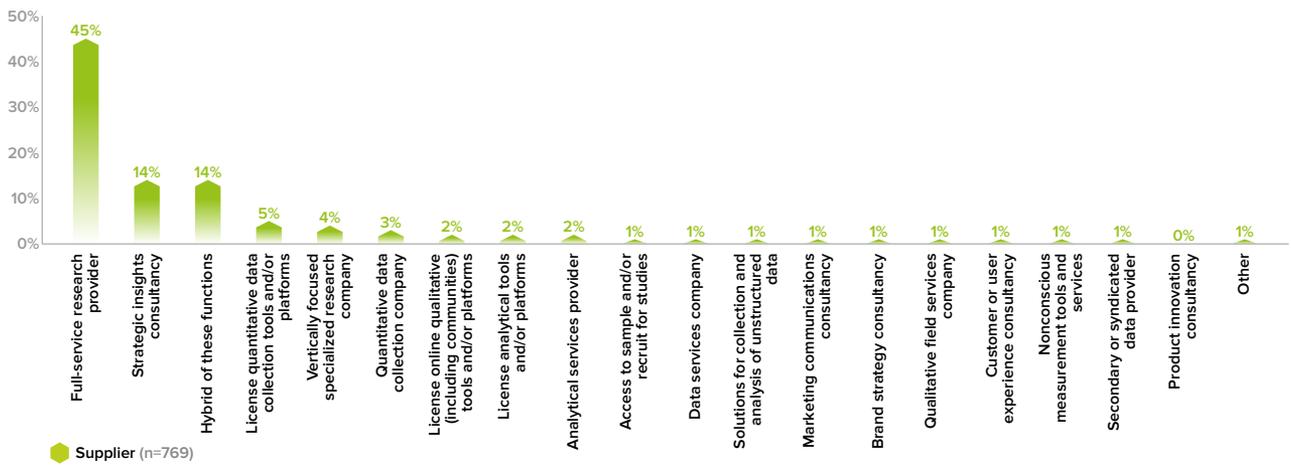


ORGANIZATIONAL AFFILIATION

On the supplier side, we have a good cross-section of the various sectors of the industry. This is in line with previous waves. Proportionally, representation

from all industry sectors has remained relatively constant across each wave of the study.

SUPPLIER PRIMARY SERVICE OFFERING

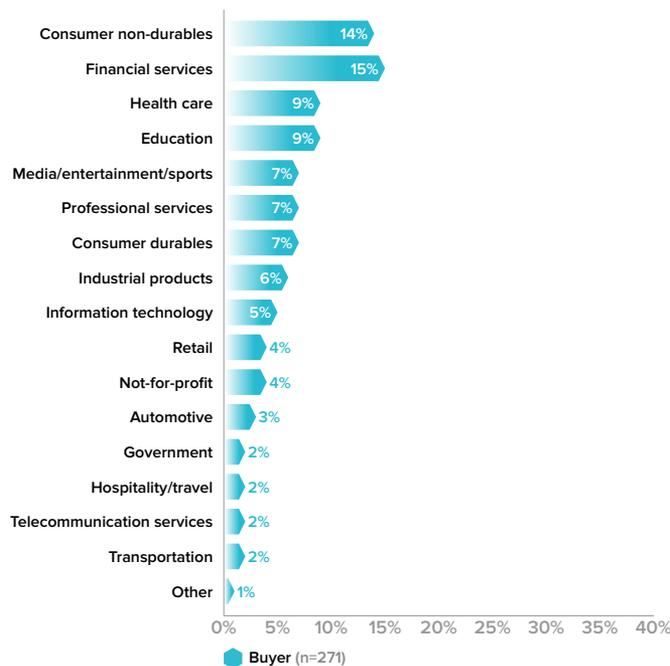


In looking only at buyers, we have a well-rounded sample of respondents from many sectors, ensuring a wide breadth of experience and views are represented. The proportion is also roughly

analogous to the categories of largest buyers identified in other industry reports with Consumer Non-durables, Healthcare, Financial Services and Media making up 40% of the sample.

BUYER PARTICIPANTS BY VERTICAL

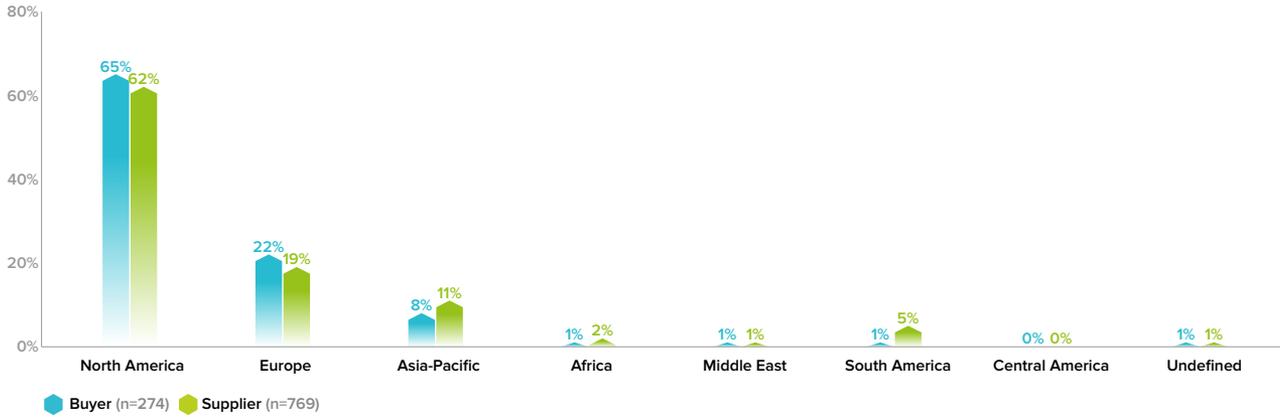
BUYER BUSINESS SECTOR



North American respondents comprised over 60% of the sample, with Europe over 20%, Asia-Pacific at 10% and the rest of the world making up the balance. These percentages are in line with previous waves with some marginal +/- differences. Regional breakouts are similar within buyers and suppliers.

GLOBAL REGION

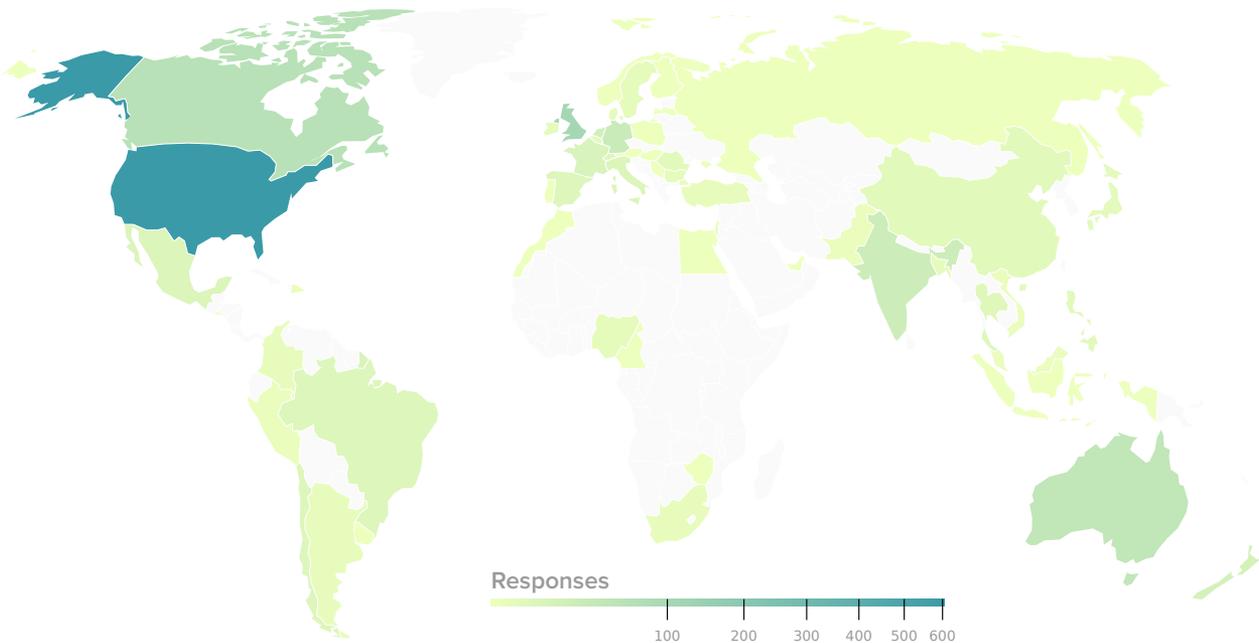
PARTICIPANTS BY REGION: BUYER VS. SUPPLIER



In exploring the physical location of GRIT participants via IP matching, we find that 60 different countries are represented within the sample, with respondent density shown in the map

below. This is quite a bit smaller than previous waves, which we assume are due to general “2020 challenges”.

GRIT 20W2 GLOBAL SAMPLE DISTRIBUTION

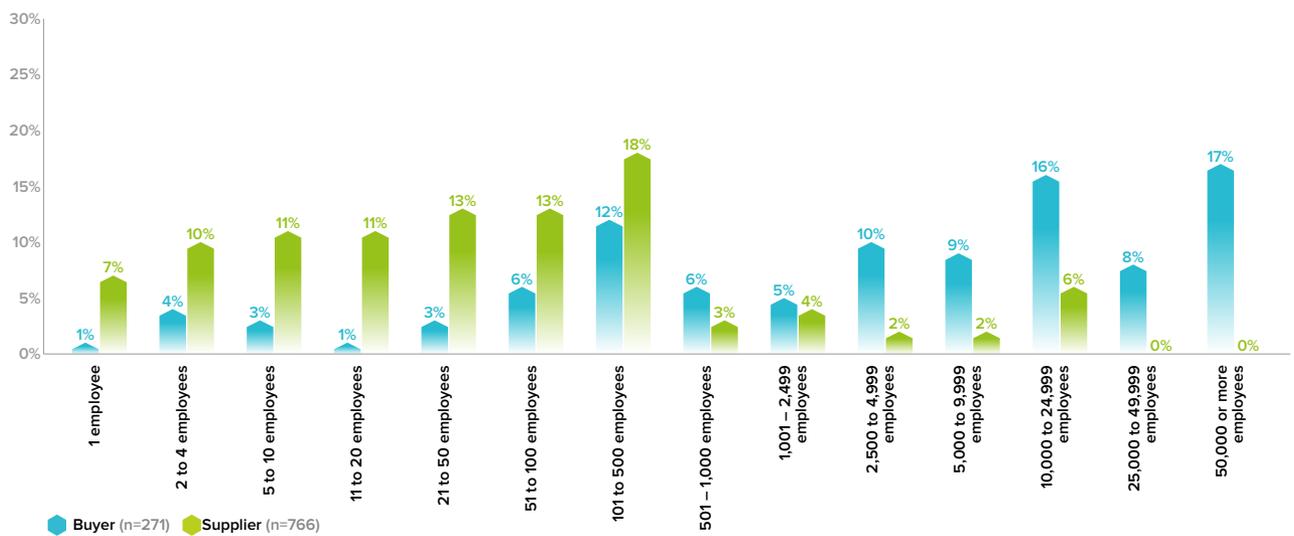


SIZE OF ORGANIZATION

Historically, slightly less than half of GRIT respondents work within organizations of 50 employees or fewer, one-quarter within organizations of 51 to 500 employees, and approximately another quarter within organizations of more than 500

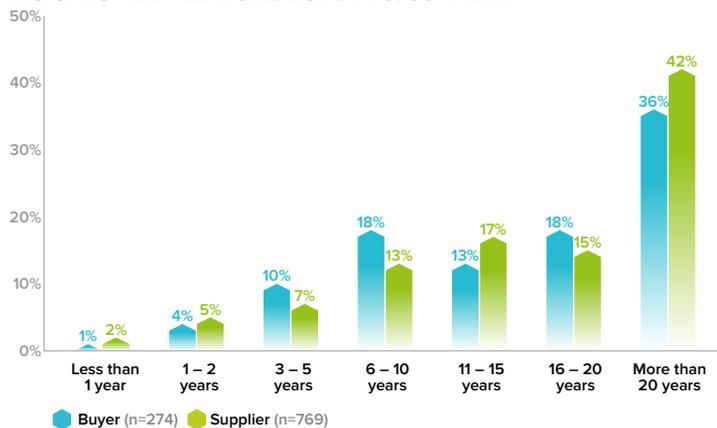
employees. In this GRIT wave, more respondents came from large organizations, driven by buyers (about 70% coming from organizations of more than 500 employees). Suppliers were more evenly distributed across employee size categories.

PARTICIPANTS BY SIZE OF ORGANIZATION: BUYER VS. SUPPLIER



RESPONDENT SENIORITY

RESPONDENT SENIORITY – YEARS WORKED IN AN INSIGHTS-RELATED ROLE: BUYER VS. SUPPLIER

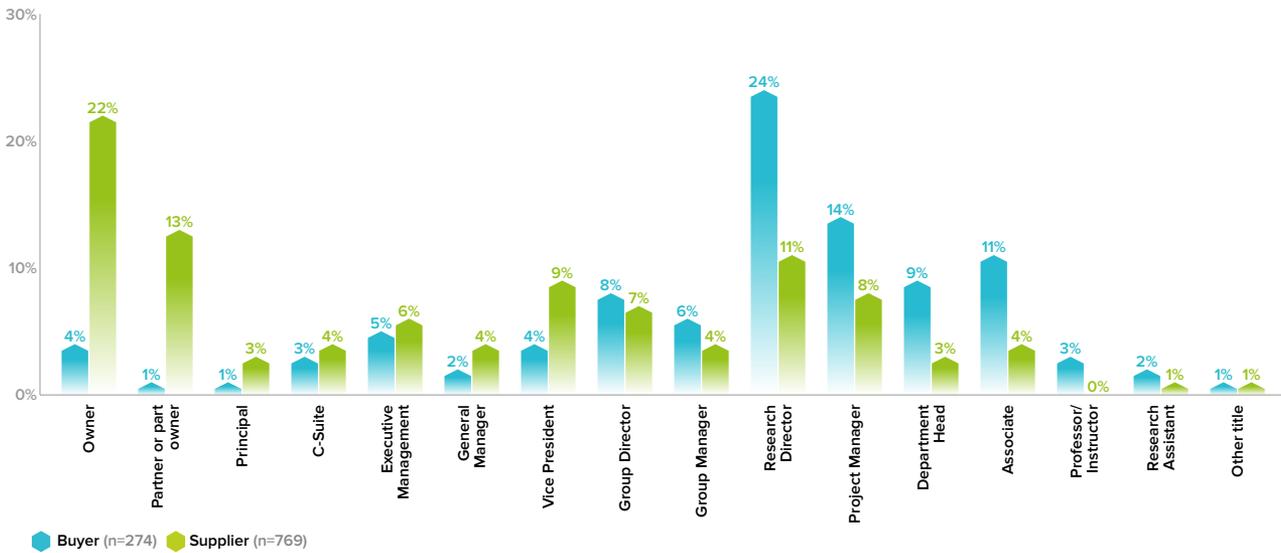


The GRIT sample is comprised of largely senior-level research professionals. The largest group among both buyers and suppliers have worked in the industry for more than 20 years, with about one-third reporting working in an insights role for less than ten years. Only about one-third have been working in an insights role for less than ten years.

RESPONDENT TITLES

Similarly, a large majority of GRIT respondents are in senior-level roles within their organizations; only a small percentage are in non-managerial roles.

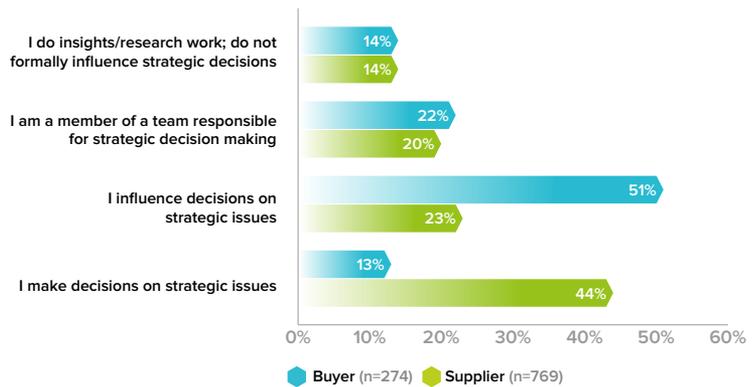
RESPONDENT TITLES – PARTICIPANT TITLE: BUYER VS. SUPPLIER



DECISION MAKING ROLE

Also, most GRIT respondents influence strategic decision-making in their organizations. Among these, suppliers skew more toward a sole decision-maker role while buyers skew more toward decision influencing.

DECISION MAKING ROLE STRATEGIC DECISION MAKING ROLE: BUYER VS. SUPPLIER



ACKNOWLEDGEMENTS

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Kristine Mensching – GreenBook

Design Partner

Keen as Mustard

Idea Highway

Research and Production

AYTM – Ask Your Target Market

Displayr

Gen2 Advisors

Infotools

Potentiate

Data Collection

AYTM – Ask Your Target Market

Data Processing

Infotools

Potentiate

Q Research Software

Data Access

KnowledgeHound

Infotools

Infographic

AYTM – Ask Your Target Market

Publication

GreenBook

Commentary Providers

AYTM – Ask Your Target Market

Behaviorally (Formerly PRS)

Bloomfire

Feedback Loop

Gutcheck

Lucy

Remesh

Sentient Decision Science

Suzy

Toluna

Veriglif

Advertisers

Ascribe

Civicom Marketing Research Services

Feedback Loop

Schlesinger Group, New Jersey

SurveyMonkey

Suzy

Tango Card

Toluna

Sample Partners

A.C. Nielsen Center for Marketing Research (at The Wisconsin School of Business)

AEDEMO

AIM

AMAI

American Marketing Association New York

APRC

AYTM

Cranbrook Search

Dynata

Gen2 Advisors

Insights Now

Knowledge Hound

Little Bird Marketing

Michigan State University

MROC Japan

MRS

OfficeReports

planung&analyse

Qualitative Research Consultants Association (QRCA)

Researchscape International

Toluna

Triggerpoint

University of Georgia | MRII

University of Texas

Women In Research

Zappi

Knowledgehound

AMC Global



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RESEARCH & PRODUCTION



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Aytm is a Consumer Insights Automation solution that drives agile innovation for some of the largest consumer brands, advertising agencies and marketing consultancies in the world. Researchers are empowered to conduct sophisticated research with a click of a button from a powerful but easy to use interface – cutting down the time to insights from days or weeks to hours. To learn more about aytm and its innovative research platform, please visit www.aytm.com.



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Idea Highway is a strategic design studio with offices in Bucharest, Romania and Linz, Austria.



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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-todecision- 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.



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www.feedbackloop.com

Feedback Loop is the agile research platform for rapid consumer feedback. Farmers Insurance, Humana, Lending Tree, Uber, and Fortune 500 companies trust Feedback Loop to bring the voice of the consumer into critical market decisions. Our mission is to help companies thrive by learning faster and innovating smarter.



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www.gutcheckit.com

GutCheck was founded on the reality that brands need to be agile to succeed in a dynamic market, and that traditional research firms and DIY tools have failed to deliver. That's why the world's leading brands trust GutCheck to uncover and action their optimal audience by combining the rigor and speed required to gain a competitive advantage. For more information, visit www.gutcheckit.com.



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www.remesh.ai

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We are Behaviorally, formerly PRS. With decades of experience and category expertise in shopper research, we apply our unique behavioral framework and a digital-first approach to help global clients navigate the uncertainty of a changing retail environment. We help brands make better shopper marketing decisions by defining and diagnosing the digital and physical behaviors that drive shopper growth.



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Toluna delivers real-time consumer insights at the speed of the on-demand economy. We do what no other insights company can, we combine the industry's first end-to-end consumer intelligence platform, Toluna Start with, award-winning research design, vertical expertise and a panel of over 30 million consumers.



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www.veriglif.com

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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.



Melanie Courtright – Dynata

Melanie serves as the Chief Executive Officer at the Insights Association, where she advocates for the industry and its members in the areas of quality standards, legal and business advocacy, education, and certification. Melanie has spent more than 25 years designing, executing, and interpreting research for agencies and corporations, and has been a fixture in market research for quality, trends and the next generation of data collection. Known as an expert methodologist, she started her career at a full-service research firm in Dallas where she spent ten years developing her strong research background. She then followed that with a decade specializing in all forms of digital research including online, mobile and social. Melanie has successfully developed and launched leading sampling platforms, routers, methodology best practices, panels, and research and data product lines.



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.



Larry Friedman, Ph.D. – GreenBook

Larry Friedman, Ph.D. is former Chief Research Officer, TNS North America. Larry has over nearly 40 years of experience in research and has worked on both the client and research company sides of market research. Larry consults extensively with senior level client executives on the business implications of their research. He also publishes widely, and speaks before numerous industry forums, including ARF, IIR, AMA and ESOMAR conferences. He is a winner of a 2009 ARF “Great Mind in Innovation” Award. Larry’s market research experience began at General Foods Corporation. Since then he has worked in numerous categories, including FMCG, financial services, pharmaceuticals (OTC and Rx), IT, telecoms, automotive and others. He has considerable experience in a wide variety of research areas, including brand equity research, tracking research, communications research (digital and traditional), social media, customer experience research, strategic/segmentation studies, and new product development. He has extensive experience with integrating these different types of research and distilling larger strategic implications from them.



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.

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