



GreenBook
GRIT REPORT

2021 EDITION

BUSINESS & INNOVATION

**GREENBOOK RESEARCH
INDUSTRY TRENDS REPORT**



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CONTACTS:

LEONARD F. MURPHY
Chief Editor & Principal Consultant
(770) 985-4904 lmurphy@greenbook.org

LUKAS POSPICHAL
Managing Director
(212) 849-2753 lpospichal@greenbook.org

GREENBOOK
New York AMA Communication Services Inc.
234 5th Avenue
New York, NY 10001

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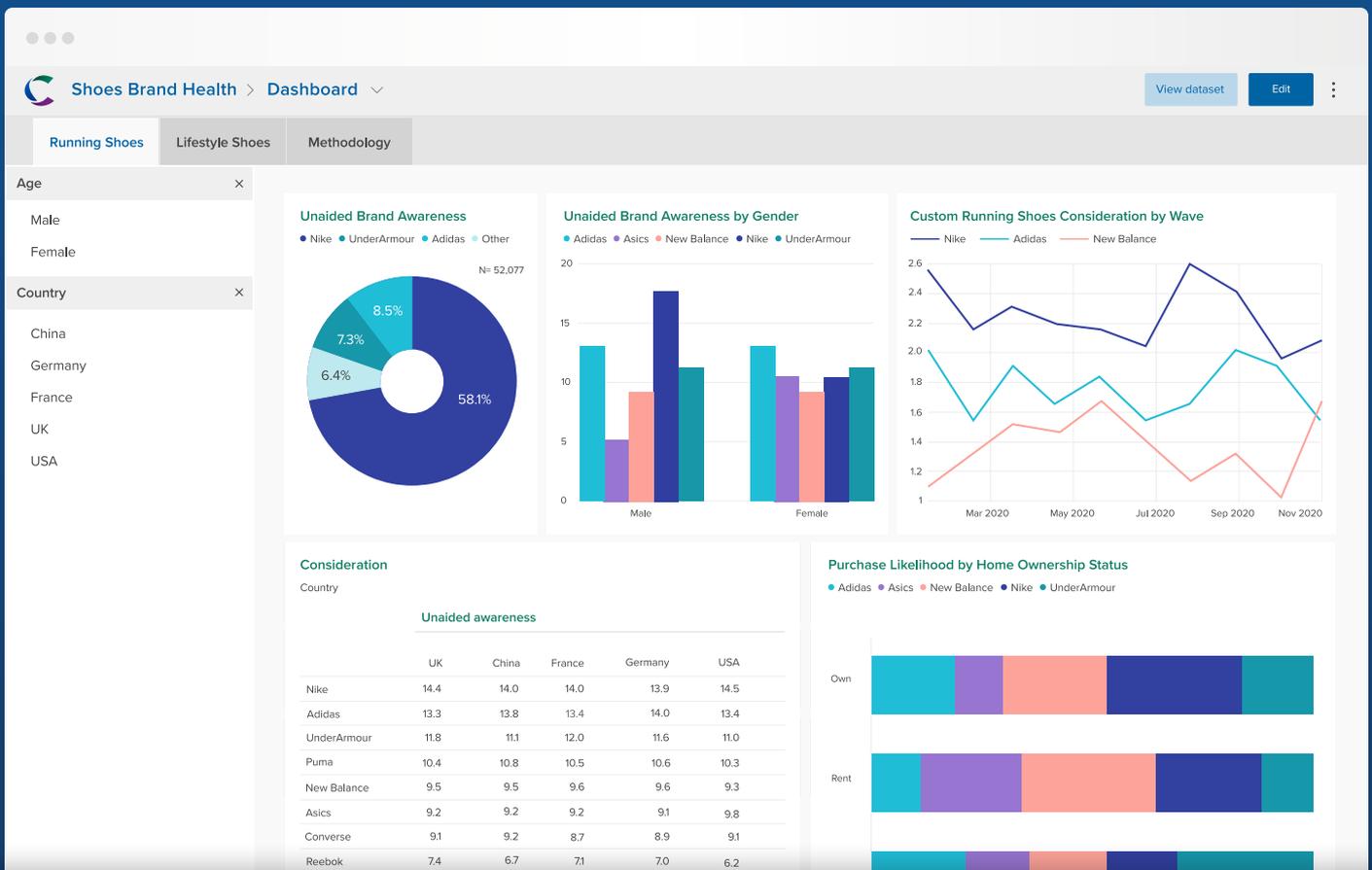
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FOREWORD



Welcome to the 29th edition of the GreenBook Research Industry Trends Report, using data collected in Q1 and Q2 of 2021. As we established a few years ago, this edition is the Business & Innovation Report wherein we focus on understanding the changing dynamics of the macro drivers of the industry, as well as the role that innovation (including the companies most identified as innovative) plays in that evolution.

We begin the report with the “Business” section – exploring the shape and structure of the industry and its evolving constituents. The section examines technical drivers of decision making, organizational success factors, business outlook, and industry benchmarking. These chapters offer context for the second section, “Innovation,” where we explore buzz topics, innovation strategies, adoption of automation platforms, and unmet needs as areas of opportunity for further innovation. It is also where you can find the perennial favorite: the Top 50 Most Innovative Suppliers and Top 25 Most Innovative Clients.

When we last conducted this version of GRIT, the COVID-19 pandemic was just beginning to unfold. In this report we apply an additional lens of how that situation has impacted the industry a year into it, with some surprising results. Who has prospered, who has struggled, and where do we go from here are questions we explore deeply and provide our take on what those answers mean for both buyer and supplier organizations.

This edition saw a return to the robust sample size we typically get for the Business & Innovation report, however we decided to augment the buyer sample through a partnership with NewtonX. This additional effort yielded great results, enabling even deeper analysis of the critical buyer perspective of the industry.

As always, the GRIT program is evolving to meet the needs of a changing industry, and in 2021 we decided that our core mission was to provide unrivaled depth of analysis and recommendations, while also ensuring our audience

could digest everything. The reality is that the GRIT reports could easily be five hundred pages long if we included all of the analyses we think are important, but we also recognize that size is untenable for most readers. Our solution is to create three sets of “spin off” reports focused on marketing and targeting, business performance, and benchmarking. We released seven “field guides” earlier this year to help the marketing and targeting efforts of different types of suppliers, and we will be rolling the others out later in the year. This report still covers those topics, but in a more high-level (and shorter!) way than in previous editions. This has also allowed us to cover other topics in more detail than previously allowed due to space limitations.

Another change you’ll notice is that we have worked to make the online version more modular and easily navigable, so while we approach this as a single report in terms of the structure and narrative consistency, we also strive to make each section “standalone” for online readers so they can ingest the information in a more flexible and on-demand way.

Although we continue to insource much of GRIT production (the vast majority of the design and analysis is now done only by the GreenBook team), GRIT continues to be a “coalition of the willing” and our commentary providers, sample partners, advertisers, and especially our research partners make it all possible. Special thanks go out to AYTM – Ask Your Target Market, CANVS, Gen2 Advisors, Infotools, Knowledgehound, NewtonX, Displayr, and Tango Card. Without their generous contribution of time, energy, and expertise we simply wouldn’t be able to do this.

Enjoy!

LEONARD F. MURPHY

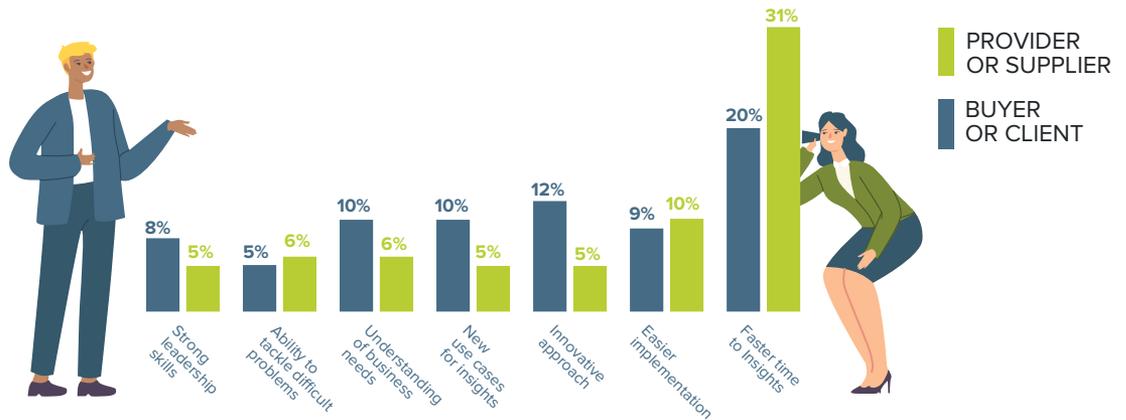
Executive Editor & Producer, GreenBook

lmurphy@greenbook.org

EXECUTIVE SUMMARY

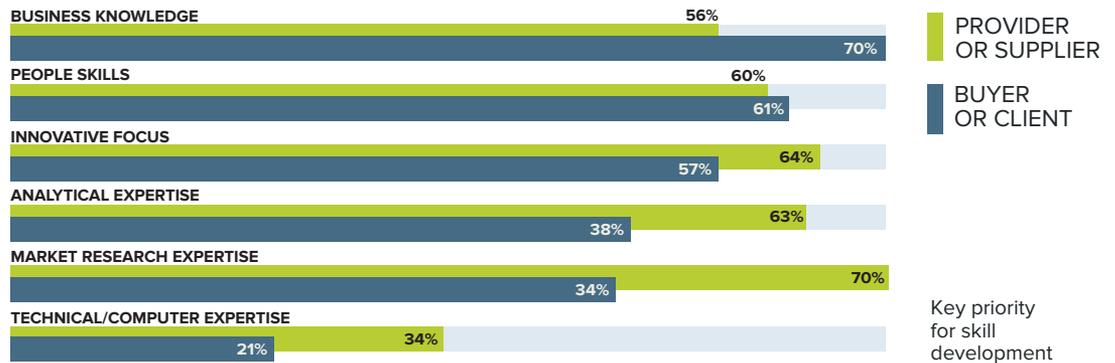
UNDERSTANDING BUYER UNMET NEEDS

We continue to see some level of disconnect between what buyers and suppliers prioritize as unmet needs. The good news is that both groups largely recognize the same themes of what the unmet needs are, but emphasize them differently. Suppliers that pay attention to what buyers are asking for have clear direction on where to focus their strategic planning efforts.



KEY PRIORITY SKILL DEVELOPMENT

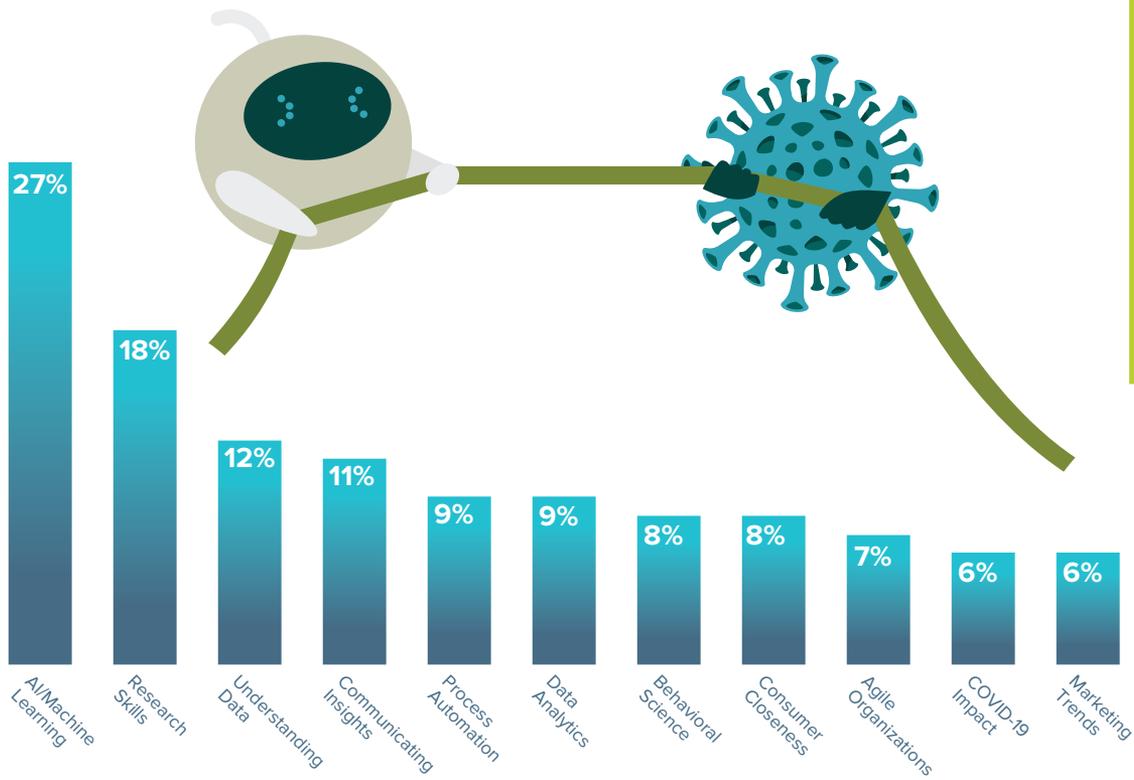
Similar to unmet needs, buyers and suppliers largely agree on the skill development emphasis needed, although differ in which they prioritize and by how much. Buyers place the largest priority on Business Knowledge while suppliers consider Market Research Expertise as number one. However, both segments place little emphasis on technical/computer expertise.



LEADER BOARD OF THE BUYERS



INDUSTRY BUZZ TOPICS

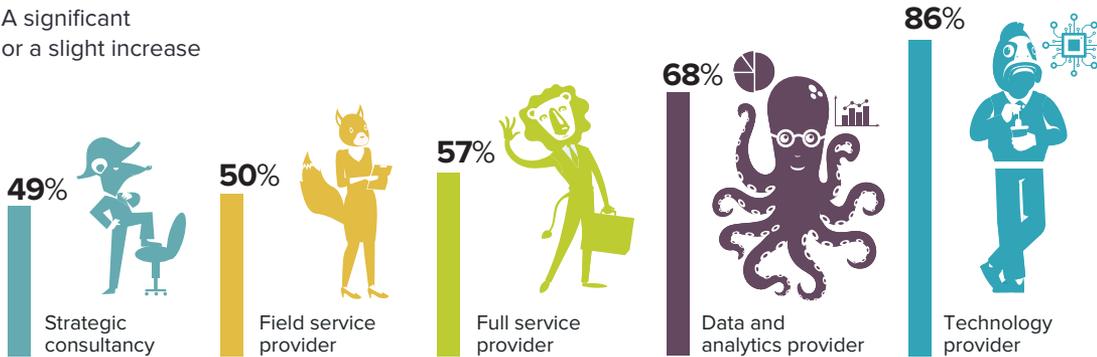


We asked all respondents what buzz topics are top of mind for them, and we see a decided emphasis on “process related” topics that are related to driving increased efficiency and efficacy of the insights & analytics function. However, COVID-19 remains a top topic as well, indicating GRIT respondents are still thinking about what impacts the pandemic will have on the future.



SUPPLIER REVENUE TREND

A significant or a slight increase



A majority of suppliers report an increase in revenue, with the Technology provider segment continuing to experience phenomenal growth. Most GRIT respondents seem to be riding the wave of recovery. However, some are still struggling, albeit at a lesser level than feared by many in 2020.



LEADER BOARD OF THE SUPPLIERS



METHODOLOGY AND SAMPLE

We fielded this wave of GRIT in Q1 of 2021 as the world (and the Insights and Analytics industry) began to recover from the COVID-19 crisis, resulting in a very robust global sample of 3,242 respondents from buyer, supplier, and other insights organizations. This phenomenal result was assisted by enlisting 200 buyer-side professionals through a partnership with NewtonX using their unique targeted recruiting methodology to ensure this wave of GRIT would be especially useful in understanding the buyer population during this era of rapid transformation. Also, as in 20W2, Tango Card supplied an incentive for respondents in the form of a \$5 donation to a charity of their choice.

For the majority of the sample, GRIT respondents are recruited via GDPR compliant, opt-in email lists and a variety of social media channels by GreenBook and GRIT partners. These lists are comprised of both research suppliers and buyers. The vast majority of respondents come directly through GreenBook email invitations compared to all other sources combined. Our unique approach enables us to reach into many of the insights industry's nooks and crannies without having to

pre-define what they are. We do not simply fill a box of chocolates with candies that fit the shapes and match the labels of what we assume to be relevant; we collect anything that looks like a candy and then figure out how the box must be designed. In other words, GRIT adapts to the world around it; it doesn't try to force the world to adapt to GRIT.

The analyses in this report are based on a final set of 3,242 completed interviews after rigorous, scrupulous data cleaning. GRIT looks at the world largely in term of insights suppliers, those whose primary business is selling insights-related research, analytics, consulting, tools, or platforms, and insights buyers, creators or users of insights work who are not suppliers. Most of the analyses in this report are separated into supplier and buyer results and often broken down further than that. You'll notice that the base sample sizes in each analysis will vary depending on which subgroups are considered, but they may also vary due to skip patterns, rotations, routing, and other factors. We have noted the sample sizes for each analysis except where it would repeat information already given and unhelpfully clutter up the chart or table. For

The analyses in this report are based on a final set of 3,242 completed interviews after rigorous, scrupulous data cleaning



GRIT SAMPLE SIZE TREND YEAR-ON-YEAR



example, sample sizes are not given for tables in which it varies from cell to cell.

The sample size for this latest survey (and GRIT 50) is consistent with the wave-on-wave patterns we have observed over the last several years wherein the Business & Innovation study has greater participation than the Insights Practice iteration.

For a detailed breakdown of the sample composition, including regional representation, demographic and firmographics, please see the Methodology and Sample section in the Appendix. As in prior GRIT waves, respondents from the United States comprise the majority of all responses, so although the U.S. may be over-represented compared to share of global turn-over, we think this oversampling may be useful due to the outsized influence the U.S. industry has globally. This appendix can provide context around the results if you are curious about it.

Because of the unique sampling approach, we employ a rigorous cleaning process. Simply put, we drop surveys that are partially completed and delete ones that are clearly poor quality or just plain phony. We remove duplicates, surveys that show a distinct lack of true effort or too much coaching, and any other type of response that we determine to be less than a clear and honest opinion from someone legitimately in the insights industry. In each wave, we learn more and more about how to identify these and ensure the highest quality sample possible. People of a certain age and cultural background may appreciate how this quote reflects our mindset: "Sorry, Charlie. Only the best tasting tuna becomes Starkist."

For this wave we eliminated over 13% of the initial completed interviews due to our flagging of them as not meeting the quality thresholds we have established internally. Out of respect and appreciation for the people who make the effort to complete the survey, we take an "innocent until proven guilty" approach so that we do not systematically exclude legitimate opinions that may not be perfectly expressed.

This effort is especially important when we conduct the GRIT 50 wave as some overly enthusiastic companies attempt to "lobby" for themselves. While unfortunate, the trade-off is that it usually results in a larger sample size (which is useful for other areas of exploration). We have designed robust data cleaning approaches to mitigate against that impact which we describe in the Data Cleaning Appendix. We are thankful that this loud faction is also small, and we continue to be impressed with and grateful for the relatively silent majority who put the effort into thinking through each question.

The mix of respondents has varied slightly wave on wave of this study, but within relatively narrow bands. For this edition, 72% of respondents identified themselves as being suppliers (n=2,325) and 27% identified themselves as buyers (n=875). We also captured a small number (n=42) who identified themselves as "providing other services" (e.g., publishing or hiring) or as otherwise associated with the industry (e.g., teachers), but we found little to comment on for these populations.

GRIT SAMPLE COMPOSITION 21W1

Insights buyer or client	875
Insights provider or supplier	2,325
Other industry participants	42
Total sample	3,242



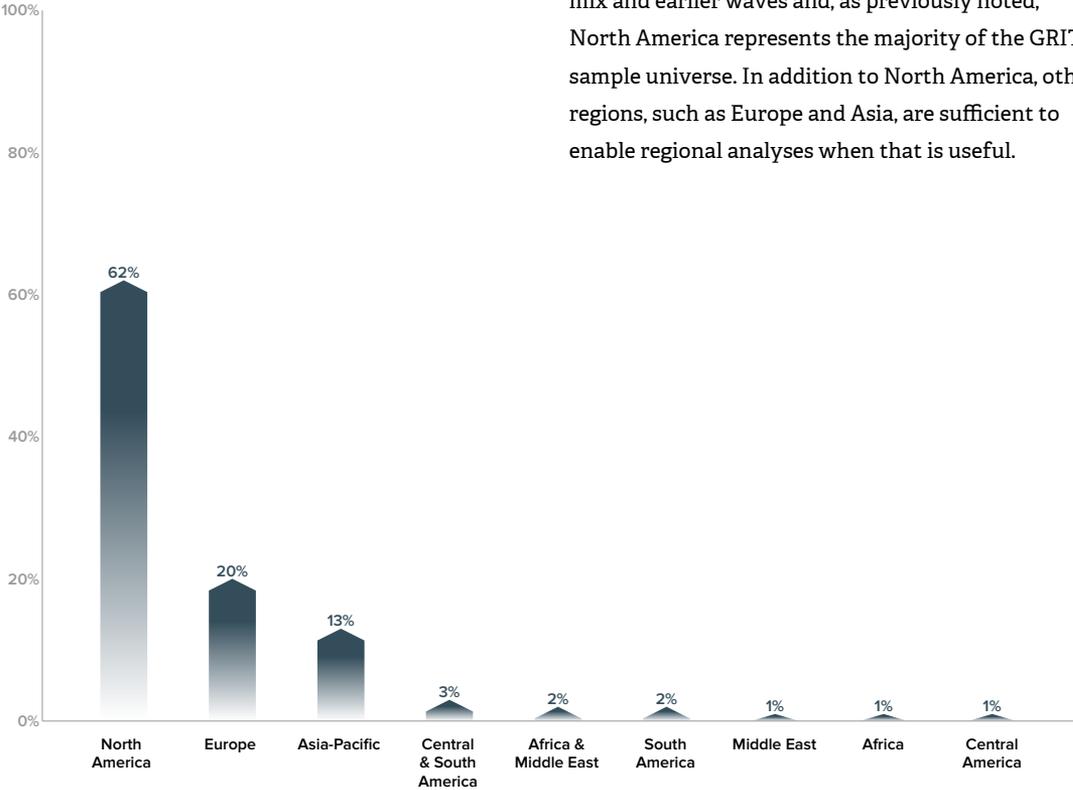
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GRIT SAMPLE BY GLOBAL REGION



There is little difference regionally between this mix and earlier waves and, as previously noted, North America represents the majority of the GRIT sample universe. In addition to North America, other regions, such as Europe and Asia, are sufficient to enable regional analyses when that is useful.

THE BIG PICTURE

This edition of the GRIT Business and Innovation Report features one of the largest and most diverse sample sizes in the history of the GRIT program, enabling a deep dive into topics of importance to both buyers and suppliers with a high degree of confidence. While we still don't claim absolute representativeness since we don't think anyone

can properly define what that would even mean for our industry. We believe our findings are broadly indicative of the current state of play for this industry, and should continue to be reliable as a strategic planning tool based on the snapshot of the industry we have captured for early 2021.



BUSINESS SECTION

INDUSTRY SCOPE

The pace of change in the Insights and Analytics industry is only accelerating with the convergence of multiple other industries becoming a central element of that change. Technology companies, management consultancies, and virtually every kind of marketing-related sector are now part of the structure and scope of the industry.

CHANGING MAKEUP OF THE INDUSTRY

The ascendancy of strategic consulting within the insights and analytics world is a story we have been following over the past few GRIT reports, along with the growing presence of technology providers. Many full service providers had been repositioning themselves as strategic consultants, and many strategic consultancies had been adding full service capabilities. Concurrently, we have chronicled the steady growth of automation in insights work and the rise of technology platform providers. One year ago, GRIT reported that suppliers who identify primarily as strategic consultancies and those who identify as technology providers each attained their all-time high as a percentage of the supplier population while full and field service providers fell to an all-time low.

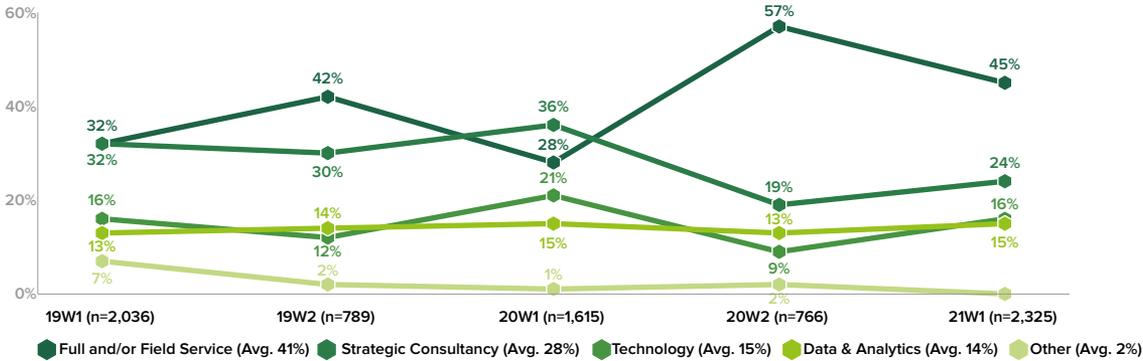
Strategic consultancies and “specialist” suppliers (providers of technology or data and analytics) had overtaken full service firms as the most common types of providers of insights-related services. At the onset of the pandemic, more suppliers said their highest revenue service was strategic consulting (36%) than said full or field service (28%), the first time this had happened in any GRIT wave. Technology (21%) had also peaked and, together with data and analytics providers, accounted for another 36% of the insights supplier population.

Since the pandemic, however, full/field service is once again the most frequent “highest revenue source,” hitting its historic peak last fall, while strategic consulting hit its two lowest points in 20W2 and now. Technology dropped to its lowest-ever point last wave, then came back up to its historic level of around 15% in 21W1. Through it all, however, the percentage of suppliers claiming data and analytics as their primary source of revenue has remained in the mid-teens. In our early 2021 snapshot, it looks like specialist services are as strong as ever while many “generalist” suppliers have found a stronger market during the pandemic for their full service research offerings than for their strategy services.

In our early 2021 snapshot, it looks like specialist services are as strong as ever while many “generalist” suppliers have found a stronger market during the pandemic for their full service research offerings than for their strategy services



RELATIVE SIZES OF PROFESSIONAL FOCUS TYPES BY GRIT WAVE (SUPPLIER)



RELATIVE SIZES OF PROFESSIONAL FOCUS TYPES BY GRIT WAVE: DEVIATIONS FROM AVERAGE (SUPPLIER)

	Average Size	19W1 %	19W2 %	20W1 %	20W2 %	21W1 %
n		2,036	789	1,615	766	2,325
Full and/or Field Service	41%	-9%	+1%	-13%	+16%	+4%
Strategic Consultancy	28%	+4%	+2%	+8%	-9%	-4%
Technology	15%	+1%	-3%	+6%	-6%	+1%
Data & Analytics	14%	-1%	0%	+1%	-1%	1%
Other	2%	+5%	0%	-1%	0%	-2%

Green highlighting represents the wave in which a supplier category was at its peak; red indicates when it was at its nadir.

GRIT supplier categories are somewhat fluid, defined by a given supplier as whichever service area provides the most revenue across the services that generate significant revenue. Suppliers decide what they consider to be “strategic consulting” versus “full service,” etc. as well as how to count revenue by each source. Because the proportion of data and analytics providers has been the most stable over time, we might hypothesize that data and analytics is the most distinct service area of the set.

By contrast, the walls between full service research and strategic consulting are paper-thin as suppliers in one category take on aspects of suppliers in the other. Further, the difference between a “full service” insights project that is strategic in nature versus a more pedestrian one that merely supplies answers to questions may be in the eye of the beholder and change over time. Similarly,

the lines between an insights offering based solely on a technology component and ones with a stronger service component may blur, for some. Also, a technology platform provider who consults with a buyer regarding how to change their business via technology might consider that to be a form of strategic consulting. The categories can be fluid, and this may begin to explain the behavior we have observed since the pandemic began.

Our interpretation of these recent trends is consistent with the hypotheses we put forth last fall. Once the pandemic hit, strategic consulting could have been considered a luxury item while full service research may have been more of a necessity, especially as buyer insights departments had to choose between investment in permanent staff and their ability to finance necessary projects. Hence, some strategic consultancies redefined themselves

At a macro level it looks as though some mid-sized strategic consultancies had to re-invent themselves as full service suppliers to get through the pandemic or simply could not sell strategic projects as insights buyers focused on acquiring data however they could to understand how to survive the pandemic

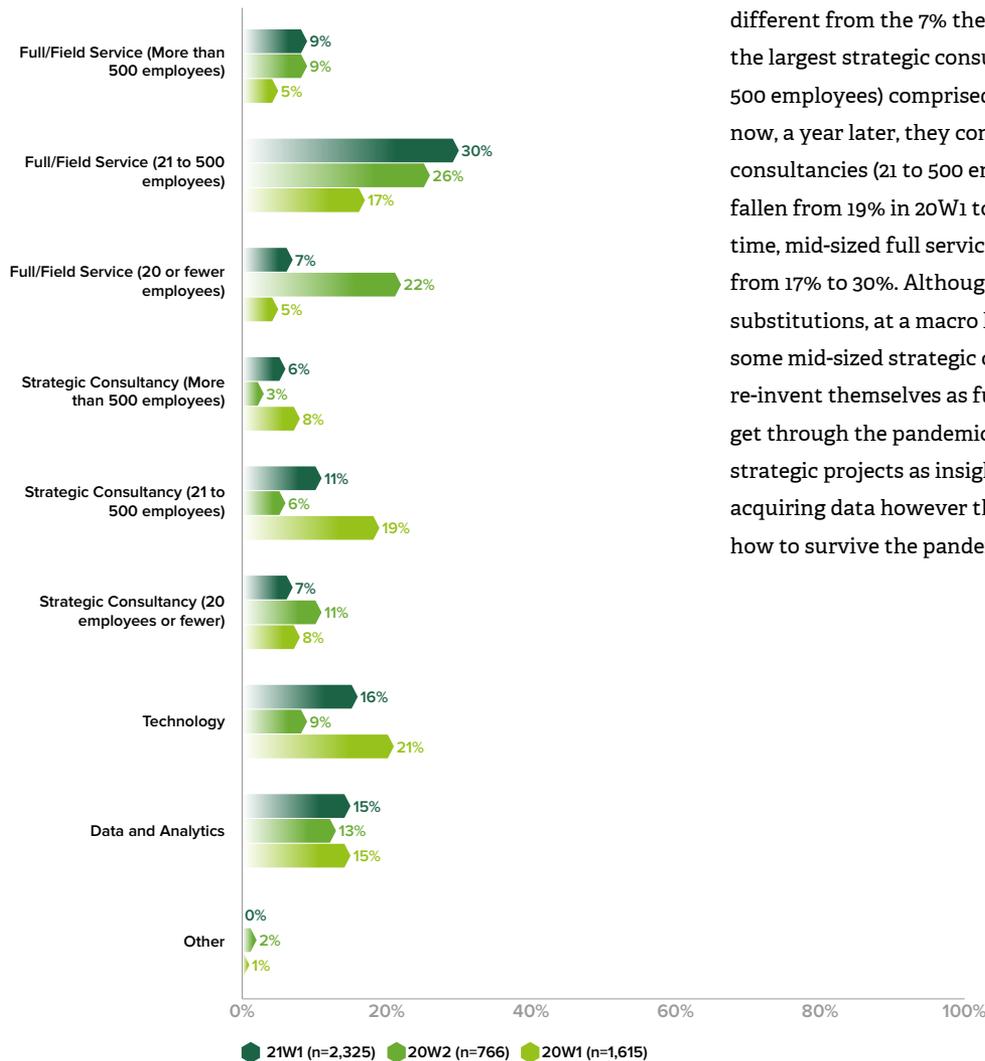


as full service providers to stay afloat, dropping the proportion of them to historic lows while raising the proportion of full service providers to historic highs. At the same time, some technology providers may have been expected to do more as buyers consolidated the number of partners they engaged, and they may have called this “full service,” which dropped the proportion of “technology providers” to an historic low. It’s also possible that full service providers partnered with them in order to keep their own businesses afloat, so the stand-alone platform became part of a full service project.

Following this line of thinking, with the industry rebounding, the market for “generalists” has started to open up again. “Permanent” full service suppliers are enjoying more success than in 2020 while “transients” are beginning to return to selling strategic consulting services or pure platform offerings. One of the storylines we’ll follow into GRIT 21W2 and beyond is whether the supplier trend toward repositioning themselves as strategic consultancies picks up where it left off when the pandemic hit, once again making strategic consultancies the most prolific type of supplier.

Other findings are consistent with these hypotheses. At the onset of the pandemic, smaller strategic consultancies (20 or fewer employees) comprised 6% of the supplier universe, not much different from the 7% they comprise now. Similarly, the largest strategic consultancies (more than 500 employees) comprised 8% of suppliers, and now, a year later, they comprise 6%. The mid-sized consultancies (21 to 500 employees), however, have fallen from 19% in 20W1 to just 11% now. At the same time, mid-sized full service firms also increased, from 17% to 30%. Although these are not perfect substitutions, at a macro level it looks as though some mid-sized strategic consultancies had to re-invent themselves as full service suppliers to get through the pandemic or simply could not sell strategic projects as insights buyers focused on acquiring data however they could to understand how to survive the pandemic.

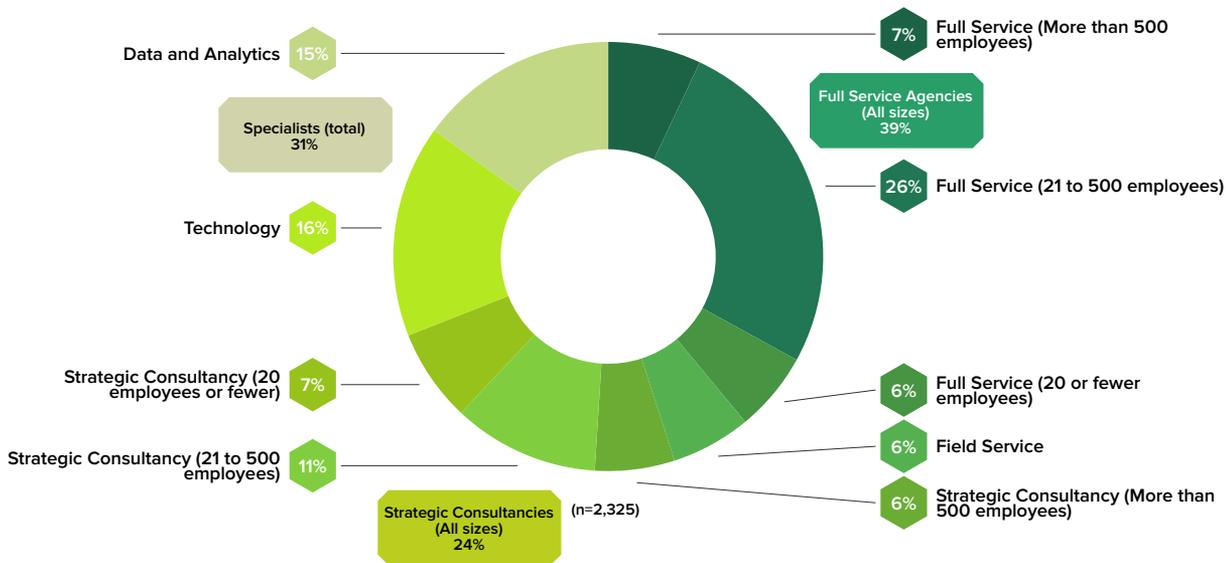
PROFESSIONAL FOCUS BY WAVE (SUPPLIER)



As noted, when strategic consultancies peaked in 20W1, specialists also peaked at 36%, marking the first time they were as abundant as strategic consultancies (and more abundant than full service research providers). In the last wave, specialists edged strategic consultancies, 22% to 19%, and now they hold a 31% to 24% lead over strategic consultancies. Simultaneously, the proportion of buyer insights departments defining themselves as in-house researchers seemed to be on the rise as the

pandemic hit, but that trend seems to have abated during the pandemic. We don't know whether the pandemic has stalled this trend or terminated it, just as we don't know whether it has changed the market for strategic consultancies permanently or merely interrupted its progression. Trends in how buyers define their roles will likely dictate trends in how suppliers position themselves and which services they offer. These storylines will be further developed in GRIT 21W2.

PROFESSIONAL FOCUS (SUPPLIER)



Since the pandemic began, suppliers are more focused on a core service than on secondary offerings. For example, going into the pandemic, 43% of full service research providers got significant revenue from strategic consulting, and 36% earned significant revenue from data and analytics. Now, those percentages are down to 31% and 22% respectively. A year ago, 33% of strategic consultants earned significant revenue from full service offerings and 36% from data and analytics; now, these are significant for just 20% and 11%. On the surface, the drop in full service revenue among strategic consultancies may seem counter to the argument

expressed earlier, that 20W1 strategic consultancies had to prioritize revenue from full service research over consulting. However, that shift resulted in those strategic consultancies being redefined as full service. Hence, the strategic consultancies that remain in 21W1 are the ones who were still able to sell their core services during the pandemic.

All types of insights providers saw their offerings consolidate to a core service. For each type of supplier, the percentage offering secondary services of any kind dropped since 20W1, and none of them increased.

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PROFESSIONAL FOCUS BY SOURCES OF REVENUE (SUPPLIER)

	21W1 Source of Highest Revenue					Difference 21W1 – 20W1			
	Full Service Research	Field Services	Strategic Consulting	Data & Analytics	Technology	Full or Field Service	Strategic Consulting	Data & Analytics	Technology
n	918	137	547	356	361				
Full Service Research	100%	19%	20%	24%	17%	0%	-13%	-8%	-16%
Strategic Consulting	31%	9%	100%	21%	11%	-12%	0%	-26%	-8%
Data and Analytics	22%	20%	11%	100%	22%	-14%	-25%	0%	-15%
Field Service	10%	100%	3%	12%	6%	N/A	N/A	N/A	N/A
Technology	9%	24%	4%	20%	100%	-7%	-11%	-7%	0%
<i>Italics indicate the primary service offering, which is always 100%. Green highlighting indicates secondary services offered by 20% or more of the supplier type.</i>						<i>In 20W1, full and field service were considered one type. Differences represent differences from full service research in 21W1. Red highlighting indicates secondary services that are not as significant in 21W1.</i>			

2020: SUPPLIERS FOCUS ON CORE SERVICES

Although the service category which provided the lion's share of revenue shifted for many suppliers, the portfolio of services they offer did not change much. That is, some services may not have provided as much revenue as they did before the pandemic, but suppliers did not seem to drop them from their portfolios.

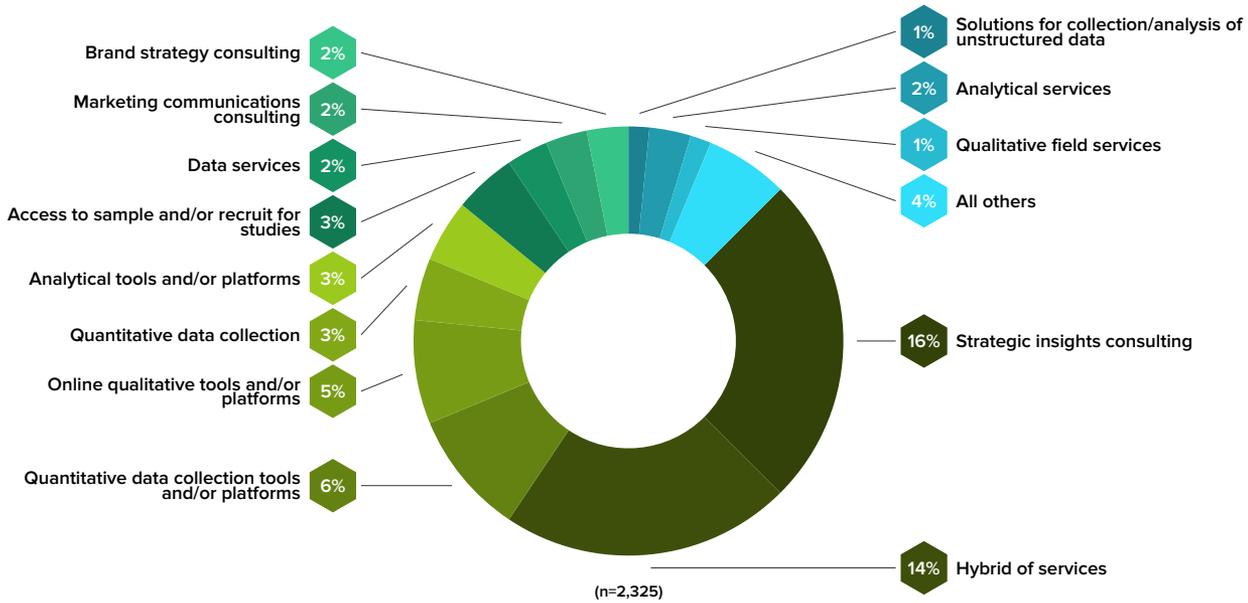
When asked for one "primary" service offering from a list of nineteen, 35% chose full service research, 16% chose strategic insight consulting, and 14% chose "hybrid" of services. With respect to their highest revenue-generating service area, 45% said full service research, and this aligns well with

the primary service offering if some of the "hybrid" includes full service. The same observation can be made for strategic consulting. The only changes from 20W1 are that more suppliers said full service research is their primary offering (+6%) and fewer said they were a "hybrid" (-7%). Strategic consulting also dropped by only by 3%; some of these may have focused on a more specific type of consulting, such as marketing communications. Overall, the comparison to the pre-pandemic state supports the hypothesis that suppliers had to become more focused, but also that they did not entirely abandon their identities.

Overall, the comparison to the pre-pandemic state supports the hypothesis that suppliers had to become more focused, but also that they did not entirely abandon their identities



PRIMARY SERVICE OFFERING (SUPPLIER)



PRIMARY SERVICE OFFERING BY WAVE (SUPPLIER)

	21W1	20W1	Difference 21W1 – 20W1
n	2,325	1,568	
Full service research	35%	29%	+6%
Strategic insights consulting	16%	19%	-3%
Hybrid of services	14%	21%	-7%
Quantitative data collection tools and/or platforms	6%	5%	+1%
Online qualitative tools and/or platforms	5%	4%	+1%
Quantitative data collection	3%	3%	+1%
Analytical tools and/or platforms	3%	3%	0%
Access to sample and/or recruit for studies	3%	3%	0%
Data services	2%	2%	0%
Marketing communications consulting	2%	1%	+1%
Brand strategy consulting	2%	2%	0%
Solutions for collection/analysis of unstructured data	1%	3%	-1%
Analytical services	2%	1%	+1%
Qualitative field services	1%	1%	+1%
All others	4%	4%	0%

In 20W1, full and field service were considered one type. Differences represent the differences from full service research in 21W1.

Although the overall percentage of data and analytics suppliers was stable, there were some shifts in how they defined their primary service



If we compare the specific services to 20W1 by the defining service based on revenue, a few differences stand out and support the “focus” hypothesis. Full service providers were more likely to name “full service” as a specific offering, and somewhat fewer called themselves a hybrid. Similarly, strategic insights consultants were more likely to name strategic consulting as a specific service and less likely to call themselves a hybrid or say they offered full service research. They were also more likely to consider themselves marketing communications consultants, specifically. These shifts also support the idea that some 20W1 strategic consultants had to place more emphasis on full service research to the extent that they changed categories in 21W1.

The small changes for some data collection services under “full or field service” may reflect the fact that GRIT considers full service research and field services independently now, and the comparison in this report is between 21W1 full service research without field services and 20W1 full or field service as one category.

Although the overall percentage of data and analytics suppliers was stable, there were some shifts in how they defined their primary service. As with full service and strategic consultants, fewer identified as hybrids. Also, fewer said they offer full service research, and more identified with a specific primary service such as sample access, quantitative insights platforms, or analytical platforms and tools.

PRIMARY SERVICE OFFERING BY PROFESSIONAL FOCUS (SUPPLIER)

	21W1 Source of Highest Revenue					Difference 21W1 – 20W1			
	Full service research	Field services	Strategic consulting	Data & analytics	Technology	Full or field service	Strategic consulting	Data & analytics	Technology
n	918	137	547	356	361				
Full service research	66%	10%	15%	24%	8%	+9%	-6%	-5%	+2%
Hybrid of services	11%	13%	14%	15%	23%	-3%	-7%	-10%	-3%
Strategic insights consulting	9%	1%	49%	6%	0%	+1%	+5%	-1%	-1%
Quantitative data collection tools and/or platforms	2%	9%	1%	8%	20%	0%	+1%	+5%	+3%
Online qualitative tools and/or platforms	2%	4%	1%	3%	20%	+1%	0%	+2%	+5%
Quantitative data collection	1%	23%	1%	6%	2%	-2%	0%	+1%	-1%
Qualitative field services	1%	10%	1%	1%	1%	-1%	0%	+1%	0%
Marketing communications consulting	1%	0%	6%	1%	0%	0%	+4%	+1%	0%
Solutions for collection/ analysis of unstructured data	1%	2%	0%	3%	3%	0%	-1%	-2%	-3%
Brand strategy consulting	1%	0%	5%	1%	0%	0%	+1%	-1%	-1%
Analytical services	1%	1%	0%	8%	0%	0%	0%	+3%	0%
Access to sample and/or recruit for studies	1%	21%	0%	7%	3%	-2%	0%	+5%	-3%
Analytical tools and/or platforms	0%	1%	0%	4%	13%	0%	0%	+3%	+1%
Data services	0%	5%	0%	8%	3%	-1%	0%	+2%	+1%
All others	3%	0%	6%	4%	3%	-1%	+2%	-2%	0%

In 20W1, full and field service were considered one type. Differences represent differences from full service research in 21W1.

If we look beyond the primary service offering, we see that the overall portfolio of services offered did not change much. Most of the changes occurred within full service research and likely resulted from suppliers who were in a different category last year shifting more of their sales to full service research and bringing their portfolios with them. The average number of services offered by full service research suppliers increased from 5.3 to 6.1, and these providers saw rises in strategic insights consulting,

analytical services, brand strategy consulting, marketing communications consulting, and product innovation consulting. As observed previously, strategic consultancies and data and analytics providers saw drops in full service research, while data and analytics providers saw increases in various kinds of quantitative data collection. It seems likely that buyers, looking for new ways to get new kinds of data, turned to data specialists for data collection help during the pandemic.

It seems likely that buyers, looking for new ways to get new kinds of data, turned to data specialists for help during the pandemic



ALL SERVICE OFFERINGS BY PROFESSIONAL FOCUS (SUPPLIER)

	21W1 Source of Highest Revenue					Difference 21W1 – 20W1			
	Full service research	Field services	Strategic consulting	Data & analytics	Technology	Full or field service	Strategic consulting	Data & analytics	Technology
n	918	127	547	256	361				
Full service research	91%	29%	57%	48%	38%	+8%	-10%	-10%	+3%
Strategic insights consulting	67%	14%	84%	37%	26%	+14%	-1%	-8%	+3%
Analytical services	44%	12%	34%	47%	30%	+15%	-4%	+5%	+6%
Brand strategy consulting	42%	8%	58%	24%	12%	+13%	+1%	-1%	+2%
Quantitative data collection	40%	70%	25%	55%	40%	0%	-1%	+17%	+2%
Customer or user experience consulting	36%	9%	37%	20%	17%	+9%	0%	-2%	+1%
Marketing communications consulting	36%	12%	48%	21%	10%	+15%	+7%	0%	+1%
Product innovation consulting	34%	8%	35%	17%	16%	+10%	-4%	-4%	-2%
Qualitative field services	32%	46%	23%	24%	18%	+2%	+2%	+1%	-1%
Solutions for collection/ analysis of unstructured data	25%	23%	16%	31%	41%	+4%	-3%	+3%	-3%
Access to sample and/or recruit for studies	22%	65%	10%	34%	47%	-1%	-2%	+7%	-4%
Quantitative data collection tools and/or platforms	22%	35%	10%	36%	57%	+3%	-4%	+15%	+2%
Nonconscious measurement tools and services	22%	10%	17%	9%	15%	+2%	-5%	-8%	-2%
Data services	22%	31%	12%	36%	23%	+5%	+3%	+3%	-2%
Online qualitative tools and/or platforms	19%	21%	9%	19%	48%	+4%	-2%	+4%	+4%
Analytical tools and/or platforms	16%	15%	12%	28%	61%	+1%	-2%	+6%	+9%
Vertically-focused specialized research	16%	8%	10%	15%	10%	+1%	-3%	0%	-1%
Secondary or syndicated data	10%	6%	6%	8%	6%	+2%	+1%	-2%	0%
Average number of services	6.0	4.3	5.0	5.1	5.2	0.9	-0.5	-0.1	-0.1

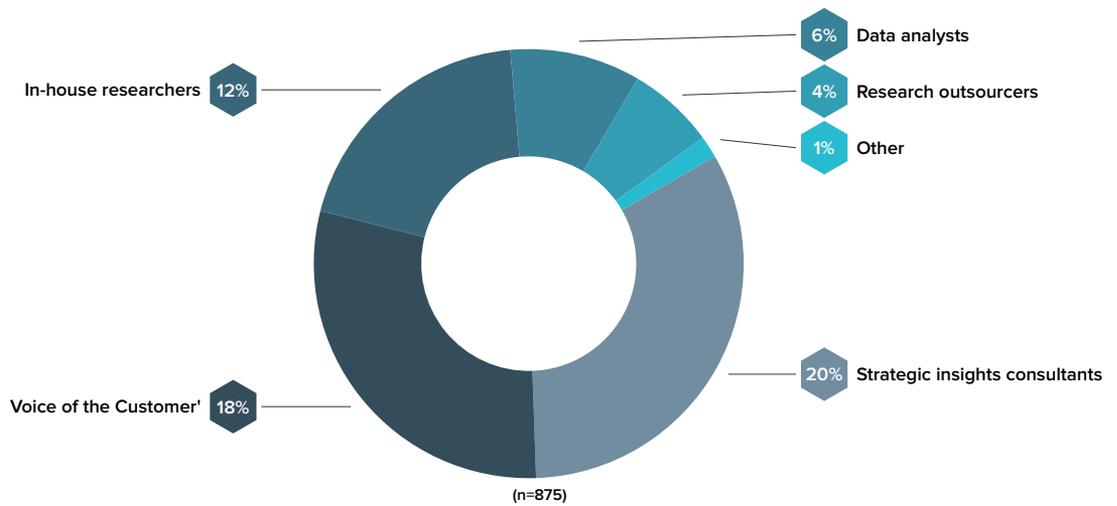
In 20W1, full and field service were considered one type. Differences represent differences from full service research in 21W1. Green highlighting represents increases of 10% or more, and red represents decreases of 10% or more.

BUYER ROLES ADAPTED, TOO

Meanwhile, buyer roles evolved somewhat since 20W1 during the pandemic to adapt to changing needs. Fewer buyers primarily identify as strategic insights consultants or "Voice of the Customer." Possibly reflecting a need to do more with fewer resources, somewhat more identify as "hybrids."

Also, somewhat more primarily identify as in-house researchers, data analysts, or research outsourcers, three roles that might be considered less abstract and more pragmatic than strategic insights or VoC during the pandemic.

PRIMARY ROLE OF INSIGHTS GROUP (BUYER)



Buyer roles evolved somewhat during the pandemic to adapt to changing needs



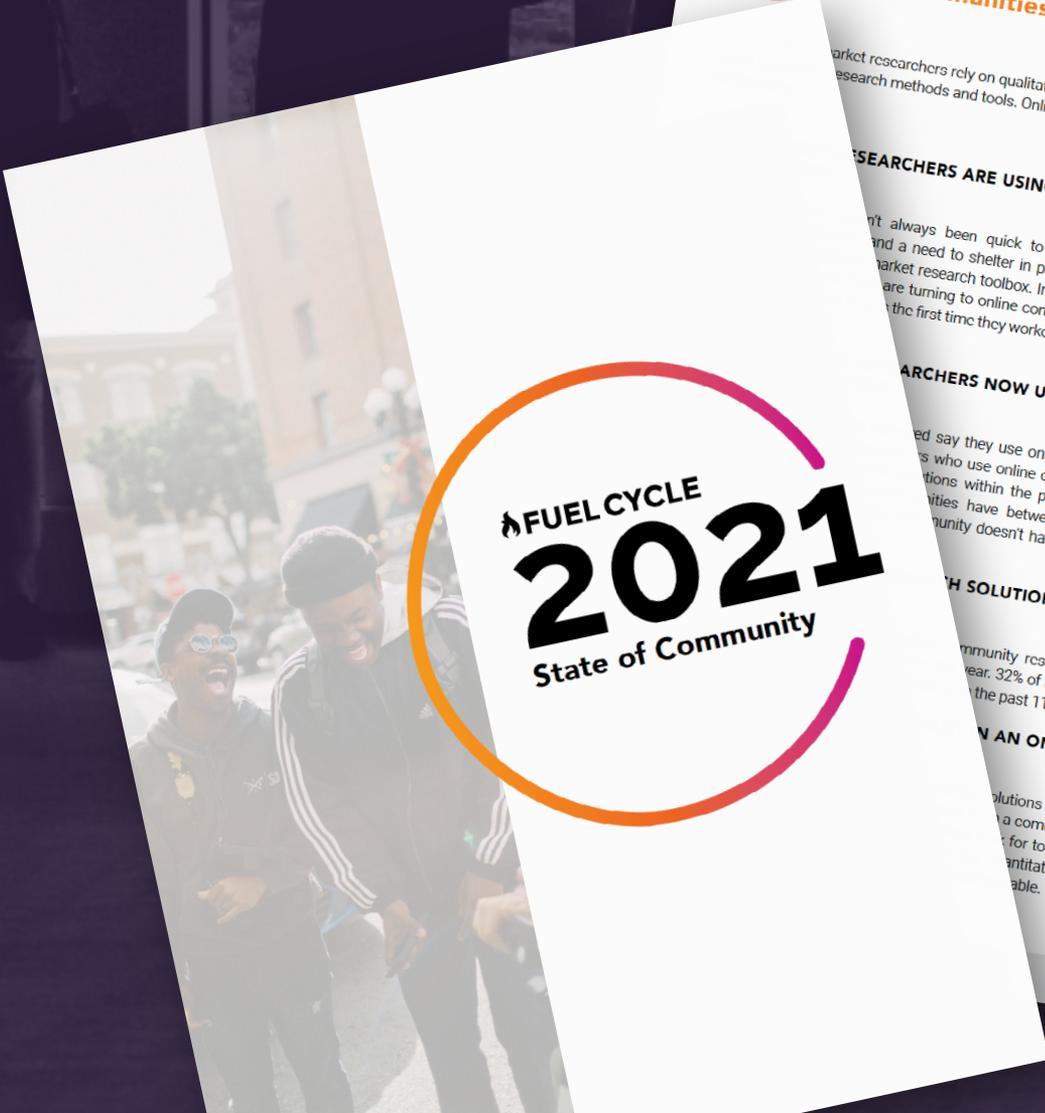
PRIMARY ROLE OF INSIGHTS GROUP BY WAVE (BUYER)

	21W1	20W1	Difference (21W1 – 20W1)
n	875	352	
Hybrid	40%	37%	+3%
Strategic insights consultants	20%	23%	-3%
'Voice of the Customer'	18%	25%	-7%
In-house researchers	12%	9%	+3%
Data analysts	6%	3%	+3%
Research outsourcers	4%	1%	+3%
Other	1%	1%	0%

2021

Market Research Online Communities

[Read the Report](#)



Section 1 **More Researchers Are Turning to Online Communities to Gather Qualitative Data**

Market researchers rely on qualitative data, and last year more people said they plan to use new research methods and tools. Online communities, in particular, are generating interest.

RESEARCHERS ARE USING COMMUNITIES FOR

...n't always been quick to adopt new technologies. ... and a need to shelter in place made it necessary to ... market research toolbox. In terms of capturing quali- ... are turning to online communities. 67% of market ... the first time they worked with an online research

RESEARCHERS NOW USE DIGITAL

... ed say they use online research commu- ... s who use online communities say they ... tions within the past two years. Most ... ities have between 1,000 to 10,000 ... munity doesn't have to be massive to

WITH SOLUTION ADOPTION

... mmunity research is growing ... ear. 32% of market research- ... the past 11 months.

AN ONLINE

... olutions is a relatively ... a community. When ... for tools that offer ... antitative research ... able.

ONLINE RESEARCH COMMUNITIES

37%

of all market research surveyed say they use online research communities.

RAPID ADOPTION OF MR COMMUNITIES

32%

of market researchers that have adopted a community solution did so in the past 11 months.

EFFECTIVE ONLINE COMMUNITY MEANS

53%	Agile
51%	Flexible
31%	Qual
37%	Quant
35%	Auto

Looking at buyers' full complement of roles, hybrids not only grew as a category, but these buyer departments assumed one full additional role since 20W1. Data analysts and in-house researchers took on one-half an additional role, on average.

Also, there is a lot of overlap between strategic insights consulting and VoC. Each function is done by most of those in a hybrid role, and most that primarily do one of these roles also do the other. Most in-house researchers also do both

roles. Totaling up these two roles, we find that they account for about 1.6 of the approximately 2.6 roles filled by those acting primarily as a strategic consultant or VoC, meaning that, on average, they have one additional role as either in-house researchers, data analysts or research outsourcers. For in-house researchers, these two roles plus their primary role account for approximately 2.1 of their 2.5 roles, on average.

ALL ROLES OF INSIGHTS GROUP BY PRIMARY ROLE (BUYER)

	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
n	355	166	160	103	50	30
Hybrid	<i>100%</i>	39%	39%	33%	11%	37%
'Voice of the Customer'	72%	65%	<i>100%</i>	55%	39%	25%
Strategic insights consultants	71%	<i>100%</i>	56%	55%	52%	22%
In-house researchers	54%	34%	34%	<i>100%</i>	43%	38%
Data analysts	50%	33%	28%	45%	<i>100%</i>	12%
Research outsourcers	48%	27%	30%	43%	25%	<i>100%</i>
Other	2%	0%	1%	0%	0%	0%
Average number of roles (21W1)	4.0	2.6	2.5	3.0	2.6	2.0
Average number of roles (20W1)	2.9	2.6	2.5	2.5	2.1	2.3
Change in number of roles (21W1 – 20W1)	+1.0	0.0	0.0	+0.5	+0.5	-0.3
<i>Italics represent table cells where the service matches the primary service and is 100% in all cases.</i>						
<i>Green highlighting represents secondary roles of 50% or more.</i>						
<i>Average number of roles includes "hybrid" only as a primary role in order to match 20W1 data.</i>						

THE BIG PICTURE

Much of the buyer mentality likely shifted from long term strategic planning toward getting immediate answers to specific questions, and the trends in how they see their roles seem to support this storyline



The insights and analytics industry structure had to adapt to the trials and tribulations of 2020, especially on the supplier side. As the pandemic unfolded, budgets tightened and client needs changed, especially as some traditional methods of data collection became impractical and the need for new kinds and sources of data became apparent. As discussed in the 20W2 GRIT report, much of the buyer mentality likely shifted from long term strategic planning toward getting immediate answers to specific questions, and the trends in how they see their roles seem to support this storyline.

In response, many suppliers who had grown their strategic consulting businesses prior to the pandemic found that their 2020 breadwinner was full service research instead. By GRIT 20W1, insights suppliers who considered strategic consulting to be their main service area had become the most common type and full service research looked to be going the way of the dinosaur, but COVID-19 changed all that, at least for 2020. The strategic consulting business seems to be on the upswing again, and time will tell if it eventually ascends back to the position it held before the Earth stood still.



BRANDS ARE TRIAGING THE WAY THEY WORK WITH SUPPLIERS – THREE POTENTIAL POSITIVE OUTCOMES

Jake Wolff

Chief Commercial Officer, Cint

Email: jake.wolff@cint.com | Twitter: [@cintgroup](https://twitter.com/cintgroup) | Website: [cint.com](https://www.cint.com)

LinkedIn: www.linkedin.com/in/jake-wolff-086b6327/

The latest GRIT report notes an evolving insights space, with new players entering the market and changes in how insights companies are presenting themselves. It finally poses a question on how brands are likely to deal with the evolving landscape.

At Cint, we do not have a direct-to-brand salesforce. However, the volume of inbound activity we are seeing, which is substantially higher than at any point in my nine years here, shows something is shifting. The simple takeaway from these conversations is that **brands are in a state of triage in terms of how they spend their research budgets. Access to a wide array of technologies combined with growing internal insights teams offers the opportunity to match research complexity with category specialists.** These specialists span from single question insights all the way to deep consultative research with complex requirements.

What does this mean for the overall insights picture?

Growth in the space!

I see room for the tech players, the methodologists, research consultants and everyone in-between. Yes, there will be some fighting over the same pot, but more so, the pot will grow. We can see examples in many places. Over the past year, Suzy.com noted big growth in licenses being used by non-insight department employees. SurveyMonkey (now Momentive) and Qualtrics are household names, shortening the path from employee and even consumer, to insight creation. Zappi is pioneering templated methodology, taking the fear off conducting methodologically sound research. Through the pandemic we saw companies like Kantar stand up and offer robust access to COVID-19 sentiment with out-of-the-box consulting, allowing brands to be quicker to action than ever before. Smart brands are taking advantage of all the space has to offer and appear to be willing to invest in the process.

Brands are becoming educated on the respondent experience.

Shortening the distance between those that commission research and research participants could be a healthy outcome for the respondent experience. For those who work with respondents regularly, there are some known issues. Length of studies, non-mobile-friendly surveys, shrinking incentives, increased desire for PII privacy, late-term points - all have diminished the experience of participating in survey-based research. Unfortunately, there have been many layers to navigate between those who are dealing with respondent experience problems and the brands who initiate the pricing pressure and the need for longer and more complex studies. As those layers disappear, brands will become educated on the toll such practices can take. It is the closest we have been in a while to having the right conversations and striking the proper balance between research need and proper respondent engagement.

Investors take notice!

At Cint, we work with reports that show the Insights space as high as \$80bn per annum - a massive industry with lots of money. The GRIT report shows that now budgets are shifting, and digitization (and digitalization) is happening. This inflection point is highly attractive for professional investors, in both the public and private sector. In the past 24 months we have seen mergers, VC and PE investment and several successful IPOs. It can be argued that these are the early days of this run. The insights space is, and will continue to be, an attractive place to invest.

To summarize with a bit of a “glass half full” prospective, additional investment from brands and investors coupled with a renewed respondent experience that will widen the pool of opinions, will result in pushing the envelope on innovation and act as a force multiplier on creative output. The space is very exciting right now and is not showing many signs of slowing down.

EVOLVING INDUSTRY STRUCTURE

As the industry continues to transform and overlap with other categories, it is getting harder and harder to cleanly define exactly what types of businesses comprise “Insights and Analytics”. The best way to figure that out is to ask the constituents which companies they think fit into accepted segments; this is where we look at how that is changing (or not).

When you see the set of companies that insights professionals think best represent strategic consultancies, for example, try to think in terms of their characteristics, not of the individual companies



First, a bit of level setting. This section is not about *companies*, it's about *categories*. GRIT knows that telling you not to think about the individual companies mentioned here is exactly like telling you not to think about pink elephants, but – hey! What about those pink elephants over there?

One way GRIT monitors the expansion of the insights industry is to ask participants which companies come to mind as they are prompted with different supplier categories, in this case, strategic consultancies, technology, and data and analytics providers. The sets of companies mentioned paint a picture – or maybe sketch a charcoal outline – of the expectations that insights professionals have of each service area. It's a top-of-mind unaided awareness exercise intended to capture the zeitgeist of each supplier category, not a quantitative analysis of how individual companies are performing.

When you see the set of companies that insights professionals think best represent strategic consultancies, for example, try to think in terms of their characteristics, not of the individual companies. You might notice things like, “most of them have been around for decades, half come from a management consulting background while nearly half come from the research industry with a smattering of tech origins; this leads me to think blah blah blah.....” The pattern is yours to interpret, like a Rorschach test.

This is simply top-of-mind, unaided awareness of companies, and not any kind of judgment on how big or small they are, how they are doing financially, how good their services are or anything like that. In fact, for all we know, a company might be top-of-

mind because they have been around forever or market themselves aggressively but have never established the value of their offering in the minds of people who recognize the name. Or, suppose a company became known for paying people to fake survey responses or made news because a business development executive took surveys posing as one of her clients and was expelled from industry organizations over it? These companies might become infamous rather than famous, but they might be top-of-mind regardless.

So, if your motivation for reading this section is to pass judgment on your own or other companies, please read another section instead and report to your parole officer or legal guardian as soon as possible because you are likely in danger of becoming a recidivist and need help.

Finally, while we report ranks and compare them across waves and segments, these are not to be confused with heavy quantitative analytics. A company is ranked if they received at least 3% of the mentions. There is nothing especially meaningful about this number, but it enables us to make comparisons to last year, and it prevents the picture from becoming distorted. The “ranks” are presented to give you a sense of the momentum that certain characteristics have in defining a category, so don't study them too carefully. If the top two companies mentioned are tech start-ups and the bottom two are grandparents of the category, you might hypothesize that the category is being redefined by new entrants. However, please don't leap to the conclusion that one company is somehow “better” than another, except based on your own experience.

STRATEGIC CONSULTANCIES STILL “ARE WHAT THEY ARE”

One-third of buyers were asked for names of companies that come to mind when they think of “strategic consultancies” in the insights industry, and 248 of them provided a total of 721 responses. Among these, 26 companies were named by five or more buyers for a total of 487 mentions. Our goal is to get a snapshot (or painting or charcoal outline) of what the category looks like, so we are not going to dwell on these numbers; we have provided them for general context.

Compared to 20W1, the companies that come to mind as strategic consultancies are basically unchanged. There are some minor differences in the ranks, but, overall, the category is defined by very established competitors with management consulting or research backgrounds. There’s a hint of modernization, but the foundation of “strategic consulting” has not been altered. Two characteristics set “strategic consulting” apart from our other “big bucket” categories. First, it functions more as an “end” versus a “means to end,” which better describes full service research and technology providers, for example. Second, fewer insights professionals work on strategic projects than are touched by other kinds of work by the other supplier categories. Although there are certainly a broad range of strategic issues for consultants to address, these two factors leave little room for disrupting the meaning of the “category”. Although one can imagine disrupting some of the processes, the hierarchy of suppliers does not seem to be on the verge of revolution.



TOP-OF-MIND STRATEGIC CONSULTANCIES BY WAVE: RANKS (BUYER)

	21W1	20W1
McKinsey	1	1
Kantar	2	2
Bain & Company	3	6
Nielsen	4	4
BCG	5	5
Ipsos	6	3
Deloitte	7	8
Accenture	8	9
Hotspx	9	7
Material (formerly LRW)	<i>Not ranked</i>	10

The perspective of the average insights buyer has not changed even with all that’s occurred over the past year. Elsewhere in this report, we noted that the percentage of suppliers whose highest revenue came from strategic consulting declined while the percentage of full service research providers increased, particularly among mid-size suppliers. We hypothesized that the pandemic shifted most of their opportunity from longer term strategic projects to shorter term research projects, but it seems likely our top-of-mind strategic consultancies would not have been affected in the same way. The category seems to be very stable, although the less iconic names in it may be undergoing some changes, at least temporarily.

The face of the strategic consulting category is well-recognized and mostly defined by the people who work with them; these are the ones who know best and who set the criteria for selecting strategic consultancies. We know that only 58% of GRIT buyers used these suppliers at least occasionally, and they view the category from a different vantage than those who rarely or never work with them. First of all, they supplied a disproportionately high 74% of the company mentions, which suggests that they are more likely to have strong opinions of what it means to be a strategic consultancy and

Compared to 20W1, the companies that come to mind as strategic consultancies are basically unchanged



who fits that description. Although they provided more mentions than others, those who work with strategic consultancies did not necessarily provide more names; this group tended to provide more

mentions of the same companies while those with less experience provided fewer mentions of more names. The rankings compare as follows:

TOP-OF-MIND STRATEGIC CONSULTANCIES BY FREQUENCY OF ENGAGEMENT: RANKS (BUYER)

	All buyers	Work with regularly or occasionally	Rarely or never work with
McKinsey	1	1	1
Kantar	2	2	4
Bain & Company	3	3	2
Nielsen	4	4	5
BCG	5	5	8
Ipsos	6	6	3
Deloitte	7	8	7
Accenture	8	7	Not ranked
Hotspex	9	9	Not ranked
Quantum	Not ranked	Not ranked	6
Facebook	Not ranked	Not ranked	9
Forrester	Not ranked	Not ranked	10
Gartner	Not ranked	Not ranked	11
Mintel	Not ranked	Not ranked	12
GfK	Not ranked	Not ranked	13

As with buyers, one-third of suppliers were asked for names of companies that come to mind when they think of “strategic consultancies” in the insights industry, and 487 of them provided a total of 1,137 ideas. Among these, 35 companies were named by five or more for a total of 795 mentions.

In 20W1, the top-of-mind list from suppliers contained the same names as the buyer list, plus four more. In 21W1, the top-of-mind supplier list contains eight of the nine buyer top-of-mind companies, and each of these were also on their 20W1 list.

Four names from 20W1 are not among the top 21W1 mentions from suppliers, but we shouldn't make too much of that. These companies tended to be farther down the list last year, which suggests that the typical supplier did not think of them as being as iconic within the category as some others.

Also, as we discussed elsewhere in this report, it seems that a lot of work that had been classified as “strategic consulting” before the pandemic was replaced with full service research projects for some suppliers as they tried to make ends meet, so the idea of what defines “strategic consulting” may have taken a more traditional form. To reiterate an important point, this hypothesis is not about these four suppliers; for all we know, they could have grown their strategic consulting services ten-fold during the pandemic. The hypothesis concerns the attitudes of suppliers who mentioned their top-of-mind strategic consultants; if they felt that strategic consulting work had dried up for everyone except for the most established suppliers, they would have named those instead of these four.

Again, we conclude that the face of the category is implacable, even if some suppliers are struggling. Although the firms on this list change their names from time to time, they remain well-known, established companies who have nurtured and grown the meaning of their brands in minds across wide swaths of the industry, not just among their employees, interns, and job applicants.

Suppliers, overall, see the same face of consulting as they saw last year, but GRIT does not like to generalize about “suppliers overall.” What are the thoughts of those who are in it to win it, the ones who are earning revenue from strategic consulting services? Suppliers who earn significant revenue from strategic consulting services represent 42% of the GRIT population, and they supplied 43% of the strategic consultancy mentions, so they do not dominate the overall ranking: they did not mention companies disproportionately as did the buyers who use strategic consultancies. However, their responses are not very different from suppliers who do not get significant revenue from strategic consulting. Again, there are some minor differences, but those are more appropriate for discussion over coffee or a beer rather than here.

TOP-OF-MIND STRATEGIC CONSULTANCIES BY WAVE (SUPPLIER)

	21W1	20W1
McKinsey	1	1
Kantar	2	5
Ipsos	3	2
BCG	4	6
Bain & Company	5	3
Nielsen	6	9
Accenture	7	11
Deloitte	8	10
Material (formerly LRW)	9	4
Hotspex	Not ranked	7
Behaviorally (formerly PRS IN VIVO)	Not ranked	8
Dig Insights	Not ranked	12
SKIM	Not ranked	13

We conclude that the face of the category is implacable, even if some suppliers are struggling



TOP-OF-MIND STRATEGIC CONSULTANCIES BY STRATEGIC CONSULTING REVENUE (SUPPLIER)

	All suppliers	Significant revenue	Does not get significant revenue
McKinsey	1	1	1
Kantar	2	2	2
Ipsos	3	3	4
BCG	4	4	5
Bain & Company	5	5	3
Nielsen	6	7	6
Accenture	7	6	8
Deloitte	8	Not Ranked	7
Material	9	8	Not ranked

TOP-OF-MIND STRATEGIC CONSULTANCIES BY STRATEGIC DECISION MAKERS (BUYER, SUPPLIER)

	Makes strategic decisions	Does not make strategic decisions
McKinsey	1	1
Kantar	2	2
Ipsos	3	5
BCG	4	4
Nielsen	5	6
Bain & Company	6	3
Accenture	7	Not ranked
Material	8	Not ranked
Deloitte	9	7
PwC	Not ranked	8
Accenture	Not ranked	9

Last year's GRIT report synopsis still applies: "While certainly the 'usual suspects' in terms of traditional players in the market research category popped up, so did the big management consultancies like McKinsey, BCG, Bain, Deloitte, Accenture, and PwC with McKinsey leading across both segments. What may give some suppliers pause is that despite efforts by some such as LRW (Material), Shapiro + Raj, and SKIM that have been working very hard to position themselves as competitors to the management consultancies, they are not top-of-mind for most

We have not seen meaningful differences in top-of-mind strategic consultancies since last year, by either frequency of engagement or by who provides those services. If we look at those who make strategic decisions versus those who do not, we do not find any meaningful differences, either. Again, the service is focused on a particular kind of end deliverable as opposed to being a process that could produce different kinds of end deliverables, and fewer professionals participate in this kind of work. As a result, the industry perspective on the category is largely monolithic.

Not only is the set of top-of-mind providers less stable, but so is the perception of what "technology provider" means compared to the more traditional "strategic consultancy" category



buyers using that terminology." Anyone who invented the credit card 90 years ago, raise your hand.

Although the term "usual suspects" comes from "Casablanca," the situation calls to mind another Humphrey Bogart movie, 1953's "Beat the Devil." Early on, Gina Lollobrigida informs Bogart that someday she wants to own one of those grand old English lawns. Bogart replies, "That's easy. Just plant some grass seed and roll it every day for 300 years." You probably have the seeds and maybe even planted them. Now keep rolling.

JUST WHAT ARE "TECHNOLOGY PROVIDERS"?

The next category, technology providers, is not as mature from top-to-bottom as strategic consultancies, probably reflecting its relative newness, but also the relative diversity of services. Not every insights professional works on strategic projects, but almost every one is touched by technology, and this creates a greater opportunity for fluidity among the top-of-mind technology providers than among strategic consultancies. Not only is the set of top-of-mind providers less

stable, but so is the perception of what "technology provider" means compared to the more traditional "strategic consultancy" category.

In 20W1, GRIT reported thirteen suppliers who, in the minds of buyers, best represented the category of "technology provider." These included providers of cloud services, applications, survey platforms, technology specific to data and analytics, and full service research providers who could package and deliver these. One year and most of

one pandemic later (hopefully), the buyers' list of representative technology providers includes three new entrants and the same diversity of offerings. There is not too much to conclude from this, but one could hypothesize that buyers may have become slightly more interested in general analytical tools they could use themselves than they had been in technology to collect data themselves. If so, this would be consistent with what we have postulated as a kind "reckoning" during the pandemic in which the division of labor became more distinct across buyers and suppliers

The increased emphasis on technology brought on by the pandemic may have increased the contrast between providers who operate more as general or pure technology solutions



Although we don't want to over-analyze specific companies, three companies who were ranked by buyers last year but not this year showed up strongly positioned in the supplier rankings, and this supports the "reckoning" theory. (Again, "not ranked" means that they did not receive at least 3% of top-of-mind mentions, not that anything negative transpired.) The movement on the supplier lists seems to complement the movement on the buyer list.

The fact that the top-of-mind supplier list went from seventeen companies to nearly half that at nine can be indicative of a few trends. First, it could mean that some suppliers were seen more as belonging to some other category than technology; perhaps they became top-of-mind data and analytics or full service research suppliers. The increased emphasis on technology brought on by the pandemic may have increased the contrast between providers who operate more as general or pure technology solutions, such as application providers, versus those who provide more specific solutions or also provide services. It could represent a preference to throw in with the most established providers rather than try relatively new technology services or ones that were too specialized.

TOP-OF-MIND TECHNOLOGY PROVIDERS BY WAVE (BUYER)

	21W1	20W1
Qualtrics	1	1
Google	2	2
Microsoft (incl. Power BI)	3	5
IBM (incl. SPSS)	4	8
Salesforce (incl. Tableau)	5	Not ranked
Nielsen	6	4
Ipsos	7	9
Amazon	8	10
Hotsplex	9	11 (tie)
Kantar	10	7
Apple	11	Not ranked
Toluna	12	Not ranked
SurveyMonkey (now Momentive)	13	6
Zappi	Not ranked	3
Medallia (incl. LivingLens)	Not ranked	11 (tie)
Dynata	Not ranked	11 (tie)

TOP-OF-MIND TECHNOLOGY PROVIDERS BY WAVE (SUPPLIER)

	21W1	20W1
Qualtrics	1	1
Google	2	2
FocusVision (incl. Decipher)	3	3
Medallia (incl. LivingLens)	4	9
SurveyMonkey (now Momentive)	5	Not ranked
Zappi	6	4
Microsoft (incl. Power BI)	7	7
Dynata	8	13 (tie)
IBM (incl. SPSS)	9	5
Confirmit	Not ranked	6
VoxPopMe	Not ranked	8
LRW (now Material)	Not ranked	10 (tie)
Schlesinger (including 20/20 Research)	Not ranked	10 (tie)
Apple	Not ranked	12
Hotsplex	Not ranked	13 (tie)
Ipsos	Not ranked	15
Cint	Not ranked	16
PRS IN VIVO (now Behaviorally)	Not ranked	17

Comparing buyers who work with technology providers regularly or occasionally (72%) versus those who don't reveals some differences in how the category is viewed. While those who work with technology providers have a diverse top-of-mind set of a dozen names, those who do not work with them have a diffuse set of eighteen. In particular, companies that can be identified with

analytical packages such as Microsoft, IBM, and Salesforce or survey platforms such as Qualtrics and SurveyMonkey (now Momentive), are not nearly as top-of-mind. The opinions of these non-adopters don't have much impact on the overall list or rankings, but they demonstrate how isolated they are from the mainstream use of technology.

TOP-OF-MIND TECHNOLOGY PROVIDERS BY FREQUENCY OF ENGAGEMENT (BUYER)

	All buyers	Work with regularly or occasionally	Rarely or never work with
Qualtrics	1	1	14
Google	2	2	1
Microsoft (incl. Power BI)	3	3	13
IBM (incl. SPSS)	4	4	17
Salesforce (incl. Tableau)	5	5	12
Nielsen	6	9	2
Ipsos	7	7	6
Amazon	8	8	7
Hotspex	9	6	10
Kantar	10	11	11
Apple	11	10	18
Toluna	12	13	Not ranked
SurveyMonkey (now Momentive)	13	12	Not ranked
Brandwatch	Not ranked	Not ranked	3
Facebook	Not ranked	Not ranked	4
IRI	Not ranked	Not ranked	5
Medallia (incl. LivingLens)	Not ranked	Not ranked	8
Discuss.io	Not ranked	Not ranked	9
Oracle	Not ranked	Not ranked	15
AYTM	Not ranked	Not ranked	16

Suppliers who generate significant revenue from technology (24%) are very different from those who do not, although both think of Qualtrics and FocusVision as top-of-mind. Because platform providers seem to be more top-of-mind than

companies like Google among those who sell technology, they are likely thinking of competitors while other types of suppliers might be thinking more of services they use themselves.

TOP-OF-MIND TECHNOLOGY PROVIDERS BY TECHNOLOGY REVENUE (SUPPLIER)

	All suppliers	Significant revenue	Does not get significant revenue
Qualtrics	1	1	1
Google	2	7	2
FocusVision (incl. Decipher)	3	3	3
Medallia (incl. LivingLens)	4	<i>Not Ranked</i>	5
SurveyMonkey (now Momentive)	5	2	<i>Not Ranked</i>
Zappi	6	5	10
Microsoft (incl. PowerBI)	7	<i>Not Ranked</i>	4
Dynata	8	8	9
IBM (incl. SPSS)	9	<i>Not Ranked</i>	8
VoxPopMe	<i>Not Ranked</i>	4	<i>Not Ranked</i>
Remesh	<i>Not Ranked</i>	6	<i>Not Ranked</i>
Cint	<i>Not Ranked</i>	9	<i>Not Ranked</i>
Suzy	<i>Not Ranked</i>	10	<i>Not Ranked</i>
Confirmit	<i>Not Ranked</i>	11	<i>Not Ranked</i>
Quantilope	<i>Not Ranked</i>	12	<i>Not Ranked</i>
Nielsen	<i>Not Ranked</i>	<i>Not Ranked</i>	6
Recollective	<i>Not Ranked</i>	<i>Not Ranked</i>	7

Across decision makers and non-decision makers, Qualtrics and Google are the most identifiable technology providers and FocusVision is in the top five for each, but otherwise their top-of-mind suppliers are different



Across decision makers and non-decision makers, Qualtrics and Google are the most identifiable technology providers and FocusVision is in the top five for each, but otherwise their top-of-mind suppliers are different. To go out on a limb, the decision makers might be more inclined to think of technology they see in use, such as a survey they might test or that they sign a big check for, while non-decision makers may be more inclined to think of things they use every day, like Google Analytics or Tableau.



TOP-OF-MIND TECHNOLOGY PROVIDERS BY STRATEGIC DECISION MAKERS (BUYER, SUPPLIER)

	Makes strategic decisions	Does not make strategic decisions
Qualtrics	1	1
Google	2	2
SurveyMonkey (now Momentive)	3	<i>Not Ranked</i>
Dynata	4	<i>Not Ranked</i>
FocusVision (incl. Decipher)	5	5
Zappi	6	<i>Not Ranked</i>
Medallia (incl. LivingLens)	7 (tie)	<i>Not Ranked</i>
Recollective	7 (tie)	<i>Not Ranked</i>
Confirmit	9	<i>Not Ranked</i>
Cint	10	<i>Not Ranked</i>
Nielsen	11	7
IBM (incl. SPSS)	12	4
Microsoft (incl. PowerBI)	<i>Not Ranked</i>	3
Salesforce (incl. Tableau)	<i>Not Ranked</i>	6

WHERE IS DATA AND ANALYTICS GOING?

TOP-OF-MIND DATA & ANALYTICS PROVIDERS BY WAVE (BUYER)

	21W1	20W1
Nielsen	1	1
Kantar	2	2
Ipsos	3	3
IRI	4	4
Google	5	5
Hotspex	6	8
Qualtrics	7	7
GfK	8	11
1Q	<i>Not Ranked</i>	6
IBM	<i>Not Ranked</i>	9
Dynata	<i>Not Ranked</i>	10

Similar to strategic consultancies, buyers' 20W1 top-of-mind data and analytics suppliers remained basically the same a year later, though with some consolidation. Also similar to strategic consulting projects, data and analytics could be closer to the deliverables end of the project than other services and might touch fewer insights professionals than full service research and technology projects or initiatives. Therefore, it may not be surprising if the top-of-mind idea of the category is similarly monolithic.

TOP-OF-MIND DATA & ANALYTICS PROVIDERS BY WAVE (SUPPLIER)

	21W1	20W1
Ipsos	1	1
Kantar	2	3
Nielsen	3	2
Qualtrics	4	6
Dynata	5	4
GfK	6	7
Google	7	11
Material (formerly LRW)	<i>Not Ranked</i>	5
Hotspex	<i>Not Ranked</i>	8
Behaviorally (formerly PRS IN VIVO)	<i>Not Ranked</i>	9
Dig Insights	<i>Not Ranked</i>	10
SKIM	<i>Not Ranked</i>	12

Among suppliers, the set of top-of-mind data and analytics providers is similarly stable and overlaps the buyer list considerably. Also like the buyer lists, it has consolidated somewhat since last year. Like the strategic consulting set, these are dominated by very large, established names. To reiterate an earlier point, this does not mean that these companies are the best at providing these services, only that they are the best known as being able to provide them. However, if they were not at least competitive with niche providers, we would have expected the list to expand rather than contract since last year. It could also mean that they are top-of-mind among those who do not use data and analytics providers, as we saw with technology providers.

Among suppliers, the set of top-of-mind data and analytics providers is similarly stable and overlaps the buyer list considerably



Those who work at least occasionally with data and analytics providers (79%) have a more focused top-of-mind set of suppliers than those who do not. In fact, those who do not use data and analytics providers are likely to name companies that appeared on the technology provider list (like IBM) or have not appeared on any list so far (like Dig Insights), so they probably do not have any concept of data and analytics services at all.

Those who do work with these providers have a more focused set of top-of-mind companies which includes some of the largest and most established suppliers, although very distinct from the list of large and established strategic consultancies. The takeaways are 1) users of data and analytics providers see it as a distinct service from strategic consulting or technology and 2) after the major suppliers are accounted for, the data and analytics provider landscape is very fragmented, which is a good thing for niche suppliers.

From the perspective of those who earn revenue from data and analytics (31%), they share the top three suppliers, plus Google, with those who work with them, but no others. Those who do not use them, of course, have the same top three plus Google. They share GfK with the buyers who use data and analytics providers and Qualtrics and Dynata with providers who offer these services in their top-of-mind sets.

Overall, we see that big companies dominate top-of-mind data and analytics services, but, in the supplier sets, we see hints of what might be considered technology or data collection services. As we reported elsewhere, the “reckoning” has settled the overlap between full service research and strategic consulting, at least for now, and the overlap or fusion of data and analytics and field services seems to be taking the evolutionary center stage. Likely, there are data collection companies offering more analytics, and analytics providers offering more data collection. Some of these are probably driven by technology.

TOP-OF-MIND DATA & ANALYTICS PROVIDERS BY FREQUENCY OF ENGAGEMENT (BUYER)

	All buyers	Work with regularly or occasionally	Rarely or never work with
Nielsen	1	1	1
Kantar	2	2	5
Ipsos	3	3	7
IRI	4	4	Not Ranked
Google	5	6	4
Hotspex	6	5	Not Ranked
Qualtrics	7	Not Ranked	9
GfK	8	7	Not Ranked
1Q	Not Ranked	Not Ranked	Not Ranked
IBM (incl. SPSS)	Not Ranked	Not Ranked	2
Dynata	Not Ranked	Not Ranked	Not Ranked
Oracle	Not Ranked	Not Ranked	3
SurveyMonkey (now Momentive)	Not Ranked	Not Ranked	6
Facebook	Not Ranked	Not Ranked	8
Salesforce (incl. Tableau)	Not Ranked	Not Ranked	10
Adobe	Not Ranked	Not Ranked	11
Dig Insights	Not Ranked	Not Ranked	12

TOP-OF-MIND DATA & ANALYTICS PROVIDERS BY DATA & ANALYTICS REVENUE (SUPPLIER)

	All suppliers	Significant revenue	Does not get significant revenue
Ipsos	1	2	1
Kantar	2	3	2
Nielsen	3	1	3
Qualtrics	4	4	4
Dynata	5	5	5
GfK	6	Not Ranked	6
Google	7	6	7
IBM (incl. SPSS)	Not Ranked	7	Not Ranked
Gartner	Not Ranked	8	Not Ranked
Salesforce (incl. Tableau)	Not Ranked	Not Ranked	8

When we compare strategic decision makers to non-decision makers, the top four data and analytics providers are the same, and the rest of the lists are similar, except for two additional suppliers from the decision maker camp.

TOP-OF-MIND DATA & ANALYTICS PROVIDERS BY STRATEGIC DECISION MAKERS (BUYER, SUPPLIER)

	Makes strategic decisions	Does not make strategic decisions
Kantar	1	2
Nielsen	2	1
Ipsos	3	3
Qualtrics	4	4
Dynata	5	7
GfK	6	8
Google	7	6
IBM (incl. SPSS)	8	<i>Not Ranked</i>
Hotspex	9	<i>Not Ranked</i>
IRI	10	5

All in all, the data and analytics category is defined by large players, as is the strategic consultancy category. Technology, on the other hand, is more diverse, probably because it is a means to several ends so there is more opportunity for providers to take on distinct, specialized roles. The strategic consultancy category, at a high level, seems to have

become more monolithic as some 20W1 members fell back on full service research, but data and analytics seems to be on the brink of differentiation as the relationship between “data” functions versus “analytics” functions may be experiencing growing pains.



The overlap or fusion of data and analytics and field services seems to be taking the evolutionary center stage



LET'S MOVE RESEARCH TO THE HEART OF ALL STRATEGIC INITIATIVES

Dr. Beatrice Capestany

Senior Solutions Consultant, quantilope

Email: beatrice.apestany@quantilope.com | Website: www.quantilope.com/en

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

Becoming a “customer-centric” organization is a key priority for leading brands. Brands want to know—in real-time—what their consumers like, need, and desire to not only cater to but to develop long-lasting, loyal relationships. However, the reality of customer-centricity is more often than not a dream or a fantasy that’s difficult to fulfill.

While insights teams *should* act as the starting lineup in an organization to gain the foundational knowledge brand leaders need to become customer-centric, there are often multiple barriers that get in their way. Whether an insights process is too slow, too expensive, or too complicated, many research teams struggle to deliver the right type of high-quality, on-going, insights that executives seek. As a result, insights teams can end up presenting irrelevant data to business leaders that lack enough substance to make strategic business decisions on.

In order to get to a point where consumer insights & strategic leadership go hand-in-hand, brands need a solution that enables them to do high-quality research processes at scale. While agencies have traditionally offered this type of high-quality strategic research, the time and cost associated with such work becomes limiting - fast. However, researchers require insights that are quick and actionable yet substantive; support immediate decision making; reduce time to market; and—of course—are affordable.

How do we get there?

With the rise of technology-based research platforms, new tools and solutions (like quantilope’s Insights Automation platform) are empowering brands to do higher-quality research easier than ever before for less money. Automating the advanced research process gives researchers back the time they need for data analysis and creativity. And with results delivered in less than one week, insights

managers can now increase their output—helping advance strategic initiatives across many areas of the organization and reducing insights bottlenecks. Coming up with new, different, and strategic research will leave leadership saying ‘tell me more,’ and to rely more heavily on insights functions to help lead important business decisions.

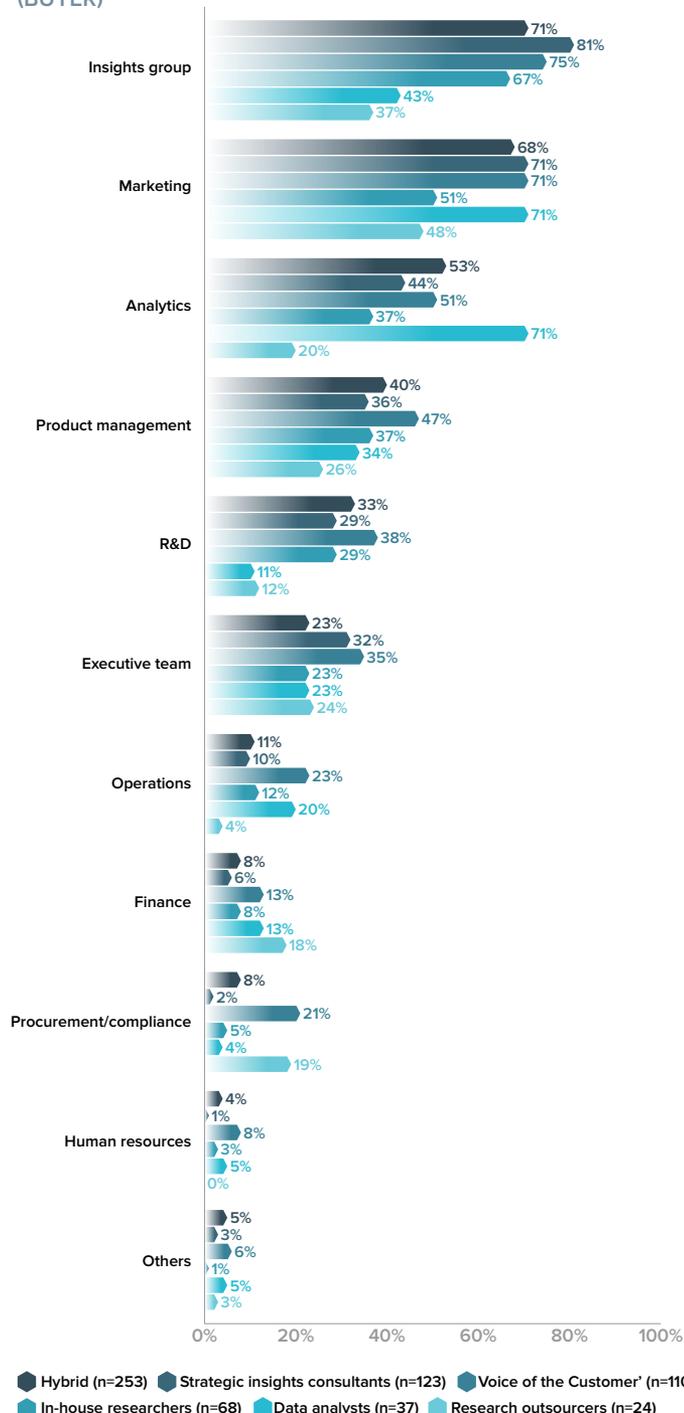
By leveraging technology, researchers can incorporate speed, substance, and scale into their insights process; empowering them to develop and run their own custom research programs to support strategic initiatives. Alongside the cost-saving benefits of automated research technology, you no longer need to wait or rely on outside agencies to hand back your data (often followed by multiple rounds of revisions). Similarly, researchers can now easily take on more research initiatives to answer immediate ad-hoc business questions as they arise.

As technology opens up the realm of possibilities for insights, so does the role of insights managers within an organization. Researchers can now be seen as a credible, strategic partner for leadership, providing them with new perspectives, supporting business goals, and building up the reputation of the company as a whole to drive organization-wide impact. And perhaps most importantly, these substantive approaches to research can help develop new KPIs that the organization can use to measure their future success.

What once was a *should*, now becomes a *could*, and insights teams will no longer have to turn down requests for research. Automated technology is making it possible for brands to do more research, at a higher quality and for less budget. Customer-centricity is now at our fingertips, and the leading brands of tomorrow will be those who take their insights in-house and transform their insights division into a strategic force of their own.

BUYER STAKEHOLDERS: WHO DEVELOPS INSIGHTS AND WHO USES THEM?

WHO ACTIVELY COLLABORATES ON INSIGHTS DELIVERABLES? (BUYER)



As we monitor the insights supplier world to see how the scope of the industry might be changing, we also look at buyers to see how far beyond a research or insights department the scope of the work extends. Regarding insights development, we look at who actively collaborates on the work and who uses the deliverables. Regarding methodology and supplier selection, we look at which buyer functions are primary decision makers and which are key influencers.

For most buyers who act as strategic insights consultants, VoC, in-house researchers or a hybrid, the insights department actively collaborates on insights deliverables. For those who act primarily as research outsourcers or data analysts, the insights department is among the minority. Data analysts are most likely to say they collaborate with marketing and analytics, while research outsourcers have a more diverse set of collaborators, led by marketing.

Along with the insights group, marketing is also named as an active collaborator by most strategic insights consultants, VoC, in-house researchers or hybrids, and analytics is also named by nearly half or more of each type of buyer.

There has been some evolution of how collaboration happens over the course of the pandemic. Although the shifts are not very dramatic, it looks like marketing and analytics have taken a more active role in insights work while collaboration with R&D, operations, product management, and other functions is occurring less frequently than it was a year ago, possibly because these typically focus on the long term.

Marketing's involvement with data analysts and research outsourcers has surged and also increased among hybrids, who have taken on more functions. Collaboration with analytics has also surged among those functioning primarily as data analysts and is also up among hybrids. Data analysts are collaborating less frequently than before with the executive team, R&D, operations, and finance. Research outsourcers (based on a smaller GRIT sample) are collaborating more with product management, the executive team, finance, and procurement/compliance, less with R&D.

One of the roles most impacted by the pandemic, strategic insights consultants, are collaborating less frequently with analytics, product management, operations, and procurement/compliance. They are not collaborating more frequently with any function. The other most impacted role, VoC, is collaborating more actively with the executive team, operations, finance, and procurement/compliance; less frequently with R&D and marketing.

It looks like marketing and analytics have taken a more active role in insights work while collaboration with R&D, operations, product management, and other functions is occurring less frequently than it was a year ago



WHO ACTIVELY COLLABORATES ON INSIGHTS DELIVERABLES? 21W1 – 20W1 (BUYER)

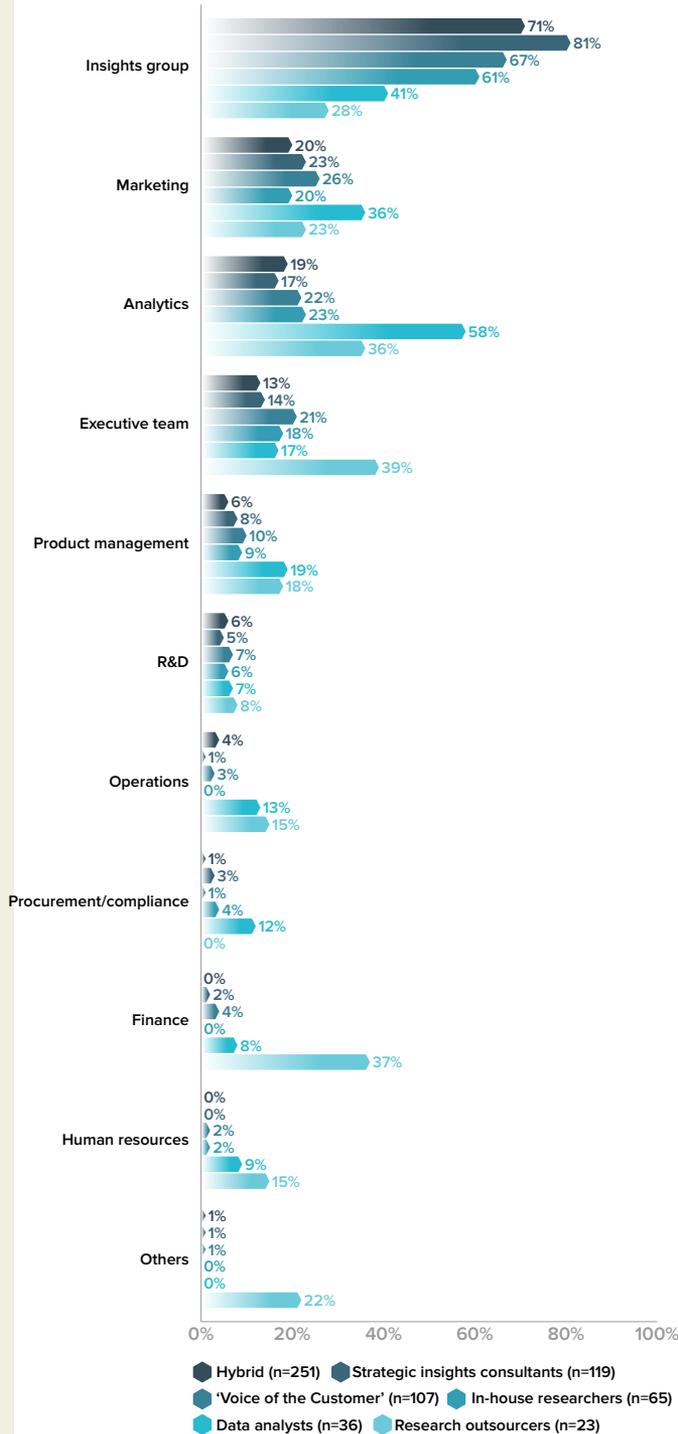
	All buyer roles	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
Marketing	+4%	+10%	+1%	-8%	+1%	54%	+48%
Analytics	+3%	+12%	-13%	+3%	+5%	38%	-30%
Product management	-4%	-3%	-10%	0%	-13%	+9%	+26%
R&D	-7%	-2%	-8%	-9%	+7%	-14%	-13%
Executive team	-2%	-5%	-1%	+9%	-8%	-27%	+24%
Operations	-6%	-7%	-11%	+8%	-19%	-13%	+4%
Finance	0%	-1%	-7%	+6%	+2%	-12%	+18%
Procurement/compliance	-3%	-2%	-11%	+8%	-5%	-4%	+19%
Human resources	-4%	-2%	-6%	-1%	-15%	-4%	0%
Others	-3%	-3%	-2%	-7%	-6%	+5%	+3%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

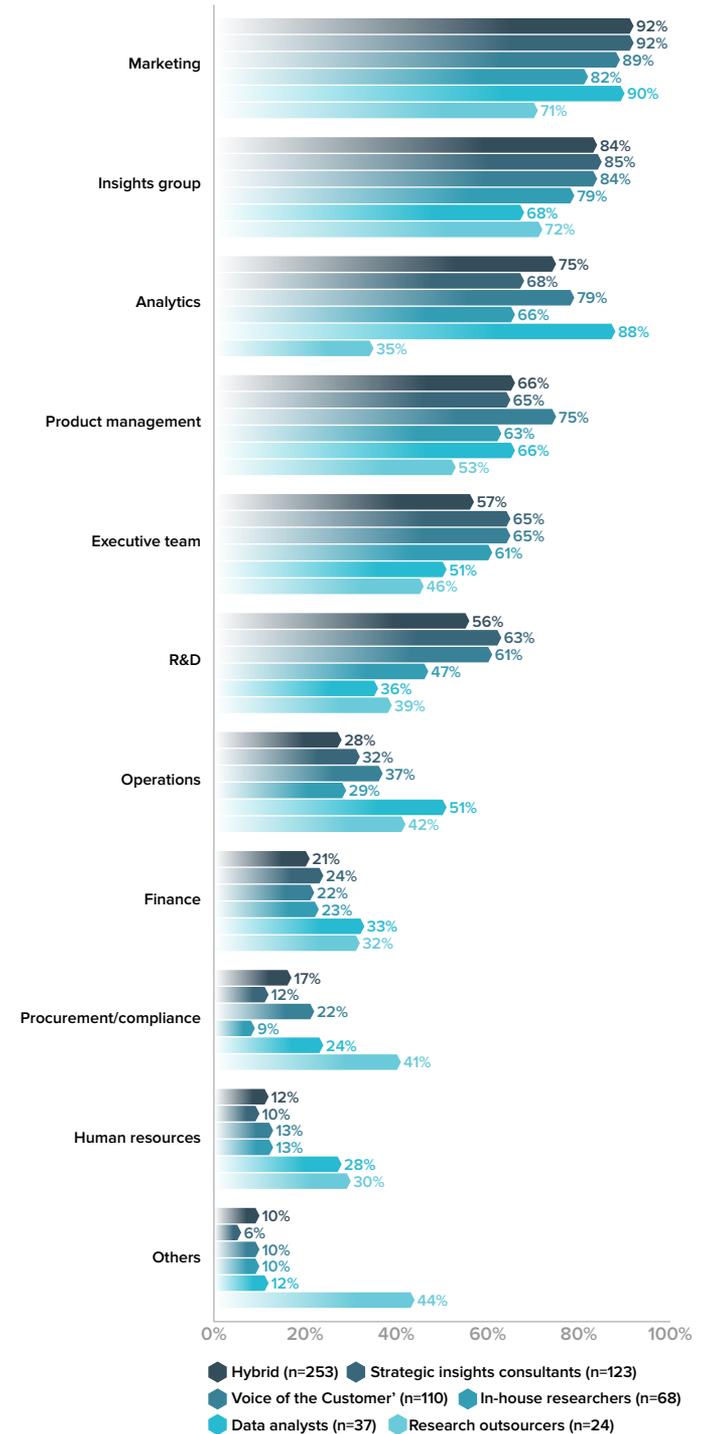
Considering the broader audience for insights, including those who work with deliverables in addition to those who collaborate to develop them, we see increases in marketing's involvement with those acting as hybrids or strategic insights consultants and especially among data analysts and research outsourcers. As we saw when considering

only active collaboration, the analytics audience has increased for hybrids and decreased for research outsourcers. Although collaboration with data analysts increased for analytics, overall audience size did not, and this suggests that analytics became more active in developing the insights they would eventually consume.

ROLE IN SELECTING METHODOLOGIES/
PARTNERS: PRIMARY DECISION MAKER (BUYER)



WHO ACTIVELY COLLABORATES ON OR RECEIVES INSIGHTS
DELIVERABLES? (BUYER)



WHO ACTIVELY COLLABORATES ON OR RECEIVES INSIGHTS DELIVERABLES? 21W1 – 20W1 (BUYER)

	Net	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
Marketing	+8%	+16%	+12%	-7%	+4%	+31%	+21%
Analytics	-1%	+10%	-14%	+3%	-7%	+3%	-45%
Product management	-3%	+1%	-4%	-5%	-10%	-9%	+13%
Executive team	-1%	0%	+3%	+2%	+6%	-24%	-14%
R&D	-2%	+2%	-1%	+3%	14%	-34%	-31%
Operations	-10%	-12%	-5%	-6%	-23%	-4%	-18%
Finance	-1%	+1%	-8%	+4%	0%	-2%	-18%
Procurement/compliance	-4%	0%	-11%	+1%	-9%	-21%	+11%
Human resources	-7%	-6%	-11%	-7%	-17%	+3%	+10%
Others	-8%	-8%	-9%	-13%	-5%	-8%	-6%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

For most buyer functions, the insights department is a primary decision maker when selecting methodologies and suppliers, but others can be involved as well. Most buyers in strategic insights consulting, VoC, in-house research, and hybrid roles view the insights department as a primary decision maker, but a low of 19% in consulting to a high of 39% in in-house research do not. The most prominent other primary decision makers come from marketing and analytics, followed by the executive team.

For data analysts, the majority say the analytics function is a primary decision maker, followed by the insights group and marketing. We noted earlier that research outsourcers have the most diverse secondary functions, suggesting that their roles differ from organization to organization, and the decision maker roles reflect that. No functional area comprises a majority, and the most prominent decision makers are the executive team (39%), finance (37%), and analytics (36%).

Decision maker roles were fairly similar to 20W1, although strategic consultants, in-house researchers, and hybrids increased their dependence on insights groups. Research

outsourcers decreased the role of the insights group in decision-making, but increased the role for the executive team, marketing, analytics, product management, operations, and finance.

Again, acknowledging the smaller sample size, research outsourcers tend to have larger departments than their counterparts, with a median size of 20 to 29 people on staff, somewhat larger than data analysts, strategic insights consultants, and hybrids (10 to 19 people) and much larger than VoC and in-house researchers (5 to 9 people). Their average overall company size, however, is smaller (501 to 1,000 employees on average; the next smallest has more than double that: 2,500 to 4,999 employees), but their budgets are larger. It may be that the companies of those who describe their roles as research outsourcers actually have fewer insights professionals on staff compared to others, but the outsourcers might be in a single department while the others are distributed across multiple smaller departments. Other roles may be more diverse than outsourcers and therefore may have more decision making power because there are more aspects to consider when they design a research project.

For most buyer functions, the insights department is a primary decision maker when selecting methodologies and suppliers, but others can be involved as well



ROLE IN SELECTING METHODOLOGIES/PARTNERS: PRIMARY DECISION MAKER 21W1 – 20W1 (BUYER)

	All buyer roles	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
Insights group	+6%	+10%	+12%	+1%	+13%	+8%	-22%
Marketing	+7%	+7%	+7%	+6%	0%	+11%	+23%
Analytics	+7%	+6%	-3%	+8%	+10%	+33%	+11%
Executive team	0%	-5%	+2%	+3%	-1%	-8%	+39%
Product management	0%	-4%	+2%	+3%	-1%	-6%	+18%
R&D	-1%	-3%	+2%	-3%	+2%	+7%	+8%
Operations	-3%	-3%	-6%	-2%	-13%	-4%	+15%
Finance	0%	-4%	+2%	+2%	0%	-9%	+12%
Procurement/compliance	-3%	-6%	+3%	-3%	-5%	+3%	-25%
Human resources	-1%	-2%	0%	-4%	-2%	+9%	-10%
Others	-1%	-2%	+1%	0%	-6%	-8%	-3%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

ROLE IN SELECTING METHODOLOGIES/PARTNERS: PRIMARY DECISION MAKER OR KEY INFLUENCER 21W1 – 20W1 (BUYER)

	All buyer roles	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
Insights group	+7%	+13%	+4%	+2%	+4%	+6%	+32%
Marketing	+9%	+7%	+8%	+5%	+11%	+38%	+43%
Analytics	+4%	+11%	-11%	-1%	+11%	+6%	-5%
Executive team	+3%	-9%	+8%	+9%	+4%	+5%	+30%
Product management	-2%	-5%	-5%	+6%	-13%	+5%	+32%
R&D	-1%	-4%	-1%	+3%	+14%	-34%	+7%
Procurement/compliance	-1%	+1%	-3%	-10%	+2%	+16%	+7%
Operations	-5%	-8%	0%	-9%	-12%	-16%	+19%
Finance	-1%	-8%	-1%	+5%	+3%	-16%	+32%
Human resources	-1%	-2%	-1%	-1%	-8%	-1%	+9%
Others	-1%	0%	-1%	-4%	-6%	-20%	+11%

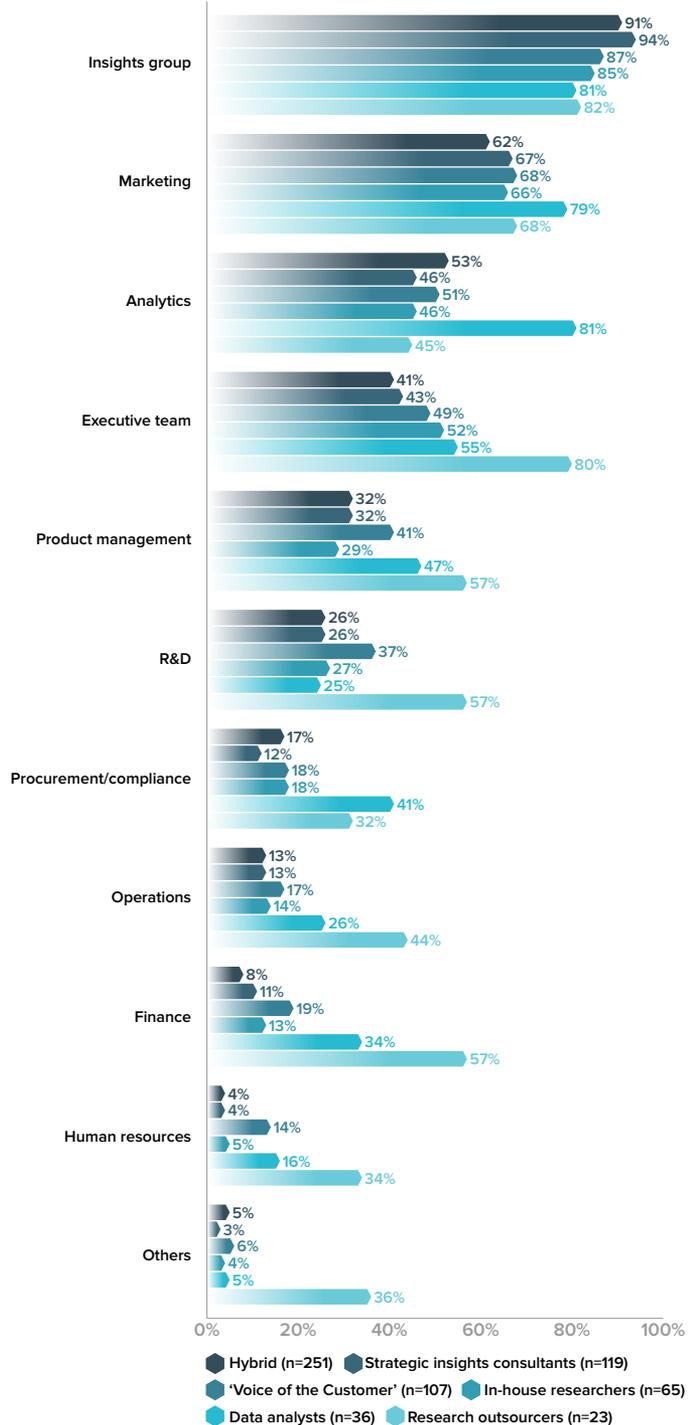
Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

When key influencers are considered in addition to primary decision makers, the insights group is involved for at least 80% in each primary role. Marketing is involved for at least two-thirds of each, and analytics are involved for close to half and spike to over 80% among data analysts. The executive team, product management, and R&D are also frequent influencers. Data analysts and research outsourcers have the most diverse sets of influencers extending beyond the six functions already mentioned.

Since the onset of the pandemic, overall influence of insights groups has increased among hybrids and especially among research outsourcers. Six to seven different areas increased their influence on research outsourcers, suggesting that needs for insights increased in departments that didn't have them before the pandemic.

For in-house researchers, influence increased for marketing, analytics, and R&D and decreased for product management and operations. For data analysts, marketing became much more influential and procurement/compliance was also more involved as a decision influencer. Possibly, these organizations had more urgency to find new data and new ways to explore data during the pandemic, so they needed more oversight from procurement to help them ensure they were making expenditures that were worth the money in these uncharted areas.

ROLE IN SELECTING METHODOLOGIES/PARTNERS: PRIMARY DECISION MAKER OR KEY INFLUENCER (BUYER)



Since the onset of the pandemic, overall influence of insights groups has increased among hybrids and especially among research outsourcers



SUPPLIER VIEW: WHO DEVELOPS INSIGHTS AND WHO USES THEM?

From the supplier point of view, the buyer functions which were the most active participants in insights work did not change much in the past year. The biggest change was reduced involvement for insights groups with data and analytics providers; possibly, these providers worked more directly with analytics groups leaving the insights groups to focus on more traditional work.

Excluding field services whose deliverables are different from the other supplier types, most said the insights group was actively involved with insight creation from their deliverables. Nearly half or more named marketing and analytics, with marketing especially involved with full service researchers and strategic consultancies. After these, the executive team, product management, and R&D were most involved.

HOW CLIENTS ENGAGE W/DELIVERABLES: CREATES NEW INSIGHTS 21W1 – 20W1 (SUPPLIER)

	All suppliers	Full/field service	Strategic consulting	Data & analytics	Technology
Insights group	+1%	+5%	0%	-10%	+6%
Analytics	+2%	+4%	+4%	-2%	+5%
Marketing	0%	-1%	+4%	-3%	+3%
Executive team	0%	0%	+4%	0%	-1%
Product management	0%	-5%	+1%	+4%	+7%
R&D	-1%	+2%	-5%	+6%	3%
Operations	-2%	-1%	-1%	+7%	-9%
Procurement/compliance	-4%	-2%	-3%	+2%	-12%
Finance	-3%	-2%	-3%	+4%	-9%
Human resources	-3%	-2%	-2%	+5%	-9%
Others	-4%	-2%	-4%	-5%	-5%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

HOW CLIENTS ENGAGE W/DELIVERABLES: CREATES NEW INSIGHTS OR RECEIVES THEM 21W1 – 20W1 (SUPPLIER)

	All suppliers	Full/field service	Strategic consulting	Data & analytics	Technology
Insights group	+2%	+3%	+1%	-3%	+5%
Executive team	+1%	-1%	+1%	0%	+5%
Marketing	0%	+2%	-2%	-4%	+5%
Analytics	+3%	+5%	+3%	+2%	+3%
Product management	-1%	-2%	-3%	0%	+2%
R&D	-1%	+2%	-7%	+4%	0%
Operations	-3%	-3%	-2%	+9%	-10%
Procurement/compliance	-3%	0%	-4%	+5%	-11%
Finance	-1%	-1%	-3%	+13%	-6%
Human resources	0%	+1%	+1%	+11%	-6%
Others	-4%	-4%	-5%	+4%	-9%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more. In 20W1, full and field service were considered one type. Differences represent differences from full service research in 21W1.

The biggest change was reduced involvement for insights groups with data and analytics providers; possibly, these providers worked more directly with analytics groups leaving the insights groups to focus on more traditional work

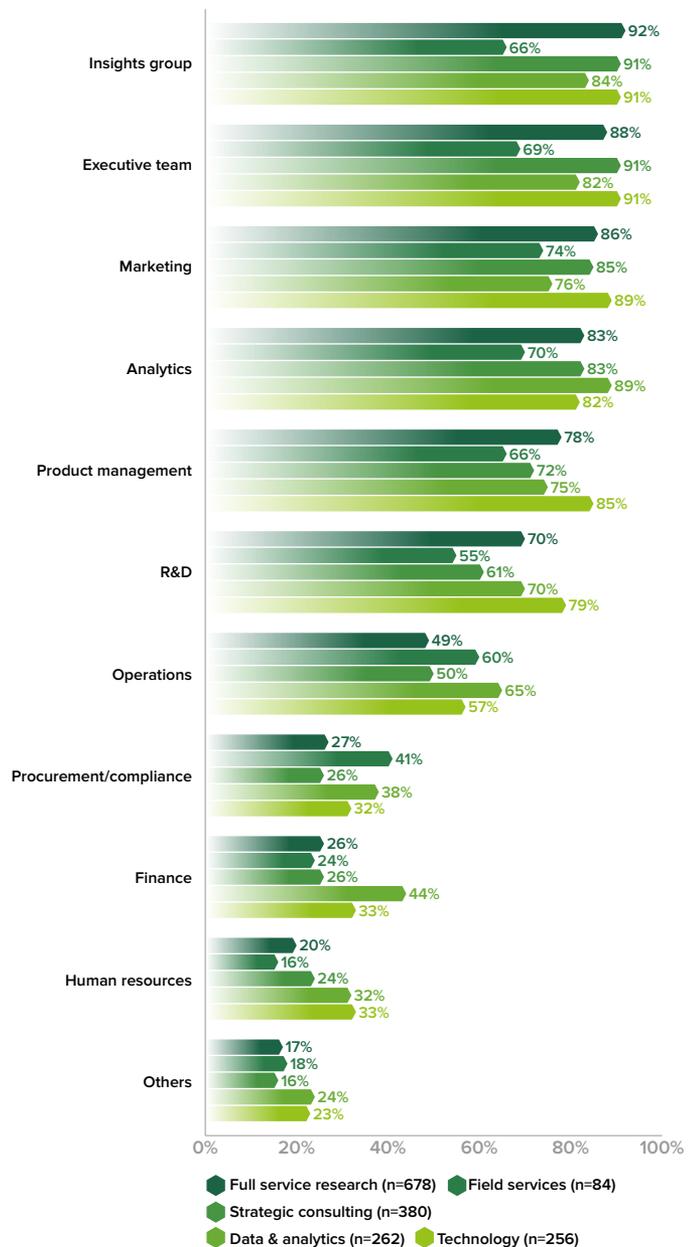
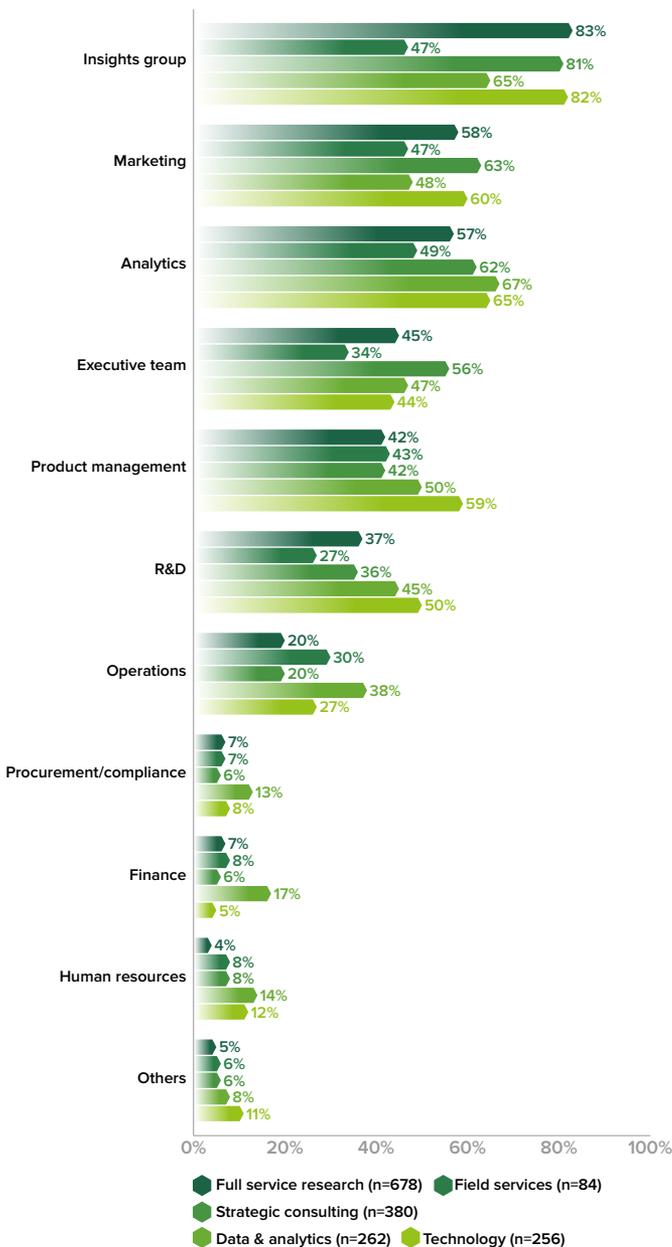


Considering the wider audience of all who receive insights deliverables, not much changed. Human resources and finance were more interested in deliverables from data and analytics providers, and operations and procurement/compliance became less concerned with deliverables from technology providers.

Overall, insights provider deliverables reach many audiences, as nearly half or more in each category said the audience included the insights group, the executive team, marketing, analytics, product management, R&D, and operations. For data and analytics providers, finance also stands out as a significant audience.

HOW CLIENTS ENGAGE W/DELIVERABLES: CREATES NEW INSIGHTS (SUPPLIER)

HOW CLIENTS ENGAGE W/DELIVERABLES: CREATES NEW INSIGHTS OR RECEIVES THEM (SUPPLIER)



With respect to supplier and methodology selection, every type of supplier mentioned increased involvement from analytics groups as primary decision makers. Marketing and operations increased involvement with data and analytics decisions, and insight groups were more involved in technology provider selection.

Aside from field services, most suppliers of each type said the insights group was a primary decision maker, although from 49% (data and analytics) down to 34% (full service research, technology) said they were not. After the insights group, there is little consensus as to which functions are primary decision makers. The only groups to break 40% of any supplier type are the executive team (for strategic consultancies, data and analytics) and analytics (for data and analytics).

Considering key decision influencers as well as primary decision makers, roles did not change very much during the pandemic. More groups became involved with data and analytics providers: operations, analytics, finance, R&D, and the executive team. Earlier, we discussed how data and analytics providers were the type most likely to diversify their portfolio of services in the past year, and the diversity of the decision maker and influencer set may reflect that.

For each type, more suppliers say selection is at least influenced by an insights group, marketing, the executive team, analytics, and product management. Procurement/compliance and operations frequently have a role as well.

ROLE IN SELECTING METHODOLOGIES/PARTNERS: PRIMARY DECISION MAKER 21W1 – 20W1 (SUPPLIER)

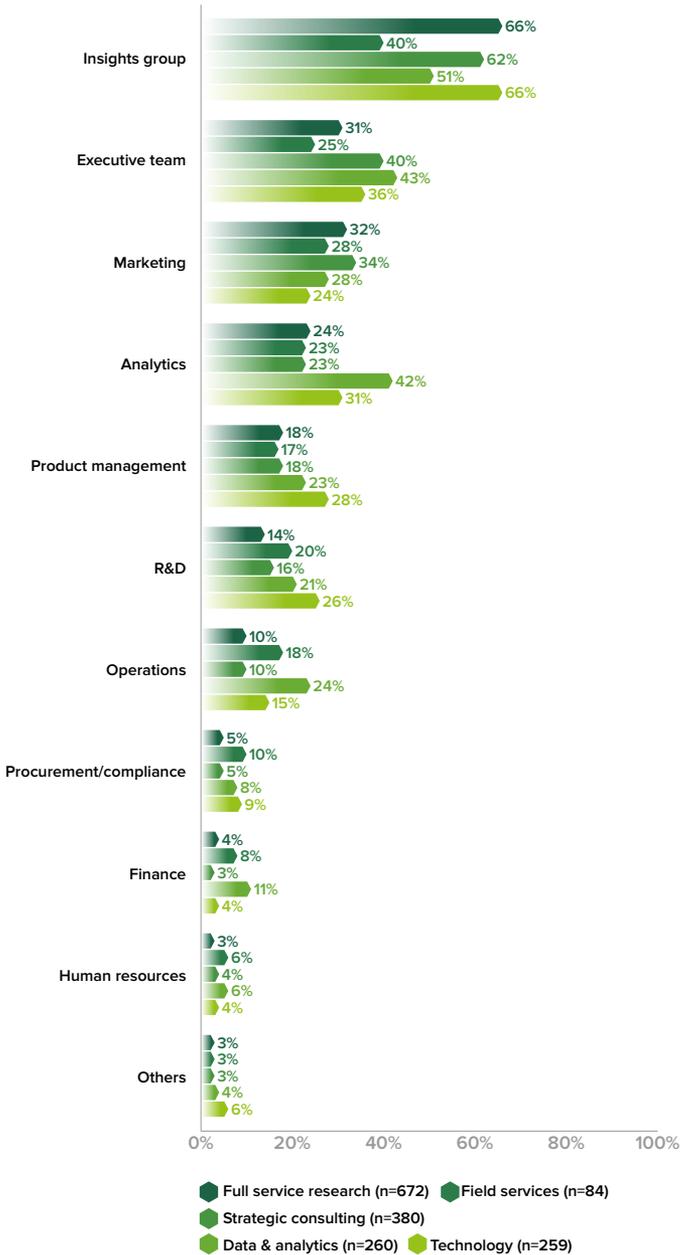
	All suppliers	Full/field service	Strategic consulting	Data & analytics	Technology
Insights group	+2%	+3%	-3%	-1%	+13%
Analytics	+13%	+10%	+18%	+18%	+12%
Marketing	+7%	+6%	+5%	+10%	+7%
Executive team	-5%	-5%	-8%	+3%	-5%
Product management	+4%	+4%	+4%	+7%	+6%
R&D	+2%	+1%	+2%	+4%	+5%
Operations	+3%	+1%	+2%	+15%	-3%
Procurement/compliance	-1%	-2%	-2%	+2%	-3%
Finance	-1%	-2%	-2%	+6%	-5%
Human resources	0%	-1%	1%	+5%	-3%
Others	-1%	0%	-1%	-1%	-2%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more. In 20W1, full and field service were considered one type. Differences represent differences from full service research in 21W1.

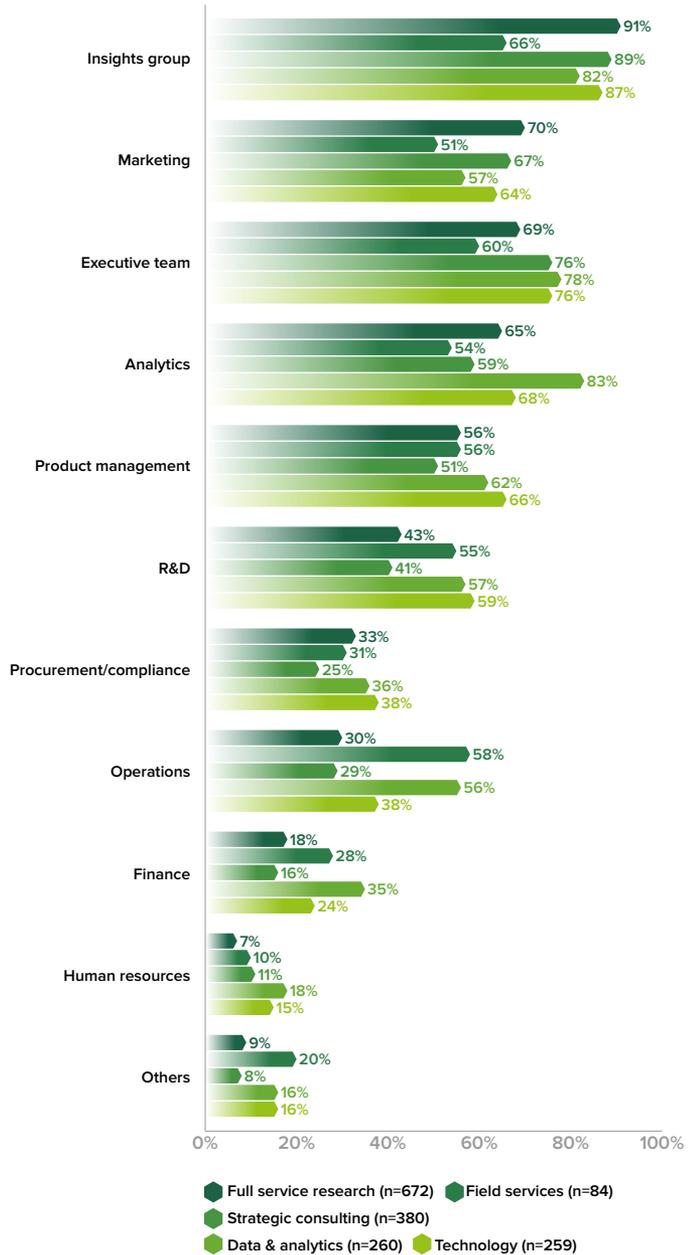
With respect to supplier and methodology selection, every type of supplier mentioned increased involvement from analytics groups as primary decision makers



**ROLE IN SELECTING METHODOLOGIES/PARTNERS:
PRIMARY DECISION MAKER (SUPPLIER)**



**ROLE IN SELECTING METHODOLOGIES/PARTNERS: PRIMARY
DECISION MAKER OR KEY INFLUENCER (SUPPLIER)**



**ROLE IN SELECTING METHODOLOGIES/PARTNERS: PRIMARY DECISION MAKER OR KEY INFLUENCER
21W1 – 20W1 (SUPPLIER)**

	All suppliers	Full/field service	Strategic consulting	Data & analytics	Technology
Insights group	+3%	+4%	0%	-1%	+6%
Executive team	+4%	+4%	+6%	+10%	+4%
Analytics	+5%	+9%	-2%	+18%	+1%
Marketing	+4%	+3%	+4%	+1%	+7%
Product management	+7%	+5%	+6%	+9%	+6%
R&D	+2%	+3%	0%	+12%	0%
Operations	+3%	+2%	+3%	+20%	-10%
Procurement/compliance	-3%	-2%	-7%	+6%	-10%
Finance	0%	-1%	-4%	+16%	-5%
Human resources	-1%	-2%	+3%	+8%	-7%
Others	-2%	-2%	-2%	+3%	-6%

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more. In 20W1, full and field service were considered one type. Differences represent differences from full service research in 21W1.

THE BIG PICTURE

In some ways, 2020 brought on a kind of hardening of supplier categories; full service research suppliers, strategic consultancies, and technology providers focused on their core identities, and the major players remained largely as they had been before the pandemic. The major players remained within data and analytics, too, but under the broad umbrella of “data” suppliers jostled to align their services with the market’s emerging data needs, blurring the edges between field service and data and analytics.

Meanwhile, the pandemic seems to have intensified the involvement of more diverse sets of functions in insights development and decision making, widening an already broad audience. Most buyers say the audience includes marketing, the insights group, analytics, product management, and the executive team. Most strategic insights consultants, VoC, and hybrids say that R&D is also an audience. Suppliers of all types agree with this perspective, and also cite operations as an audience. The supplier perspective has not changed since 20W1, but more buyers are seeing involvement from marketing than when the pandemic began.

Marketing is more likely now than a year ago to actively collaborate with data analysts and research outsourcers, and more likely to be

involved in supplier selection when those functions are involved. Data and analytics suppliers have seen marketing take a greater role in selection of suppliers and methodologies. Always in the audience, analytics has become more actively involved with insights data analysts and are more influential in supplier and methodology selection when data analysts, in-house researchers, and research outsourcers are involved. The growth in the influence of analytics in these decisions is a trend in every buyer category.

The pandemic created a need for immediate answers to new questions. Arguably, marketing had to pivot more quickly and sharply than any other function, resulting in their increased involvement in insights development and decision-making, particularly with those closest to data collection and analysis. Because of how the practices of insights data collection and analysis had to adapt, the analytics function was also drawn more centrally into the sphere of marketing insights. This is yet another storyline to monitor: whether the way buyers have organized around insights and how suppliers have responded to it represent stop-gap measures or new and enduring practices in insight development.

Because of how the practices of insights data collection and analysis had to adapt, the analytics function was also drawn more centrally into the sphere of marketing insights





THE SKILL OF MORE TIME

Matilda Sarah

Co-Founder, Displayr

Email: matilda.sarah@displayr.com | Twitter: @Displayr | Website: www.displayr.com

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

I was delighted when asked to write this piece. I am passionate about the story that this data tells. The 2021 Grit report asked research suppliers which factors were critical to their success. There are only four things that are considered “must be best in class” by more than half the sample, and we can condense these into two key points:

Be awesome consultants: understand clients’ goals and strategies (71%) and gain their trust (63%).

Find and share insights: communicate insights effectively (63%) and analyze data powerfully (51%).

How do we develop these skills in researchers? The critical factor that drives these skills is time. If you do not have time to meet and understand your clients and their businesses, you cannot be an awesome consultant. Likewise, if you do not have time to sift through the data and create powerful reporting, then you cannot learn those skills either.

Fortunately, since the first Egyptians dragged a stone and built the first pyramid, the key strategy for saving time has remained unchanged: invest in technology. And the new wave of analysis and reporting tech has vastly expanded the capabilities of quant researchers and market research companies.

More DIY, less outsourcing

Traditional analysis and reporting software is often time-consuming and hard to use, requiring technical specialists to do data cleaning, creating tables, charting, or advanced things like segmentation and driver analysis.

Modern tech automates away most of this pain, freeing up more time for insights. For example, the software can now automatically process data and automate table creation, stat testing, and weighting.

New tech enables researchers to use more powerful data analysis techniques, a skill over half the sample considered ‘must be best in class.’ Today, many more analysis techniques are accessible to all researchers - with smart systems automating many of the complex steps that used to take years of training to master.

Advanced analysis practitioners and data science teams are also analyzing data more powerfully and faster with the help of modern tools that support R integration and collaboration. As a result, all teams are now working on the same page (literally).

Digital reporting

As research buyers demand faster turnaround times, more comprehensive deliverable options, and more control - digital reporting is the only way to achieve this. As a result, digital reporting and dashboards are becoming a staple at companies like dunnhumby, GFK, Cygnal, and Léger.

It is now possible to analyze & visualize data and create presentations & dashboards, all in the same software, fully connecting everything.

Reporting has taken a quantum (pun intended) leap from static point-in-time PowerPoint reports to digital reports that can be queried, filtered, and automatically updated, enabling viewers to drill down when they want more depth.

This new way of communicating insights might be more effective, but it also requires new skills. In particular:

- Data visualization: researchers now have hundreds of visualizations at their fingertips, often with interactive options like hover, selection, drag & drop, zoom.
- UX or audience interaction, e.g., understanding how the audience navigates the report (hyperlinks, tags, buttons).
- Page interaction dynamics, e.g., the possibility and placement of filters, does the page need to be printed or exported?

Does this report need to be automatically updated or replicated for syndicated reports? e.g., should it have dynamic text?

Analyzing multiple data sources

About a quarter of the grit sample considers the skills related to multiple data sources imperative. I suspect this will increase in importance as new tech already makes it easier to analyze multiple data sets in the same document, leading to even more powerful data stories.

ORGANIZATIONAL SUCCESS FACTORS

What are the key drivers of organizational success for both buyers and suppliers, and have those drivers changed as a result of the accelerated transformation of the industry? Yes....but in some unexpected ways. The status quo has definitely changed, and successful organizations will need to continue to adapt as a result.

SUPPLIER/PARTNER USE

So far, we've discussed how the industry structure and scope evolved during the pandemic. At this point, it would be intuitively obvious that buyers' use of insights suppliers and partners would have evolved, too, right? Well, it has evolved, but the direction of that evolution may or may not be intuitively obvious.

The 21W1 GRIT survey asked insights buyers how frequently they use each of our six "big bucket" supplier categories – full service research, field services, qualitative research, strategic consulting, data and analytics, and technology. (The 20W1 survey asked about five "big buckets" as full service research and field services were bundled together into one category). Buyers, loosely defined as organizations who exist mainly for some purpose *other* than to supply insights services and solutions to other organizations, indicated whether they work with each type "regularly," "occasionally," or "rarely or never."

At the start of the pandemic, the average buyer worked with 4.1 of the five supplier types at least occasionally and with 2.2 types regularly. One year later, those numbers have plummeted by one-tenth of a supplier type to 4.0 and 2.1, respectively. OK, maybe "plummeted" is too strong a word for it, but the numbers *are* lower, although maybe not significantly. OK, OK. They are definitely not *significantly* lower; buyers are working with basically the same number of supplier types with the same frequency as before the pandemic. No change.

So what *has* changed with respect to how buyers work with suppliers? Well, as a general statement, buyers are using full service research providers more frequently and other types of suppliers less frequently. In terms of types worked with at least occasionally, full/field services increased by 7% while strategic consultancies dropped 1%, qualitative researchers dropped 3%, technology providers dropped 9%, and data and analytics providers dropped 10%. Another way to look at it is that the percentage of buyers who work with full/field service providers rarely or not at all dropped while buyers stopped using the other types of suppliers in the percentages just mentioned.

If we consider only buyers who regularly work with each supplier type, the changes are even more dramatic. Regular work with full/field service suppliers increased by 16% overall and more than 10% in each buyer segment except the segment comprised of data analysts and research outsourcers (these had to be combined in order to make the comparison to 20W1). Among in-house researchers and hybrids, regular usage of full/field service suppliers increased by over 20%. Regular use of this supplier type dropped by 4% among the research outsourcer/data analyst segment, and this is driven by the data analysts. In 21W1, 61% of research outsourcers worked with full/field service suppliers regularly compared to just 47% of data analysts; the combined rate for 20W1 was 56%, second highest of any buyer segment. It is likely that by 21W1 research

As a general statement, buyers are using full service research providers more frequently and other types of suppliers less frequently



outsourcers worked with full/field service suppliers more frequently than they did a year ago, but we cannot make an exact comparison.

To a lesser extent, more buyers worked with qualitative researchers regularly than at the start of the pandemic, although the overall percentage of buyers using them at least occasionally decreased slightly. Except among buyers acting as strategic insights consultants or as hybrids, fewer buyers used qualitative researchers at least occasionally. This shrinkage may have been due to the havoc the pandemic wreaked on attempts to schedule in-person research and the lack of alternatives perceived by some buyers in these segments.

On the other hand, buyers in each segment maintained or increased their collaboration with qualitative researchers on a regular basis. Buyers with roles primarily as strategic insights consultants or VoC worked regularly with qualitative researchers to the same extent they had before the pandemic, and regular collaboration increased at least modestly in the other segments. So, while qualitative researchers as a group may have lost customers, many of the remaining customers increased their collaboration with them. Perhaps somewhat ironically, qualitative research suppliers lost the highest percentage of buyers in the data analyst/research outsourcer segment, but also gained the most from that segment in terms of percentage of buyers deciding to work with them regularly instead of occasionally.

Buyers in each segment maintained or increased their collaboration with qualitative researchers on a regular basis



WORK WITH TYPE OF SUPPLIER: REGULARLY OR OCCASIONALLY; DIFFERENCES 21W1 – 20W1 (BUYER)

	All buyers	Hybrid of functions	Strategic insights consultants	'Voice of the Customer'	In-house researcher	Outsourcing or data analysts
Full and/or field services	+7%	+11%	+7%	+6%	+7%	-1%
Qualitative research	-3%	+4%	-1%	-8%	-4%	-20%
Data & analytics	-10%	-7%	-17%	-16%	+7%	-19%
Technology	-9%	-9%	-21%	-15%	+9%	-8%
Strategic consulting	-1%	+3%	+4%	-8%	+2%	-13%
Average Number of Types	-0.1	0.0	-0.3	-0.4	+0.2	-0.6

Research outsourcers and data analysts are combined to compare data to 20W1.

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

WORK WITH TYPE OF SUPPLIER: REGULARLY; DIFFERENCES 21W1 – 20W1 (BUYER)

	All buyers	Hybrid of functions	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Outsourcing or data analysts
Full and/or field services	+16%	+25%	+14%	+11%	+24%	-4%
Qualitative research	+4%	+8%	+1%	+1%	+7%	+16%
Data & analytics	-8%	-4%	-9%	-19%	+8%	-25%
Technology	-12%	-13%	-22%	-14%	+13%	-21%
Strategic consulting	-10%	-10%	-11%	-19%	+7%	+3%
Average Number of Types	-0.1	+0.1	-0.3	-0.4	+0.6	-0.3

Research outsourcers and data analysts are combined to compare data to 20W1.

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

Now we see that data from buyers confirm this trend as they report increased use of full service research suppliers and decreased use of other types of suppliers



In the Evolving Industry Structure section, we documented the resurgence of the full service research category at the expense of strategic consultancies as suggested by the data provided by suppliers regarding the sources of their revenue. Now we see that data from buyers confirm this trend as they report increased use of full service research suppliers and decreased use of other types of suppliers. If we consider the “work with regularly” metric to be the best evidence for these trends, we find:

- As mentioned above, regular collaboration with full service research suppliers increased by more than 10% in each buyer segment except the data analyst/research outsourcer segment, although it probably increased for research outsourcers, too.
- Regular collaboration with qualitative research suppliers held steady or increased moderately in each segment.
- For data and analytics providers, regular collaboration increased moderately among in-house researchers, declined steeply within VoC and data analysts/research outsourcers, and declined at least moderately in the other segments.
- For strategic consultancies, regular collaboration increased moderately among in-house researchers and data analysts/research outsourcers, but fell sharply in every other segment.
- Regular collaboration with technology providers increased substantially among in-house researchers, but fell sharply in every other segment.

Although regular collaboration with data and analytics providers “declined sharply” among the data analyst/research outsourcer “segment,” we have to remember that this is not a “segment” in the best sense of the word; these two roles are force-fit together simply to make the comparison to 20W1 because they could not be reported separately for that wave. The more significant finding is that most data analysts (62%) in 21W1 work with data and analytics providers on a regular basis, by far the highest rate of any segment and twice as much as their “cell-mates,” the research outsourcers.

Regular collaboration with strategic consultancies decreased the most in segments which, arguably, have significant strategic consulting responsibilities. It increased for in-house researchers who are more likely to lack such expertise. Despite the decline among strategic insights consultants, that segment still works with strategic consultancies on a regular basis more than any other segment except research outsourcers, who may have increased these collaborations. Further, among the three segments who decreased regular use of strategic consultancies, two-thirds or more work with them at least occasionally, which is significantly higher than among in-house researchers and data analysts.

WORK WITH TYPE OF SUPPLIER: REGULARLY OR OCCASIONALLY (BUYER)

	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
n	345	162	156	102	48	28
Full service research	89%	93%	84%	78%	62%	96%
Qualitative research	83%	89%	83%	78%	66%	71%
Data and analytics	82%	79%	75%	71%	85%	74%
Technology	75%	68%	60%	79%	82%	77%
Strategic consulting	74%	84%	66%	54%	53%	75%
Field services	59%	53%	49%	68%	52%	64%
Average No. Types	4.6	4.7	4.2	4.3	4.0	4.6

WORK WITH TYPE OF SUPPLIER: REGULARLY

	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research outsourcers
n	345	162	156	102	48	28
Full service research	60%	73%	59%	43%	25%	37%
Qualitative research	51%	58%	51%	34%	42%	40%
Data and analytics	45%	44%	39%	39%	62%	30%
Technology	31%	24%	27%	43%	39%	31%
Strategic consulting	19%	34%	20%	19%	26%	47%
Field services	24%	17%	16%	34%	25%	35%
Average No. Types	2.3	2.5	2.1	2.1	2.2	2.2

The elephant in the room is the decline in collaboration with technology providers in every segment except in-house researchers, where collaboration increased. Overall, the percentage of buyers who work with technology providers at least occasionally dropped from 81% to a still-respectable 72%, just ahead of strategic consultancies and well ahead of field service providers. Regular collaboration dropped from 43% to 31%, still well ahead of strategic consultancies and field service providers. It dropped among strategic insights consultants, VoC, and hybrids, and those three segments, arguably, are less engaged with the nuts-and-bolts of insight development as the in-house researchers, outsourcers, and data analysts, and they might see technology solutions as less of an immediate necessity for achieving their goals under the pandemic. It also dropped among the pseudo-segment of research outsourcers plus data analysts, but, in 21W1, data analysts and research outsourcers each continue to work with technology providers more frequently than either strategic insights consultants or VoC and at least as much as hybrids (which could include data analyst and research outsourcing functions).

So, we can rationalize the decline in buyer use of technology providers. It declined in segments where it may be less critical to the core role. When it declined in segments where it could be considered critical to the core role, collaboration still occurred

at a greater frequency than in the other segments. It can be argued that technology provider relationships were shed by a minority who felt these solutions were optional, no longer affordable, or who had simply reached a level of automation that no longer required the use of external providers.

Further, it could be argued that the market was fully penetrated in 20W1 with 81% using tech providers at least occasionally and that growth would come from increasing revenue per customer rather than reaching significantly more customers. Plus, the concept of working with a technology provider “regularly” is probably different from the concept of working with another type of supplier regularly. It is easier to think of full service research, field services, strategic consulting, and data and analytics as “projects” than it is to think of technology solutions that way.

These points can be argued, but you are probably thinking that something is still not quite right, that there is a missing piece somewhere. It seems more than ironic that a supplier segment could be losing customers while *SPOILER ALERT* they seem to be the healthiest supplier segment, according to this report’s Business Outlook section.

Wait a minute. That’s not a spoiler. In the last GRIT Insights Practice report, we documented that technology providers were the *only* segment thriving in the pandemic.

Overall, the percentage of buyers who work with technology providers at least occasionally dropped from 81% to a still-respectable 72%, just ahead of strategic consultancies and well ahead of field service providers



In the 2020 GRIT Insights Practice report and in the seven recently released GRIT Field Guides to Your Best MRX Buyers, we observe that while relationship is still a significant supplier selection criterion, new criteria are emerging as significant



Here's the most logical missing piece. Recall that when we began this discussion, we explained that these questions were asked only of "buyers," whom we clumsily defined as "organizations who exist mainly for some purpose *other* than to supply insights services and solutions to other organizations." Put another way, we did not ask full service research providers, field service providers, qualitative researchers, strategic consultancies, data and analytics providers, or technology providers how often they work with full service research providers, field service providers, qualitative researchers, strategic consultancies, data and analytics providers, or technology providers. Therefore, if technology solutions were used by full service research suppliers to meet client needs in the pandemic or packaged by full service research providers to end clients – or buyers – instead of sold directly by technology providers, a lot of the mystery would be dispelled.

The evidence suggests that *SPOILER ALERT* the insights and analytics industry has rebounded (see *Business Outlook* section) in part because of an evolving symbiosis across full service research providers, technology providers, and, perhaps, other types of providers. According to this theory, technology suppliers provided solutions that enabled full service research providers and others to meet the demand for speed, affordability, scale, and, yes, innovation dictated by the conditions of the pandemic. Full service research suppliers could provide technology suppliers with high volume purchases for their own use as well as distribution to their customers. Such a symbiosis would not have to include every full service supplier, every technology provider, every project, or every transaction, it would just have to involve enough to explain how the evidence fits together.

CRITICAL PRIORITIES FOR SUPPLIERS

In competitive markets, there is no advantage quite like being an incumbent supplier with great client relationships. In olden times, some might have mistaken such a situation for a sustainable advantage, but that was then, and this, as we are all painfully aware, is now. In the 2020 GRIT Insights Practice report and in the seven recently released GRIT Field Guides to Your Best MRX Buyers, we observe that while relationships are still a significant supplier selection criterion, new criteria are emerging as significant. In particular, we observe that the pandemic has forced insights professionals to quickly adapt their practices to deal with these unprecedented conditions, and many buyers have been willing to trade off relationships if it means they can get access to more suitable solutions from suppliers with good reputations.

Suppliers need to design their business development and marketing approaches to establish credibility on significant buyer criteria, but the foundation of that credibility is the supplier's strategy for outperforming competitors where

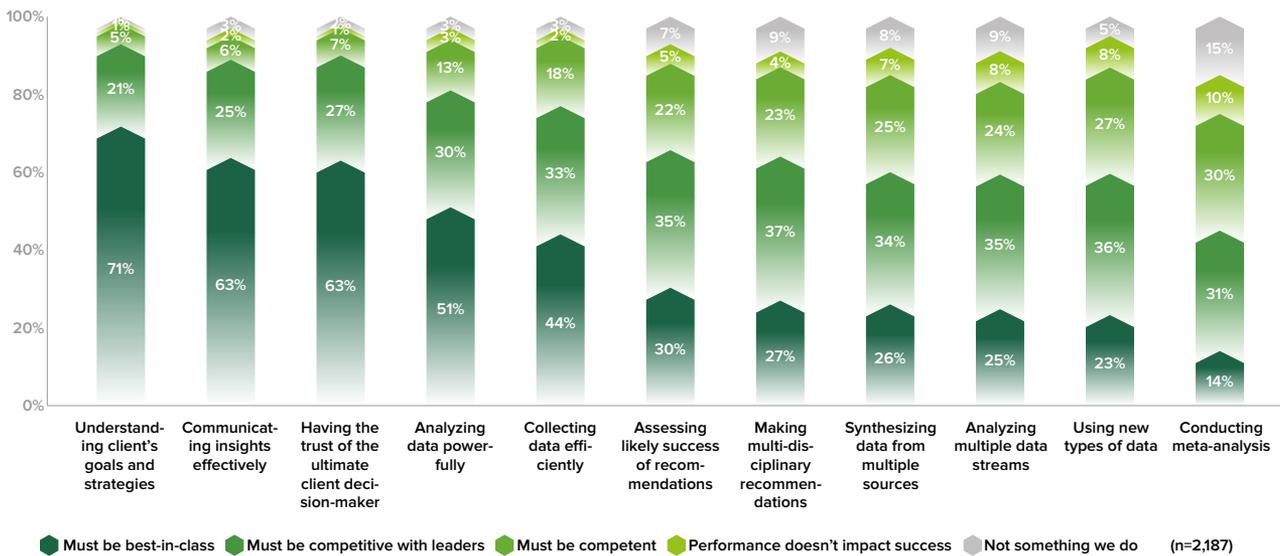
possible (and valuable), matching competitors where necessary, and executing on these goals. To better understand these strategies, GRIT asks suppliers what level of performance they need to achieve in each of eleven strategic areas in order to succeed in the market. How they answer can reveal their desired positioning. For example, successfully differentiating from competitors on one subset of criteria will establish you as a strategy consultant, while another subset may establish you as an expert in data and analytics. Saying that you want to be best-in-class on all eleven likely means that you don't really have a plan.

Considering suppliers as a group, four statements are selected by most of them as areas where they need to differentiate as best-in-class in order to succeed: understanding clients' goals and strategies, communicating insights effectively, having the trust of the ultimate decision maker, and analyzing data powerfully. Broadly speaking, if most suppliers pick the same best-in-class goals and multiple suppliers achieve it, that performance level

becomes table-stakes and the next one down the list becomes the differentiator. In the case of the overall top three best-in-class areas, these likely are close to table-stakes for some types of suppliers, such as strategic consultancies. The fourth, analyzing data

powerfully, was selected for a best-in-class goal by just over half, and this likely provides our first broad insight into how suppliers plan to differentiate from each other.

HOW CRITICAL TO YOUR 2021 SUCCESS? (SUPPLIER)



Next, for a more granular understanding of supplier strategies, we'll focus on suppliers who are involved in their companies' strategic decisions and where they intend to become best-in-class or at least competitive with the leaders. First, we notice that full service research suppliers, data and analytics suppliers, and strategic consultancies each chose an average of about eight of the eleven as areas to achieve best-in-class status or become competitive with the leaders. Suppliers of technology and field services chose fewer, possibly because they are less likely to be involved at the back end when final deliverables are produced and used.

Ten of the eleven areas were selected by most "generalist" suppliers (full service research providers and strategic consultancies). Most data and analytics suppliers selected all eleven. The same three areas were selected by more than 90% of generalists: understanding clients' goals and strategies, communicating insights effectively, having the trust of the ultimate decision maker, and analyzing

data powerfully. Data and analytics providers did not have any areas break the 90% mark, but had five areas break the 80% mark: the three at the top of the list for the generalists plus analyzing data powerfully and collecting data efficiently. These five also broke the 80% for technology providers. The only area that achieved 80% consensus among field service providers was collecting data efficiently, which hit 90%.

The generalists and data and analytics providers have the same areas in their top three. Full service research and data and analytics providers shared their fourth ranked area, analyzing data powerfully, and fifth ranked, collecting data efficiently. These were ranked fifth and eighth, respectively, for strategic consultancies. Instead, consultancies ranked making multi-disciplinary recommendations fifth; it was sixth for full service research and tenth for data and analytics providers. They ranked assessing likely success of recommendations sixth and synthesizing data from

We notice that full service research suppliers, data and analytics suppliers, and strategic consultancies each chose an average of about eight of the eleven as areas to achieve best-in-class status or become competitive with the leaders



The only area to increase more than 10% was communicating insights effectively (+14%) for technology providers



Technology providers seem to be focusing on their core services and not spreading themselves thin by competing with data and analytics providers or generalists



multiple sources seventh, just before efficient data collection. Full service research providers ranked these seventh and eighth, respectively, and data and analytics suppliers ranked them eighth and ninth.

Technology and field services providers each ranked understanding clients' goals and strategies and communicating insights effectively in their top three, as did the other supplier types. Unlike the other types, technology providers ranked analyzing data powerfully third, and field services providers ranked collecting data efficiently first.

The biggest changes from a year ago are all decreases in mentions of performance that is best-in-class and competitive with the leaders. The only area to increase more than 10% was communicating insights effectively (+14%) for technology providers. The decreases of more than 10% were:

- Strategic consultancies: collecting data efficiently, synthesizing data from multiple sources, and analyzing multiple data streams
- Data and analytics: having the trust of the ultimate client decision maker, assessing likely success of recommendations, and making multi-disciplinary recommendations
- Technology providers: having the trust of the ultimate client decision maker, making multi-disciplinary recommendations, using new types of data, and conducting meta-analysis

In the industry structure section, we hypothesized that many 20W1 strategic consultancies were now making more of their money via full service research. These priorities suggest that the remaining 21W1 strategic consultancies are more focused on client engagement and recommendations than on research functions.

We also saw how data and analytics providers were taking on more services, such as data collection. Their current priorities suggest that they are giving up any pretensions of becoming business consultants to focus on supporting those consultants while concentrating on services more directly related to their core skill set.

Similarly, technology providers seem to be focusing on their core services and not spreading themselves thin by competing with data and analytics providers or generalists. The fact that they have increased the priority of communicating insights effectively while toning down their focus on the ultimate decision maker suggests that they are working symbiotically with generalist firms and the buyers' internal consultants by focusing on their expertise but improving aspects that they know are important to their direct clients.

HOW CRITICAL TO 2021 SUCCESS? MUST BE "BEST IN CLASS" OR "COMPETITIVE WITH LEADERS" RESPONSES (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	686	102	451	227	272
Understanding client's goals and strategies	95%	78%	96%	88%	88%
Having the trust of the ultimate client decision maker	90%	77%	95%	85%	89%
Communicating insights effectively	93%	51%	94%	83%	81%
Analyzing data powerfully	84%	45%	76%	81%	85%
Collecting data efficiently	76%	90%	64%	81%	84%
Assessing likely success of recommendations	66%	54%	74%	63%	55%
Making multi-disciplinary recommendations	69%	39%	76%	58%	50%
Synthesizing data from multiple sources	64%	34%	69%	61%	46%
Using new types of data	55%	41%	58%	66%	67%
Analyzing multiple data streams	58%	31%	62%	66%	56%
Conducting meta-analysis	44%	17%	49%	57%	39%
Average number of "differentiating" initiatives	7.9	5.6	8.1	7.9	7.4

HOW CRITICAL TO 2021 SUCCESS? MUST BE “BEST IN CLASS” OR “COMPETITIVE WITH LEADERS” RESPONSES RANKED (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	686	102	451	227	272
Understanding client’s goals and strategies	1	2	1	1	2
Having the trust of the ultimate client decision maker	3	3	2	2	1
Communicating insights effectively	2	5	3	3	5
Analyzing data powerfully	4	6	5	4	3
Collecting data efficiently	5	1	8	5	4
Assessing likely success of recommendations	7	4	6	8	8
Making multi-disciplinary recommendations	6	8	4	10	9
Synthesizing data from multiple sources	8	9	7	9	10
Using new types of data	10	7	10	6	6
Analyzing multiple data streams	9	10	9	7	7
Conducting meta-analysis	11	11	11	11	11

Green highlighting represent top three areas by “best-in-class” or “competitive with leaders” response.

HOW CRITICAL TO SUCCESS? “BEST IN CLASS” OR “MUST BE COMPETITIVE WITH LEADERS” RESPONSES; DIFFERENCES 21W1 – 20W1 (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Full/field service	Strategic consultancy	Data & analytics	Technology
Understanding client’s goals and strategies	-3%	-8%	-6%	-2%
Having the trust of the ultimate client decision maker	-1%	+3%	-12%	-12%
Communicating insights effectively	-6%	-7%	-8%	+14%
Analyzing data powerfully	+5%	-8%	-6%	+1%
Collecting data efficiently	-5%	-11%	+7%	-5%
Assessing likely success of recommendations	-8%	-6%	-10%	-5%
Making multi-disciplinary recommendations	-2%	-6%	-20%	-19%
Synthesizing data from multiple sources	-9%	-16%	-3%	+6%
Using new types of data	-6%	-4%	-7%	-14%
Analyzing multiple data streams	-7%	-18%	-6%	-5%
Conducting meta-analysis	-5%	-7%	-3%	-11%
Average number of “differentiating” initiatives	-0.4	-0.9	-0.8	-0.6

Full service research and field services are combined to compare data to 20W1.

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

Stripping away the responses targeted at achieving parity with leaders to focus on the best-in-class aspirations, we see more similarity across the supplier categories. With one exception, each category has the same areas in their top five:

- Understanding clients' goals and strategies
- Having the trust of the ultimate client decision maker
- Communicating insights effectively
- Analyzing data powerfully
- Collecting data efficiently

The lone exception is that field service suppliers rank synthesizing data from multiple sources fifth instead of collecting data efficiently, which was their overall

number one when we included those who said they aspired to be competitive with leaders. When we consider only best-in-class aspirations, it rises from fifth to third for data and analytics providers. The previous discussion of changes versus 20W1 also applies to this revised perspective.

In previous GRIT waves, we saw full service research suppliers striving to position themselves as strategic consultants, and strategic consultancies trying to add full service research capabilities. For the time being, the pandemic seems to have clarified each identity. The new cross-evolution seems to involve field services and data analytics providers as each seem to aspire to take on expertise of the other.

HOW CRITICAL TO 2021 SUCCESS? "BEST IN CLASS" RESPONSES (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	686	102	451	227	272
Understanding client's goals and strategies	71%	56%	77%	63%	67%
Communicating insights effectively	66%	22%	75%	55%	55%
Having the trust of the ultimate client decision maker	60%	58%	71%	55%	66%
Analyzing data powerfully	53%	16%	48%	53%	56%
Collecting data efficiently	35%	66%	29%	57%	59%
Assessing likely success of recommendations	28%	25%	38%	25%	24%
Making multi-disciplinary recommendations	29%	16%	34%	24%	18%
Synthesizing data from multiple sources	24%	19%	30%	27%	28%
Analyzing multiple data streams	23%	10%	26%	29%	27%
Using new types of data	20%	11%	16%	33%	30%
Conducting meta-analysis	13%	4%	15%	21%	13%
	4.2	3.0	4.6	4.4	4.4

HOW CRITICAL TO 2021 SUCCESS? MUST BE “BEST IN CLASS” RESPONSES RANKED (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	686	102	451	227	272
Understanding client’s goals and strategies	1	1	1	1	1
Having the trust of the ultimate client decision maker	3	3	2	2	3
Communicating insights effectively	2	2	3	5	2
Analyzing data powerfully	5	4	4	4	5
Collecting data efficiently	4	7	5	3	4
Assessing likely success of recommendations	6	6	9	9	6
Making multi-disciplinary recommendations	8	7	6	7	8
Synthesizing data from multiple sources	7	5	10	11	7
Using new types of data	9	10	8	6	9
Analyzing multiple data streams	10	9	7	8	10
Conducting meta-analysis	11	11	11	10	11

Green highlighting represent top three areas by “best in class” response.

HOW CRITICAL TO SUCCESS? “BEST IN CLASS” RESPONSES; DIFFERENCES 21W1 – 20W1 (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Full/field service	Strategic consultancy	Data & analytics	Technology
Understanding client’s goals and strategies	-3%	-8%	-6%	-2%
Having the trust of the ultimate client decision maker	-1%	+3%	-12%	-12%
Communicating insights effectively	-6%	-7%	-8%	+14%
Analyzing data powerfully	+5%	-8%	-6%	+1%
Collecting data efficiently	-5%	-11%	+7%	-5%
Assessing likely success of recommendations	-8%	-6%	-10%	-5%
Making multi-disciplinary recommendations	-2%	-6%	-20%	-19%
Synthesizing data from multiple sources	-9%	-16%	-3%	+6%
Using new types of data	-6%	-4%	-7%	-14%
Analyzing multiple data streams	-7%	-18%	-6%	-5%
Conducting meta-analysis	-5%	-7%	-3%	-11%
Average number of “differentiating” initiatives	-0.4	-0.9	-0.8	-0.6

Full service research and field services are combined to compare data to 20W1.

Green highlighting represents increases of 10% or more; red highlighting, decreases of 10% or more.

SKILL DEVELOPMENT PRIORITIES

So, we've discussed how buyers use different types of suppliers and how suppliers prioritize their strategic aspirations. Another indication of organizational strategy is which skills are given priority to develop across the insights staff.

For the skills GRIT tested in 20W1, buyers prioritized them as follows (with variations within segments):

1. Business knowledge
2. Innovative focus
3. People skills (virtual tie with analytical skills)
4. Analytical skills (virtual tie with people skills)
5. Technical/computer expertise

Business knowledge was ahead of innovative focus, people and analytical skills formed the next tier, and technical/computer was much less of a priority. Suppliers had a somewhat different ordering (again with variance by segment):

1. Innovative focus
2. Analytical skills
3. Business knowledge
4. People skills
5. Technical/computer expertise

For suppliers, innovation focus was ahead of the tightly-bunched second tier, and technical/computer expertise was also dead last for them.

For 21W1, we decided we needed to add market research expertise to the list. With the practice of insights changing so quickly, we felt we should benchmark fundamental research skills with these other types of skills.

For buyers, business knowledge once again came out on top, this time followed by people skills instead of innovative focus, which was third. Analytical and market research expertise formed the fourth tier, and technical/computer skills was last once again. Despite our concern, buyers have a stronger need for business knowledge and other skills on staff than for market research expertise.

For suppliers, the order of the five 20W1 skills changed. Innovative focus was still on top, but joined by analytical expertise and people skills. Business knowledge dropped to fourth of the five, and technical/computer knowledge remained dead last. Possibly, the shift in priorities might reflect some of the reckoning that the pandemic seems to have triggered in which not every supplier needs to be a business consultant, but does need to treat direct customers well. The hyper-dependence on analytics in 2020 in the absence of some more traditional approaches possibly shined the spotlight more brightly on analytical expertise.

So much for the five skills from 20W1, except to add one more detail: for suppliers, market research expertise leapfrogged all of them as a priority skill to develop. Perhaps this underscores another aspect of the "reckoning:" many buyers just might prefer to have their roles be as distinct as possible from the roles of suppliers, with market research fundamentals being less immediately relevant to them than business knowledge.

Business knowledge was ahead of innovative focus, people and analytical skills formed the next tier, and technical/computer was much less of a priority



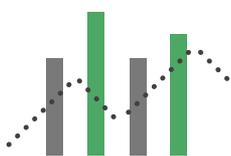
Many buyers just might prefer to have their roles be as distinct as possible from the roles of suppliers, with market research fundamentals being less immediately relevant to them than business knowledge





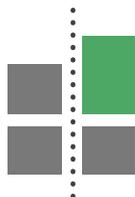
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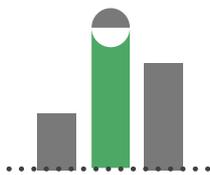
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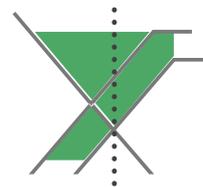
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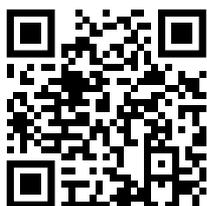
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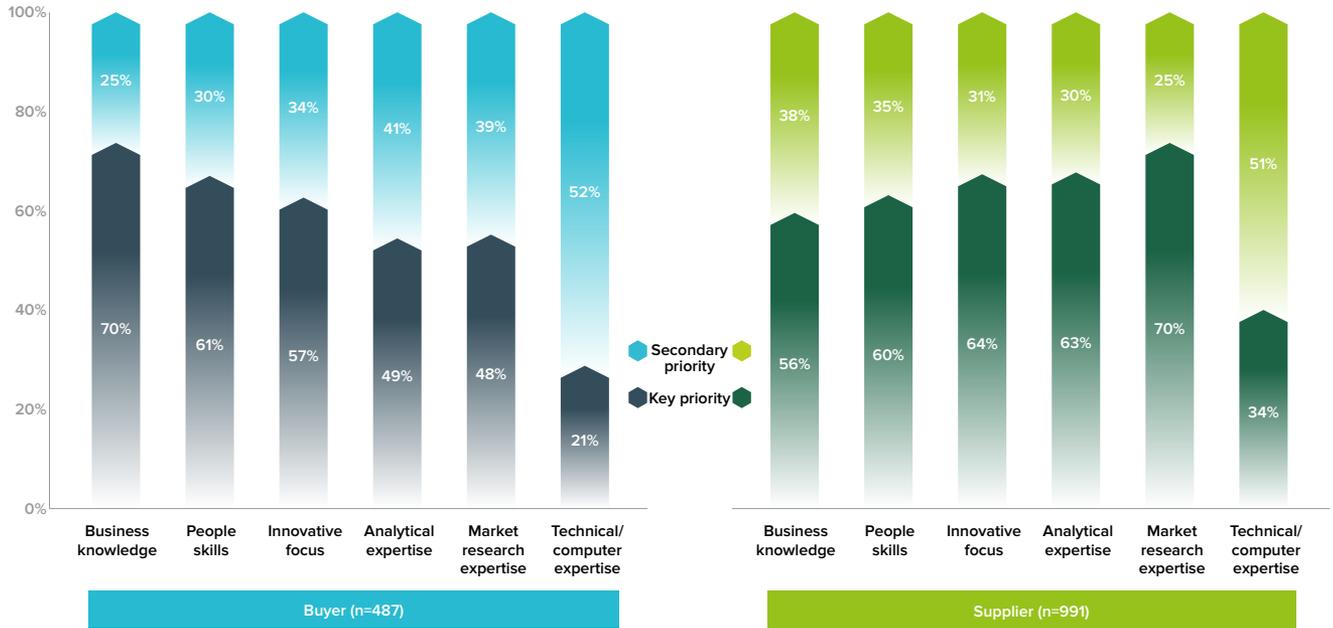
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SKILL DEVELOPMENT EMPHASIS: BUYER VS. SUPPLIER



Technology providers are the most different of these five “big bucket” supplier types. Like field services suppliers, they place much less emphasis on business knowledge (40% key priority), but, unlike any other supplier type, they are almost single-mindedly focused on innovation



Market research expertise was the top priority for full service research suppliers, strategic consultancies, and data and analytics suppliers, but there was stronger consensus within full service research (77% key priority) than among either strategic consultancies (71%) or data and analytics suppliers (69%). Similarly, analytical expertise was in the top three for these supplier types, but the consensus was somewhat stronger among full service (72% key priority) than for the other two supplier types (66% each). People skills was third for both full service research (59% key priority) and data and analytics (63%) suppliers. For strategic consultancies, it was fourth, but with a level of consensus (62%) that was very similar to the other two types. Instead of people skills, strategic consultancies put innovative focus (66% key priority) in their top three; it was fourth for both full service research and data and analytics suppliers, but with somewhat less consensus than among strategic consultancies (58% and 56%, respectively). Business knowledge was the strongest differentiator across these three supplier types, highest for

strategic consultancies (61% key priority) and lowest for data and analytics providers (47%) with full service suppliers in between (55%).

The primary difference between these three supplier types and field services suppliers was the lack of emphasis on analytical expertise among the latter (32% key priority, less than half the consensus among each of the other three). Instead, field services suppliers strive to balance innovative focus (64% key priority), people skills (63%), market research expertise (60%), and business knowledge (59%).

Technology providers are the most different of these five “big bucket” supplier types. Like field services suppliers, they place much less emphasis on business knowledge (40% key priority), but, unlike any other supplier type, they are almost single-mindedly focused on innovation (79% key priority compared to 66% for strategic consultancies, the next highest consensus within a supplier type). After innovation, they balance people skills (59% key priority), business knowledge (58%), and market research and technical/computer expertise (55% each).

SKILL DEVELOPMENT EMPHASIS (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	%Key Priority					Rank				
	Full service research	Field services	Strategic consultancy	Data & analytics	Technology	Full service research	Field services	Strategic consultancy	Data & analytics	Technology
n	395	56	273	117	145	395	56	273	117	145
Market research expertise	77%	60%	71%	69%	55%	1	3	1	1	5
Innovative focus	58%	64%	66%	56%	79%	4	1	2	4	1
Analytical expertise	72%	32%	66%	66%	40%	2	6	3	2	6
People skills	59%	63%	62%	63%	59%	3	2	4	3	2
Business knowledge	55%	59%	61%	47%	58%	5	4	5	6	3
Technical/computer expertise	26%	41%	26%	48%	55%	6	5	6	5	4

Rows are sorted by priority based on aggregation of all suppliers.
Green highlighting indicates the top three skills for the supplier type.

Earlier, in the Evolving Industry Structure section, we noted the great overlap and similarity across the roles of strategic insight consultants, VoC, and hybrids. We'll note that similarity again here: they share the same top three skills (business knowledge, people skills, and innovative focus), and all three skills are clearly differentiated from the bottom three. The lowest key priority consensus is 56% (innovative focus among hybrid), while the highest among the bottom three is only 51% (analytical expertise among strategic insights consultants). Within each of these segments, the gap between the top and bottom three is at least 8%. The smallest gap is within hybrid, which can include any of the other roles.

Similar to these segments, in-house researchers place business knowledge among their top three skills, but, unlike those three, they prioritize market research expertise and analytical expertise. They are likely to be more involved in the front end of

insights work than these other segments, so it makes intuitive sense that they would prioritize market research and analytical expertise. However, they don't prioritize them very much: market research expertise is the only skill area for which more than half say it is a key priority, and it only reaches 58%. Perhaps as the main "doers" of insights work they do not focus on developing staff, but hire for those skills instead.

For the other two segments, data analysts and research outsourcers, we have to be careful of their smaller sample size for this battery of questions. Most notably, 73% of data analysts say analytical expertise is a key development priority while 70% of research outsourcers say the same for business knowledge. For data analysts, people skills (65% key priority) and innovative focus (62%) are the next priorities. For research outsourcers, only business knowledge is considered a key priority by the majority.

SKILL DEVELOPMENT EMPHASIS (BUYERS INVOLVED IN STRATEGIC DECISIONS)

	% Key Priority						Rank					
	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research out-sourcers	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers	Data analysts	Research out-sourcers
n	214	96	85	53	27	16	214	96	85	53	27	16
Business knowledge	70%	79%	72%	49%	56%	70%	1	1	1	2	4	1
People skills	63%	62%	70%	42%	65%	42%	2	3	2	5	2	3
Innovative focus	56%	65%	61%	45%	62%	23%	3	2	3	4	3	6
Analytical expertise	48%	51%	48%	47%	73%	31%	5	4	4	3	1	4
Market research expertise	48%	48%	44%	58%	42%	48%	4	5	5	1	5	2
Technical/computer expertise	21%	16%	27%	13%	26%	26%	6	6	6	6	6	5

Note the low sample sizes for data analysts and research outsourcers.

Rows are sorted by priority based on aggregation of all buyers.

Green highlighting indicates the top three skills for the buyer type.

THE BIG PICTURE

We hypothesize that a significant portion of buyers essentially simplified their management responsibilities by treating a full service research provider as a single point of contact for external insights work that might involve other types of suppliers



In response to the unprecedented challenges of 2020, many buyers changed how they use different types of suppliers. In particular, use of full service research suppliers increased while direct use of other types decreased overall. While different buyers handled the challenges differently, there seems to have been a strong trend among some to clearly distinguish between their internal responsibilities and those they assign to external partners. We hypothesize that a significant portion of buyers essentially simplified their management responsibilities by treating a full service research provider as a single point of contact for external insights work that might involve other types of suppliers.

For their part, suppliers seemed to address challenges by focusing on their core expertise in order to maximize their opportunities. We speculate that, as a by-product, increased specialization

enhanced symbiosis across supplier types and that buyers could take advantage of that to simplify their insights management responsibilities and focus more squarely on their company's business needs.

At this moment in the industry, the domains of full service research providers, strategic consultancies, and technology providers seem to be more clearly defined than ever, while field services and data and analytics suppliers sort out what roles best fit their capabilities and the market's needs. The biggest wild card will be the aftermath of the pandemic, which more and more of us seem to assume is just around the corner. After we turn that corner, will we be heading on a path that continues toward clear differentiation of supplier types, or will it lead us back to a scenario in which the boundaries between supplier categories blur once again?



ENSURING IMPACT – 4 CRITICAL SUCCESS FACTORS FOR YOUR NEXT INSIGHT PROJECT

Todd Trautz

Chief Innovation & Solutions Officer, Maru Group

Email: todd.trautz@marumatchbox.com | Website: www.marugroup.net

LinkedIn: www.linkedin.com/in/todd-trautz-31720529/

Was your last project a success? The answer depends on if you're a buyer or supplier. Buyers are less likely to agree that their project was a success while suppliers are more likely to agree that they delivered against project goals.

This disconnect is a barrier to growth for both parties. The common benchmark of success is whether the project results in recommendations or insights that lead to business impact. Often operational execution is misconstrued as success. A flawlessly executed project can still fail to deliver the project goals.

Four Factors for success

1. Alignment on the business question, and viable decisions

Often the business question becomes less of a priority to sample, methodology design, and timing. People get so caught up in how they'll deliver that they pay less attention to why they are executing the research. Without alignment up front, the project will fail. Every client touchpoint is an opportunity to communicate what the objectives are, and which decisions are viable. Align early and often.

2. Speed and agility

The industry shift from traditional research providers to technology-based companies highlights that speed is expected. Buyers are pressured to provide information to internal stakeholders faster. Innovation groups have adopted agile work styles. To keep pace, research suppliers must have a technology or software platform that allows real time access to data. Sharing and access to that data by multiple decision makers requires centralization and the ability to ingest multiple sources of data. The days of sharing the latest report has given way to real time dashboards and interactive visualizations. Regardless of how impactful the recommendation, if it comes after the decision needs to be made, it is useless. Provide real-time or near-time access to data, and analyze the data as it comes in. The insight

or valuable business recommendation is often visible before field ends and working through the data early with a client often leads to valuable decisions that can shift the course of study. Waiting can lead to missing the success goal.

3. Analytical framework consistency

Too often we build a new wheel for every research issue. This creates inconsistency and the inability to look across data sets holistically. There is need for an overarching framework that replicates the System 1 & 2 human decision process. If the framework remains consistent then the insights and recommendations will not be in a vacuum. Disparate pieces of information that cannot be used to view the holistic picture are frustrating. Providing recommendations or insights that lead to a business impact consistently requires a consistent way of analyzing data. An analytical framework allows each project to fit together and build upon each other.

4. The right tools

We are so busy asking what people think that we ignore how they behave and rarely ask how they feel. To provide insights that lead to business impact we must utilize tools that capture how consumers make decisions. Understanding behavior requires more than stated intent. Choice-based questions align with how we make decisions. Observed behavioral data will provide even more insight. Using System 1 tools helps to understand implicit biases, barriers, and advantages. It is what consumers don't tell us that is often the disconnect preventing action and insight. Understanding why consumers behave the way that they do provides actionability. Capturing the emotional motivations of consumers requires passive System 1 tools. How consumers feel is the impetus to behavior and whether that behavior will continue. Consumer insights is the study of human decision making and with the right tools you can impact your client's business decisions and provide meaningful insights and recommendations.

MEETING PROJECT GOALS

The “Project” is still the most ubiquitous method of engagement between buyers and suppliers, so understanding the goals of each one is vital for all stakeholders, and evaluating performance in relation to them is the clearest metric of success. The question is, have the definitions of success changed, as have so many other aspects of the industry?

WHY DOES THIS MATTER?

Each year, GRIT documents how well insights project deliverables and value measure up against the goals they were supposed to meet. We report on buyers’ and suppliers’ perceptions of what percentages of their projects exceeded, met, and fell short of the needs of the business as outlined in the project brief or SOW. We elaborate on what distinguishes a project that exceeds business needs from one that does not. We offer our perspectives on these topics. No charge.

One thing we don’t often do is tell you *why* you should give a [insert your favorite valuable thing to give] about meeting project goals. Well, let’s take a quick look at why you might give a [*] or maybe even give lots of [****]s.

Higher rates of projects that exceed business needs are correlated with certain supplier and buyer experiences, such as:

Supplier Experiences	% of Projects that Exceeded Business Needs	Buyer Experiences	% of Projects that Exceeded Business Needs
Organization’s overall performance v. goals		Organization’s overall performance v. goals	
Exceeded goals	53%	Exceeded goals	42%
Did not exceed goals	40%	Did not exceed goals	29%
Optimism about department		Optimism about department	
Optimistic	49%	Optimistic	40%
Not optimistic	39%	Not optimistic	33%
Optimism about company		Satisfaction with suppliers	
Optimistic	49%	Completely satisfied	61%
Not optimistic	40%	Less than completely satisfied	35%
Revenue trend			
Increased	51%		
Did not increase	43%		
Full-time equivalent positions trend			
Increased	50%		
Did not increase	45%		

OK. So GRIT doesn't ask a lot of "how are you doing/how are you feeling" questions, and no participant has ever asked GRIT to add more questions. And correlation doesn't prove causality. However, the evidence available to GRIT is consistent with the assumption that exceeding business needs on more projects is better than merely meeting needs or falling short.

Is GRIT suggesting that you strive to exceed the business needs expressed in the SOW's of every project? Not at all. For some types of projects, it's

impossible to exceed the business needs. For others, it would be foolish to do so because the business value of exceeding the needs wouldn't justify the cost of doing so. No one wants to be known for being foolish or wasting money.

However, it is important to try to exceed needs when appropriate, especially for suppliers and for insights managers who want to stand out positively, build strong relationships with key stakeholders, and receive more funding. In other words, we believe you should give lots of [****]s.

The evidence available to GRIT is consistent with the assumption that exceeding business needs on more projects is better than merely meeting needs or falling short



HOW ARE WE DOING?

The average buyer says that 37% of projects exceeded business needs while 10% fell short, leaving 53% that exactly met the needs. We can't know what those numbers signify until we compare them to other benchmarks because we have no idea how many projects could have exceeded needs. Compared to 20W1, these numbers represent a 4% decrease in the average percentage of projects that met goals, with half of that shifting to "exceeded" and half going to "fell short."

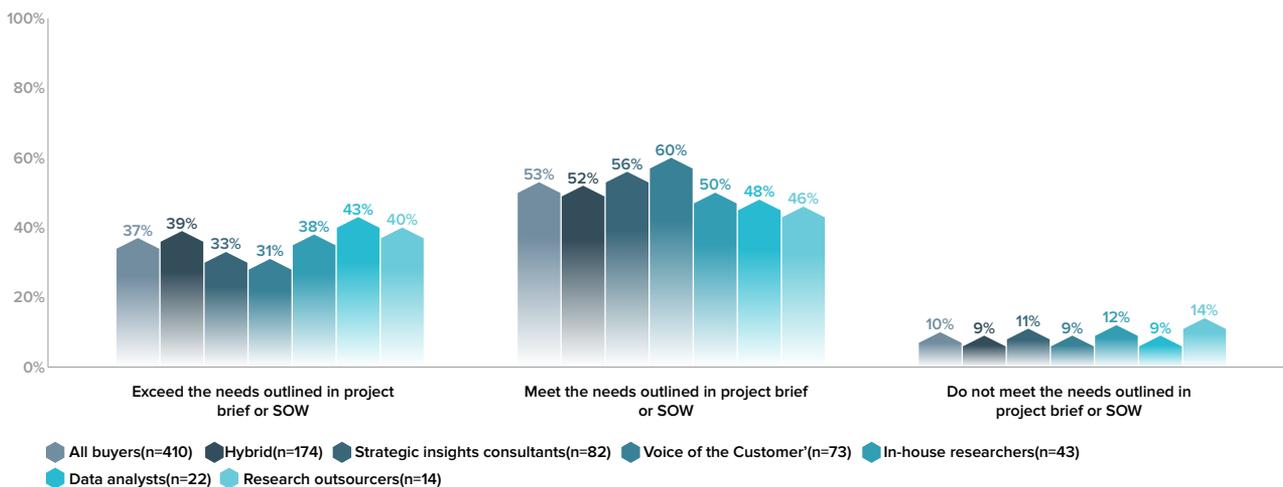
Across buyer roles, the percentage that exceeded expectations ranged from 31% for VoC to 43% for data analyst. Project failures ranged from

9% for hybrid, VoC, and data analysts to 14% for research outsourcers. None of these differences are statistically significant, and the sample sizes for data analysts and research outsourcers are small. Further, we don't know if we should expect the same success rates across segments. For example, in-house researchers have more control over their outcomes than do research outsourcers, who depend on external suppliers by definition. Perhaps the projects that strategic insights consultants manage are more cutting-edge than those attempted by data analysts, or vice versa, and a higher failure rate might be the cost of experimentation.

The average buyer says that 37% of projects exceeded business needs while 10% fell short, leaving 53% that exactly met the needs



PROJECT PERFORMANCE: BUYER PRIMARY ROLE



The fairest benchmark available would be segment performance in prior GRIT waves. From this vantage, we can see that all segments are not equal. Strategic insights consultants reported a percentage of projects that exceeded needs which was 11% below their performance of a year ago. Most of that turned into projects that merely met needs, but they also

had the highest percentage increase of projects that fell short of business needs, at least directionally. The percentage of projects meeting needs decreased by 10% for hybrids with most of the change going to projects that exceeded needs. To a lesser extent, in-house researchers reported trends similar to what hybrids reported.

PROJECT PERFORMANCE: BUYER PRIMARY ROLE DIFFERENCES 21W1 – 20W1

	All buyers	Hybrid	Strategic insights consultants	'Voice of the Customer'	In-house researchers
Exceed the needs outlined in project brief or SOW	+2%	+8%	-11%	-2%	+5%
Meet the needs outlined in project brief or SOW	-4%	-10%	+8%	+2%	-7%
Does not meet the needs outlined in project brief or SOW	+2%	+2%	+3%	0%	2%

Data analysts and research outsourcers are not included due to sample size. Red highlighting indicates decreases of 10% or more.

As some additional food for thought – food to be eaten with two grains of salt – the gap between percentages of projects that exceeded needs between organizations that exceeded their goals versus those that did not was twice as large for hybrids (+17%) and VoC (+15%) than for strategic insights consultants (+7%) and other roles (+8%). The grains of salt are 1) smaller sample sizes due to the additional cut by organization performance against goals and 2) the assumption that a correlation between project success and organization success is meaningful.

The results suggest that exceeding business needs may be more important to the ultimate success of hybrids and VoC than for strategic insights consultants and other roles. Perhaps it is more difficult to immediately evaluate the performance of strategic projects versus their stated objectives, delaying the impact of project performance on organizational success. Perhaps those working primarily as in-house researchers, data analysts, or research outsourcers have a greater mix of mundane projects that can't exceed business needs or else have less impact on overall success when they do exceed them.

%PROJECTS EXCEEDING NEEDS: BUYER PRIMARY ROLE

	All buyers	Hybrid	Strategic insights consultants	'Voice of the Customer'	Other roles
Organization exceeded goals	42%	46%	35%	39%	44%
Organization did not exceed goals	30%	30%	29%	24%	36%
Difference: Org exceeded – not exceeded	+13%	+17%	+7%	+15%	+8%

In-house researchers, data analysts, and research outsourcers combined for sample size. Sample n varies within each cell from 28 (strategic insights consultants who did not exceed goals) to 100 (hybrids who exceeded goals).



ACHIEVING ORGANIZATIONAL SUCCESS THROUGH A DIGITAL-FIRST MINDSET

Alex Hunt

CEO, Chief Executive Officer, Behaviorally (Formerly PRS)

Email: Alex.Hunt@behaviorally.com | Website: www.behaviorally.com

LinkedIn: www.linkedin.com/in/alex-hunt-540ba910/

There is a lot to unpack in this year's GRIT report about the organizational success factors for suppliers and by extension, for the brands they serve. It is a transitional year in which to collect such data; the pandemic upended everything for the industry, and frankly for the consumers our clients serve. There were a few "predict the unpredictable" components that guided our COVID year, so it is probably best to frame a POV on organizational success through our recent journey as Behaviorally having rebranded in January this year.

It is no accident that the strategy underpinning our rebrand was built on a "digital-first" approach. Even as shopper behaviors were gyrating dramatically due to the pandemic, this allowed us to leverage decades of experience and a unique behavioral framework to define and diagnose the factors that could drive our clients' shopper growth both now and into the future.

The critical priorities for suppliers outlined in this report include some basics we subscribe to wholeheartedly orienting Behaviorally's own strategic formula for success: credibility and trust at the ultimate client decision-maker level, differentiating from competitors, and analyzing data powerfully. Research expertise became table stakes this year, topped by another key factor: understanding clients' goals and strategies, keeping pace with which became a key KPI for establishing or maintaining supplier relationships in a year when those goals and strategies were upended.

Further, the GRIT report reveals what, on the one hand, might seem a dichotomy, but makes perfect sense to us at Behaviorally: 2020 saw a willingness of clients to switch from an incumbent if a new supplier could deliver solutions that the pandemic forced insights professionals to embrace. Conversely, the power of deep client relationships, when the incumbent could pivot quickly, gave insights professionals confidence as they embarked on uncharted territory in which to continue to conduct consumer research.

A case in point is the shift toward digital qualitative. Our commitment to a "digital-first" mindset positioned Behaviorally perfectly as conditions in which to conduct face-to-face research all but evaporated for several months. But our "digital-first" approach embraced more than just online qual; consumers were for the most part only shopping digitally during lockdown, a trend towards e-commerce that COVID only accelerated. Clients needed insight into the online shopper journey as well as the ways in which packaging and other shopper marketing were influencing choice. Clients also required assurance that new digital methods would deliver equally reliable results. Our long standing "trusted advisor" relationship with clients instilled confidence as they navigated unprecedented circumstances.

The report suggests that some qualitative research firms managed to survive and grow in 2020 despite the pandemic; we suspect that we were among the lucky, prescient ones who embraced and succeeded in "digital" qualitative before it became a survival tool, at the same time maintaining our preferred provider relationships.

We additionally believe that there is nuance behind the "analyze the data powerfully" metric. Any agency worth its salt can count up quantitative data and come up with a mean. But to put power behind data analysis requires a unique perspective. For us at Behaviorally, that is a behavioral framework which provides invaluable context for the factors we define and diagnose that influence the omnichannel shopper journey.

Finally, in the chart that contrasts buyer and supplier skills development, innovative focus is #3 as a priority for success factors in both groups. We are proud to rank as high as we did this year as the top debut brand and #11 among the GRIT Top 50 Most Innovative Suppliers. It is validation that our mission and the impetus for our rebranding aligns with what buyers need to succeed and drive their own growth agendas.

The kinds of projects done collectively across in-house researchers, data analysts, and research outsourcers have more impact on the overall success of their organizations when they fall short of business needs than when they exceed them



Looking at the other side of the coin – a chocolate coin, since we're still discussing food for thought – strategic insights consultants and VoC whose organizations exceeded their goals had lower project failure rates than hybrids and other roles. Hybrids whose organizations did not exceed their goals failed 55% more often than those who exceeded their goals (3.9% more failures than the 7.1% for those who exceeded goals). The comparable combined rate for in-house researchers, data analysts, and research outsourcers was 41%, while it was just 16% for strategic insights consultants and only 3% for VoC.

If we take these results at face value, what do they suggest? For one thing, they suggest that the kinds of projects done collectively across in-house researchers, data analysts, and research outsourcers

have more impact on the overall success of their organizations when they fall short of business needs than when they exceed them. In contrast, typical VoC projects don't have much overall impact if they fall short of business needs, but increase organization success when they exceed them. Typical projects by strategic insights consultants, on average, have less impact either way, possibly because it is harder to judge their performance against business needs in the short term. Hybrids, which are by far the largest buyer segment, have the most direct impact on the success of their organizations: exceeding business needs improves organization success while failing to meet them degrades it.

%PROJECTS FALLING SHORT OF NEEDS: BUYER PRIMARY ROLE

	All buyers	Hybrid	Strategic insights consultants	'Voice of the Customer'	Other roles
Organization exceeded goals	9%	7%	11%	9%	10%
Organization did not exceed goals	11%	11%	12%	9%	14%
Difference: Org exceeded – not exceeded	-3%	-4%	-2%	–	-4%

In-house researchers, data analysts, and research outsourcers combined for sample size. Sample n varies within each cell from 28 (strategic insights consultants who did not exceed goals) to 100 (hybrids who exceeded goals).

Suppliers, as usual, reported better results for their projects than buyers did for theirs, although we can't really compare the two directly because the project populations are fundamentally different. For one thing, a supplier works on 100% of their own projects but a lesser percentage of a given client's projects, especially because some client projects do not involve suppliers. For another, each supplier's project portfolio involves different kinds of projects than the average buyer or even than other suppliers. Further, the GRIT metric is the average percentage of projects across buyers or suppliers, not the average of all insights projects, so the differences in types of projects is a consideration. Finally, if a supplier fails on enough projects, they lose revenue and might eventually go out of business and drop

out of the GRIT sample, so their success rates should always be higher than buyers' who rarely face such consequences.

Again, the best benchmark is performance within the same segment in a different GRIT wave. However, for orientation, we'll start by reporting that the average 21W1 supplier said 48% of their projects exceeded business needs and only 6% fell short, leaving 46% that exactly met needs. Compared to 20W1, the average supplier experienced a 5% drop in projects that exceeded needs, and most of that went to the "met needs" category, and this may be a stronger comment about the types of projects that were done in 2020 and how easy they were to evaluate in the short term than it is about supplier performance.

If a supplier fails on enough projects, they lose revenue and might eventually go out of business and drop out of the GRIT sample, so their success rates should always be higher than buyers' who rarely face such consequences



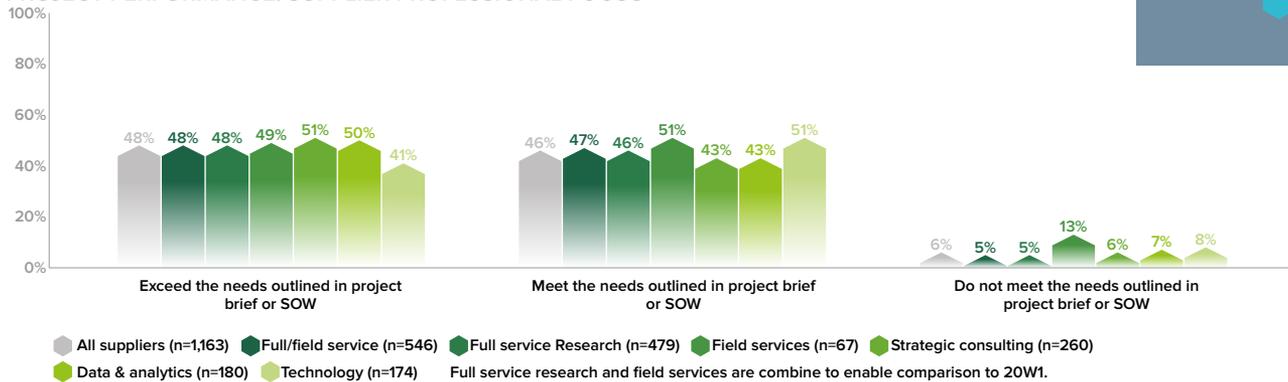
Full service research suppliers, field services suppliers, data and analytics suppliers, and strategic insights consultants each reported that about half of their projects exceeded business needs. Technology providers reported a lower rate, on average (41%).

Field services had the highest failure rate (13%) of any supplier type. For field service suppliers, clients write the business needs, the respondent universe determines the success, and field managers are left to explain why reality doesn't obey the client's wish list.

We will go out on a limb and suggest that the kinds of projects that were conducted in 2020 were different than the typical project from any other year



PROJECT PERFORMANCE: SUPPLIER PROFESSIONAL FOCUS



Compared to just before the COVID-19 outbreak, full/field service providers had the same overall performance, data and analytics providers were somewhat more likely to exceed business needs, strategic consultancies were somewhat less likely to exceed business needs, and technology providers were much less likely to exceed business needs, but at least they were not more likely to fall short of them.

We will go out on a limb and suggest that the kinds of projects that were conducted in 2020 were different than the typical project from any other year. For purposes of wrapping up this discussion, we'll oversimplify based on the trends we've discussed in the report so far. Conducting traditional research was challenging, and, for full and field service providers, success was defined more strongly by being able to pull it off at all rather than adding value beyond the stated needs. We suspect that data and analytics providers had a more diverse client audience than in previous years who made novel requests whose answers had immediate consequences that could be measured against the stated business needs. Further, strategic consultancies, a segment that had shed many of its researchers, probably had to look into crystal balls that were as cloudy as the reality around them

and had less immediate success than previously. Technology providers, who in prior years had to make their cases to prospective customers with as much creativity as they could muster, now had people knocking on their doors, often with large orders. The pandemic made the business value case for them, and success in 2020 was built around meeting functional needs, not specifically about adding more business value.

PROJECT PERFORMANCE: SUPPLIER PROFESSIONAL FOCUS DIFFERENCES 21W1 – 20W1

	All suppliers	Full/field service	Strategic consulting	Data & analytics	Technology
Exceed the needs outlined in project brief or SOW	-5%	0%	-7%	+5%	-12%
Meet the needs outlined in project brief or SOW	+3%	0%	+4%	-7%	+11%
Does not meet the needs outlined in project brief or SOW	+1%	0%	+2%	+2%	+1%

Full service research and field services are combine to enable comparison to 20W1. Green highlighting indicates increases of 10% or more; red indicates decreases of 10% or more.

With the same caveats as for buyers, consider the gaps in percentages of projects exceeding business needs for supplier organizations that exceeded their goals versus those that did not. The largest gaps were for technology, data and analytics, and field services providers. Taking field services first, it's easy to see how exceeding business needs would increase overall success because researchers are almost always happier when they have more and better data to work with, and exceeding needs might also mean additional direct revenue. We suspect that data and analytics providers served an even more crucial role in 2020, especially for new clients who may not have known exactly what to expect, so the opportunity to delight by exceeding needs was greater than in the past. Technology providers

may have struggled to exceed the business needs of projects more than before, but they always have the opportunity to impact business value in multiple ways, and those who took advantage of those opportunities benefited from them.

Full service research providers and strategic consultancies had smaller gaps across those who exceeded organizational goals and those who did not. We speculate that full service research providers played a less glamorous, more functional role than in prior years and had fewer opportunities to exceed business value. Finally, as we have been speculating, strategic consulting projects are more difficult to judge quickly against business value, especially last year.

%PROJECTS EXCEEDING NEEDS: SUPPLIER PROFESSIONAL FOCUS

	All suppliers	Full service research	Field services	Strategic consulting	Data & analytics	Technology
Organization exceeded goals	50%	54%	45%	56%	56%	45%
Organization did not exceed goals	40%	42%	31%	44%	41%	29%
Difference: Org exceeded – not exceeded	+10%	+12%	+14%	+12%	+15%	+16%

Sample n varies within each cell from 33 (field service providers who exceeded goals) to 332 (full service research providers who exceeded goals).

The gaps across organizations that exceeded goals and those who did not with respect to project failure rates are somewhat lower than for buyers, but if

suppliers have too many failures, they go out of business and drop out of the GRIT population.

%PROJECTS FALLING SHORT OF NEEDS: SUPPLIER PROFESSIONAL FOCUS

	All suppliers	Full service research	Field services	Strategic consulting	Data & analytics	Technology
Organization exceeded goals	5%	4%	11%	5%	7%	7%
Organization did not exceed goals	7%	6%	14%	7%	7%	9%
Difference: Org exceeded – not exceeded	-2%	-2%	-3%	-3%	–	-2%

Sample n varies within each cell from 33 (field service providers who exceeded goals) to 332 (full service research providers who exceeded goals).

DRIVING PROJECT SUCCESS

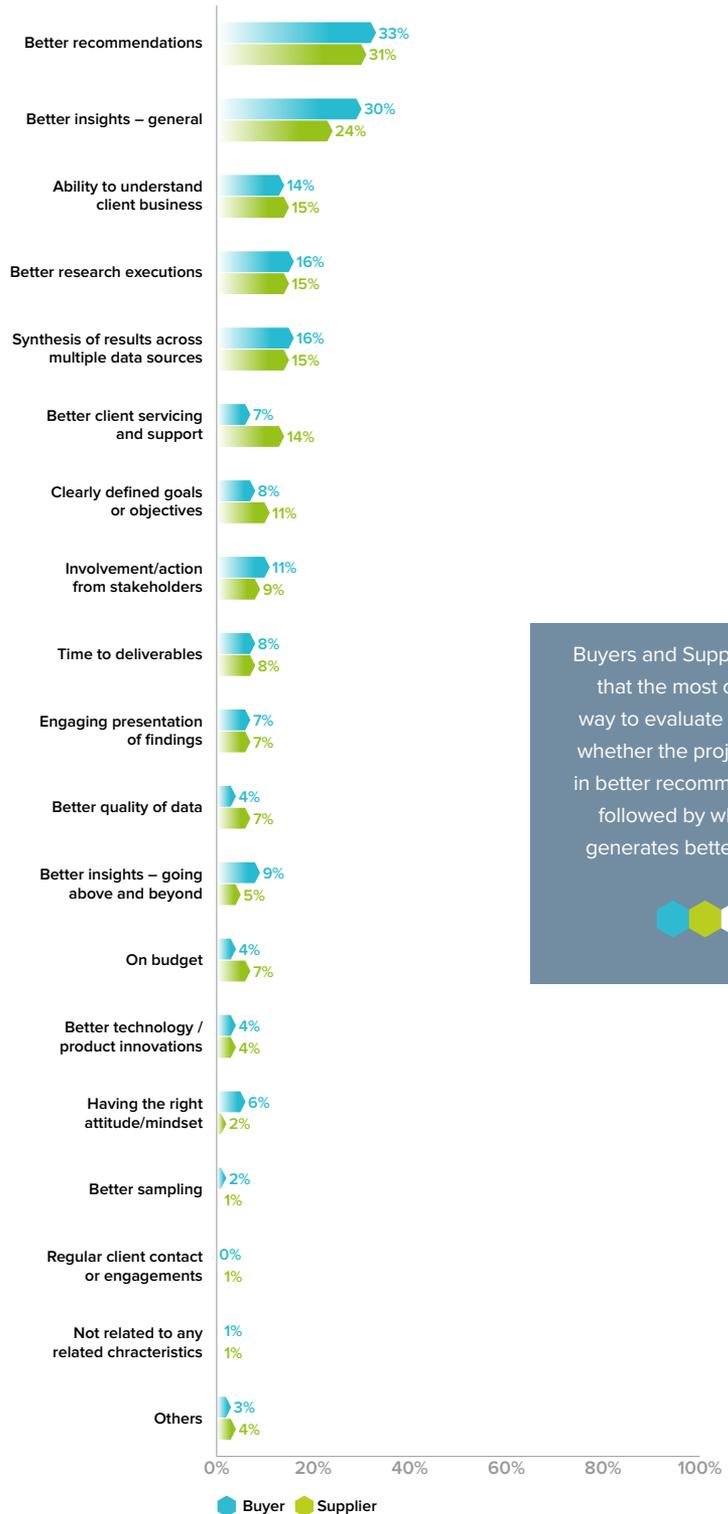
As we continued to explore organizational success factors, we wanted to understand how respondents evaluate project success. We asked, “What characteristics separate a job that exceeds the needs of the business from one that does not meet the needs of the business?” This was an open-ended question and we coded responses.

Buyers and suppliers agree that the most common way to evaluate success is whether the project results in better recommendations, followed by whether it generates better insights. These are by far the most prevalent responses, leading across both buyers and suppliers.

When buyers talk about “better recommendations,” they express opinions such as:

- *A job that exceeds addresses the business need by identifying very clear and actionable insights for the challenge at hand, and also identifies broader consumer truths that lead to other new ideas.*
- *Answer their business question and on top provide solutions on how to implement.*
- *Crafting findings summaries and recommendations that display a thorough understanding of the business; or delivering insights that are novel and new and offer a new way to look at the consumer or category.*
- *Two characteristics drive an exceeding rating: one, resulting in sales opportunity and two, keep us from doing something stupid.*
- *It’s important for us to link the learnings to the bigger and more strategic needs of the business. Answering the objectives of the research is a MUST but going the extra mile to really link those learnings to longer term business strategy is a great thing for us to do.*

FACTORS THAT DRIVE PROJECT PERFORMANCE: BUYER VS. SUPPLIER



Buyers and Suppliers agree that the most common way to evaluate success is whether the project results in better recommendations, followed by whether it generates better insights

In addition to deliverables, we also see operational elements such as better execution, data synthesis, and service and support being mentioned as important metrics, although far below the impact that insights create as the key performance criteria



From suppliers, “better recommendations” include examples such as:

- *When you seek out related objectives that you know should be considered based on your vertical market experience that wind up being included in the research and become important additions to the project.*
- *Providing next steps consultancy and broader context / category learnings, grounding insights in behavioral economics to predict shopper-consumer behavior.*
- *Additional key insights and recommendations picked up during analysis and could be considered extremely valuable for client (but not necessarily specified before the research was conducted).*
- *Tend to have more recommendations on how to apply to the client’s business; they demonstrate understanding of the client’s business. Those that do not meet needs typically have errors and no helpful analysis or insights.*
- *Supplies the “whys” and offers business guidance/ recommendations that can be considered/put into action.*

Regarding “better insights,” buyers made statements such as:

- *Providing insights that the requester didn’t originally think of, providing them with new information they didn’t consider, providing results faster than expected with new technology.*
- *Additional learning – an “aha” they weren’t expecting or that conflicted with their ingoing hypotheses.*
- *Extra analysis that they were not expecting, connecting the dots with other sources of information.*
- *Delivering unexpected, “wow” insight that moves the business forward more than expected from the original objectives.*
- *Strong practitioners using innovative methodologies sometimes lead to unexpected findings, with implications far beyond the intended goals of the study.*

Examples of supplier statements about “better insights” include:

- *Allowing research to be re-mined in the future/ short- to mid-term for new insights on specific and changing business needs; unlocking new insights that were previously unknown to end clients; debunking popular knowledge within end clients.*
- *Actionable insights that were not part of the original scope or doing work differently to what is normally expected (when it comes to regular reports).*
- *Providing and proving out hypotheses that come out during the research. We may find additional insights during the course of research that we prove out.*
- *We are open to learning from everything and anything we discover in the research process, not just the answers to the client’s questions... the ability to think bigger than the problem.*
- *Peeling the onion further than they expect to uncover root causes; examining different angles – not just the one they had in mind, so you can understand what “normal” looks like, then identify aberrations (i.e. opportunities) from that.*

In addition to deliverables, we also see operational elements such as better execution, data synthesis, and service and support being mentioned as important metrics, although far below the impact that insights create as the key performance criterion.



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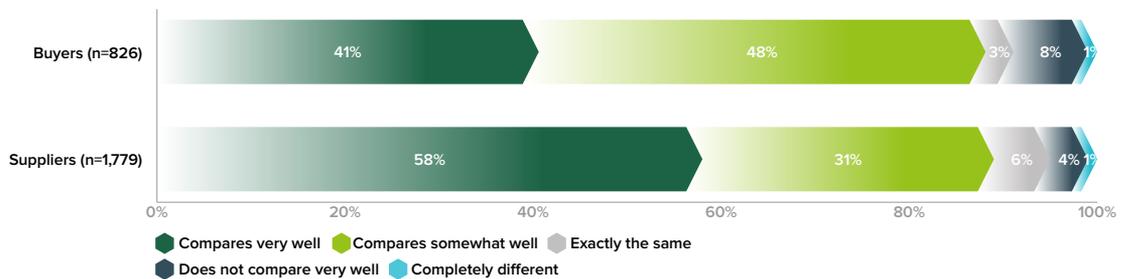


REACHING FOR THE IDEAL PROJECT

GRIT also asks insights professionals to rate their average project on how well it compares to their ideal. Buyers may be more critical of their projects than suppliers: 41% of buyers who are involved in strategic decisions say their average project compares "very well" to their ideal, but a greater proportion, 48%, say it compares only "somewhat

well." By contrast, most suppliers who are involved in decisions (58%) say the average project compares "very well" to their ideal and only 31% say it compares "somewhat well." Possibly, the average buyer has a more diverse set of projects to execute than the average supplier has and repeats them less frequently.

AVERAGE PROJECT VS. IDEAL PROJECT PERFORMANCE: BUYER VS. SUPPLIER INVOLVED IN STRATEGIC DECISIONS)



Buyers and suppliers should strive to think beyond the business needs expressed in project briefs and statements of work because going the extra mile tends to be related to greater overall success



How bad is a rating of “somewhat well” versus “very well”? When the average project compared “very well,” 73% of buyer and supplier organizations exceeded their goals. When the average project only compared “somewhat well,” these numbers drop about 30 points to 44% and 40%, respectively. Comparing worse than “somewhat well” penalizes buyers a bit more, as fewer organizations (40%) exceeded goals and more fell short (9% of “somewhat well” and 14% of those with lower evaluations).

For suppliers, penalties for average projects that don’t compare at least “somewhat well” versus the ideal are not much greater (26% fell short of

goals) versus those which compare “somewhat well” (22%). However, their organizations were actually more likely to exceed their goals (54%) than those whose average project compared only “somewhat well” (40%). Only 11% of suppliers said their average project compared less than “somewhat well,” and all of these suppliers survived long enough to take the first GRIT survey of 2021. We speculate that these tended to be suppliers who had to reach outside their comfort zone in order to survive the pandemic, so while they may not have been delighted with the results, they were at least able to pay their bills.

HOW AVERAGE PROJECT COMPARES AND OVERALL ORGANIZATIONAL PERFORMANCE: BUYER VS. SUPPLIER (INVOLVED IN STRATEGIC DECISIONS)

Overall Organizational Performance	Buyers			Suppliers		
	Very well	Somewhat well	Worse than “somewhat well”	Very well	Somewhat well	Worse than “somewhat well”
n	337	403	86	1,069	522	188
Exceeded goals	73%	44%	40%	73%	40%	54%
Met goals	25%	47%	46%	19%	37%	20%
Fell short of goals	2%	9%	14%	9%	22%	26%

THE BIG PICTURE

Generally speaking, buyers and suppliers should strive to think beyond the business needs expressed in project briefs and statements of work because going the extra mile tends to be related to greater overall success. But not if the length of the pier is less than a mile.

Some types of projects have greater business potential than others, and some may require more effort to exceed business needs than the value of exceeding needs would justify. We see evidence of this in the variability across buyer roles and supplier types of the relationship between the proportions of projects that exceed business needs and overall success. For buyers, the role with the largest potential impact on success is the hybrid, which reports greater benefits from exceeding

business needs and deeper penalties for falling short of them. Strategic consultants among buyers and suppliers may have the most ambiguous position, as they may not be able to immediately evaluate their deliverables relative to the expressed business needs, and the ultimate business value may be influenced by multiple other initiatives.

In the Organizational Success Factors section, we reported that all types of suppliers place the highest priority on understanding client needs and strategies. We suggest that buyers and suppliers apply this perspective to each new project with an eye toward identifying opportunities to exceed the expressed business needs, acknowledging that project excellence, in some cases, may be more dependent on execution than on adding value.



IT'S TIME TO DISRUPT THE MARKET RESEARCH INDUSTRY

Zain Raj

Chairman & CEO, Shapiro+Raj

Email: zain@shapiroraj.com | Twitter: [@ZAIN_RAJ](https://twitter.com/ZAIN_RAJ) | Website: www.shapiroraj.com

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

The biggest enemy we face today is time. Covid-19 accelerated trends already underway resulting in a wake-up call for businesses to become more agile and responsive because traditional approaches, models and paradigms no longer work.

The big question of the day: is the Market Research industry responding to this imperative?

It seems not. The challenges of 2020 have made market research buyers reconsider the role they need to play and have shifted their expectations of their suppliers. They are looking for research suppliers that have broad business knowledge (70% top box) because they need partners that can help deliver business outcomes.

Unfortunately, their needs and the MR industry model don't align. We've built an institutional, industrialized model of products/tools sold by project, to solve tactical evaluative needs versus creating integrated strategic learning agendas that deliver measurable business impact.

Having spent three decades in the strategy, marketing, and advertising industries, I began the journey in 2015 to purposefully build a new kind of a strategic insights consultancy. One that would make us credible partners not just vendors!

These are the four keys to create this transformation:

Focus On Delivering Business Outcomes

We approach every project as an opportunity and challenge to answer critical business questions. Every client RFP/discussion is an opportunity for us to solve an important problem for them and their stakeholders. This is why, for every project, we go beyond just addressing the "what" and "so what" but push hard to define the "now what." A clear focus on this helps spark transformative outcomes that drive business success.

Build Deep and Abiding Relationships

Unlike many agencies, we don't have a sales force/business development team. We reduced our client roster from 179 companies in 2015 to 18 companies today. Despite this reduction, we have tripled

in size over the past five years. We have dedicated teams working with our concentrated group of clients, that intimately know their business, processes, priorities, internal stakeholders, and agencies. The teams execute learning agendas that build on prior learnings and integrate other business data to frame powerful insights that facilitate marketplace activation to create competitive advantage.

Staff with Credentialed and Battle-Tested Talent

All projects, whether big strategic projects or agile dipsticks, are staffed by an integrated team of social scientists who dig for insights in partnership with brand strategists who transform these into market-ready actions. This gives our clients the ability to activate learnings quicker than other research companies. Insights delivered as infographics, podcasts, webcasts, and interactive reports allow clients to democratize the learnings while activating in-market with agency partners quicker.

Access to the Best Tech Tools Paired with Innovative Methodologies

Technology helps save time but to be effective, needs to be paired with the right methodologies to ensure that speed is grounded on scientific rigor. We have built methodologies based on behavioral economic principles that integrate system 1 plus system 2 thinking; are a hybrid of qual + quant; and are not just evaluative but also generate deeper insights faster. We pair these methods with the right technology from curated industry tech leaders to get to market-ready insights. We developed a proprietary ML/AI app, S+R AQuA™, to enable clients to use their prior qual research to answer questions leveraging their longitudinal data because there is nothing like this available.

I hope the journey we are on helps illustrate a potential path to others in the industry. Our clients need business partners that can help them win. We can be that resource!

To borrow a phrase, let's work together to "put a dent" in the market research universe.

INDUSTRY BENCHMARKING

If we “measure what matters”, then there is no better place to start than understanding what factors drive business outcomes. In the Insights and Analytics industry that is a diverse set of variables, and it is vital that we understand not just what they are, but how they relate to each other so we can increase success.

In recent years, GRIT has been benchmarking how insights buyers and suppliers prioritize various aspects of the research efforts they conduct. One aspect is the priority insights professionals place on various elements to ensure their projects have the maximum possible impact. We asked respondents to trade off elements by ranking them when they were shown in random sets of four and derived the overall priorities from this.

Buyers and suppliers share the same top five priorities:

- Providing results executives can act on
- Making impactful recommendations
- Ensuring work completely aligns with business objectives
- Effective storytelling
- Directly involving key business stakeholders

Buyers and suppliers share three of the next five priorities:

Rank	Buyer	Supplier
6	Partners/suppliers who understand my business	Concise, direct reporting
7	Generating measurable ROI	Applying innovative research methods
8	Concise, direct reporting	Generating measurable ROI
9	Synthesizing results from multiple data sources/types	Maximizing the precision of the data
10	Partners/suppliers who bring unique perspectives	Partners/suppliers who understand my business

The groups agree that having partners who understand their business, generating measurable ROI, and concise, direct reporting are high priorities. These also match some of the main supplier strategic priorities discussed in the Organizational Success Factors section.

They differ on two rankings. Buyers place more emphasis on synthesizing data from multiple sources and partnering with parties who have unique perspectives. One can argue that every buyer organization has to make sense of multiple data streams, but only some suppliers do. Some suppliers supply one of the streams. Also, while suppliers

place some priority on having partners with unique perspectives (#15), often they are striving to be the partner with the unique perspective, especially since 2020.

For suppliers, these two are replaced in the top ten with applying innovative research methods and maximizing the precision of data. Buyers place less emphasis on whether a method is innovative or not (#14) because if a proven method (#17) provides the same results as an “innovative” one, there is no value in the innovation. For suppliers, however, there is some value in the difference between innovative and proven methods independently of

The groups agree that having partners who understand their business, generating measurable ROI, and concise, direct reporting are high priorities



client results because the distinction helps them to stand out against competitors as well as giving them something to build on so that future innovations will add demonstrable value.

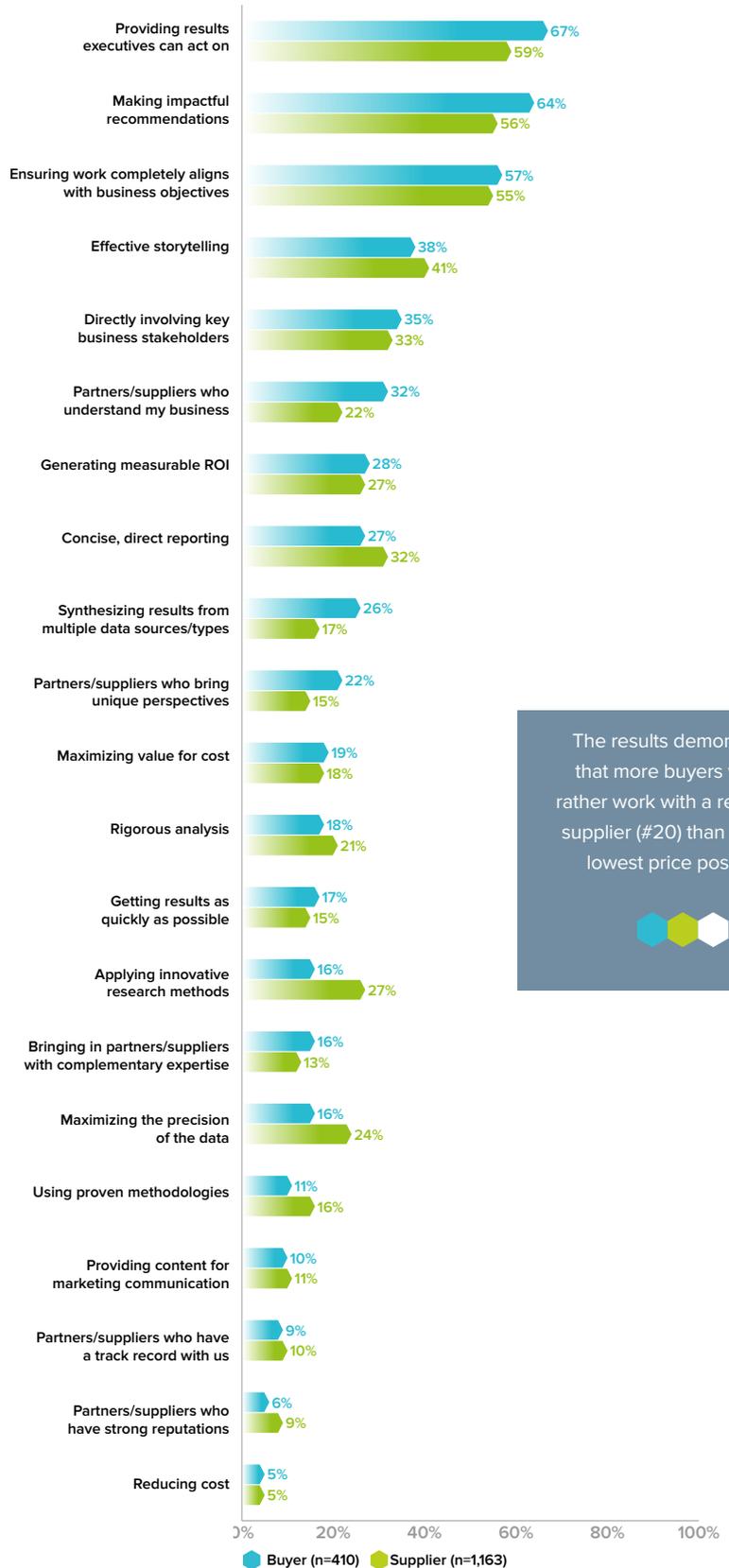
Finally, suppliers want to maximize the precision of data because they are often responsible for it. While data precision may be crucial for clients, *maximizing* it is not a high priority (#16). Compared to suppliers, clients may be in a position to better judge what is good enough, and they may wish to assume that suppliers have already maximized it.

It may be surprising that maximizing value for the cost is just outside the top ten instead of closer to the top, but this is why we measure trade-offs. If you asked someone what was most important to them, they might mention value for the cost right away. However, the trade-off makes them think about it in context. You might want to maximize value for the cost, but you may also believe that a project that lacks effective storytelling (#4) or results that executives can act on (#1) has no value. If you paid nothing for it, you've maximized the value for the cost.

Reducing cost is at the bottom of the list (#21), but a similar argument holds. Why would you want to reduce the cost of something if it also reduces the value of it to an unacceptable level? The results demonstrate that more buyers would rather work with a reputable supplier (#20) than pay the lowest price possible, although some might make the opposite choice.

A final point about trade-offs: just because an element is deemed to be *least* important does not mean it is *not* important. True, some trade-off exercises may include aspects that are not very important, but you can't decide that something is not important based solely on that exercise because everything in it is relative to the other elements in the trade.

PRIORITIES FOR EXECUTING RESEARCH WITH MAXIMUM IMPACT: %CHOSEN (BUYER, SUPPLIER)



The results demonstrate that more buyers would rather work with a reputable supplier (#20) than pay the lowest price possible

PRIORITIES FOR EXECUTING RESEARCH WITH MAXIMUM IMPACT: RANKS (BUYER AND SUPPLIER)

	Buyer	Supplier
n	410	1,163
Providing results executives can act on	1	1
Making impactful recommendations	2	2
Ensuring work completely aligns with business objectives	3	3
Effective storytelling	4	4
Directly involving key business stakeholders	5	5
Partners/suppliers who understand my business	6	10
Generating measurable ROI	7	8
Concise, direct reporting	8	6
Synthesizing results from multiple data sources/types	9	13
Partners/suppliers who bring unique perspectives	10	15
Maximizing value for cost	11	12
Rigorous analysis	12	11
Getting results as quickly as possible	13	16
Applying innovative research methods	14	7
Bringing in partners/suppliers with complementary expertise	15	17
Maximizing the precision of the data	16	9
Using proven methodologies	17	14
Providing content for marketing communication	18	18
Partners/suppliers who have a track record with us	19	19
Partners/suppliers who have strong reputations	20	20
Reducing cost	21	21

Comparisons to past waves are not exactly apples-to-apples because we've updated the approach, mainly by adapting the wording to be more inclusive and more relevant to more GRIT participants. For example, the previous wording seemed to assume that everyone did surveys, so we translated tactical phrasing to be more benefit-oriented, such as "appropriate sampling frame" to "maximizing the precision of the data." We recognize that these are not perfect substitutes, but that was not our goal. We believe the revisions better represent an industry that is much less survey-dependent and that the new wording reflects benefits and more robust topics.

In our apples-to-bananas comparison, the top three elements for buyers are the same as they were a year ago, which is sort of remarkable, given the changes to the survey. Only three items changed by five places or more. "Effective storytelling" shot up to #4 from #17; its 20W1 analog is "creative reporting," something you are about as likely to want from your market researcher as from your auditor. "Rigorous analysis," worded the same as in 20W1, fell from #7 to #12; it was passed by "effective storytelling," "generating measurable ROI," "synthesizing results from multiple data sources/types," "partners/suppliers who bring unique perspectives," and "maximizing value for cost." Each of these probably became a little more important as the horrors of 2020 became apparent.



BENCHMARKING TAKEAWAYS FROM A SUPPLIER'S PERSPECTIVE

Greg Matheson

Managing Partner, Quest Mindshare

Email: gmatheson@questmindshare.com | Twitter: @QuestMindshare

Website: www.questmindshare.com | LinkedIn: www.linkedin.com/in/greg-matheson-a16a525/

The GRIT 2021 Industry Benchmarking Report is of keen interest to me for a particular reason. For a number of years, there has been a significant shift in our industry, specifically in the primary research space. As a provider of primary field research, online sample and related services, our client base – while diverse and unique in every aspect imaginable – was consistent in that they were generally comprised of insights-based researchers, rarely end clients.

Over time, that line has begun to blur, and a more 'blended' supplier/buyer relationship has emerged. There are a variety of reasons for this change, the biggest being a cohesion between meeting ROI needs and technological advancements that allows for a more seamless working relationships between primary providers and end buyers. There are many other reasons for this too, of course, as unique as the buyers themselves, but that is a topic for another day.

With this shift in the traditional line of primary supplier -> insights professional -> end client becoming more blurred, benchmarking becomes simply that much more important.

In this context, I look at this report from two different perspectives: One, which is what the report is primarily intended for – insights professionals as the 'Supplier' and end clients as the 'Buyer' and secondly, primary research providers as the 'Supplier' and independent insights professionals as the 'Buyer'. While we are comfortably in the second section of that, there are parallels to the first.

As the GRIT 2021 Industry Benchmarking report outlines, most priorities are consistent on both ends, even as those lines blur. Suppliers and Buyers are aligned on key issues like providing actionable results (I certainly hope so!) and ensuring business objectives are met (thankfully...) There are also, however, key separations in those priorities that are as old as time. Suppliers are

more dialed into thinking their clients wants bells and whistles like dashboards and innovative research methods. In reality, Buyers really always want the same thing. Good, actionable data, regardless. To that end, Suppliers still have problems understanding Buyers needs vs wants.

When I started in this industry, I was selling telephone research in the primary data collection space in the mid 90's. Back when CATI was cool... Alright, it was never cool...

I would spend many hours meeting with clients, visits, calls, etc., all the usual things one sales exec does. I enjoyed those conversations immensely. It is great to spend time with people who like their work and even more entertaining to spend time with those that do not! The one thing that always was a source of disappointment was when those efforts led to, well, nothing.

Until I realized that what we were always talking about was wants, not needs. At least not real needs. When I started to look at these interactions through that lens - cut through the wants and find the actual needs, things changed.

Now that anecdotal story of a sales guy learning the ropes still applies today. It is clear that Buyers, while liking the bell and whistles, need actionable, impactful data of quality regardless. Suppliers are still prioritizing things like dashboards and looking for new and innovative ways to do things that, while important, perhaps may not be as important as Suppliers seem to think they are.

Is that the Supplier's fault? Of course, it is! The Buyer is always right. At least they are if you want to work with them. So, it is up to you, fellow Supplier, to wade through the wants, identify the needs and better your business. The GRIT 2021 industry benchmarking report is a good place to start.

Innovative methods were necessary for meeting the new challenges, but proven methodologies were more reassuring for addressing familiar ones



For suppliers, “providing results executives can act on” replaced “ensuring work completely aligns with business objectives” as #1 and “partners/suppliers who understand my business” in the top three. Seven items moved five places or more, and four of these moved up and three moved down. As with buyers, “effective storytelling” shot up, this time from #11 to #4. Contrary to buyers, “rigorous analysis” jumped from #18 to #11, possibly suggesting

that buyers wanted to be able to assume that suppliers would do it but didn’t want to spend their own time on it in 2020. “Maximizing the precision of the data” rose from #14 to #9, probably from the wording change but possibly because of the additional attention paid to data in 2020. Finally and perhaps surprisingly, “using proven methodologies” jumped from #20 to #14. The wording change was minor: in 20W1 it was “use of proven methods.” Although proven methodologies moved up, it remained much lower than “applying innovative research methods.” This suggests that innovative methods were necessary for meeting the new challenges, but proven methodologies were more reassuring for addressing familiar ones.

On the other hand, “partners/suppliers who understand my business” fell from #3 to #10, “maximizing value for cost” fell from #7 to #12, and “partners/suppliers who have a track record with us” fell from #12 to #19. The first one was simply “understands my business” last year, and we suspect that there was some industry realignment in which the *end* client is no longer the *direct* client for many projects. In such cases, it would be more important for the supplier to understand the direct client (partner) than for the new partner to understand their business. “Maximizing value for cost” was “value for price” last year, and “partners/suppliers who have a track record with us” was “experience with agency.” We don’t think the wording change caused these to fall, but desperation may have. We suspect that in 2020 everyone was so desperate to find solutions and situations that simply *worked* that they were willing to sacrifice optimizing value to get innovation (#8), and substitute reputation (#20) for relationship if a prospective partner had a credible offering that uniquely addressed a key need.

PRIORITIES FOR EXECUTING RESEARCH WITH MAXIMUM IMPACT: RANKS, 21W1 VERSUS 20W1 (BUYER, SUPPLIER)

	Buyer		Supplier	
	21W1	20W1	21W1	20W1
Providing results executives can act on	1	3	1	5
Making impactful recommendations	2	2	2	2
Ensuring work completely aligns with business objectives	3	1	3	1
Effective storytelling	4	17	4	11
Directly involving key business stakeholders	5	6	5	6
Partners/suppliers who understand my business	6	4	10	3
Generating measurable ROI	7	10	8	9
Concise, direct reporting	8	5	6	4
Synthesizing results from multiple data sources/types	9	9	13	10
Partners/suppliers who bring unique perspectives	10	12	15	13
Maximizing value for cost	11	8	12	7
Rigorous analysis	12	7	11	18
Getting results as quickly as possible	13	15	16	15
Applying innovative research methods	14	11	7	8
Bringing in partners/suppliers with complementary expertise	15	16	17	16
Maximizing the precision of the data	16	14	9	14
Using proven methodologies	17	20	14	20
Providing content for marketing communication	18	19	18	19
Partners/suppliers who have a track record with us	19	13	19	12
Partners/suppliers who have strong reputations	20	18	20	17
Reducing cost	21	N/A	21	N/A

Green highlighting indicates the item moved up at least five places in 21W1, and red highlighting indicates it moved down at least five places.

BEST OF THE BEST PRACTICES

In addition to what buyers and suppliers think is important, GRIT also asks them what they do in the form of thirteen “best practices.” This year, we added a new one in light of the events of 2020, “prioritize building or hiring teams for initiatives or projects that are socially diverse.”

Buyers and suppliers have different business models and different working environments, and they also follow different best practices. The five most frequently done by buyers are:

1. Focus on future growth strategy
2. Ensure that all research initiatives are aligned with senior stakeholders’ business objectives
3. Regularly interacting with senior stakeholders
4. Use multiple data sources instead of a single study to address business issues
5. Is involved in strategic planning sessions at the business unit level

These are consistent with what we would expect from other earlier sections and topics in this report. We know that buyers value the alignment of research with business objectives and that it is important for them to use multiple sources of data effectively. Now we know a little bit more of the context around these: they are involved in business unit strategic planning and regularly interact with senior stakeholders. The new piece of information, at least as far as this report is concerned, is that the most frequent activity is to focus on future growth. This was second in 20W1, and we know from earlier waves that it is strongly related to budget increases.

For suppliers, the top five are somewhat different:

1. Ensure that all research initiatives are aligned with senior stakeholders’ business objectives
2. Focus on future growth strategy
3. Explore new methods, technologies, business models, and partners
4. Regularly interacting with senior stakeholders
5. Give client access to active dashboards and visualization tools

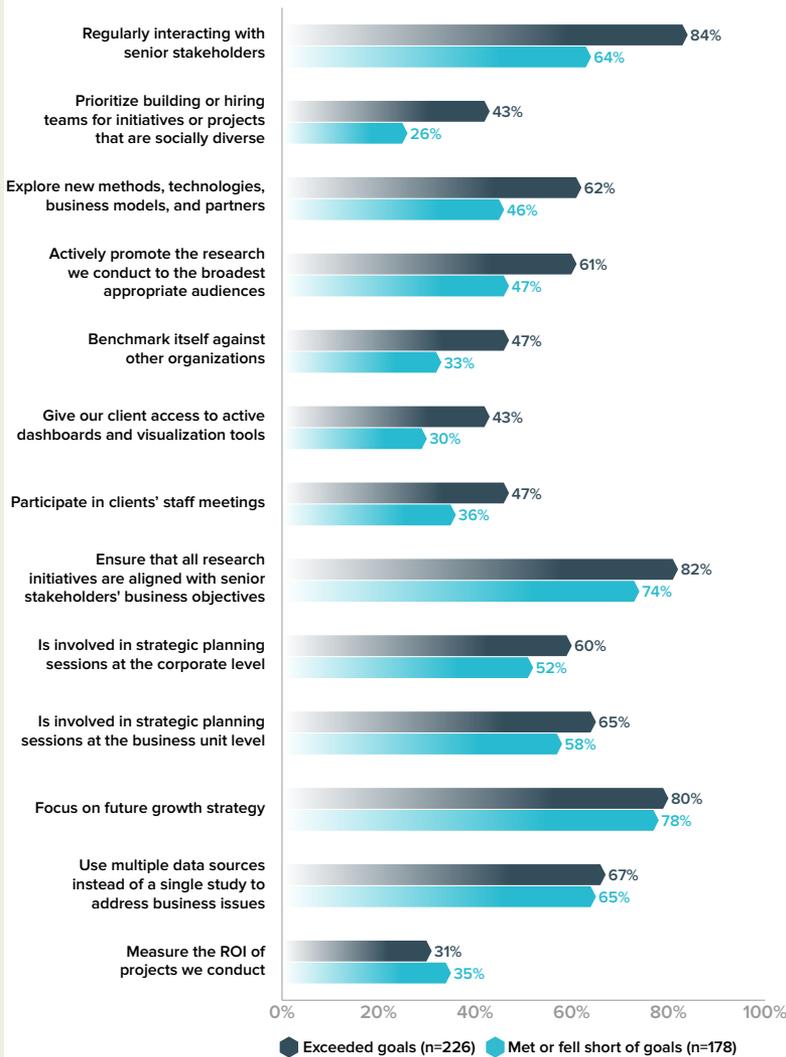
BEST PRACTICES DONE “ALWAYS” OR “FREQUENTLY”: (BUYER, SUPPLIER)



This is perhaps the third time thus far in this report (hint: it comes again later!) that suppliers have stressed the importance of aligning with business objectives, a similar concern for buyers. As with buyers, focus on future growth strategy is one of the most frequent activities, and, similar to what we observed for buyers, we have seen this historically linked to revenue increases. Another similarity to buyers is interaction with senior stakeholders, probably a significant way to ensure that insights work aligns with objectives. Unlike buyers, suppliers prioritize exploring new ways to operate and giving clients access to dashboards, two activities that have also been linked to increased revenue in past waves.

This is perhaps the third time thus far in this report (hint: it comes again later!) that suppliers have stressed the importance of aligning with business objectives, a similar concern for buyers

BEST PRACTICES DONE “ALWAYS” OR “FREQUENTLY”: EXCEEDED GOALS V. DID NOT (BUYER)



Our new best practice, building socially diverse teams, came in twelfth for buyers and tenth for suppliers. For buyers, it is similar in frequency to measuring ROI, giving access to dashboards, benchmarking itself, and participating in client staff meetings. For suppliers, it is similar to measuring ROI and benchmarking itself.

Now we know which “best practices” are most commonly executed by buyers and suppliers, but which ones are truly the best of the best? Next, we’ll consider which best practices are most associated with organizations which exceeded their goals.

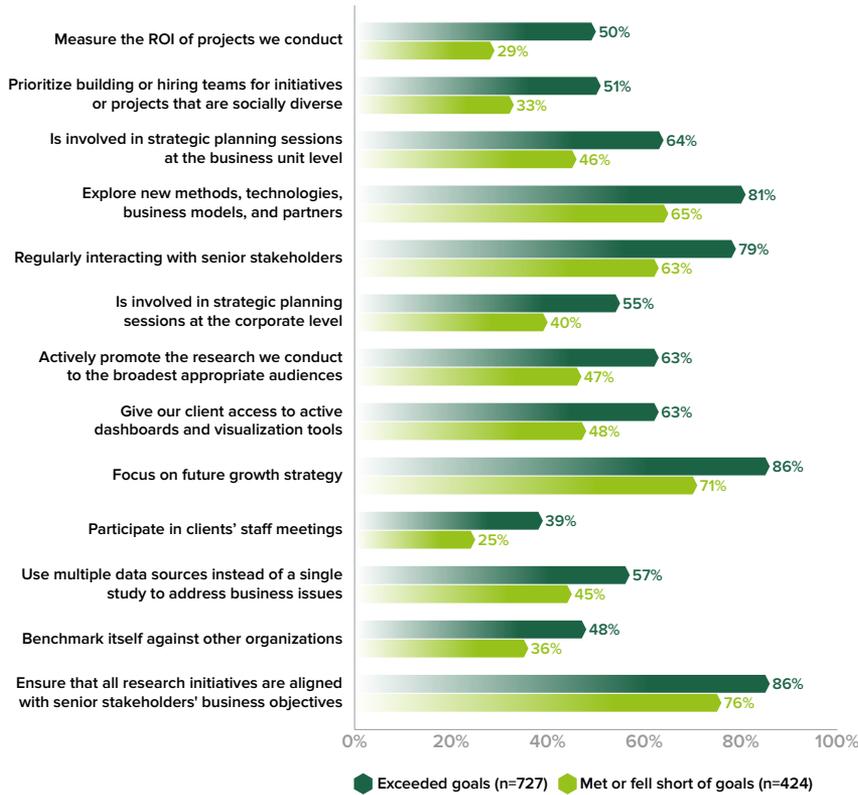
Among buyers, the top three best practices done more frequently by buyers who exceeded their goals versus those who did not are interacting regularly with senior stakeholders, prioritizing building or hiring teams for initiatives or projects that are socially diverse, and exploring new methods, technologies, business models, and partners. Only one of these was among the most common best practices across buyers, and social diversity was only common for about one-third of buyers overall. We can’t go as far as to say you are more likely to exceed your goals if you interact with senior stakeholders, promote diversity, and explore new methods more frequently, but buyers who have this mindset are in a better position than those who do not.

Among suppliers, the top three activities that most distinguish those who exceeded their goals from those who did not are getting involved in strategic planning sessions at the business unit level, prioritizing building or hiring teams for initiatives or projects that are socially diverse, and, in stark contrast with buyers for whom this is last, measuring the ROI of projects they conduct. Of these, only involvement in business unit strategic planning can be considered common (57%); measuring ROI and prioritizing socially diverse teams are in the low 40%. Again, will doing these things make you more successful? Not necessarily, but thinking like a winner might.

We can’t go as far as to say you are more likely to exceed your goals if you interact with senior stakeholders, promote diversity, and explore new methods more frequently, but buyers who have this mindset are in a better position than those who do not



BEST PRACTICES DONE “ALWAYS” OR “FREQUENTLY”: EXCEEDED GOALS V. DID NOT (SUPPLIER)



DO BEST PRACTICES FOSTER OPTIMISM?

They say money can't buy happiness, but can your best practices improve it? Let's look at the gaps between optimistic buyers and suppliers and the ones who are neutral or pessimistic. "Optimism" might also be referred to as "confidence," so think of these as potential confidence-builders for your staff.

Certain best practices are more common for buyers who are optimistic about the future of their department than for ones who are neutral or pessimistic (% always or frequently for optimistic buyers and gap in parentheses):

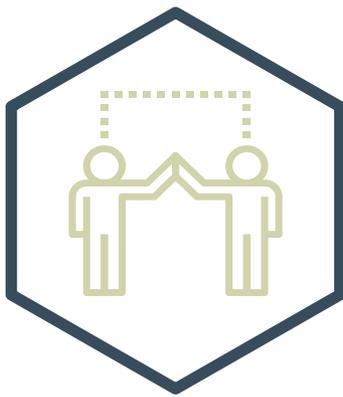
1. Focus on future growth strategy (84%, +22%)
2. Is involved in strategic planning sessions at the corporate level (61%, +22%)
3. Explore new methods, technologies, business models, and partners (58%, +18%)
4. Actively promote the research conducted to the broadest appropriate audiences (59%, +16%)

5. Participate in clients' staff meetings (46%, +16%)
6. Prioritize building or hiring teams for initiatives or projects that are socially diverse (39%, +16%)
7. Is involved in strategic planning sessions at the business unit level (65%, +14%)
8. Regularly interact with senior stakeholders (78%, +13%)

For suppliers, optimism about the future of their company is most related to:

1. Prioritize building or hiring teams for initiatives or projects that are socially diverse (48%, +33%)
2. Give clients access to active dashboards and visualization tools (60%, +28%)
3. Focus on future growth strategy (84%, +26%)
4. Actively promote the research conducted to the broadest appropriate audiences (59%, +26%)

5. Explore new methods, technologies, business models, and partners (78%, +25%)
6. Measure the ROI of projects conducted (45%, +24%)
7. Is involved in strategic planning sessions at the corporate level (52%, +23%)
8. Regularly interact with senior stakeholders (75%, +23%)
9. Is involved in strategic planning sessions at the business unit level (59%, +22%)



Employees will be more confident if they see you doing things that make the department or company stronger

The practices related to higher optimism yet done only by a minority of buyers are participating in client staff meetings and prioritizing social diversity. For suppliers, these are prioritizing social diversity and measuring ROI.

The key takeaway is that employees will be more confident if they see you doing things that make the department or company stronger, such as discussing future growth or exploring new ways of doing things. Although, perhaps, it may not be as obvious how prioritizing social diversity could directly drive the strength of company, it seems to be an up-and-coming best practice that is associated with both performance against goals and confidence.

THE BIG PICTURE

The top priorities for project work among buyers and suppliers are focused on the end result: actionable results, impactful recommendations, alignment with business objectives, communicating results effectively, and involving key stakeholders. These echo what we learned in earlier sections, such as suppliers' strategic priorities in Organizational Success Factors. The most common best practices support these priorities: focusing on growth, interacting with stakeholders, and aligning objectives. Of these, only interacting with stakeholders separate the high performers from the rest; the other two are probably table-stakes.

Other, less common practices separate the high performers, such as measuring ROI (for suppliers), actively promoting their research (for buyers), exploring new ways of doing things (less common for buyers), and prioritizing team diversity. It may be the frequencies of the practices themselves or the mindsets behind them that drive success, but it is not always the most common behaviors that correlate to the greatest success.



LOOKING FURTHER INTO INDUSTRY BENCHMARKING

Horst Feldhaeuser

Group Services Director, Infotools

Email: horst.feldhaeuser@infotools.com | Twitter: @nzfeld | Website: www.infotools.com

What's hot and what's not? What is most important to research Buyers and Suppliers?

It's reassuring to see that Buyers and Suppliers largely share the same top priorities for market research and insights to drive real business outcomes. But what do we see if we dig a little deeper into the report?

Buyer need and supplier response - one example.

Buyers place emphasis on synthesizing data from multiple sources and partnering with parties who have unique perspectives. This is in line with what we hear from our client partners, who are more and more interested in data integration from multiple sources, thus the rise of data lakes, data hubs and similar initiatives. The time of standalone market research studies has ended as today's decision makers need integrated solutions to drive business outcomes. Buyers are looking toward Suppliers to help them with both technology solutions and service support.

In this environment, many Suppliers are using innovative research methods to differentiate themselves from their competitors. While this can help to provide the unique perspective that Buyers want, it can also put Suppliers on an ongoing chase for the next "big thing" - a thing that Buyers may not even need in the first place. If COVID-19 taught us anything, then it highlighted the need for the right (fit-for-purpose) solution, at the right time. This need doesn't necessarily correlate with chasing the latest trend.

The data quality question

We cannot discuss market research without touching on data quality, a fact that this study highlights. Suppliers put this firmly in their top 10 important attributes, but - at some level - Buyers may not be in a position to weigh in. Whether they assume that their Suppliers have already maximized data quality, whether they see it as

a commodity, or whether they aren't clear on the differences between good and bad data (and thus are not willing to pay for quality measures) - it isn't something that is tracking as a high priority for this cohort.

That said, it's still our responsibility as research partners to have these detailed discussions. Again COVID-19 might have helped us here - highlighting the need for alternative data collection options, plus the need for valid and up-to-date consumer information. Anything that impacts data quality needs to be on the table for both Buyers and Suppliers. After all, we're only as good as the insights we deliver, and data quality is the foundation of proving the value of the insights function.

Let's talk practically about ROI.

I'm encouraged that both Buyers and Suppliers appear to align on the de-prioritization of certain cost issues. It isn't that cost isn't important; it's that the "cheap" trade-off isn't worth it. This indicates a forward-thinking, future-proofing approach. Insights professionals are focusing on the benefits of longer-term investments, understanding that the right (again fit-for-purpose) market research solutions can positively impact organizational bottom lines.

While you may not think diversity directly relates to ROI, those that prioritize diversity appear to be more successful in achieving or exceeding business goals. Best practice only gets you so far; to be better than good, you need to do things differently. This is supported by swathes of secondary research and should be a key consideration for both Buyers and Suppliers looking to the future.

As our industry continues to transform, there are pressures on both sides of the market research marketplace to meet new demands. Buyers and Suppliers alike look to the data to find places to align and work together toward a future that delivers quality, value and understanding.

BUSINESS OUTLOOK

21W1 documents how the insights and analytics industry has rebounded from the depths of 2020, but is it the same industry?

A TALE OF TWO CITIES

It was “not-quite-the-best” of times for some in the insights and analytics industry while, for others, it was most definitely the worst of times.

When asked for the most significant factor behind their revenue decrease, more than three-fourths of suppliers who lost revenue chose “economy/market conditions not favorable.” Some of them by-passed this choice, selected “other,” and wrote in “COVID.” When asked for other factors, some selected “other” again and wrote in “COVID” a *second* time. One survey participant wrote in “COVID. Isn’t it obvious?”

If that participant had given us a choice between “Yes,” “No,” “Other,” and “Don’t know,” we’d have to choose “No.” Unless we chose “Other,” then wrote in: “No. It’s not obvious.”

Granted, for anyone whose business suffered significantly in the wake of the outbreak, the dramatic impact of COVID is obvious. But that doesn’t make it *universally* obvious.

To some extent, the pandemic hastened the adoption of automation and DIY, as reflected in the continuing strong revenue trends for tech platform providers. To another extent, however, revenue bounced back for many full service suppliers, suggesting that technology was not the only success factor in play



In the GRIT 20W2 report, we documented the devastating impact of the pandemic on suppliers, but even then we noted that not all of them were impacted negatively and, in fact, some thrived, particularly technology providers. Now, consider these results from GRIT 21W1:

- Nearly twice as many suppliers said revenue *increased* in the past 12 months compared to 20W2, 61% to 32%
- Nearly half (46%) said COVID-19 had a *positive* impact on their volume of client work
- The percentage of suppliers who said COVID-19 had a *positive* impact on attracting new clients exceeded those who said the impact was negative by 17%
- 88% of suppliers said they were optimistic about their company, and 51% were *very* optimistic

So, no; when GRIT asks a question like this, we don’t assume that COVID-19 had an obvious, devastating impact on any participant because, for most, it did not. As we untangle the various threads of the GRIT 21W1 Business Outlook, we will pay particular attention to why so many suffered while others thrived. To some extent, the pandemic hastened the adoption of automation and DIY, as reflected in the continuing strong revenue trends for tech platform providers. To another extent, however, revenue bounced back for many full service suppliers, suggesting that technology was not the only success factor in play.

THE ROAD TO 2021

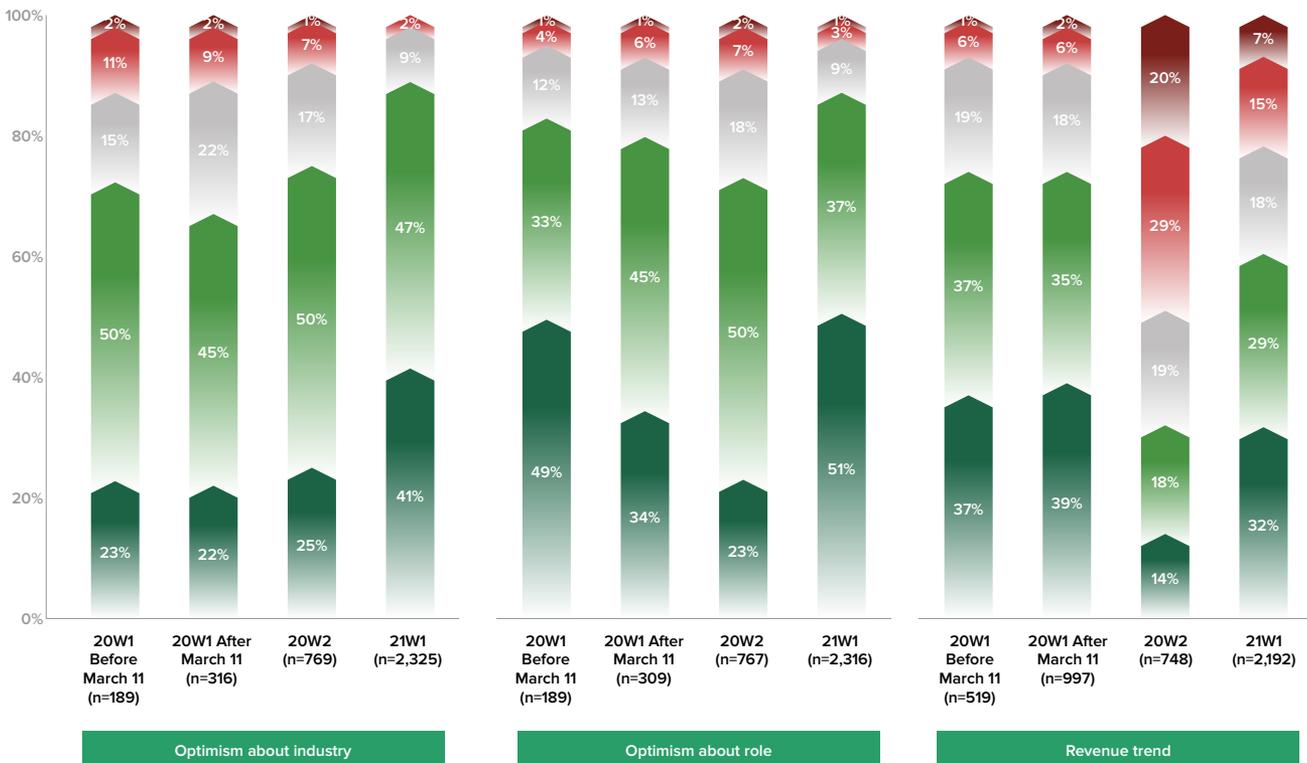
GRIT was in field during March 2020 when the early actions by many governments in response to the emerging COVID-19 situations seemed to be turning the world upside down and suppliers who participated in GRIT after that date had somewhat different views than those who completed the survey earlier. Although optimism about the industry and reported revenue trends were not yet impacted, optimism about their own companies weakened. Six months later, suppliers reported the worst revenue trends in the history of GRIT. While industry optimism was steady, confidence in individual companies dropped again; the percentage who were “very optimistic” about their own companies dropped from about half of suppliers before the pandemic to about one-third at the outbreak, ultimately bottoming out at about one-quarter in the fall.

As we prepare the 21W1 GRIT report, evidence of better days to come is emerging: cruise lines have the go-ahead to gear up for the summer, Wembley announced an increase to 75% capacity for the Euro 2020 finals, and “A Quiet Place: Part II” exceeded box office projections by 60% in the US. Supplier optimism about the insights and analytics industry is higher than at the start of the pandemic, and optimism about their companies is back up near pre-pandemic levels. Reported revenue trends over the past 12 months reflect the hardships of the pandemic months, but the percentage of suppliers reporting revenue increases is creeping up to pre-pandemic levels while the percentage reporting decreases is less than half what it was last fall.

Supplier optimism about the insights and analytics industry is higher than at the start of the pandemic, and optimism about their companies is back up near pre-pandemic levels



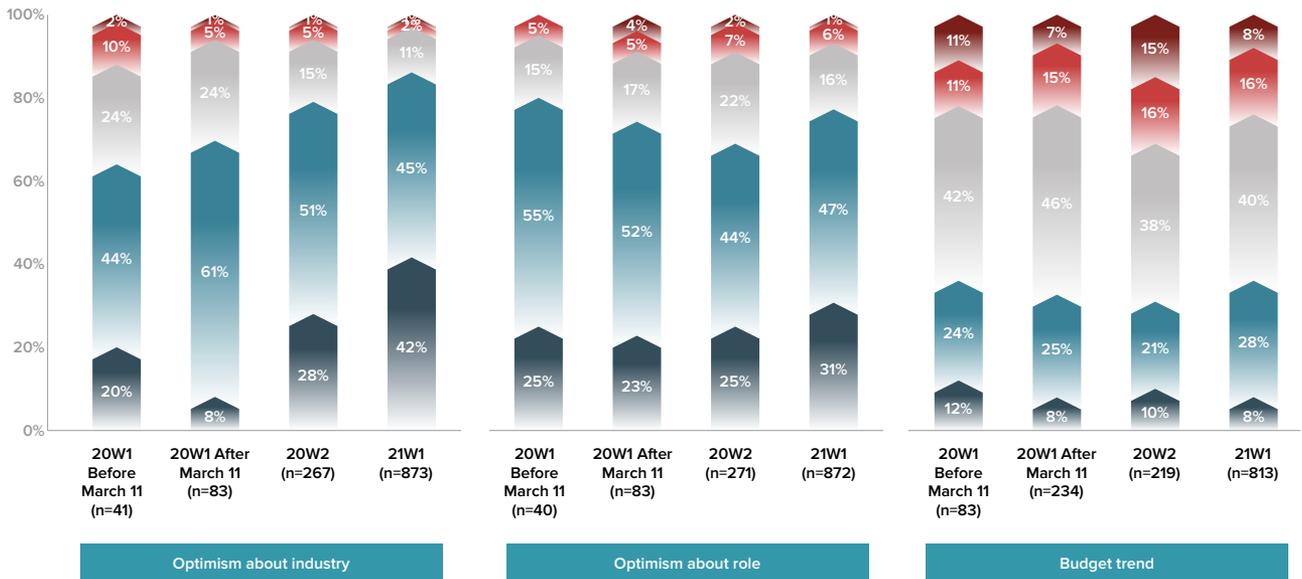
OPTIMISM, REVENUE, & COVID-19 EFFECT (SUPPLIER)



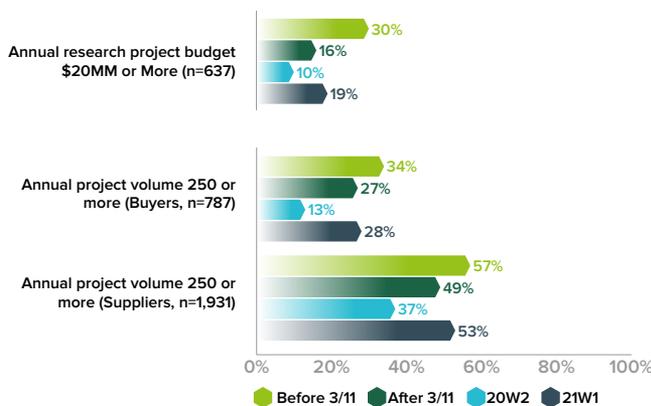
On the buyer side, optimism has also rebounded. After an initial hit as the pandemic broke, industry optimism rebounded in the fall and remains high. Optimism about their own roles in their companies weakened somewhat, but seems to be back to pre-

pandemic levels now. In the fall, only about one-third of buyers (31%) reported a budget increase, but the percentage has since increased 5% to reach historical levels.

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



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



Overall, research project volume and budgets are rebounding. Last fall, the percentage of buyers executing 250 research projects or more annually dropped to half of what it had been in the spring, but is now back to where it was a year ago. From spring to fall, the percentage of suppliers executing 250 research projects or more dropped 20 points from 57% to 37%, but is now back to 53%. In the 20W1 GRIT report, the percentage of buyers reporting research project budgets in excess of \$20MM was 30%; in 20W2, only 10%. That has nearly doubled to 19%; not back to where it was, but trending in a healthy direction.

Overall, the insights and analytics industry is healthier than it was last fall, and perhaps nearly as healthy as ever, but it is also different. Last fall, GRIT reported the most negative revenue trends for suppliers in its history. GRIT is a tracking study, not a longitudinal study, and we do not follow specific individuals over time. We don't know with precision how much of this report's "improvements" are the result of casualties of the pandemic falling out of the survey population because we don't track

individuals. We do know that the budget trend is similar to pre-pandemic GRIT reports and that large budgets have rebounded, at least somewhat, and this suggests real improvements for suppliers overall. We also know that technology providers were the most resilient suppliers last fall and that this rising tide did not lift all boats. As we proceed through this Business Outlook discussion, we'll shed some light on these trends, and the other sections of the GRIT report will help to piece together more of the story.

Overall, the insights and analytics industry is healthier than it was last fall, and perhaps nearly as healthy as ever, but it is also different

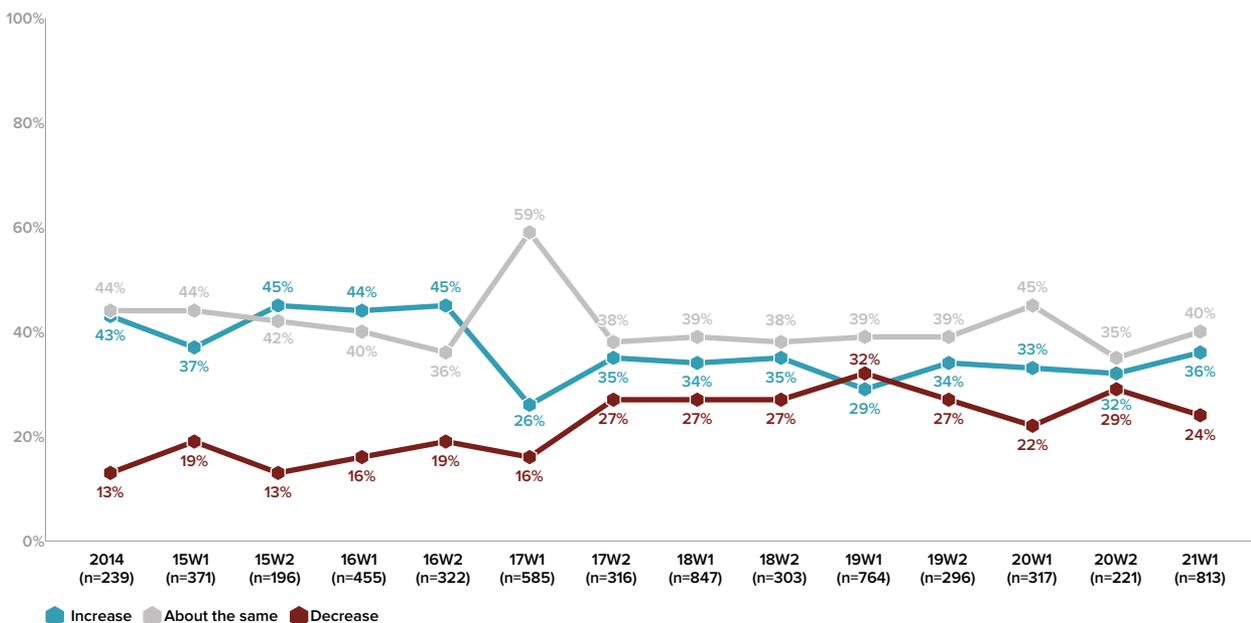


RESEARCH PROJECT SPENDING TRENDS

When diagnosing the health of the insights industry, the trend in research project spending is the first metric GRIT considers. When research spending increases, it 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 are healthy. A simplistic view, but a good starting point.

Budget trends have been very stable from GRIT wave to GRIT wave, and 21W1 is right in line with its predecessors. Prior to the pandemic, the average percentage of buyers who increased budgets was 37%, and 21W1 is 36%. For decreases, the average was 21%, and 21W1 is slightly higher at 24%. The five GRIT waves immediately preceding the pandemic each exceeded 24%, so the current trends are not unusual.

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



It suggests, however, that dollar amounts available for research projects are stable, if not increasing

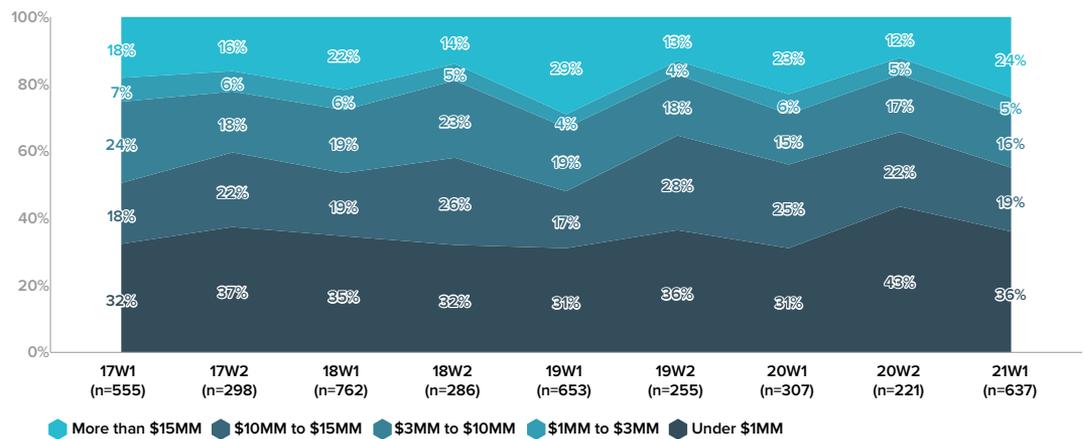


One can argue – correctly – that the percentage of buyers who have increased or decreased budgets is not very meaningful if there is a clear counter-trend in budget size. GRIT does not ask for specific research budget amounts, but we can generate some hypotheses by looking at budget ranges. At the top end, 12% of the 20W2 sample had budgets of more than \$15MM, and that is consistent for the fall waves of GRIT; in 19W2 this was 13% and in 18W2 it was 14%. This spring's 24% is similar to other spring waves; 23% last year and 22% in 18W1, although there was a spike to 29% in 19W1. So, the overall proportion of budgets above \$15MM continues to be stable, but

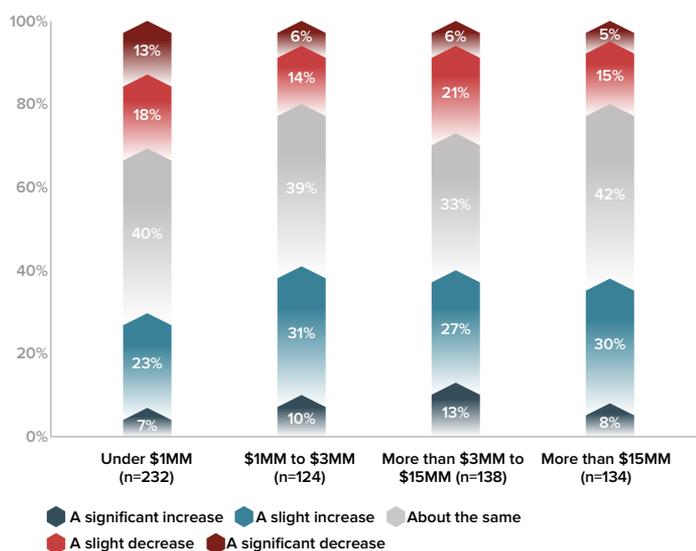
we don't know a lot about what is happening within that upper range (e.g., how many budgets of \$50MM or more have dropped to \$30MM or less).

At the low end, budgets under \$1MM may be increasing as a proportion of buyers. In pre-pandemic fall waves, the average percentage was 35%; in 20W2, it was 43%. For spring waves, the pre-pandemic average was 33%; in 20W1 it was 31% but is currently 36%. This suggests, but does not prove, an overall tightening of budget dollars available for research projects, although it does not indicate anything about spending in areas such as staff or research technology.

ANNUAL RESEARCH PROJECT BUDGET SIZE BY GRIT WAVE (BUYER)



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



We can also look at spend trends within budget size categories. Among budgets of \$15MM or more, 38% of buyers reported a spending increase compare to just 20% reporting a decrease, barely half the proportion of increases. At the low end, 30% reported an increase while a similar proportion (31%) reported a decrease. In the middle two size categories, increases also significantly outpaced decreases. Again, this does not prove anything because we don't know the magnitude of the changes and we don't know how many buyers moved into a different size category. It suggests, however, that dollar amounts available for research projects are stable, if not increasing.

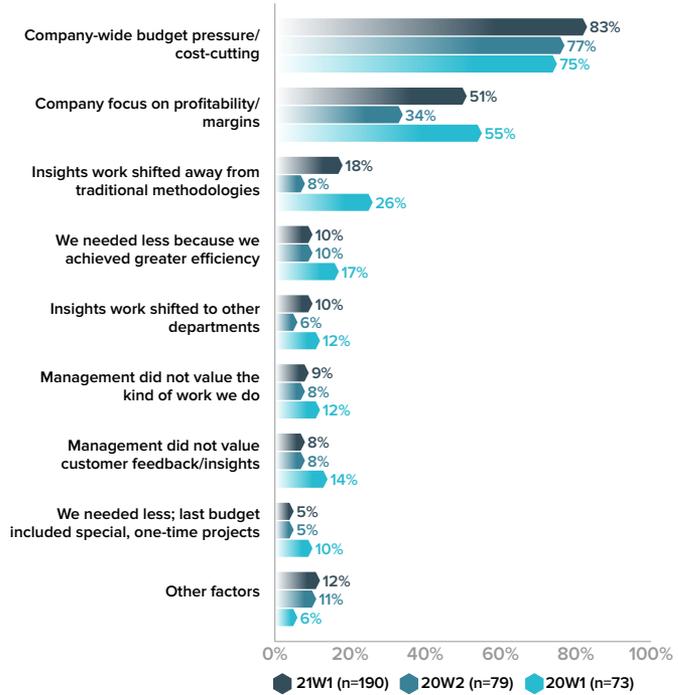
As in the last two GRIT waves, more than three-fourths of buyers who experienced budget decreases attributed it to company-wide pressure not specific to the insights department. Unlike the last wave but similar to 20W1, most of these buyers also attributed it to their company's focus on profitability. Not to push the interpretation too far, but it seems like many buyers are moving out of pure survival mode into a more normal mode of trying to optimize business results.

Such buyers reduce their budgets by design, not despair

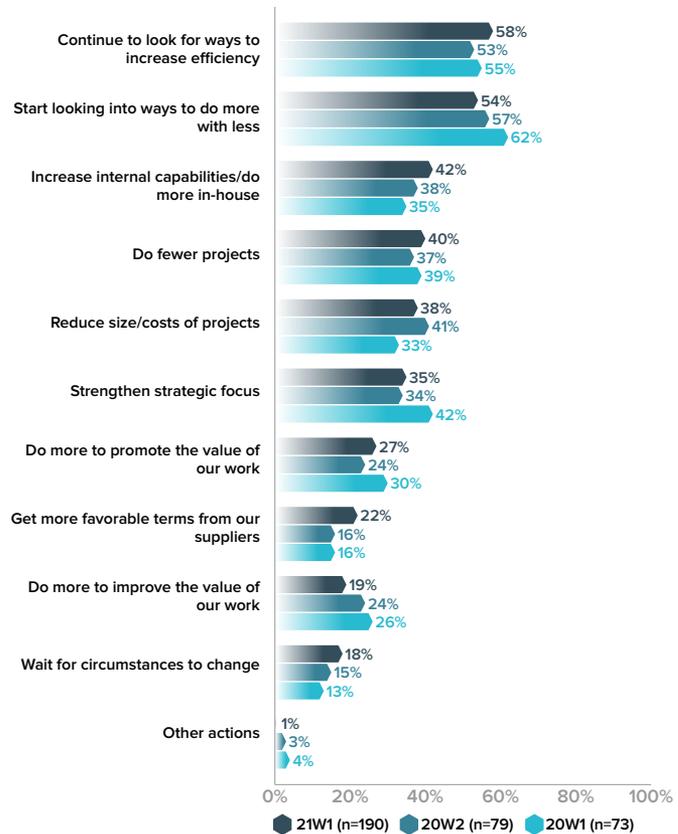


As in the last two waves, most buyers who experienced a decrease will continue to look for ways to increase efficiency or start to do so. While we know that some budget decreases are due to a de-prioritizing of the insights function, either by management preference or necessity, we also know that many buyers recognize a need or have a mandate to get more results from their budget dollars regardless of the any other considerations. Such buyers reduce their budgets by design, not despair.

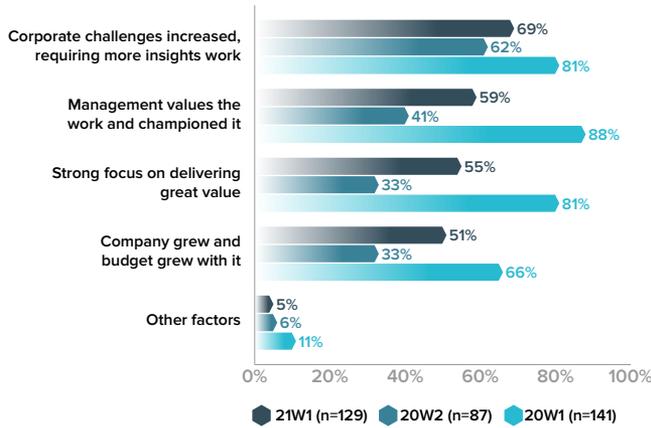
SIGNIFICANT FACTORS BEHIND BUDGET DECREASE (BUYER)



HOW INSIGHTS FUNCTION WILL RESPOND TO BUDGET DECREASE (BUYER)



SIGNIFICANT FACTORS BEHIND BUDGET INCREASE (BUYER)



Regarding factors behind budget increases, most buyers cited increased corporate challenges, similar to previous waves. Unlike the most recent GRIT wave, most also cited management valuing and championing the work, their focus on delivering value, and company growth. In 20W1, most buyers who had budget increases also cited these factors, and this may be further evidence of the improved health of the industry. It is better for companies to realize that insights work helps them grow than to just acknowledge that it needs to be done sometimes, and the peak pandemic months looked a lot like survival mode rather than growth mode.

SUPPLIER REVENUE TRENDS

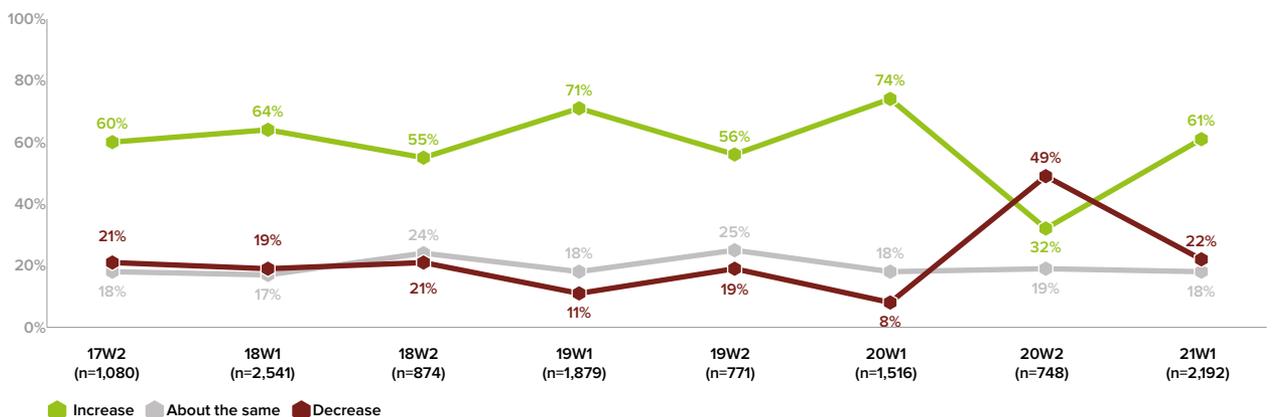
The proportion of suppliers who increased revenue (61%) is virtually the same as the pre-pandemic historical average (63%)



In 20W2, for the first time in GRIT history, supplier revenue increases did not more than double decreases. Worse, it was also the first time that supplier revenue decreases outnumbered increases as nearly half of suppliers (49%) reported a decrease. Now, however, the proportion of suppliers who increased revenue (61%) is virtually the same as the pre-pandemic historical average (63%), although the proportion who decreased (22%) is higher than its historical average (17%). This metric is likely always biased toward revenue increases because suppliers

who suffer revenue decreases tend to go out of business or get acquired, no longer contributing to the metric. This condition makes the 20W2 results all the more remarkable because they indicate that many suppliers continued to compete despite the losses. While we can assume there have been casualties and suppliers who are no longer in our revenue metric, some of those who toughed it out seem to have rebounded. It's true that some sectors proved more resilient than others, but there have been successes in each sector.

REVENUE TREND BY GRIT WAVE (SUPPLIER)



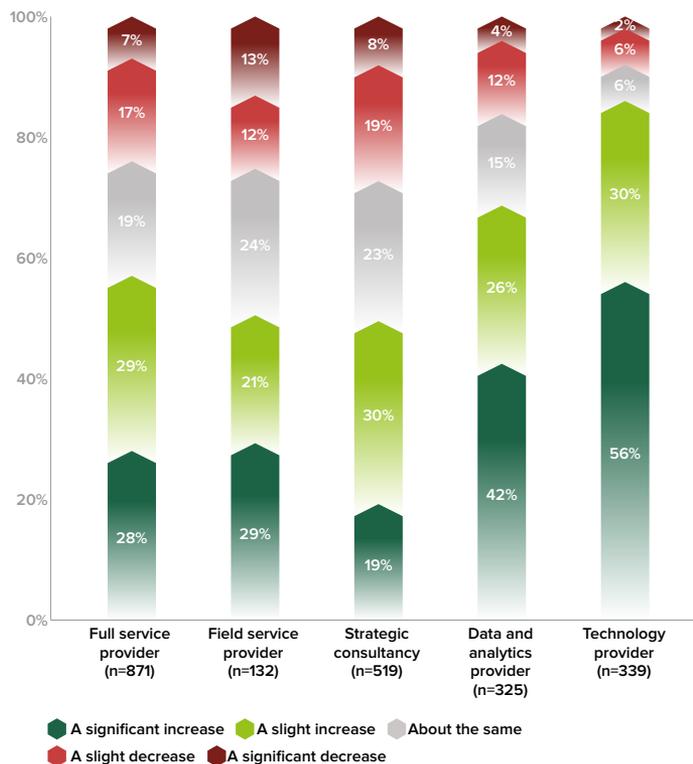
As in 20W2, suppliers for whom technology represented the highest revenue service enjoyed the strongest revenue trend. Fully 86% of technology providers said revenue increased over the past 12 months compared to just 8% who said it decreased. Data and analytics suppliers were struggling last fall, but now 68% say revenue increased compared to just 16% who say it decreased. Full/field service providers and strategic consultancies fared the worst in 20W2. Last fall, decreases outnumbered increases for full/field service providers, but now increases outnumber decreases by more than two to one: 57% to 24% for full service research and 50% to 25% for field services. Strategic consultancies similarly struggled in 20W2, but now increases also lead decreases by a 49% to 27% margin.

In other words, it's not "obvious" that COVID-19 caused revenue to decline: most suppliers say it did not decline. Within each supplier type, most say that revenue increased, and, in the case of technology providers, almost all of them say that. The entire world was affected by COVID-19 – hence the term "pandemic" – but only a minority of suppliers reported lost revenue in this GRIT wave. In other words, COVID-19 can't be the "obvious" reason for revenue decline because different suppliers performed differently. Although it certainly exposed and exacerbated existing weaknesses, those perhaps once-latent weaknesses are the true factors behind poor revenue performance.

As we have reported previously, small suppliers have suffered the most during the pandemic. In the current wave, 37% of suppliers with four or fewer employees reported a revenue increase, but 40% reported a decrease. Further, 27% of the smallest suppliers reported a significant decrease compared to only 12% who reported a significant increase. No other size category shares these dynamics.

For suppliers with five to twenty employees, increases outpaced decreases by 46% to 32%, and more had significant increases than significant decreases. Sixty-four percent of suppliers with 21 to 100 employees reported a revenue increase compared to just 19% reporting a decrease, and increases outpaced decreases 76% to 13% among

REVENUE TREND BY SUPPLIER PROFESSIONAL FOCUS



suppliers with 101 to 500 employees. Suppliers with more than 500 employees reported more tepid, but still positive, results with increases outpacing decreases by 53% to 22%. In each of these latter three segments, more than eight times as many suppliers reported a significant increase as reported a significant decrease. If the impact of COVID-19 is "obvious" anywhere, it may be with respect to how vulnerable the smallest suppliers are to economic downturns as they likely lacked the resources to quickly adapt their business models or to wait out an extended period of low revenue.

Of course, we could also hypothesize that the smallest companies experienced increases and moved to a larger category, reporting the increases there, and that the smallest companies in 21W1 were larger ones in 20W2 that shrank and are now reporting decreases in the smallest category. Anyway, based solely on GRIT data, it's mathematically possible.

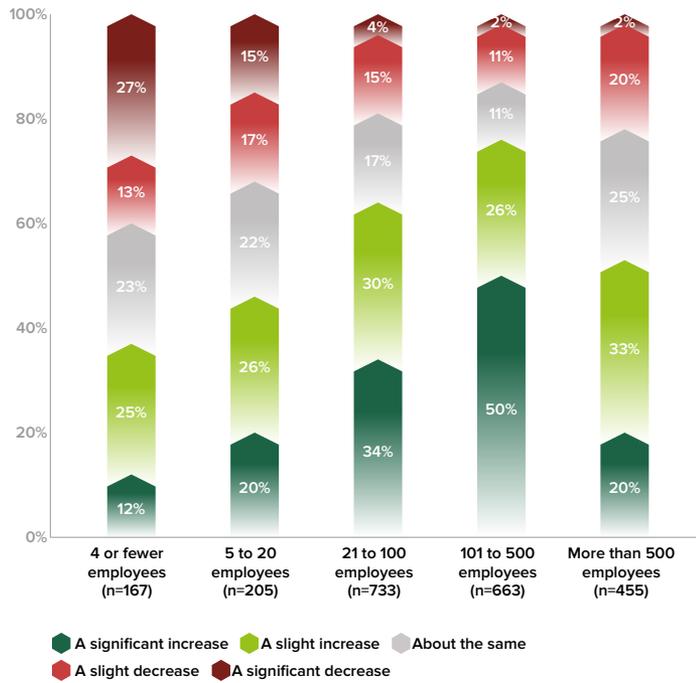
Fully 86% of technology providers said revenue increased over the past 12 months compared to just 8% who said it decreased



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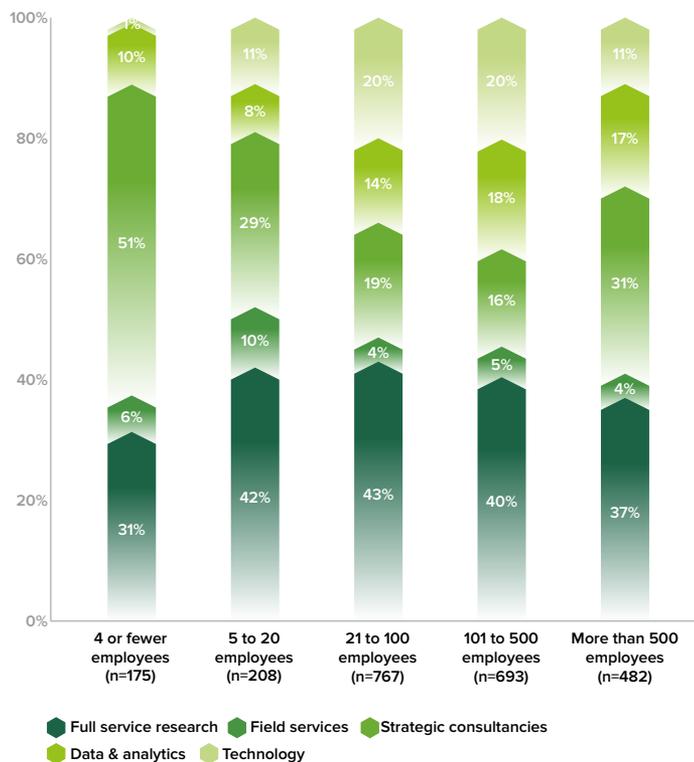


REVENUE TREND BY EMPLOYEE SIZE (SUPPLIER)



Among supplier types, strategic consultancies were the only category in which revenue increases have not at least doubled revenue decreases. Perhaps not coincidentally, half of the smallest suppliers self-identify as strategic consultancies. In each other size category, the most frequent supplier category was full service provider. Each size category included nearly twice as many specialists (technology or data and analytics providers) as the smallest size, and mid-sized suppliers had three times as many. There is a correlation between the more successful supplier types and the more successful size categories. While the exact causal dynamic is unknown, the worst possible place to occupy during the pandemic seems to have been at the intersection between resource-constrained small company and difficult-to-differentiate strategic consultancy.

SUPPLIER TYPE WITHIN EMPLOYEE SIZE CATEGORY (SUPPLIER)



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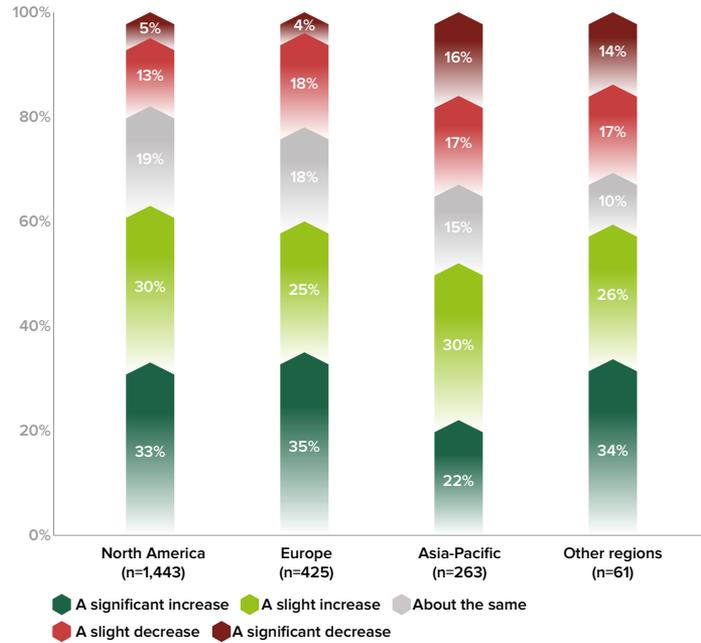


Across global regions, Asia-Pacific fared the worst, with just over half of suppliers reporting a revenue increase and one-third reporting a decrease. In North America and Europe, about 60% of suppliers reported an increase while only about 20% reported a decrease. Similar to North America and Europe, 60% of suppliers in the other regions reported an increase while one-third reported a decrease, similar to Asia-Pacific.

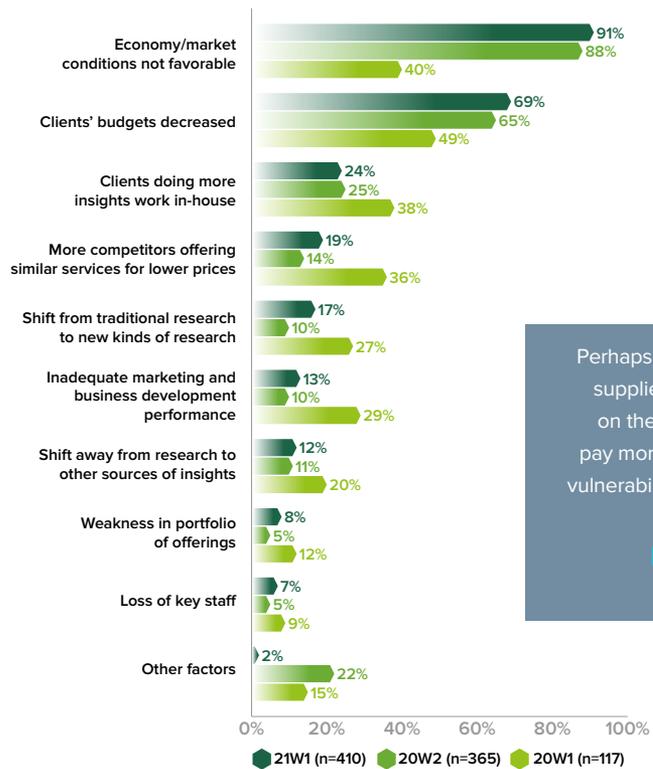
As in GRIT 20W2 but different from 20W1, almost all suppliers who lost revenue cited the unfavorable economy and market conditions (91%) and decreases in clients' budgets (69%) as significant drivers of the decrease. Back in 20W1, less than half as many cited the economy and market conditions (40%) and only 49% pointed to decreased budgets. In addition to those two reasons, the top factors last spring were clients taking more work in-house (38%) and more competitors with similar offerings at lower prices (36%). These are also among the top four in this wave, though mentioned by only 24% and 19%, respectively.

The narrow focus on economic and market conditions and their impact on client budgets as explanations for declines in revenue was understandable in GRIT 20W2 when nearly half of suppliers reported losses. Now that only half that many are reporting losses and the number reporting increases has doubled, the single-minded focus on economic and market conditions as the sole cause of revenue decline seems myopic. The proportion of suppliers suffering a revenue loss is higher than the historical average, but it's not unprecedented; the magnitude is similar to other GRIT waves in which the factors behind the decreases were distributed across more causes. Perhaps it's time for some suppliers to focus less on the pandemic and pay more attention to the vulnerabilities exposed by it.

REVENUE TREND BY GLOBAL REGION (SUPPLIER)

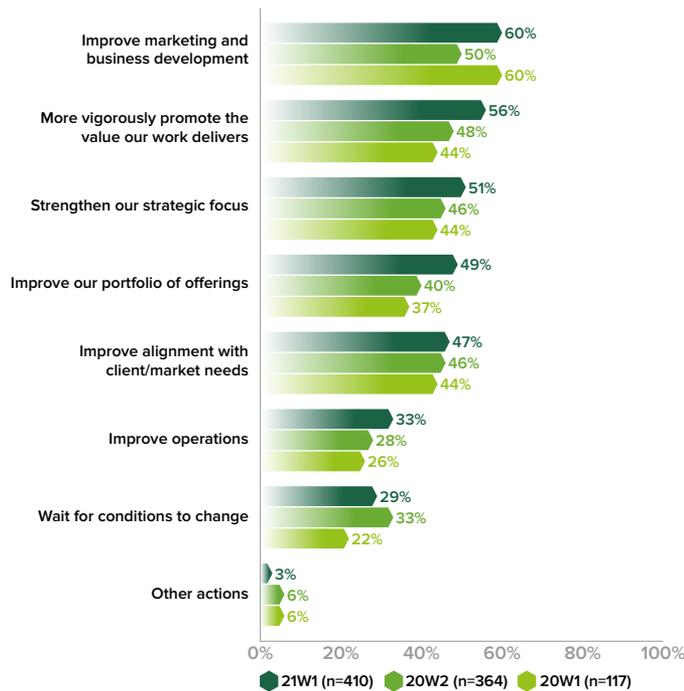


SIGNIFICANT FACTORS BEHIND REVENUE DECREASE (SUPPLIER)



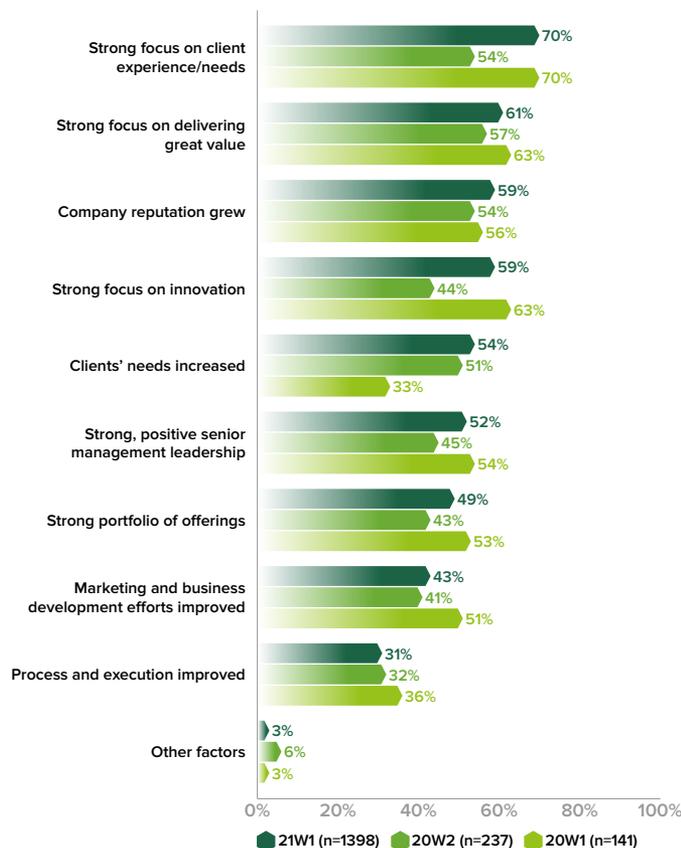
Perhaps it's time for some suppliers to focus less on the pandemic and pay more attention to the vulnerabilities exposed by it

HOW ORGANIZATION WILL RESPOND TO REVENUE DECREASE (SUPPLIER)



It seems as though many suppliers are doing just that. Although nearly one-third of those who lost revenue said they will wait for conditions to change, on average, suppliers named 3.3 ways they will respond to their revenue decrease, up from 20W2 (3.0) and 20W1 (2.8). As in other waves, most say they will improve marketing and business development, and now most say they will more vigorously promote the value of their work and strengthen their strategic focus. These actions have been among the top three in other waves, with improving alignment with client and market needs just behind them. Since the pandemic began, however, more seem to be focusing on improving their portfolio of offerings and their operations, actions that seem to address weaknesses exposed by the pandemic. There's no question the top four issues are important to address, but, without improving the portfolio or operations, these might signal a strategy based on "saying it one more time with feeling" rather than one based on acknowledging real competitive deficiencies.

FACTORS BEHIND REVENUE INCREASE (SUPPLIER)



If suppliers who lost revenue need to focus on their own ability to compete, the factors behind revenue increases are the other side of that coin: it seems the more successful suppliers have done just that. In GRIT 20W2, technology providers were the most consistent revenue winners, and most suppliers who increased revenue cited their own focus on value and customer needs, the growth of their reputation, and an increase in client needs. Less prominent factors compared to 20W1 included focus on innovation, senior management leadership, strong portfolio of offerings, and marketing and business development efforts. These suppliers already had innovative offerings and strong leadership, and, for the first time, the market came to them, relegating marketing and business development to a background task. As the pandemic unfolded, entrenched suppliers offering traditional methods became less relevant to clients, and success for these technology providers depended more on their ability to serve customers well and offer better value than like competitors with similar offerings to theirs.

Now that success is shared by more different supplier types than in 20W2, we see a return to 20W1 levels for some of the factors. While a leading factor last wave, strong focus on client experience and needs has come back up to where it was in 20W1 when full service suppliers and strategic consultancies were also experiencing some success. Strong focus on innovation, senior management leadership, and portfolio of offerings also look as they did in 20W1 now that generalist suppliers are finding their footing. One factor that has not rebounded is marketing and business development,

which, coincidentally or not, is the top response from suppliers who lost revenue. Looking at both sides of the supplier coin, it seems as though traditional suppliers who are committed to adapting their business model have seen improvement in revenue, while those who are “weathering the storm” or “getting the word out” without adapting are foundering. If improvement in marketing and business development is not the primary driver of revenue increases, it could be that suppliers who have embraced change are easier for potential clients to spot, even if their marketing efforts are lacking.

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STAFF SIZE TRENDS

Staff size trends among buyers are depressed compared to previous GRIT waves, but not unprecedented. In the current wave, 28% of buyers reported an increase in staff size versus a pre-pandemic average of 31%. This is higher than last wave’s 24% but much lower than 20W1’s 38%. With respect to staff size decreases, buyers’ 25% is higher than the pre-pandemic average of 21%, up slightly from 20W2’s 22% and up significantly from 20W1’s 16%.

On the supplier side, 54% increased staff size compared to the pre-pandemic average of 43%. This is up from last wave’s 43% but down from 20W1’s

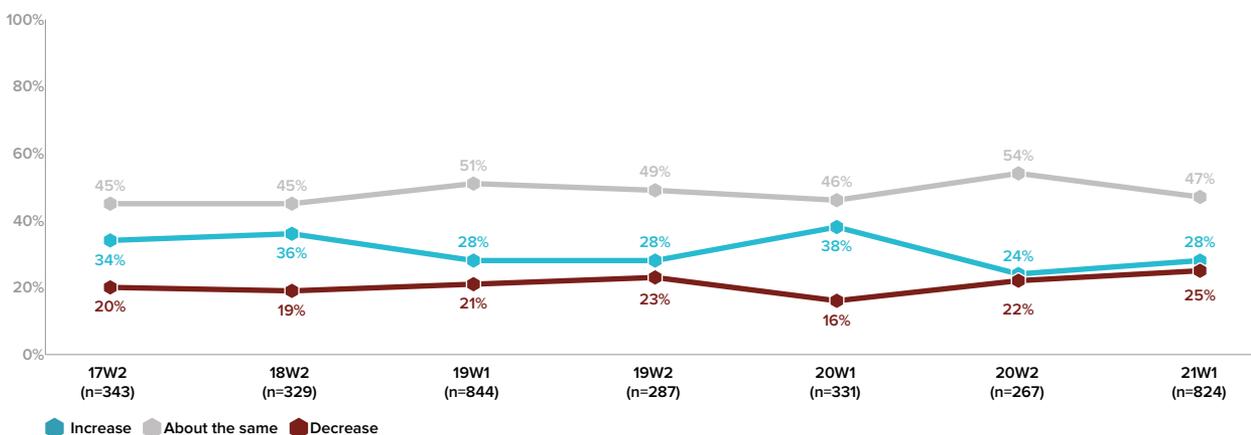
64%. With respect to decreases, 17% of suppliers reported one, comparable to a pre-pandemic average of 16%. This is down slightly from last wave’s 20% but double 20W1’s 8%.

While buyer and supplier hiring seems to be rebounding from the dark days of 2020, it’s not clear whether the industry will recapture the promise it showed on the brink of the pandemic when the trends were very positive. Of course, we also need to mention that we do not know the magnitude of each change and that we also can’t account for suppliers who have recently ceased operations or merged with other suppliers.

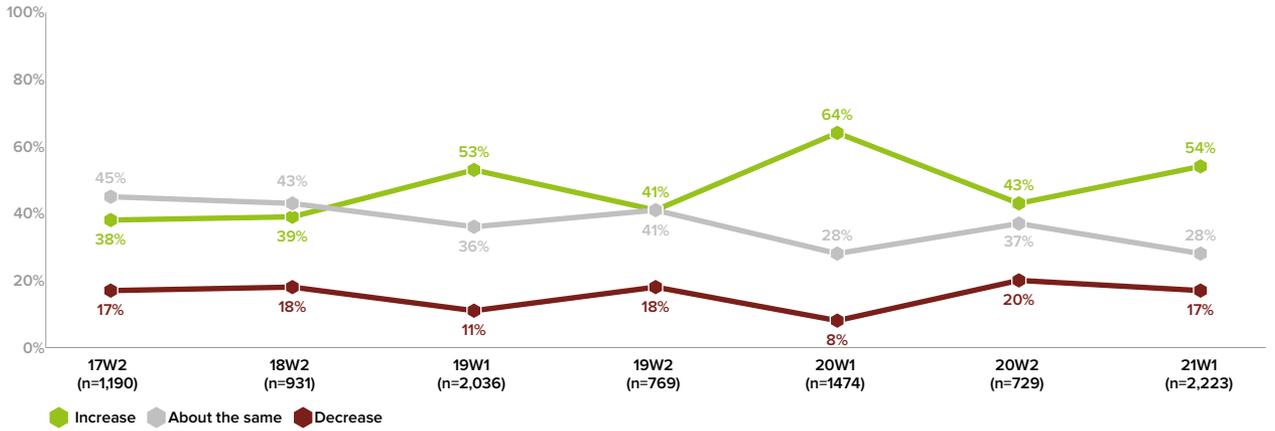
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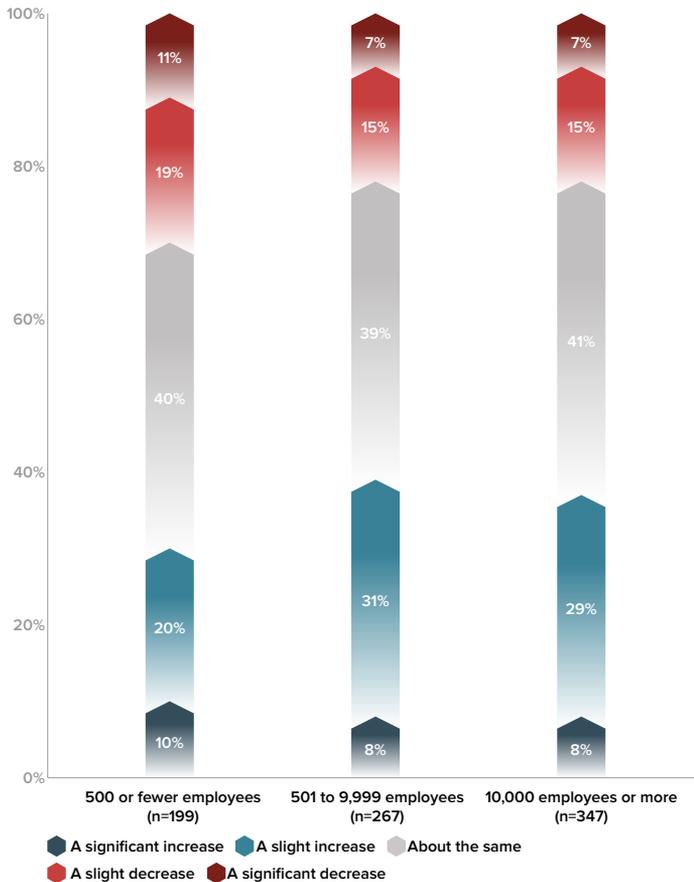
CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS BY GRIT WAVE (BUYER)



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



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



To gain some insight into the magnitude of the changes within the industry, we can look at the staff size trends by employee size. Among smaller buyers (500 or fewer employees), increases matched decreases, 30% to 30%, with equivalent amounts of “significant” increases as “significant” decreases. Among mid-sized buyers (501 to 9,999 employees), increases outpaced decreases 39% to 22%, and, again, “significant” increases and decreases were essentially offsetting. The largest buyers (10,000 or more employees) were nearly identical to the mid-sized buyers: 37% increases to 22% decreases. If we assume that the insights work force is proportional to the overall company size, we could hypothesize that the overall magnitude of staff change on the buyer side of the industry was stagnant for smaller buyers but robust for larger ones and robust overall.



NAVIGATING THE “NEW NORMAL” HOW INNOVATION REPRESENTS THE NORTH STAR FOR MARKET RESEARCH FIRMS

Sam Pisani

Managing Partner, The Logit Group

Email: sam.pisani@logitgroup.com | Twitter: @sampsani

LinkedIn: www.linkedin.com/in/sam-pisani-a41013a/

We're now midway through 2021, and nearly a year and half into the COVID-19 pandemic. It's been a challenging and unprecedented period to navigate for the Logit Group, but it has also been a period of success and pride, as our team has shown a commitment and dedication to being research execution practitioners.

At Logit, we reacted swiftly and decisively to the events of 2020, putting the health and safety of our team members first. After shifting to a remote working environment across the organization, Logit was able to not only seamlessly maintain our service and quality levels to our clients, but also the vital human connections that make us much more than just a group of people that work together.

We strongly believe that it was this approach that led to our busiest stretch in recent memory, in the latter half of 2020, and we kept that momentum going into 2021.

Like many successful MR suppliers this year, we focused on client needs (70%) and delivering great value (61%). As a result, Logit, like the 59% of other companies, saw their reputation grow in this wave.

The same number (59%) of MR companies also put a greater emphasis on innovation, and for Logit, that's something we've been championing since well before the pandemic.

We recently launched several new industry-leading tools that have assisted our clients in providing better quality and more cost-effective research to their stakeholders.

One example is Votified: the first real time online registered voter profiling tool, which allows users to dynamically confirm registered voter (RV) status and append RV data to panelists while also being able to set study quotas based on those appended variables.

Another offering is Zamplia: an all-in-one, API-driven platform that provides complete visibility between project and online sample vendor, resulting in increased sample feasibility, competitive costs and maximized quality.

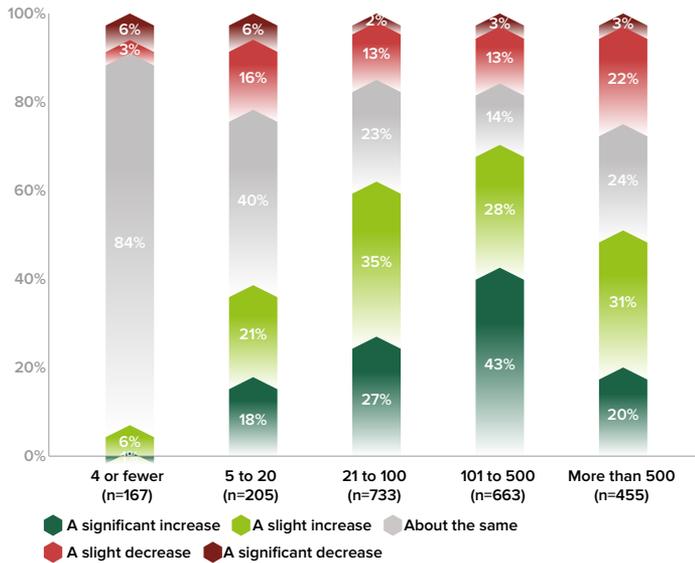
With these and other forward-thinking market research products and services, Logit is helping to shape the future of insights, and further underscore that innovation is at the heart of what we do as a research execution company.

In 2020 and so far in 2021, MR suppliers have been forced to embrace change and new ways of doing business in order to adapt to the “new normal” that COVID-19 has created. We've welcomed the shift to a remote workforce, and we are currently executing a hybrid workplace approach for the foreseeable future.

As we move ever closer to a post-pandemic world, it is imperative that companies continue to innovate, while also looking inward to ensure that their team is supported and positioned to succeed.

Navigating global business challenges is never easy, but when innovation is your North Star, you can confidently set sail knowing you'll reach your destination.

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



On the supplier side, the smallest suppliers (4 employees or fewer) were stagnant: 7% increased, 9% decreased and 84% stayed about the same, although 6% reported “significant” decreases to only 1% “significant” increases. Realistically, if a company that small loses employees, it will have a very hard time staying in business, and we do not have defunct suppliers in our population. For the other size categories, staff size growth is robust. The proportions of increases to decreases are 51% to 25% for suppliers with more than 500 employees; 71% to 16% for suppliers with 101 to 500 employees; 62% to 15% for 21 to 100 employees; and 39% to 22% for 5 to 20 employees. In each case, “significant” increases are at least three times as frequent as “significant” decreases, and at least six times as likely for the three largest categories. Again, the smallest suppliers are under the most pressure, larger-sized suppliers are growing staff, and the mid-sized suppliers have the most robust growth.

BUYER SEGMENTS

The smallest suppliers are under the most pressure, larger-sized suppliers are growing staff, and the mid-sized suppliers have the most robust growth



The following diagram summarizes buyer “health” metrics for buyer segments based on internal roles, including budget trends, department staff trends, and technology spend trends. The metrics represent scores calculated from the complete data just discussed and 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 increased slightly, 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 12.7, meaning the average buyer indicated it did not change much, although it is more positive than last wave’s -0.8. Department growth was slightly positive at 4.7 (up from 2.6), but technology investment was much more solid, scoring 42.6 (up from 27.6).

At the segment level, budgets grew the most for data analysts (64.2) and least for those functioning as the Voice of the Customer (-4.7). Department growth was also strongest for buyers functioning as data analysts (41.9) and, again, weakest for those functioning as the Voice of the Customer (-5.5). Data analysts also had the strongest tech investment (69.8); tech investment was weakest for in-house researchers (18.6) and research outsourcers (19.0).

Historically, the budget growth has tended to be flat (around 0) for hybrids, strategic consultants, and Voice of the Customer. In past waves, we have had to aggregate data analysts, research outsourcers, and others due to sample size, so their track record has fluctuated the most but tended to be slightly stronger than for other functions.

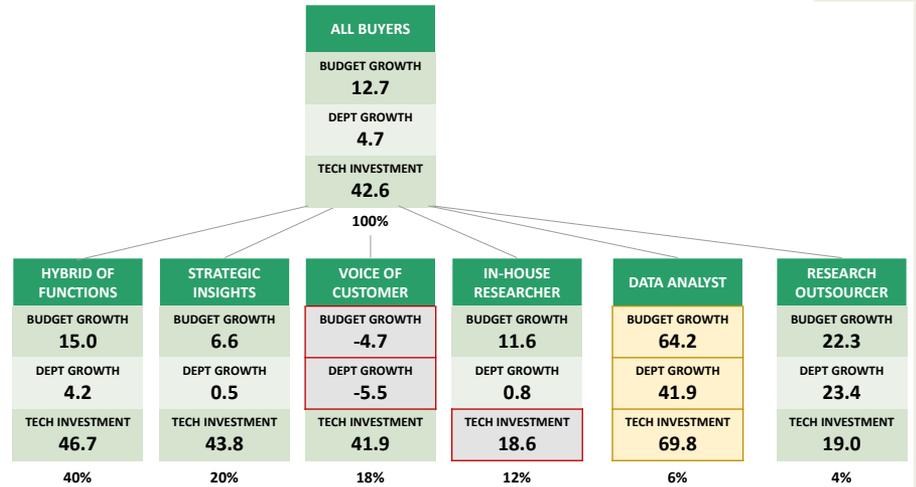
The average score for budget growth across all buyers was 12.7, meaning the average buyer indicated it did not change much



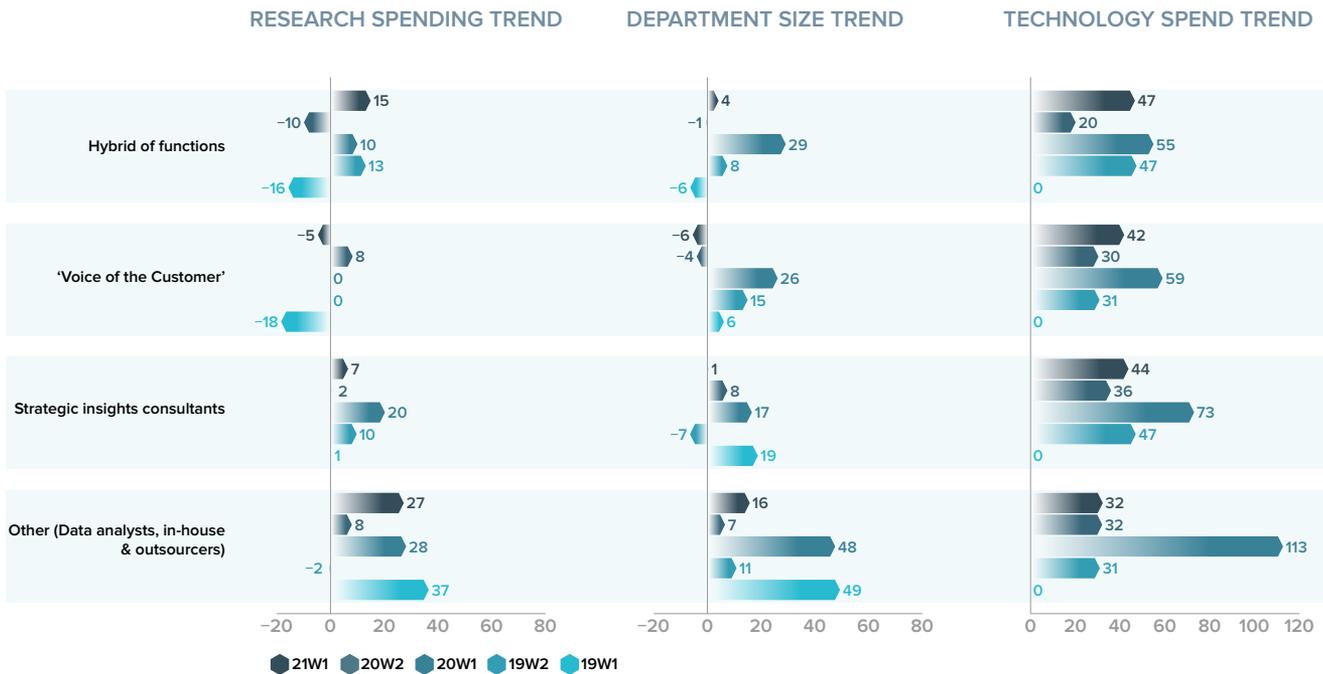
Regarding the staff size index, these have stagnated for each internal function, reflecting the overall buyer trend. While slightly higher for the aggregation of data analysts, in-house researchers, and research outsourcers than for others, it is down from pre-pandemic waves and mostly driven by data analysts.

Tech investment has always been positive, even if only slightly so. The pattern suggests that there was a surge of spending during the pandemic, but it has declined for all functions but hybrids.

These trends suggest that the pandemic influenced buyers to shift investments from other functions to data analysis. Although only 6% identified their primary role as data analysts, 43% said this was one of their department's roles, and this proportion is higher for buyers who maintained or increased their budget than for those who decreased it.



KEY TRENDS BY BUYER CATEGORY OVER P12M (BUYER TREND INDEXES)



SUPPLIER PROFESSIONAL FOCUS SEGMENTS

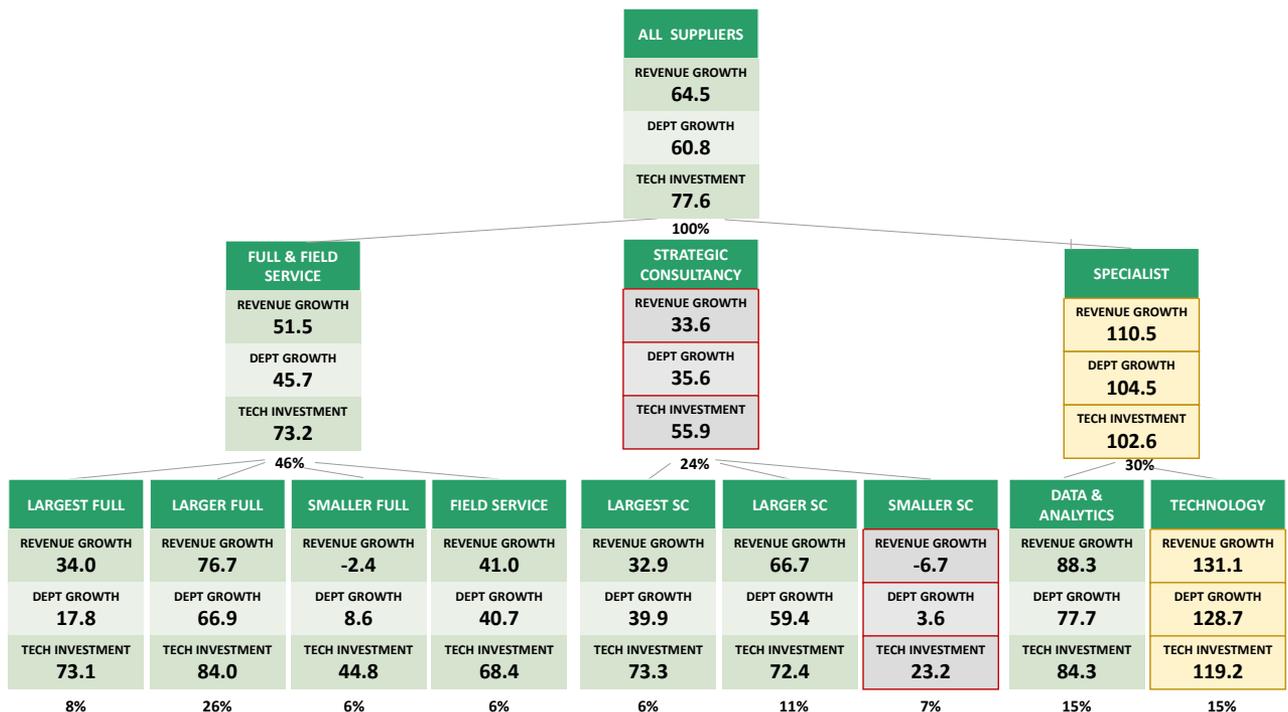
2021 seems to be re-establishing (or re-inventing?) the partnership between humans and machines



Similar to the one in 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 is clearly summarized: overall, supplier revenue bounced back (64.5, up from -22.6) as did staff size (60.8, up from -14.7). Technology investment also improved (77.6, up from 28.3). In 20W2, these three metrics suggested that suppliers saw that the road back to profitability must be enabled by technology more than by humanpower. By contrast, 2021 seems to be re-establishing (or re-inventing?) the partnership between humans and machines.

The next level down summarizes other points touched on earlier. Generalists (full/field service providers and strategic consultancies) are growing again, although fortune is smiling a bit more winningly at full/field service providers than at strategic consultancies. Specialists, on the other hand, continue to see very solid revenue increases and to re-invest in both technology and staff.

At the most granular level, we see mid-sized generalists outperforming their larger counterparts, but both faring better than the smaller suppliers, who are stagnating. While experiencing similar trends in revenue and tech investment, the largest strategic consultancies seem to be investing in staff to a greater extent than their full service counterparts. Field services firms are reporting revenue trends similar to the largest generalists, but their staff size trend is more robust.





LEAVE UNCERTAINTY IN THE REARVIEW MIRROR

Madeline Warren

Director of Brand Strategy, Op4G

Email: madeline@op4g.com | Twitter: [@mwarren193](https://twitter.com/mwarren193) | Website: www.op4g.com

LinkedIn: <https://www.linkedin.com/in/madeline-warren-31539577/>

It is indisputable that the entire consumer landscape has experienced a seismic shift. The whys behind a consumer's path to purchase have taken a sharp left down a one-way freeway, when it was predicted they would safely stop at the red light. To be successful in the industry's future, market researchers need to rethink their interactions with the audiences they serve. Ensuring they have good co-pilots in the passenger seat is crucial to navigating these uncertain times.

We've seen it in the real estate market, grocery store aisles, lumber yards, and now the sample space. This past year has stimulated unprecedented demand for certain products and services. If truth in insights is a commodity, then, as an industry, we are in short supply. Recalling grade school economics, you might remember that when demand increases and supply is low, prices rise. But in this race to provide the best sample at the fastest pace and cheapest rates, the industry has become the Wild West of bidding wars. We've forgotten that the true mission is to provide integrity in data that gives brands decision-making confidence. For that reason, we say goodbye to the days where you choose a vendor based on "better, faster, cheaper" and hello to partners based on trust, collaboration, and innovation.

Obtaining rich insights and premium data that clients can trust is a top concern amongst researchers. If you've been in the industry for as long as Op4G has, you know data quality isn't just about the panelists; it starts with a smart survey design. When it comes to complex design and advanced analytics, clients need experienced partners who can execute the proper research and yield accurate results. It is more crucial than ever to choose a full-service research partner who is

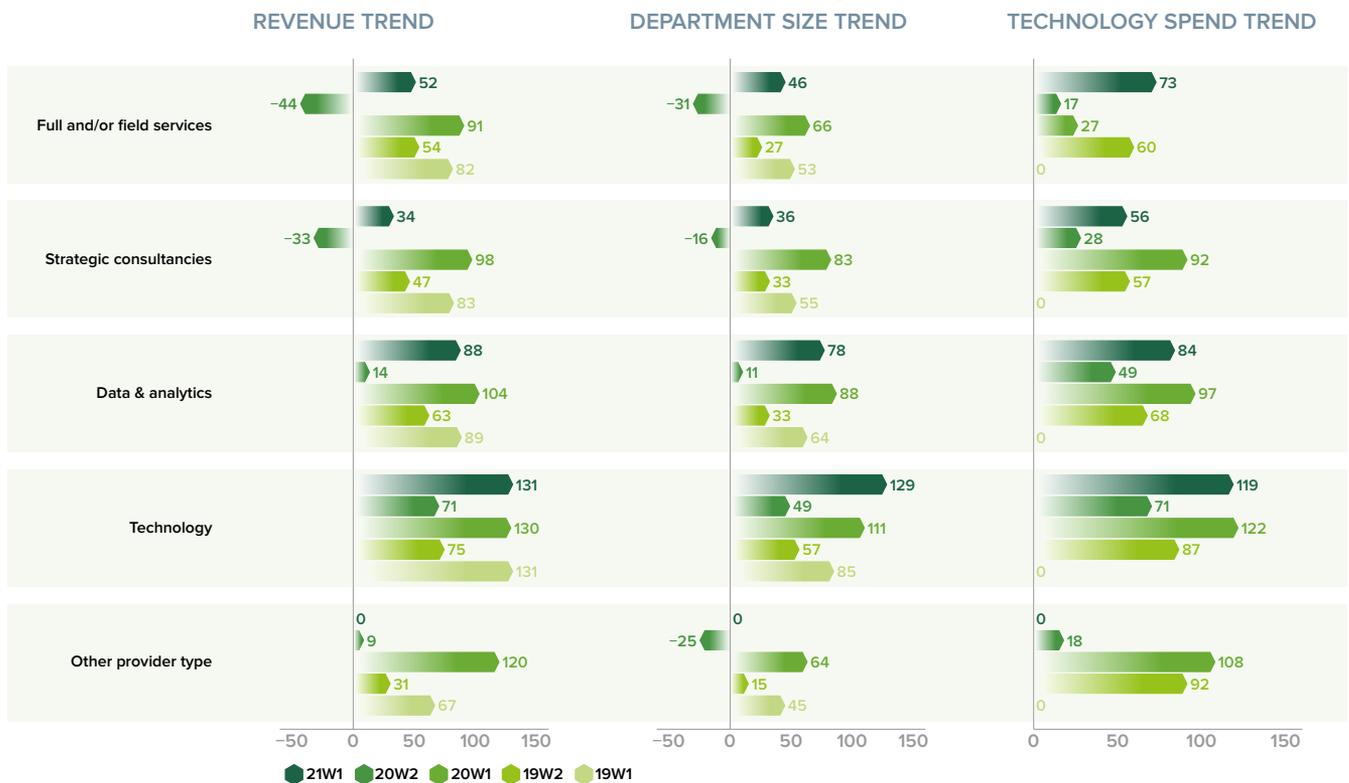
truly invested in navigating the overall process. Finding a partner who provides quality panelists, robust technology, and functionally sound consultation is a scarcity in this industry. Op4G is proud to differentiate ourselves by delivering on all three aspects of this trifecta. If trust is the concern, then collaborating with an expert partner can be the unwavering road map to richer data. To fully capture the voice of the consumer, we need to balance filling the supply void without sacrificing data quality. This is a critical juncture where innovation comes into play. Instead of focusing on problems, an innovative partner isn't afraid to try new methods that lead to better quality solutions. One of the perpetual challenges in our industry is communicating with hard-to-reach audiences who don't typically take online surveys. When a survey incentive is a few dollars, potential respondents such as C-level executives and specialized tradespeople are not likely to sacrifice their time. Researchers can instead appeal to these niche audiences through their underlying values and intrinsic motivators. Tapping into the desire to inherently "do good" by giving back to nonprofits is something that appeals to any demographic. Researchers can use that as an incentive to capture the voices of those typically hard-to-reach or even marginalized audiences. We may refer to them as n=, but truly, we're in the business of studying real humans. The best research recognizes that.

As we look towards the future, the road ahead may have its fair share of unexpected twists and turns. Choosing a research partner based on trust, collaboration, and innovation can help you weather any storm. Are you ready to put your foot on the gas and drive?

The specialist segments, technology providers and data and analytics providers, are in much better positions. For technology providers, revenue is very robust (131.1, up from 70.6), as is department growth (128.7, up from 49.3) and technology investment (119.2, up from 70.6). Their 20W2 metrics looked nearly identical to pre-pandemic levels, and their current metrics are even better. Data and analytics providers are thriving, compared to 20W2. Revenue trends (88.3, up from 13.9), department growth trends (77.7, up from 10.9), and tech investment trends (84.3, up from 49.0) have all risen and are fairly robust.

To give these numbers more context, we can refer to metrics from previous waves. Across all full/field service providers, their revenue trend index has been as high as 91.1 before plunging to a low of -43.6 last fall; it is now a healthier 51.5. For strategic consultancies, the revenue trend index has been as high as 97.8, falling to -32.6 in 20W2; it is now a pedestrian, but improving, 33.6. By contrast, the highs for technology providers and data and analytics providers were 131.1 and 103.7, respectively, and hit lows of 70.6 and 13.9 in the last wave. Tech providers have matched their previous high, and data and analytics providers seem to be on track to return to peak performance.

KEY TRENDS BY SUPPLIER CATEGORY OVER P12M (SUPPLIER TREND INDEXES)



IMPACT OF COVID-19

COVID-19 did not impact everyone equally or even in the same direction. When asked directly about its impact on various business areas, buyer opinions were divided between positive and negative, except with respect to staff size. Most buyers said it had no impact on staff size, but more believed the impact to be negative (31%) than positive (13%).

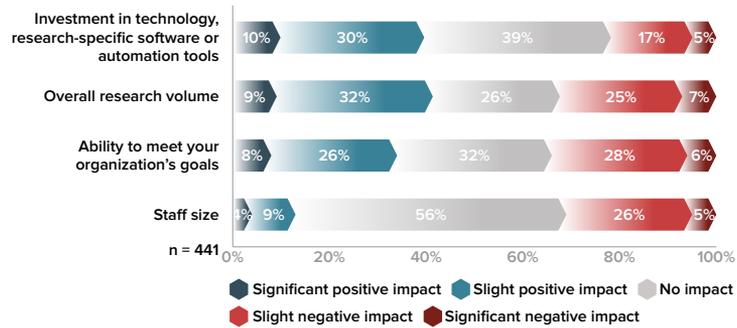
Buyer opinions were evenly split on ability to meet their organization's goals, with 34% saying it had a positive impact and the same amount saying the impact was negative. Buyers were more likely to say COVID-19 had a positive impact on research volume (41%) than negative (32%), and on technology investment (40% positive to 22% negative).

The delta between opinions of positive impact and negative impact on staff size matches last fall's: the percentage of negative impact exceeded positive by 19% in 20W2 and by 18% now. However, perceptions of the impact on tech investment grew more positive in recent months as did the impact on overall research volume, though by a lesser amount. The impact on the ability to meet goals was very negative last fall (-17%) but is currently neutral; however, one would guess that this is due to original goals being revised rather than met.

For suppliers, the impact of COVID-19 tended to be more positive than negative. The positives were greater than the negatives for tech investment (+36%), ability to attract new clients (+17%), volume of client work (+8%), and staff size (+5%). The only area for which the negative outnumbered the positive was very minor: ability to meet goals (-2%). This may have been due to original goals being revised, but we also know that most suppliers increased their revenues, and that revenue goals, for suppliers, are essentially the only ones that matter because they enable all the others.

2021 paints a very different picture of how COVID-19 impacted suppliers compared to the portrait from late 2020. Its impact on tech investment was only slightly more negative than positive, but it was much more negative on all other

IMPACT OF COVID-19 (BUYER)



IMPACT OF COVID-19: % POSITIVE – % NEGATIVE (BUYER)

	21W1	20W2
n =	441	130
Investment in technology, research-specific software or automation tools	+18%	+4%
Overall research volume	+9%	+5%
Ability to meet your organization's goals	No difference	-17%
Staff size	-18%	-19%

IMPACT OF COVID-19 (SUPPLIER)



For suppliers, the impact of COVID-19 tended to be more positive than negative



COVID-19 did not impact everyone equally or even in the same direction



areas. The delta ranged from 29% for ability to attract new clients to 49% for ability to meet goals. In light of the current results, it looks like the fears from late 2020 were either unfounded or short-sighted.

But maybe not. It would be tempting to put on rose-colored glasses and say that the positive results in 2021 prove that the pandemic was not as

devastating as once thought, but there are other perspectives, too. Perhaps the suppliers who had such negative experiences in 2020 did not last until 2021. Perhaps their former employees contributed to the net positive impact on staff size reported by the survivors while their 2020 employers can tell no tales.

IMPACT OF COVID-19: %POSITIVE – % NEGATIVE (SUPPLIER)

	21W1	20W2
n	1,055	367
Investment in technology, research-specific software or automation tools	+36%	-7%
Ability to attract new clients	+17%	-29%
Volume of client project work	+8%	-37%
Staff size	+5%	-31%
Ability to meet your organization's goals	-2%	-49%

Reality is probably somewhere in between. We've seen that there has been a reshuffling of the supplier deck. GRIT 20W2 suggested that innovation and reputation had ascended to become important supplier selection criteria where, in previous waves, relationship and price held sway over them. We also noted that buyers were using fewer different types of suppliers, that they had essentially reduced their portfolio to just their pandemic-era go-to partners. It's not so hard to believe that the

pandemic benefited those who were able to gain access to clients and markets that were previously closed to them while crippling incumbents who lacked the capabilities to work effectively under the new conditions. We don't yet know if displaced incumbents will be invited back, if the new incumbents are firmly entrenched, or if buyers have a new openness to bringing on suppliers they know by reputation but not first-hand experience. We'll be examining these issues in next fall's GRIT Report.

It's not so hard to believe that the pandemic benefited those who were able to gain access to clients and markets that were previously closed to them while crippling incumbents who lacked the capabilities to work effectively under the new conditions





THE ADAPTABILITY ADVANTAGE: MEETING THE NEW DEMANDS OF MARKET RESEARCH

Sascha Eder

CEO, NewtonX

Email: sascha.eder@newtonx.com | Website: www.newtonx.com

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

Covid-19 has dramatically changed the business landscape. Organizations that pivoted to work-from-home experienced the power of flexibility and with it the need for responsive solutions that matched the new work model. Some of these changes are here to stay, according to a new study conducted by NewtonX in partnership with Fortune:

- Just 22 percent of organizations work fully in person today versus 73 percent pre-Covid.
- Less than 40 percent of CFOs expect a return to fully in-person work for professional employees.

The pandemic didn't just usher in unwanted change. Seventy percent of CFOs cited in the NewtonX study want greater flexibility in work schedule on in-office days and as much as 85 percent of Chief Human Resource Officers and employees still expect a hybrid work model going forward.

Work is never going back to normal, and market research can't expect to, either. According to the metrics provided by the 21W1 GRIT study, the insights and analytics industry is in the process of rebounding from the effects of Covid-19. It was a tough year for many, with more suppliers reporting decreases than increases in 20W2. More buyers are shifting to a view of insight work as a way to deliver value and drive company growth rather than a box-ticking exercise needed to stay in survival mode.

However, with all its disruption the Covid crisis also revealed what the industry needed to hear: market research must keep pace with change and outdated traditional methods must go.

GRIT asked, "Is the insights industry the same?" The evidence suggests that buyers have changed how they conduct insights work and with whom they conduct it. In research, we see buyers are becoming more diversified, fragmented and overall tougher to reach as the responsibility for insights is shared across functions and business units. That's why we were happy to help when GreenBook reached out to NewtonX to find and field 200 client-side buyers to supplement the GRIT study sample.

Shifting the research paradigm

The nature of research is changing and it's clear from the 21W1 GRIT study that greater emphasis is being placed on data analysis, technology, and adaptability. Research budgets have grown, in part due to management's confidence in the ability of quality data to deliver value and drive company growth. The more businesses value and champion research, the more companies will be interested in suppliers who can deliver on innovation and quality. The new face of market research delivers accurate, automated verification that actively seeks out the right respondents to ensure clean data and clearly demonstrate tangible ROI.

That's why we believe the industry has to move beyond the panel and not be limited by a database. At NewtonX, our open network and a proprietary process called custom recruiting allows us to reach over 1.1 billion professionals who meet our clients exact specs.

As we look further into the future, we envision a self-serve insights marketplace where clients can interact with the knowledge network themselves to get access to highly specific and segmented audiences and choose any type of study from a single question to a three-year tracking study. It's an ambitious goal, but one we think will move the industry forward in an exciting way.

Adapt to overcome.

Adaptation has proven to be the common denominator of continued success. Buyers are looking more closely than ever at their suppliers' reputation and ability to innovate, rather than considering just price and relationship, so research firms must demonstrate that they bring something new and quantifiable to the table if they want to thrive in the new tomorrow.

THE BIG PICTURE

As we approach the middle of 2021, the insights and analytics industry seems to be putting the horrors of 2020 behind it. Negative budget, revenue, and staff trends have reversed polarity, and once-depressed tech investment is again becoming robust. Compared to pre-pandemic levels, the metrics we track are nearly the same. But is the industry the same?

In 20W2, all types of suppliers were losing revenue except for tech platform providers. The proportion of strategic consultancies waned while the proportion of full service providers waxed. In buyer insights departments, data analysts received the strongest support while departments built around the Voice of the Customer were neglected. These trends suggest that buyers changed how they conducted insights work in response to the pandemic in terms of their own roles and how they used suppliers. As a result, tech providers became household names, and strategic consultancies had to focus on full service research because buyers could more easily understand the value of designing research and collecting data than they could justify “consulting.”



Our evidence suggests that buyers have changed how they conduct insights work and with whom they conduct it. It further suggests that the suppliers who have also embraced change are advancing toward a brighter tomorrow, while those suppliers who cannot or will not adapt are left behind in a Dickensian nightmare

Flashing back to 20W1, strategic consultancies and specialists in tech and data and analytics had each become more abundant than full/field research suppliers. Supplier revenue and buyer and supplier hiring trends were the most positive ever recorded by GRIT. Currently, full service research providers are the most abundant type of supplier, and we don't know if the industry will return to its pre-pandemic mode where strategic consultancies seemed poised to dominate and all GRIT metrics had peaked. A lot will depend on whether buyers want to return to that world after adopting new ways of conducting insights work and starting new supplier relationships. Will the once-incumbent suppliers be invited back? Will the new incumbents have staying power? Or will shuffling the supplier deck become the norm?

Also, although the insights and analytics industry is coming back, it's not bringing everyone back with it. Small supplier firms continue to struggle, and we don't know how many of them survived from 20W2 to 21W1, we only know that the survivors are struggling. Most suppliers are reporting increased revenue, but some continue to see revenue decline. Worse, about one-third of them say their plan includes waiting for conditions to change. Most say they will improve marketing and business development, but much fewer say they will change their operations or portfolio of offerings. Suppliers who reported revenue increases are their polar opposites: fewer of them say that improved marketing and business development drove their success while more credited strong innovation and portfolio of offerings.

Our evidence suggests that buyers have changed how they conduct insights work and with whom they conduct it. It further suggests that the suppliers who have also embraced change are advancing toward a brighter tomorrow, while those suppliers who cannot or will not adapt are left behind in a Dickensian nightmare.



INNOVATION SECTION

BUZZ TOPICS

GRIT pays attention to buzz topics because they are strong leading indicators of not only what is on the minds of insights and analytics professionals today, but help point the way to what are likely to be key drivers of the industry in the future as well.

For several years now GRIT has experimented with various methods to understand which emerging topics, technology, ideas and trends insights and analytics professionals are paying attention to as “buzz topics”. Starting in 2019 we decided the best way to do that would be to simply ask respondents to tell us what topics they are following via a verbatim response in the Business & Innovation study, and use those to update our more structured question in the Insights Practice edition to determine actual adoption levels. We have found this is an effective early indicator of where the industry might be going in the future and a fantastic way to plant seeds of innovation for enterprising entrepreneurs to grow.

In previous waves we hand-coded the topics, but for this wave we decided to apply text analytics (courtesy of our friends at Canvs AI) to see if we could improve our ability to uncover thematically-

connected topics and report on their frequency within the corpus of unstructured responses. In total, we collected 2,570 discrete verbatim responses to this question and were able to extract 4,298 topic clusters and 247 distinct topics. For the purposes of brevity (not something GRIT is usually renowned for!) we have decided to only report topics that represented over 5% of the overall corpus.

One note before we dive in to these results: astute readers will see the remarkable coherence in the buzz topics mentioned and other findings in this report: clearly buyers and suppliers are focused on a core set of considerations thus far in 2021 with a surprising amount of consilience between them. Perhaps there really is nothing like a crisis to provide clarity on what really matters.

Here is the current buzz topics ranking for spring of 2021:

Topic Rank	Topic Name	Mentions	Mention Rate
1	AI/machine learning	550	27%
2	Research skills	460	18%
3	Understanding data	296	12%
4	Communicating insights	274	11%
5	Process automation	231	9%
6	Data analytics	228	9%
7	Behavioral science	201	8%
8	Consumer closeness	193	8%
9	Agile organizations	176	7%
10	COVID-19 impact	164	6%
11	Marketing trends	162	6%
n=2,570			



THE BUZZ: NEW AREAS OF INSIGHT AND NEW AREAS OF METHODS

Olivier Tilleuil

CEO and Founder, EyeSee

Email: olivier.tilleuil@eyeseee-research.com | Website: eyeseee-research.com

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

The pandemic has exponentially accelerated the need for change and escalated the willingness to adopt new tech (AI, ML...) and solutions (ecommerce, social...). Despite being around for +20 years, insights can't hide from them anymore. So, what now?

Dealing with new Buzz

Confused about ecommerce testing? You are not alone. Many clients are. New environment, new research questions, no established frameworks, new research methods, AI/ML...

First, we need to map all the research questions within the organization and create a framework. The mistake no 1 is trying to find the answers to all questions in one study. It is as if we were to conduct a pack, planogram, decision tree, U&A, and segmentation at once. If we don't know something, we tend to overcompensate.

Secondly, prioritization is key. **It might be smart to go the counter-intuitive way: not looking at strategy and but at the tactical level and work your way up.** This will provide you with quick wins that demonstrate impact of the technology or approach to your stakeholders and provide leverage for negotiating another stride forward.

Next, how do you approach? There are as many methodologies as there are research questions. A common bias is that we feel insecure and go for the method that will make us most secure, not necessary the best method to answer the research question (think qual). The best research methodology is not one, but multiple. Ideally, you want to track people live on websites: (1) what is the real behavior? This is done with passive tracking and AI/ML learning is necessary to make the data useful. However, many questions are still unanswered: e.g., how does navigation happen on different missions, did they see my product, do they use filters, why did they choose that specific product... Therefore (2) behavioral methods such as eye tracking, navigation etc. in an experimental setup are necessary to understand the why (3) surveys.

Then, how to gain research skills? Most of our clients never tested on ecommerce sites and often they don't have prior experience with passive/behavioral methodologies. If you do not have it, then the best way to acquire it is through partnership with an agency. They execute similar projects for different clients and thus their learning is steeper.

Finally – socialize the insights. This ties in with another buzzword– communicating insights. You need to make sure you are not the only person who 'gets' what this new type of info means for your business but find different avenues to disseminate the learnings.

Evaluating the new buzz: NPD and pack testing

9/10 innovations fail. Many new AI-based solutions are popping up - are they the solution to improve this ratio? Unfortunately, probably not; but they are great for screening and feedback. A purchase decision depends on so many factors (and many are subconscious) and it is almost impossible to create a database with all these factors, collect sufficient enough data and update the model always because the decision-making factors change over time. The most accurate way to test whether something will sell is in stores as it considers all the different factors. The second-best way is to test in virtual shopping environments which are close to reality, more budget-friendly and less of a hassle.

Another issue that appears with AI prediction for gaze direction on pack and shelves (and other stimuli). They are probably useful in the design phase and to discard already potentially big failures, but they can't help with deciding which out of the 3 tested designs in the final phase is the best. Differences in visibility in areas of interest on the pack and shelf are often around 5-10% - which can be a significant improvement in sales (10% more people that see your product), but AI prediction model margins are much higher than that.

In both cases, AI might be useful in early stages, but for validation it is better to use more advanced experimental methodologies in correct context such as virtual shopping and eye tracking. It is important to know what to use when.

The most frequently mentioned buzz topic of 21W1 was AI and machine learning



The most frequently mentioned buzz topic of 21W1 was *AI and machine learning*, a perennial favorite since the advent of this question, and, like virtually all things tech-related since COVID-19, it seems to have risen in importance to GRIT respondents as the “buzziest” of buzz topics. At 27% of all mentions, it is far and away the leading topic. With the focus on DIY solutions and insights technology in general driven by fundamental shifts due to the pandemic, it’s no surprise that AI/ML rocketed back to the top-of-mind areas for insights professionals since those technologies are emerging as fundamental drivers of enhanced efficiencies.

As one participant articulated in the 2020 report, Artificial Intelligence “will affect everything,” both professionally and personally, and is a key tool for understanding people as they react to an evolving world of data. There was skepticism about its real potential at that point, but, as with so many things, the urgency of adaptation to the conditions of 2020 seems to have forced the issue and many GRIT participants began to dive more deeply into the pragmatic use cases of the technology. Many of them were quite forthcoming as to their specific areas of interest for the application of AI/ML:

Buyer	<i>AI / Machine learning; Predictive analytics; Foresight; Behavioral Science</i>
Buyer	<i>AI & Machine Learning – New analytics and optimization techniques, and online/digital qualitative research</i>
Buyer	<i>AI. A proper application of AI can really save both time and cost of research, e.g. concept screening, social listening</i>
Buyer	<i>AI and machine learning, virtualization, analyzing and modeling big data, sensor based research, digitally enabled observational research, systems thinking</i>
Supplier	<i>Artificial intelligence use in market research, Secondary data to enrich primary insights</i>
Supplier	<i>Machine learning and AI for its capabilities and widespread application</i>
Supplier	<i>Artificial Intelligence, Real-time Data and Analytics, Predictive Analytics</i>
Supplier	<i>AI – Automated intelligence helps both timing and can provide benchmarks when needed.</i>

A distant second in interest is *Research Skills*, which focuses on professionals who are expanding the functional focus of insights business issues such as UX or data synthesis, expanding their toolbox to encompass new technologies and methodologies but are grounding them in traditional research fundamentals. As reported

in the Organizational Success Factors and Innovation Strategy sections, developing market research expertise is a top priority across suppliers, and many buyers seem to be looking to them to provide that knowledge. A small sampling of verbatim responses demonstrates these common themes.

Buyer	<i>UX research is getting the most buzz but I don't see why. It's not really new and a lot of the people getting into it lack general research experience and skills</i>
Buyer	<i>While we'd like to use vendors more to scale what we do and our approach to research, we find it hard to get the quality and experience we need for a reasonable cost. So, we continue to do mostly DIY – and are focused on building our Capabilities Model (i.e. researcher skills, tools, best practices).</i>
Supplier	<i>At the moment I am increasingly interested in User Experience – learning the theory behind current practice (e.g. Top Tasks, Jobs to be Done etc) and also learning how more traditional research skills can complement the practice</i>
Supplier	<i>Data integration – integrating disparate data sets remains a challenge. Identifiers and Cookies – how will marketers target and retarget. Sample quality – foundation of good research. Lack of training and skills on the corporate research side. Separation of insights from analytics from CX from UX when they are all part of insights.</i>



HUMANS AND MACHINES: WHY YOU NEED BOTH

Jessica Gaedeke

Chief Revenue Officer, GutCheck

Email: Jessica.Gaedeke@gutcheckit.com | Website: www.gutcheckit.com

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

Let's talk, Human to Human.

"FOMO" is a real thing in our industry. It can feel impossible to keep up with all the technologies and tools claiming to democratize data, and this "fear of missing out" has many chasing their tails to evaluate and embed the latest solutions.

But technology applied without a clear purpose, and without human intelligence in both design and execution, is bound to underwhelm. As this GRIT Report uncovers, buyers are not prepared to fully insource all aspects of the research process. They need help managing the service-based components that DIY just can't deliver. Clients need human expertise to ensure they are maximizing the power of the latest technologies. They need to know they are not in it alone.

It's easy to see why AI/ML is so attractive.

Futurists predict that the outlook for market research will include more tech, more humanity, and more AI/ML. This year's GRIT Report confirms that these topics are indeed at the forefront of our industry's mind, with both buyers and suppliers mentioning AI/ML as the #1 "buzz topic."

Our clients approach AI/ML with equal amounts enthusiasm, reluctance, and awe. It's easy to be enamored by the promise of algorithms making sense of big data, of machines iterating to deliver novel insights. But what is the purpose of the technology? If it doesn't help clients grow their business and bring them closer to the people they serve, what's the point?

To deliver real results, we believe that AI/ML must be grounded in human-centricity. The most useful applications of AI/ML are those with the clear purpose of developing meaningful connections, uncovering true innovation, and deepening brand loyalties.

AI/ML enables humanization at scale

At GutCheck, our purpose is to equip and empower brands to unlock bold new possibilities through empathic experiences, agile insights, and breakthrough technologies. One area where clients clearly need more agility is in persona understanding and activation. With attitudes and behaviors changing rapidly – particularly in the last year – traditional methods just can't keep up with marketplace demands. To enable swift decision-making, we marry explicit and implicit data sources, with highly efficient survey techniques powered by AI, to identify the personality and needs of target audiences. In this instance, AI enables deeper learning, faster – so brands better understand the messaging, imagery, and design elements required to inform compelling creative and media briefs.

Another area where we deploy AI/ML is against unsolicited data sources such as online commentary in forums, social media, and product reviews. This application extends far beyond sentiment monitoring. Through Hybrid NLP, we understand humans in deeper dimensions, particularly emotional drivers around their needs, frustrations, and tensions. This application of AI/ML enables "qual at scale", uncovering what really matters so brands can create empathic, "they get me" experiences.

None of it matters if it doesn't help you grow.

But let's be real – it's not about the tool or the technology. Material growth for both buyers and suppliers comes when clients can make better informed decisions in a hyper-competitive world.

AI/ML is undoubtedly changing how we learn, engage, and activate. The most useful applications of AI/ML are those that bring human-centricity, those that help you unlock bold ideas that win in the marketplace. To do this, the most successful brands balance humanization and digitalization. Winning in today's marketplace requires both.

AI/Machine Learning, Research Skills, Understanding Data and Communicating Insights seem to be of close to equal importance across both groups



Insights buyers and suppliers largely have similar levels of interest in the most popular topics, and larger gaps in the lower ranks. *AI/machine learning, Research skills, Understanding data and Communicating insights* seem to be of close to equal importance across both groups, which is perhaps reflective of the dueling core dynamics driving the industry today: **Process** (the types of data we use, how we collect it, and how we transform that into useful information) and **Impact** (taking that information, aligning it to business issues, and creating actionable insights that deliver business value).

As we look to the lower tier of buzz topics, we see disparity in rankings between buyers and suppliers. Buyers are more focused on topics that are more closely aligned to business impact, related to themes such as *Data analytics, Consumer closeness, and Agile organizations*. Suppliers, in contrast, place a greater emphasis on more process-oriented ideas such as *Process automation and Behavioral science*, with an additional prioritization on the business health-related topic of *COVID-19 impact*.

ARE BUYERS AND SUPPLIERS REALLY SO DIFFERENT AFTER ALL?

Interestingly, despite being in the lower tier, *Marketing Trends* receives similar attention from buyers and suppliers, and we have never seen it so prominent in previous waves of GRIT. Perhaps

as an outcome of the disruptions of 2020, 2021 has been emerging as transformative for the broader marketing ecosystem.

Topics	Supplier	Buyer
AI/machine learning	21%	22%
Research skills	19%	16%
Understanding data	12%	10%
Communicating insights	11%	10%
Process automation	11%	5%
Data analytics	8%	12%
Behavioral science	8%	5%
Consumer closeness	7%	10%
Agile organizations	7%	9%
COVID-19 impact	6%	3%
Marketing trends	6%	7%

Perhaps as an outcome of the disruptions of 2020, 2021 has been emerging as transformative for the broader marketing ecosystem



Recent shifts by Apple, Google, Facebook, etc. to significantly restrict how marketers can access data for marketing programs is one of the obvious issues, but in 2021 we have also seen a massive acceleration in what we consider to be three trends that are reshaping the digital data landscape:

1. **Media fragmentation:** A huge number of people have shifted their media engagement and consumption habits away from mainstream media and media tech platforms to emerging platforms and channels.
2. **Social fragmentation:** Similarly to media, the exodus away from Facebook/Twitter/WhatsApp has fragmented the dominant social media marketplace fueling the unprecedented and rapid growth of challenger platforms.
3. **Privacy compliance:** Undergirding 1 and 2, users are becoming far more concerned about data privacy and security. Users recognize that their data fuels the systems that they distrust the most.

The bottom line is that the marketing ecosystem is powered by data, and insights and analytics professionals play a significant role in collecting and analyzing many of the types of data that give marketing its power. Companies need data to engage, understand and activate consumer relationships, and suddenly a very large chunk of

the population has withdrawn their attention and data from the established system. They are moving behind the walled gardens of privacy-first platforms which provide limited to no mechanisms for brands to engage with these consumer populations.

That is a huge issue for both advertisers and the companies that exist to serve them via data. With these changes happening, it is no wonder that insights professionals are now aligned on this topic in the greater interest of the broader marketing industry.

These data also support our earlier hypothesis that technology solutions are now playing to a wide audience, with the supplier community, especially full service companies, emerging as important clients for tech and reclaiming their role as the preferred partner for buyers who are not prepared to fully insource all aspects of the research process and/or need help with managing service-based components of the process that technology providers are not fully equipped to address as yet. This symbiosis has always existed but appeared to be diverging in late 2020. However, it appears that may have been an anomaly driven by the unique circumstances of the pandemic, and we might be returning to the historical norm. We'll monitor that in the future to see how it plays out.

Whether we are buyers or suppliers, often we get so caught up working *within* our businesses that we forget to look up and think *about* our businesses



THE BIG PICTURE

Our thesis that these buzz topics can be roughly split into two categories related to *process-oriented* issues and *business impact* focused themes should be a familiar one; we have described this dichotomy for years. However, some of the components that fall into those segments have shifted with a more clearly defined focus on technology-driven efficiencies and a broadening of perspective on how the insights and analytics industry can drive clear value with an expanded set of resources (and challenges!).

These findings dovetail nicely into the key insights from other areas of exploration in this report. The insights industry continues to evolve based on a variety of key driver dynamics that are all interacting to drive rapid transformation. Those

insights professionals who are trying to stay ahead of the transformation wave clue us in via the buzz topics as to what they see coming down the pike, and the emerging narrative from this overall report backs up their foresight.

So what is the lesson? Whether we are buyers or suppliers, often we get so caught up working *within* our businesses that we forget to look up and think *about* our businesses. When we do, we can start thinking about the future trends that are likely to help define the industry in the future, and those are the buzz topics that we pick up here and share with you to give you a leg up on what the future might hold.



MOVING FROM TALK TO ACTION: FOSTERING INCLUSIVE INSIGHTS

Melissa Geathers

Manager, Global Bid Management, InnovateMR

Email: Melissa@innovatemr.com | Website: www.innovatemr.com

LinkedIn: www.linkedin.com/in/melissa-geathers-417309a9/

2020 will forever be synonymous with the COVID-19 pandemic, and the immense devastation it caused. Within that chaos, the world watched as George Floyd was brutally murdered. I assumed we were seeing yet another life lost with no hope of justice for his family; the Black community left to mourn yet another tragic death in solitude. I wept for him and his family. I wept for my son, my nephews, my uncles, for all who traverse this place we call America in black and brown skin. Skin weaponized by its very existence.

I expected the conversation around George Floyd's death to be focused entirely on his flaws; how he could have complied or prevented the vulgar display which ended his life without compassion. To my surprise, the protests and demonstrations which followed – usually arranged and attended by the Black Community with little offshoot – blossomed: Voices from allies rose up to amplify the long persisting, exhausted cries of my community. Conversations about equity became global topics. Organizations big and small, whether through pressure or epiphany, vowed to bring more inclusive, diverse perspectives to the table.

However, in 2021 and beyond, we must move away from merely performative, PR-focused gestures, and begin writing policies with actionable results built on fostering inclusiveness and diversity. This is true across all industries, and in market research – which seeks to represent the culture at large – it is paramount.

To this end, Voices of Equity, the Multicultural Insights Collective (MIC) was co-founded by InnovateMR. The MIC is a group of veteran insights professionals who are working to fill this gap in the industry, giving brands the confidence to speak and act on issues of race, equality, inclusion, representation, and more. The Multicultural Insights Collective is a diverse, cross-organizational research-based community focused on enacting meaningful and insightful change.

The MIC encourages diversity practices in research methodologies, questionnaire design, and panel building, such as:

- Examining tried and true research methodologies and adjusting them to be more representative should be common practice.
- Questionnaire design needs to be intentionally culturally sensitive.
- The way in which we as researchers ask questions should be reviewed to ensure that we are addressing underrepresented groups appropriately.
- Selecting moderators that represent diverse backgrounds and for in-person qualitative research, making sure that spaces used to host respondents are accessible for those with disabilities.

The MIC has also learned from its research that for Hispanic/Latino communities having the option to identify country affiliation would more accurately reflect the respondent's heritage. Lastly, adopting an inclusive review process of any creative being used in the research is crucial to ensuring that the study would be appropriate and representative.

Advertising campaigns developed from market research should strive to represent the full spectrum of gender identities, ages, body types, race/ethnicities, cultures, sexual orientations, skin tones, languages, religions/spiritual affiliations, physical abilities, socio-economic statuses, etc. This should be done with the intention of respectfully and authentically connecting with the audience.

Research and insights companies should establish policies that create and encourage work environments that promote diverse viewpoints. Recruiting and cultivating talent from a representative applicant pool, elevating voices that have been previously marginalized, and mentoring new employees that are from less represented communities can all further equity.

Market researchers are storytellers; we shape the narrative and therefore we are socially and ethically responsible to be as representative as possible in our research and in our work environments. The insights community has wide-reaching influence and that influence can be used to create tangible and enduring change in the world.

SEPARATING THE SIGNAL FROM THE NOISE

We don't think it is much of a leap to connect the emphasis on speed to the other signals related to technology adoption such as AI, automation, DIY, etc. and draw the conclusion that the insights and analytics industry is clearly now dominated by "ResTech" (hats off to Patrick Comer of Lucid for coining that term!). Due to the need to meet this need, however, as previously noted, dominance

doesn't necessarily reflect the sales channels of how that tech is accessed. We should note that although the speed factor was top for both groups, suppliers clearly have gotten the message as they declared speed an unmet need for buyers far more than any other issues; in fact, nothing else even comes close to that priority.

	Buyer	Supplier
Faster time to insights	20%	31%
Easier implementation	9%	10%
Innovative approach	12%	5%
Creating new use cases for insights	10%	5%
Deep understanding of business needs	10%	6%
Ability to tackle difficult problems	5%	6%
Strong leadership skills	8%	5%
Personalized service and recommendations	5%	2%
Reliable service	3%	4%
Trustworthy findings	3%	7%
Others combined (all under 2%)	15%	17%
<i>n=1,747 (sorted by combined net, not shown)</i>		

The second most mentioned theme, *Easier implementation*, was closely aligned across suppliers and buyers, clearly showing the importance of technology solutions that focus on user experience during their solution architecting sessions.

Rounding out the top tier from the buyer perspective are *Innovative approach*, *Creating new use cases for insights* and *Deep understanding of business needs*.

A sampling of the actual verbatim responses analyzed for each theme shows the nuance behind each.

Segment	Faster Time to Insights
Buyer	<i>Quicker research to help influence decisions, using simplicity and not going over the top with unnecessary analytics</i>
Buyer	<i>Fast and good quality research</i>
Buyer	<i>Faster results that can be shared easily, not having so much turnover on team that they lose knowledge of our business</i>
Supplier	<i>Faster turnarounds!</i>
Supplier	<i>Fast, accurate, and constant analysis of data across multiple sources with automated insights, recommendations, and predictable results.</i>
Supplier	<i>Quick-turn fieldwork and analysis capabilities (less than one week)</i>

Segment	Easier Implementation
Buyer	<i>Easier B2B sample recruitment using automation/marketplace</i>
Buyer	<i>Making standard research studies more turnkey and easier to execute which frees time up to be more strategic</i>
Supplier	<i>Easy to use / DIY analytics portals</i>
Supplier	<i>Ease of gathering and analysis</i>

Segment	Innovative Approach
Buyer	<i>Trigger breakthrough innovation ideation, full coverage of consumer touchpoints media investment & consumer interaction tracking to analyze biz modeling in era of digital/social. Quick test of innovation mix to check successful potential</i>
Buyer	<i>More truly agile approaches that are innovative (not just the same method in a condensed time period or with a smaller sample).</i>
Buyer	<i>Continue in providing innovative options to give us an edge or understand our customers and market in greater depth</i>
Supplier	<i>Innovation transfer – learning from similar situations faced by others in other industry. Learning from insights/ actions in other industries – case studies, benchmarking data, analogous research studies is always helpful when the information comes from a trusted source.</i>
Supplier	<i>An innovative consulting mind, openness to integrate unique techniques and methodologies</i>
Supplier	<i>Innovative, validated tool kit. Experience both across and within industry verticals. Ability to challenge "the ways things have always been done" to drive deeper understanding and decision-making. Focus on driving client value in time and cost through innovation and hustle.</i>

Segment	Creating New Use Cases for Insights
Buyer	<i>Providing new ways of looking at analytics and insights. Validating or challenging existing methods.</i>
Buyer	<i>Offering new ideas on information sources or ways to collate data more effectively. Ways of transforming data quickly for multiple different projects.</i>
Buyer	<i>Providing new ways to research besides always the same old survey</i>
Supplier	<i>New technologies, such as eye tracking hardware and software.</i>
Supplier	<i>Introducing them to new methodologies, especially in the online space – and show them what is possible nowadays.</i>
Supplier	<i>Availability of new participants in research</i>

Segment	Deep Understanding of Business Needs
Buyer	<i>Deeper understanding of the business</i>
Buyer	<i>Understanding my business and knowing how to apply insights/results</i>
Buyer	<i>Understanding of ecommerce and shopping behaviour in Ecomm</i>
Supplier	<i>Deep understanding of the internal business challenge and objectives</i>
Supplier	<i>Understanding the whole customer, who they are, what they need, and where they come from.</i>
Supplier	<i>Deep consumer understanding translated into actionable recommendations</i>

As we look at the rest of the list a bit more specificity is apparent. *Ability to tackle difficult problems, Strong leadership skills, Personalized service and recommendations, Reliable service and Trustworthy findings* are seemingly obvious expectations for buyers to have of suppliers, but based on these data we can only draw the conclusion that these expectations are not being met consistently enough. Moreover, since suppliers mention these as well (albeit at a lesser rate), clearly everyone recognizes that there is room for improvement.

Once again, we see the defining tension of the industry at play: process vs. impact. The angle here is slightly different though: in the unmet needs exploration we get the sense that one of the challenges the industry struggles with is a human capital or training issue. The lower tier of unmet needs fit together as a checklist for hiring specific skills or training existing research professionals in these skill sets. The potential risk in this dichotomy

is that although technology continues to evolve to meet the process needs that rose to the top of the list, the industry must also have a thriving consulting capability to truly prosper.

As the industry evolves to adapt to the rapid changes in global cultures, technology, and business needs, it's vital that we don't get overly focused on the shiny objects of technology and that we continue to look at the big picture of delivering real business impact and value. If we are to earn our seat at the Board Room table and prove our relevance in this age of easy access to data from a thousand different sources, we need to ensure that we are selling success to our clients. Every interaction should be based on that core absolute. We can discuss how our specific offerings or approaches will enable that to happen, but we should never lose sight of what is really expected of us from those that use what we do.

THE BIG PICTURE

As previously noted, many of the unmet needs mentioned align with priorities and benchmarking measures identified multiple times earlier in this report. There is a definite theme that has emerged of both buyers and suppliers recognizing that consulting skills combined with efficient insights generation are critical for the industry.

The key to closing the gap on unmet buyer needs requires developing the right portfolio of capabilities and skill sets necessary to successfully combat specific and unique business challenges. Suppliers must have the vision to diagnose the challenges, the ingenuity to define a solution, the knowledge to find the right skills and capabilities suited to the challenge, and the temperament to bring it all together.



In the unmet needs exploration we get the sense that one of the challenges the industry struggles with is a human capital or training issue



ADAPTING TO CHANGE REQUIRES RAISING THE INSIGHTS BAR

Dr. Dave Lundahl

CEO & Founder, InsightsNow

Email: dave.lundahl@insightsnow.com | Website: www.insightsnow.com

LinkedIn: www.linkedin.com/in/david-lundahl-a6bb45

Insights start by asking the right questions. Why is faster time to insights the clear leading unmet need in the industry? Why are buyers seeking easier ways to implement research? Why the gaps in needs between buyer and supplier for “innovative approaches,” “new cases” for insights applications, and “deeper business understanding?”

The answer to these questions is that we are living through a time of extreme change where the need is greater for buyers to respond faster to emerging market opportunities and threats. As a result, buyers’ organizations are becoming more agile, shortening timelines for marketing, and product innovation/development initiatives.

Last year, we saw an acceleration in the demand for faster insights. To address this need, we invested in data automation to raise the bar in insights delivery. Our operations team put into place new tools so that our client services teams could focus on translating results into insights, and to create more impactful ways to communicate those insights to client teams. To make our custom research services easier to access we focused on improving the RFP process. We invested in the development of the InsightsNow Innovation Center™ (see <https://www.insightsnow.com/innovation-center/>) - a platform for collaborative scoping of research designs facilitated by an instant quoting feature.

To address the gaps between buyer and provider, I believe suppliers must strive to become more innovative in providing insights that align with this shift in buyer agility. To address this need we aligned our business processes and developed some new services to deliver insights through rapid iterative learning sprints. These sprints often mix quant and qual in innovative ways, easily aligning with shortened

timelines and budget cycles. We also invested in the development of new “cases for insights” by expanding our behavioral toolbox and applications. One example was the expansion in applying our Implicit / Explicit Test™, a neuromarketing technique) which quickly measures the behavioral impact of concept elements, messaging and/or product qualities. This helped clients more quickly and easily know how to design and market products to disrupt or nudge habits, or to motivate or demotivate important behaviors necessary for market success.

Perhaps the biggest challenge facing suppliers is knowing how to achieve a deeper understanding of buyer’s business challenges and objectives. To close this gap, we invested heavily during the pandemic in consumer research to stay ahead of the insights needs of our clients. We provided complimentary research reports every few weeks about key changes in consumer behavior that we believed were important to our clients. This included tracking weekly changes in shopping and consuming habits and motives in response to the pandemic disruption. These investments helped us stay lock step with our clients in understanding their business threats and to inform them on new opportunities that we saw throughout the pandemic.

Closing these types of gaps between buyer and supplier need is hard work. It requires listening to client needs and being innovative in taking action. In our case, it required us to invest in a new platform for collaborative research design and quoting, in new methods that deliver behavioral insights faster, and in primary research that helps us better understand the business needs of our clients. It has required us to aligning our services to fit with the more nimble and agile business processes of our clients.

ADOPTION OF AUTOMATION PLATFORMS

Automation is no longer an emerging trend; in many ways it may be the defining change to the process of insights and analytics of our time (at least until robots pass the Turing Test). However, adoption is not universal yet, so tracking the progress helps us understand where we go from here.

GRIT asks buyers and suppliers about the role automation has or could have in sixteen different insights-related activities. Five of the sixteen areas have a key role or are expected to play one by nearly half of buyers or more. If we include buyers who are testing these, the number of areas increases to eight. If we further include those who are considering it, fourteen of the sixteen areas have the attention of most buyers!

For suppliers, nearly half or more also see current or future key roles for five areas. Including testers bumps this to eleven, and if we add those who are considering them, we once again get fourteen of the sixteen that are at least under consideration by nearly half or more! (For the curious, the two that don't make the cut are "matching contract 'talent' to projects" and "matching suppliers and buyers." We'll keep tracking them, though.)

The areas of automation application that buyers are most likely to believe has or will have a key role are mainly related to analytics:

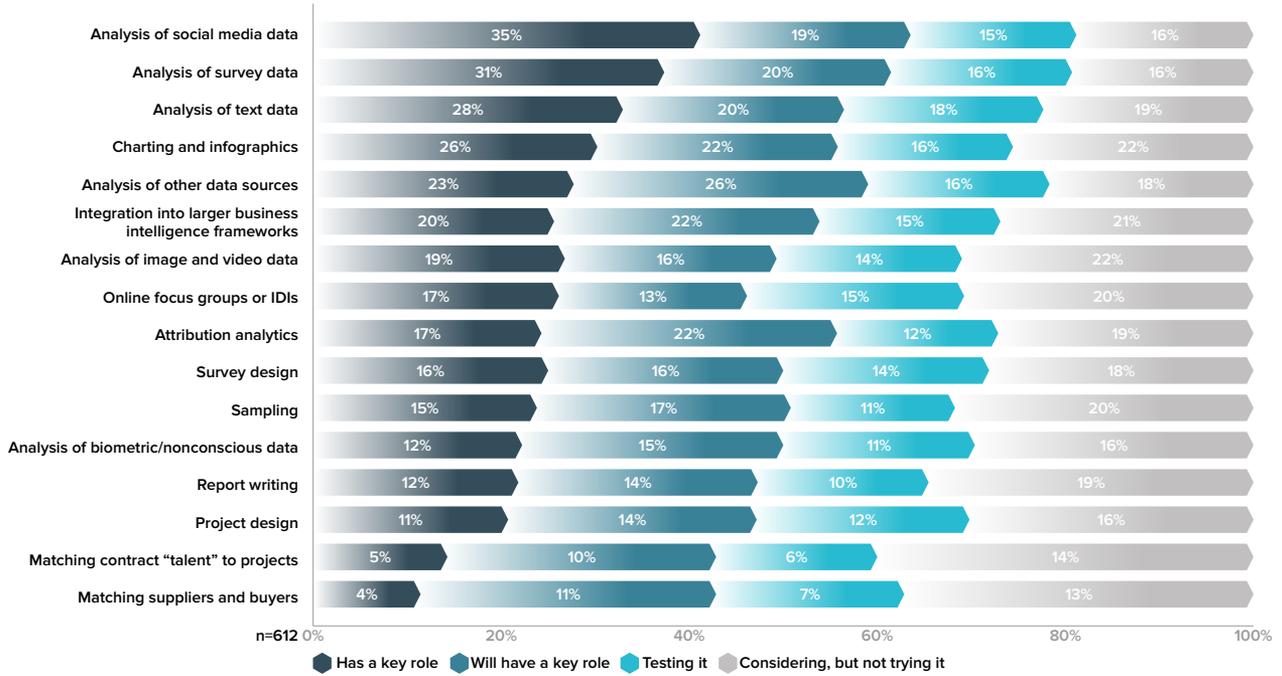
- Analysis of social media data (54%)
- Analysis of survey data (51%)
- Analysis of "other" data sources (49%)
- Analysis of text data (48%)
- Charting and infographics (48%)
- Analysis of other data sources (49%)

The five areas for suppliers are the same, except that sampling replaces social media. The order and levels of interest are somewhat different: survey data is higher (62%) as are text data (57%) and charting and infographics (55%), followed by "other" data sources (50%), which is about the same as buyers. Sampling is fifth (47%).

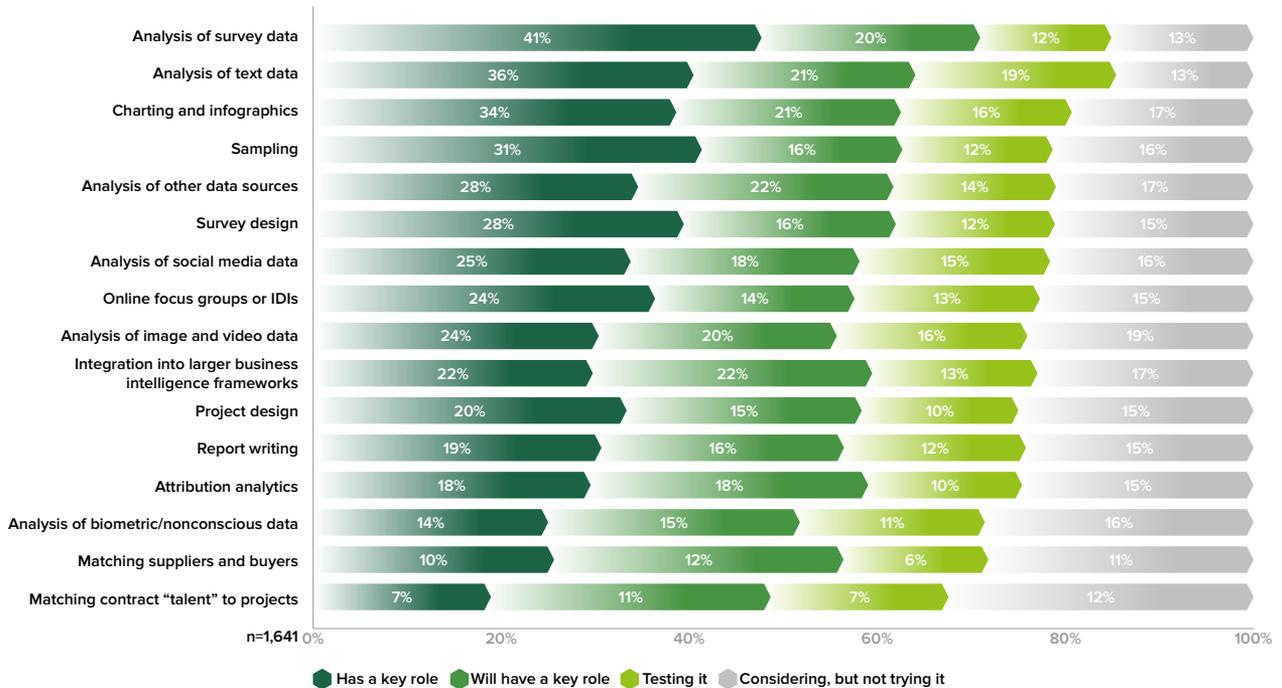


The areas of automation application that buyers are most likely to believe has or will have a key role are mainly related to analytics

AUTOMATION ADOPTION (BUYER)



AUTOMATION ADOPTION (SUPPLIER)



THE LONG ARM OF AUTOMATION

As mentioned in preceding sections of GRIT, we can't make too much of the differences between buyers and suppliers. For example, analysis of social media data is much lower for suppliers than for buyers. Why? Because suppliers are "laggards"? Because they have good sense? Or maybe it's because all insights buyers have social media users in their

markets, but not all suppliers offer analytics as a service? In the GRIT sample, 31% of suppliers say that data and analytics are a significant source of revenue for them, and 38% of suppliers see a key role for automation in analysis of social media data. It seems appropriate.

In the GRIT sample, 31% of suppliers say that data and analytics are a significant source of revenue for them, and 38% of suppliers see a key role for automation in analysis of social media data



ADOPTION OF AUTOMATION (BUYER, SUPPLIER)

	% Has/will have a key role		Rank	
	Buyer (n=612)	Supplier (n=1,641)	Buyer	Supplier
Analysis of social media data	54%	38%	1	9
Analysis of survey data	51%	36%	2	1
Analysis of other data sources	49%	43%	3	4
Charting and infographics	48%	44%	4	3
Analysis of text data	48%	44%	5	2
Integration into larger business intelligence frameworks	42%	44%	6	7
Attribution analytics	39%	22%	7	11
Analysis of image and video data	35%	50%	8	8
Sampling	32%	18%	9	5
Survey design	32%	57%	10	6
Online focus groups or IDIs	30%	30%	11	10
Analysis of biometric/nonconscious data	28%	62%	12	14
Report writing	26%	36%	13	12
Project design	25%	35%	14	13
Matching suppliers and buyers	15%	47%	15	15
Matching contract "talent" to projects	15%	55%	16	16

Green highlighting indicates the top five areas for automation.



THE RISE OF AI, REDEFINED: WHAT'S NEXT FOR INSIGHTS TECHNOLOGY

Pri Carr

GM, Momentive (formerly SurveyMonkey)

Website: momentive.ai

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

I've been able to watch the growth of automation and AI in research technology firsthand in my seven years at Momentive, especially in my role leading corporate development for the company.

Today, researchers report that automation is commonly leveraged during data analysis. The most recent GRIT data shows twice as many research buyers say automation has a key role in analysis of survey data (31%) than either survey design (16%) or sampling (15%).

It makes sense to start with automating data analysis—it's the most tedious part of doing research, but automation can do so much more. Research methods that are easily templated, like concept and creative testing, benefit from survey design automation, and online panels are integrating with insights platforms via APIs to enable automatic fielding with just a few clicks. You'll start to see automation play a larger role across the entire research process as more purpose-built solutions, like those at Momentive, enter the market and gain traction.

Is automation the cure for poor quality?

Most respondents agree that adopting automation will enable researchers to complete projects faster (63%), do more with less (57%), and even gain a competitive advantage (56%). It surprises me to see that researchers are much less likely to say that automation will enable better quality research, granted suppliers (49%) were more optimistic than buyers (40%).

Automation is one of our largest combatants of poor data quality, including:

- Standardizing question structure for more accurate benchmarking and comparisons
- Detecting bots, fraud, and duplicate sign-ups in panel recruiting
- Evaluating response quality by flagging speeding, straightlining, gibberish, profanity, etc.
- Eliminating human computational error in data analysis

What we can't ignore, however, are all of the human decisions that need to be made during the research process: aligning research goals

to business goals, knowing what to ask, targeting the right sample, and ultimately packaging up findings in a way that leads to impactful decisions. So, while automation can't ever fully replace what we do as researchers, it can certainly enhance the quality of our output.

The rise of AI, redefined.

At Momentive, AI has been a focal priority over the last few years. We've hired data scientists, built a proprietary machine learning model using our predictive algorithm that integrates tightly with our solutions—all in the name of getting our customers to meaningful insights faster.

You may know AI as "artificial intelligence," but our AI technology at Momentive is anything but artificial. It is deeply human and authentic -- each month, there are more than 150 million predictions completed on our platform, drawing from the 25 million questions answered every single day. Each answer represents an individual human perspective, amplified by technology.

AI is the future—think of it as automation on steroids—and you'll see it show up in many ways throughout our insights platform should you choose to leverage it.

- Our Answer Genius detects the kind of question you are asking and auto-fill a set of pre-written answer choices proven to capture unbiased data.
- Our industry-leading sentiment analysis uses natural language processing to categorize the responses to your open-ended questions as positive, negative, or neutral.
- And our AI-powered insights engine quickly reveals meaningful trends beneath the surface that you may have missed on your own—like specific demographics where ads scored particularly well or which cohort is driving down your brand perception.

What I just described just scratches the surface. Soon, AI will be more than a buzzword, it'll come to be expected in your research technology. Don't mistake us: AI won't replace the work you're doing as strategic researchers, but it will augment, accelerate, and scale your ability to quickly make an impact in your organization. That's the power of authentic intelligence.

Across our five “big bucket” supplier types, all of them have analysis of survey data and charting and infographics in their top five. All but field services providers have analysis of text data in their top five, and all but field services and technology providers have analysis of “other” data sources in their top five. Field services and technology providers have integration into the larger business intelligence framework in their top five. Field services providers

also have survey design in their top five, but they are barely ahead of full service research providers and strategic consultancies and behind data and analytics and technology providers. Field services providers average only 5.6 areas that have or will have a key role, and strategic consultancies only average 5.8. Data and analytics providers average 7.7 while technology providers average the most, 8.4.

ADOPTION OF AUTOMATION BY PROFESSIONAL FOCUS (SUPPLIER, % HAS/WILL HAVE A KEY ROLE)

	All suppliers (n=1,641)	Full service research (n=637)	Field services (n=101)	Strategic consulting (n=391)	Data & analytics (n=240)	Technology (n=268)
Analysis of survey data	62%	60%	50%	54%	64%	81%
Analysis of text data	57%	55%	40%	51%	62%	72%
Charting and infographics	55%	53%	46%	44%	66%	70%
Analysis of other data sources	50%	48%	39%	49%	56%	56%
Sampling	47%	42%	52%	36%	60%	64%
Survey design	44%	39%	41%	35%	55%	63%
Integration into larger business intelligence frameworks	44%	37%	41%	37%	51%	65%
Analysis of image and video data	44%	41%	36%	39%	52%	54%
Analysis of social media data	43%	44%	33%	46%	40%	41%
Online focus groups or IDIs	38%	36%	36%	36%	39%	45%
Attribution analytics	36%	32%	25%	32%	48%	46%
Report writing	36%	35%	34%	28%	38%	47%
Project design	35%	29%	34%	30%	46%	51%
Analysis of biometric/nonconscious data	30%	31%	18%	29%	36%	30%
Matching suppliers and buyers	22%	18%	23%	16%	33%	31%
Matching contract “talent” to projects	19%	17%	16%	15%	26%	24%
Average number of areas with key role	6.6	6.2	5.6	5.8	7.7	8.4

Green highlighting indicates the top five areas for automation.

CHANGES IN AUTOMATION ADOPTION

GRIT has covered automation adoption in 17W1, 18W1, 20W1, and 21W1. In 2018, this was planned as a bi-annual topic, but the events of 2020 made us think we should ask it again this year. In order to track back to 17W1, we need to backtrack in our

methodology to retrofit to how the question was asked prior to 20W1. We changed the structure of this question in 20W1 as noted below. For the reasoning behind this, see the 2020 GRIT Business & Innovation Report.

Wave(s)	17W1 & 18W1	As of 20W1
Question(s)	How are you currently using automation to address these research functions, or which do you see ahead in your future?	<ul style="list-style-type: none"> In your organization, which best describes how automation affects each of these activities? In your organization, which best describes how automation is or could be used for each of the following?
Response Choices	Already have adopted widely	Has a key role
	–	Will have a key role
	Exploring pilot use cases	Testing it
	Thinking about it but have not tried it	Considering, but not trying it
	Not sure	Not considering it
	Not applicable to our organization	Not applicable to us

Admittedly, the old version wasn't exactly a clean measure of adoption because it defined adoption as "already have adopted widely" plus "exploring pilot use cases," and it seems like "piloting" isn't really "adopting" and that there is something missing in between the two. Also, "already have adopted widely" seems kind of awkward.

The new version doesn't get at adoption precisely either, but it doesn't leave a gap. It asks whether it "has a key role" (meaning it is already adopted and accepted) or whether it "will have a key role" (you are confident you will use it – may or may not have adopted already), then offers choices of testing, considering, not considering and not applicable. Ideally, we would have split "will have a key role" in two to reflect already in-house versus likely to be, but we are already pushing the envelope for a number of answer choices.

Tracking "has a key role" and "will have a key role" is more consistent with how GRIT tracks other topics areas, which report overall interest. In the context of automation, we will consider this as "adoption," and you can tack on the modifier "current and likely" if you prefer.

In the past year, buyer interest in automation has spiked across seven areas:

- Attribution analytics
- Analysis of biometric/nonconscious data
- Analysis of image and video data
- Analysis of text data
- Integration into larger business intelligence frameworks
- Analysis of social media data
- Charting and infographics

In the past year, buyer interest in automation has spiked across seven areas



It has also dropped in two areas, project design and survey design. On the other hand, supplier interest has spiked in one area, analysis of social media data, and dropped in three areas: project design and survey design, same as buyers, and report writing, which was never much of an attraction for buyers. In the six areas that spiked for buyers and not for suppliers, suppliers were already at least 6% ahead of

buyers, so these might represent catch-up numbers. In the lone area that spiked for both, analysis of social media data, suppliers had trailed buyers in interest by 11%, so that is also a catch-up. Overall, the trends look consistent across buyers and suppliers, which suggests these seven areas may have staying power.

AUTOMATION INTEREST OVER TIME (BUYER, SUPPLIER)

Has/Will have	Buyer			Supplier		
	Has/will have a key role		Change	Has/will have a key role		Change
	20W1	21W1	21W1 – 20W1	20W1	21W1	21W1 – 20W1
n	366	602		1,615	1,593	
Attribution analytics	28%	39%	+11%	35%	36%	+2%
Analysis of biometric/nonconscious data	18%	28%	+10%	29%	30%	+1%
Analysis of image and video data	26%	35%	+9%	44%	44%	0%
Analysis of text data	39%	48%	+9%	54%	57%	+2%
Integration into larger business intelligence frameworks	34%	42%	+8%	40%	44%	+4%
Analysis of social media data	47%	54%	+8%	36%	43%	+7%
Charting and infographics	41%	48%	+7%	54%	55%	+1%
Analysis of other data sources	47%	49%	+2%	49%	50%	+1%
Matching suppliers and buyers	14%	15%	+2%	22%	22%	0%
Matching contract “talent” to projects	13%	15%	+1%	20%	19%	-2%
Analysis of survey data	50%	51%	0%	61%	62%	1%
Report writing	26%	26%	0%	42%	36%	-6%
Online focus groups or IDIs	32%	30%	-2%	38%	38%	0%
Sampling	34%	32%	-2%	49%	47%	-1%
Project design	31%	25%	-6%	43%	35%	-7%
Survey design	38%	32%	-7%	51%	44%	-7%

Rows are sorted by buyer change.

Green highlighting indicated increases of 5% or more; red highlighting indicates decreases of 5% or more.

Next, we'll discuss the retrofitted results so we can look back on 18W1 and 17W1. *SPOILER ALERT* most of these results seem muted or negative compared to results from the newer measures we just reviewed. That doesn't necessarily make the newer metric better, but the newer metric is more consistent with the other findings in practically every section of this report.

Among buyers, the top five areas for automation adoption – “adopted widely” or “piloting” – are the same as in 20W1. And in 18W1 they're in a different order, at least. The biggest changes in rank order from 20W1 are analysis of image and video

data, which moved up to #7 from #10, and survey design, which dropped from #5 to #9. Nothing else changed by more than two positions.

Analysis of social media increased 4% (to 50%) as did charting and infographics (to 42%). Nothing else increased by more than 1%.

Several areas declined, led by survey design (-8% to 30%), sampling (-7% to 27%), and project design (-7% to 23%). Analysis of survey data dropped 4% to 47%, analysis of “other” data sources dropped 3% to 39%, and report writing also dropped 3% to 22%.

AUTOMATION ADOPTION OVER TIME (BUYER)

	% Adopted widely or piloting		% Has/will have key role or testing		Change		Rank		
	17W1	18W1	20W1	21W1	20W1 – 18W1	21W1 – 20W1	18W1	20W1	21W1
n	647	981	366	602			981	366	602
Analysis of social media	59%	55%	46%	50%	-9%	+4%	1	2	1
Charting and infographics	51%	42%	38%	42%	-3%	+4%	4	5	4
Integration with larger frameworks	*	35%	34%	36%	-1%	+1%	6	7	6
Analysis of text data	53%	50%	45%	46%	-5%	+1%	2	3	3
Analysis of biometric/nonconscious data	26%	22%	23%	23%	+1%	+1%	13	14	12
Analysis of image & video data	37%	35%	33%	33%	-2%	+1%	7	10	7
Matching contract “talent” to projects	16%	10%	11%	11%	+1%	0%	16	16	16
Attribution Analytics	30%	22%	29%	29%	+7%	0%	13	12	10
Online focus group/IDI moderation	38%	28%	34%	32%	+6%	-2%	10	8	8
Matching suppliers & buyers	14%	13%	13%	11%	+1%	-2%	15	15	15
Report writing	28%	24%	25%	22%	0%	-3%	12	13	14
Analysis of other data sources	*	40%	42%	39%	+2%	-3%	5	4	5
Analysis of survey data	53%	45%	50%	47%	+5%	-4%	3	1	2
Project design	28%	33%	29%	23%	-4%	-7%	8	11	13
Sampling	34%	27%	34%	27%	+7%	-7%	11	9	11
Survey design	35%	32%	38%	30%	+7%	-8%	9	5	9

The rows are ranked in descending order of change since 20W1. Highlighting indicates areas ranked in the top five.

17W1 ranks omitted due to difference in list of potential areas to automate.

On the supplier side, the top five was a bit less stable than for buyers. Analysis of text data, charting and infographics, and analysis of survey data have been in the top five in each wave since 18W1. Sampling entered the top five in 20W1 and remained there, while analysis of “other” data sources replaced survey design, which dropped to sixth after two waves in the top five.

Modest gains were made by analysis of text data (+4% to 55%), charting and infographics (+4% to 50%), and analysis of social media (+3% to 39%). Project design suffered a big loss (-8% to 29%), survey design dropped 5% to 40%, and matching suppliers and buyers, Attribution Analytics, and report writing each dropped 3% (to 16%, 28%, and 32% respectively).

AUTOMATION ADOPTION OVER TIME (SUPPLIER)

	% Adopted widely or piloting		% Has/will have key role or testing		Change		Rank		
	17W1	18W1	20W1	21W1	20W1 – 18W1	21W1 – 20W1	18W1	20W1	21W1
n	1,990	2,949	1,615	1,593			2,949	1,615	1,593
Analysis of text data	53%	53%	51%	55%	-2%	+4%	2	2	1
Charting and infographics	57%	54%	46%	50%	-8%	+4%	1	3	3
Analysis of social media	42%	41%	36%	39%	-5%	+3%	4	9	7
Integration with larger frameworks	*	30%	33%	35%	+3%	+2%	11	12	10
Analysis of other data sources	*	37%	42%	43%	+5%	+1%	7	6	5
Sampling	45%	36%	43%	44%	+7%	+1%	8	5	4
Online focus group/IDI moderation	36%	25%	36%	36%	+11%	0%	12	9	9
Analysis of biometric/nonconscious data	24%	21%	27%	27%	+5%	0%	13	14	14
Analysis of image & video data	36%	36%	39%	39%	+3%	0%	9	7	8
Matching contract “talent” to projects	16%	10%	16%	15%	+6%	-1%	16	16	16
Analysis of survey data	57%	53%	55%	53%	+2%	-2%	2	1	2
Matching suppliers & buyers	18%	15%	19%	16%	+3%	-3%	15	15	15
Attribution Analytics	25%	18%	31%	28%	+13%	-3%	14	13	13
Report writing	33%	32%	35%	32%	+3%	-3%	10	11	11
Survey design	43%	40%	44%	40%	+4%	-5%	5	4	6
Project design	30%	38%	37%	29%	-1%	-8%	6	8	12

The rows are ranked in descending order of change since 20W1. Highlighted areas are in the top five.

17W1 ranks omitted due to difference in list of potential areas to automate.

WHAT AUTOMATION ENABLES

Since 18W1, GRIT has asked insights professionals what capabilities automation can enable. We've added four new topics, and made a minor change to the answers, so you can consider "%Completely/Mostly Agree" to be "Top 2 Box" as far as 18W1 is concerned and move on.

The top two capabilities that automation can enable for buyers are the same in each of the three waves: completing projects and initiatives faster

AUTOMATION WILL ENABLE YOU TO...? (BUYER)

	% Completely/mostly agree			Change	Rank		
	18W1	20W1	21W1		18W1	20W1	21W1
n	981	366	619		981	366	619
Complete projects and initiatives faster	52%	62%	63%	+1%	2	1	1
Do more with less			57%				
Transform work processes throughout our organization			57%				
Access tools previously not available	54%	57%	56%	-1%	1	2	2
Gain or maintain a competitive advantage	39%	49%	56%	+7%	5	4	3
Lower our costs	50%	53%	47%	-6%	3	3	4
Take more work in-house			42%				
Deliver better quality research	40%	41%	40%	-1%	4	5	5
Lower our prices or fees			32%				

Rows sorted by 21W1.

For suppliers, the greatest expectation for automation is that it will enable them to complete projects and initiatives faster. The next tier of capabilities includes transforming work processes, gaining or maintaining a competitive advantage,

and gaining access to tools that were previously unavailable. However, two new capabilities would also be in that set for 21W1: do more with less and transform work processes. In 21W1, most buyers agree with each of those four capabilities as well as gaining a competitive advantage. Compared to 20W1, buyers are more likely to see automation as providing a competitive advantage and less likely to believe it will help them lower their costs.

doing more with less, and access to tools previously not available. Expectations did not increase since 20W1, but, like buyers, fewer believed that automation will help them lower their costs.

AUTOMATION WILL ENABLE YOU TO...? (SUPPLIER)

	% Completely/mostly agree			Change	Rank		
	18W1	20W1	21W1		18W1	20W1	21W1
n	2,949	1,615	1,581		2,949	1,615	1,581
Complete projects and initiatives faster	62%	71%	69%	-1%	1	1	1
Transform work processes throughout our organization			64%				
Gain or maintain a competitive advantage	50%	60%	62%	+2%	4	3	2
Do more with less			60%				
Access tools previously not available	56%	62%	59%	-3%	2	2	3
Lower our costs	52%	58%	51%	-7%	3	4	4
Deliver better quality research	49%	50%	49%	-1%	5	5	5
Take more work in-house			45%				
Lower our prices or fees			37%				

Rows sorted by 21W1.

The top two capabilities that automation can enable for buyers are the same in each of the three waves: completing projects and initiatives faster and gaining access to tools that were previously unavailable



Across these attitude segments, suppliers agree with buyers that the most likely capability that automation will deliver is speed



OK, so the genpop of the insights industry expects automation will most likely deliver speed and least likely lower prices or improve quality. But what do the automation movers and shakers expect? Let's look at three groups: those who say automation already plays a key role for them in at least one area, others who believe it will play a key role in at least one area, and the agnostics and naysayers.

Among buyers, the first observation is that the agnostics and naysayers are not likely candidates for automation: they have the lowest agreement

with every capability and no capability gains 50% approval. However, believe it or not, each segment has completing projects and initiatives faster among their top two capabilities. The likely adopters have the most faith that automation will deliver access to tools that were not previously available, and a similar percentage of adopters agree but even more believe in speed. The biggest difference, however, is that the adopters believe automation will be transformative for their work processes while just under half of likely adopters agree.

AUTOMATION WILL ENABLE YOU TO...? BY ATTITUDE (BUYER)

	% Completely/mostly agree			Rank		
	Has a key role	Will have a key role	Undecided or will not adopt	Has a key role	Will have a key role	Undecided or will not adopt
n	395	111	103	395	111	103
Complete projects and initiatives faster	70%	55%	44%	1	2	1
Transform work processes throughout our organization	64%	48%	41%	2	5	2
Do more with less	63%	52%	40%	3	4	3
Gain or maintain a competitive advantage	62%	54%	36%	4	3	5
Access tools previously not available	59%	63%	38%	5	1	4
Lower our costs	52%	42%	35%	6	7	6
Take more work in-house	46%	40%	29%	7	8	7
Deliver better quality research	44%	47%	21%	8	6	9
Lower our prices or fees	35%	23%	26%	9	9	8

Rows sorted by "has a key role."

Across these attitude segments, suppliers agree with buyers that the most likely capability that automation will deliver is speed. However, unlike buyers, adopters and likely adopters see eye to eye on process transformation as a top two capability,

although faith is stronger across the board for adopters. Adopters also rank gaining a competitive advantage higher than others, and they also have more faith that automation can deliver better quality, although it ranks only sixth.

AUTOMATION WILL ENABLE YOU TO...? BY ATTITUDE (SUPPLIER)

	% Completely/mostly agree			Rank		
	Has a key role	Will have a key role	Undecided or will not adopt	Has a key role	Will have a key role	Undecided or will not adopt
n	1,164	208	187	1,164	208	187
Complete projects and initiatives faster	76%	53%	43%	1	2	1
Transform work processes throughout our organization	69%	53%	40%	2	1	3
Gain or maintain a competitive advantage	68%	49%	38%	3	5	5
Do more with less	65%	50%	43%	4	3	2
Access tools previously not available	64%	49%	39%	5	4	4
Deliver better quality research	57%	28%	21%	6	9	8
Lower our costs	56%	41%	31%	7	6	6
Take more work in-house	49%	33%	29%	8	7	7
Lower our prices or fees	42%	28%	19%	9	8	9

Rows sorted by "has a key role."



EMBEDDED AUTOMATION HELPS COMPANIES DELIVER UNPRECEDENTED INSIGHTS SPEED AND AGILITY

Janice Caston

SVP, Marketing, Toluna

Email: Janice.Caston@Toluna.com | Website: tolunacorporate.com

As insights teams need to be more agile, an automated insights solution unlocks new opportunities to stay ahead. When surveyed more than half of insights professionals feel automation would enable them to gain or maintain a competitive edge, at 56%, according to the GRIT report.

Automated insights solutions inform product development, drive brand growth, and offer the consistency needed to fuel efficiency and scalability. Why is this important? Because today's market is changing faster than ever before, and with it, so are consumer behaviors and expectations.

Brands must keep their finger on the pulse of these constant shifts to remain relevant and stay competitive and are realizing automation can help. Sixty-three percent of buyers agree that automation would enable them to complete projects and initiatives faster.

Meet the modern insights professional's demands.

It stands to follow that consumer insights professionals have new and specific demands to keep up with target audiences. Aside from the struggle of ever-changing consumers, they're faced with business pressures from budget constraints to aggressive timelines and beyond.

Today's buyers agree they can access tools previously not available, at 59%. Here's what to know about their insights demands — all of which automation can deliver.

Speed and agility are non-negotiable.

Fast-moving projects often demand results in hours or days, and not weeks, to bring new products to market and stay competitive. Further, each project is different and likely requires customization.

Many insights professionals are supporting multiple business functions, with an average of nine under their jurisdiction, meaning crunch-time is all the time. They're expected to handle as much as possible in-house, making fast, flexible technology and real-time results a must. Pre-templated questionnaires with customization options are the fast and flexible time and resource-saver that insights professionals rely on to get studies done quickly and reliably.

Insights professionals expect value, efficiency, and support.

Doing more with less is a common expectation across industries and around the world. About 77% of insights professionals report feeling budget pressure, and more than half look to automation to drive value and efficiency. That automation becomes even more powerful when coupled with live, expert support — when and where it's needed — to further control costs.

Automation helps insights professionals save without sacrificing quality. Intuitive technology that's always being optimized frees up their time and energy so it can be invested elsewhere. This type of efficiency keeps projects manageable, on schedule, and on (or under) budget.

Scale quality and consistency are key.

Business questions must be answered at scale to keep up with today's vast global insights needs, and automation ensures that insights professionals aren't sacrificing quality for the sake of time.

Professionals rely on customization, analytics, and visualization to provide simplicity and scale to their projects, and common project and product parameters to drive scale and consistency. Best practice methodology and quality checks are baked right into the solutions for better outcomes — even on the biggest projects.

Here's how automated solutions answer industry needs.

Automation isn't one size fits all, nor is it meant to replace human knowledge and support. Not only do built-in templates and modules deliver on the speed and agility insights professionals now need, but they leverage best practices, advanced thinking, and best-in-class approaches.

From there, brands can quickly and easily customize solutions, find the right fit, and share across the company and around the world.

Embedded automation helps brands achieve faster consumer learning in a powerful and cost-effective way. An overwhelming 83% of technology suppliers agree that automation would enable users to complete projects and initiatives faster. This is the catalyst for seamless collaboration and accurate, real-time reporting on a larger scale.

Each supplier type has faith that automation will deliver speed, and it is #1 for each one except field services who rank doing more with less highest. Full service research, field services, and data analytics providers also believe process transformation will be a capability automation delivers, while strategic consultancies and technology providers rank gaining a competitive advantage more highly. Full service

research providers and strategic consultancies also rank access to tools not previously available in their top three. Each of these capabilities gains more than 50% agreement in each supplier segment, except access to tools and competitive advantage. These latter two bubble just under 50% for field services providers.

AUTOMATION WILL ENABLE YOU TO...? BY PROFESSIONAL FOCUS (SUPPLIER)

	% Completely/mostly agree					Rank				
	Full service research	Field services	Strategic consulting	Data & analytics	Technology	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	623	104	381	227	242	623	104	381	227	242
Complete projects and initiatives faster	72%	56%	60%	71%	83%	1	2	1	1	1
Transform work processes throughout our organization	64%	53%	55%	68%	77%	2	3	4	2	4
Access tools previously not available	60%	48%	55%	56%	72%	3	4	3	6	5
Gain or maintain a competitive advantage	60%	48%	56%	63%	82%	4	5	2	3	2
Do more with less	59%	58%	53%	59%	79%	5	1	5	4	3
Deliver better quality research	49%	35%	35%	55%	70%	6	8	8	7	6
Lower our costs	49%	46%	43%	57%	69%	7	7	6	5	7
Take more work in-house	43%	47%	36%	45%	64%	8	6	7	8	8
Lower our prices or fees	34%	32%	33%	43%	51%	9	9	9	9	9

Rows sorted by full service research.

Green highlighting indicates an area is in the top three.

AROUND THE WORLD WITH AUTOMATION

In each global region, the top five areas of automation adoption for buyers includes analysis of social media data, analysis of “other” data sources, charting and infographics, and analysis of text data. The fifth area in Asia-Pacific and the other regions

is integration into larger business frameworks while North America and Europe include analysis of survey data. In general, regions outside of North America and Europe see more ways for automation to play a key role in insights.

In general, regions outside of North America and Europe see more ways for automation to play a key role in insights



ADOPTION OF AUTOMATION BY GLOBAL REGION (BUYER)

	% Has or will have a key role				Rank			
	North America	Europe	Asia-Pacific	Other regions	North America	Europe	Asia-Pacific	Other regions
n	468	75	45	24	468	75	45	24
Analysis of social media data	52%	53%	74%	57%	1	1	1	6
Analysis of survey data	50%	48%	54%	60%	2	2	7	3
Analysis of other data sources	47%	46%	57%	68%	3	4	5	1
Charting and infographics	45%	43%	65%	60%	4	5	2	4
Analysis of text data	45%	48%	63%	58%	5	3	3	5
Integration into larger business intelligence frameworks	42%	20%	60%	61%	6	14	4	2
Attribution Analytics	41%	23%	56%	34%	7	11	6	9
Analysis of image and video data	33%	25%	54%	51%	8	10	8	7
Sampling	33%	26%	37%	33%	9	8	12	10
Survey design	32%	30%	33%	21%	10	6	14	15
Online focus groups or IDIs	31%	22%	32%	28%	11	12	15	11
Analysis of biometric/nonconscious data	25%	26%	43%	34%	12	7	10	8
Project design	25%	22%	34%	16%	13	13	13	16
Report writing	24%	25%	46%	23%	14	9	9	14
Matching suppliers and buyers	14%	5%	37%	23%	15	16	11	13
Matching contract “talent” to projects	14%	6%	28%	26%	16	15	16	12
Average number of areas w/key role	5.5	4.7	7.7	6.5				

Rows sorted by North America percentages.
Green highlighting indicates area is among the top five.

Suppliers across global regions share just two areas in their top fives: analysis of survey data and charting and infographics. North America, Europe, and Asia-Pacific share two more: analysis of text data and sampling. The fifth for North America and Europe is sampling, and for Asia-Pacific it's analysis

of image and video data. The other regions have three unique areas in the top five: survey design, analysis of social media data, and Attribution Analytics. Unlike buyers, suppliers across regions have similar numbers of areas for automation in mind; all are between 6.5 and 7.1.

ADOPTION OF AUTOMATION BY GLOBAL REGION (SUPPLIER)

	% Has or will have a key role				Rank			
	North America	Europe	Asia-Pacific	Other regions	North America	Europe	Asia-Pacific	Other regions
n	1,068	319	203	50	1,068	319	203	50
Analysis of text data	59%	53%	59%	46%	1	3	3	8
Analysis of survey data	59%	67%	68%	61%	2	1	1	1
Charting and infographics	55%	53%	58%	50%	3	2	4	3
Analysis of other data sources	49%	50%	60%	39%	4	4	2	12
Sampling	48%	46%	43%	46%	5	5	8	7
Integration into larger business intelligence frameworks	45%	43%	43%	34%	6	8	9	13
Survey design	44%	44%	43%	53%	7	7	10	2
Analysis of image and video data	44%	44%	45%	41%	8	6	5	10
Analysis of social media data	42%	42%	44%	48%	9	9	6	5
Online focus groups or IDIs	38%	35%	39%	47%	10	12	11	6
Report writing	35%	36%	32%	45%	11	11	14	9
Project design	35%	37%	36%	34%	12	10	13	14
Attribution Analytics	35%	32%	43%	49%	13	13	7	4
Analysis of biometric/nonconscious data	28%	30%	38%	39%	14	14	12	11
Matching suppliers and buyers	20%	22%	31%	21%	15	15	15	16
Matching contract "talent" to projects	17%	17%	26%	24%	16	16	16	15
Average number of areas w/key role	6.5	6.5	7.1	6.8				

Rows sorted by North America percentages.

Green highlighting indicates area is among the top five.

Buyers across global regions agree that automation will deliver access to tools not previously available, and those in North America, Europe, and Asia-Pacific have strong faith in its ability to deliver speed. For Asia-Pacific and other regions, however, buyers share the most agreement that it will transform

their processes. Buyers in North America, on the other hand, rank the ability to do more with less higher, while Europeans think the second most likely capability to be delivered is gaining a competitive advantage.

AUTOMATION WILL ENABLE YOU TO...? BY GLOBAL REGION (BUYER)

	% Completely/mostly agree				Rank			
	North America	Europe	Asia-Pacific	Other regions	North America	Europe	Asia-Pacific	Other regions
n	478	72	44	25	478	72	44	25
Complete projects and initiatives faster	60%	68%	72%	73%	1	1	2	5
Do more with less	56%	57%	62%	65%	2	4	5	6
Access tools previously not available	53%	58%	65%	76%	3	3	3	2
Gain or maintain a competitive advantage	53%	58%	65%	76%	4	2	4	3
Transform work processes throughout our organization	52%	53%	82%	84%	5	5	1	1
Lower our costs	44%	46%	59%	75%	6	6	6	4
Take more work in-house	41%	38%	49%	50%	7	7	7	8
Deliver better quality research	40%	31%	47%	58%	8	9	9	7
Lower our prices or fees	29%	35%	48%	39%	9	8	8	9

*Rows are sorted by North America.
Green highlighting indicates area is in top three.*

Buyers across global regions agree that automation will deliver access to tools not previously available



Around the globe, suppliers tend to agree more than buyers about the capabilities of automation. Each region believes in speed and process transformation. Europe, Asia-Pacific, and the other regions also have

gaining a competitive advantage in their top three. North America uniquely has the ability to do more with less third, although the level of agreement is similar in each region.

AUTOMATION WILL ENABLE YOU TO...? BY GLOBAL REGION (SUPPLIER)

	% Completely/mostly agree				Rank			
	North America	Europe	Asia-Pacific	Other regions	North America	Europe	Asia-Pacific	Other regions
n	1,025	304	205	47	1,025	304	205	47
Complete projects and initiatives faster	70%	70%	63%	76%	1	1	1	2
Transform work processes throughout our organization	63%	65%	57%	79%	2	2	3	1
Do more with less	62%	58%	56%	60%	3	5	4	5
Gain or maintain a competitive advantage	62%	62%	59%	75%	4	3	2	3
Access tools previously not available	61%	60%	52%	64%	5	4	6	4
Lower our costs	53%	46%	55%	49%	6	6	5	8
Deliver better quality research	48%	45%	52%	57%	7	7	7	7
Take more work in-house	45%	41%	43%	59%	8	8	8	6
Lower our prices or fees	40%	31%	37%	39%	9	9	9	9

*Rows are sorted by North America.
Green highlighting indicates area is in top three.*

THE BIG PICTURE

Throughout this report, we have speculated that the unprecedented challenges of 2020 have forced a kind of reckoning during which buyers and suppliers have had to define their roles more crisply and the bare necessities have come into sharp relief against the background of “nice to haves.” With respect to automation, it may be that the industry has crystallized around seven areas to automate: Attribution Analytics, analysis of biometric/nonconscious data, analysis of image and video data, analysis of text data, integration into larger business intelligence frameworks, analysis of social media data, and charting and infographics. In each of the areas, the gap between supplier and buyer acceptance converged or narrowed.

The universally acknowledged benefit of automation is the ability to execute projects and initiatives faster. Buyers and suppliers seem to have the least faith in its ability to lower costs or improve the quality of results. There are strong quorums within the industry that believes automation will be transformative with respect to processes throughout their organizations. Significant groups believe it will give them a competitive advantage while others believe it will enable them to do more with less.

We consistently see that buyers and suppliers have increased their tech spending – even those who say COVID-19 had a negative impact on it. Whether in analytics, visualization, or process transformation, the long arm of automation has stretched across the globe and into businesses of all kinds and is likely to keep stretching.

The universally acknowledged benefit of automation is the ability to execute projects and initiatives faster





HARNESSING THE TRUE POWER OF AUTOMATION

Kandice Coltrain

VP of Global Sales, aytm

Email: kandice@aytm.com | Website: aytm.com

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

Both buyers and suppliers agree that automation platforms play a key role in helping them complete projects and initiatives faster, gain access to previously unavailable tools, do more with less, transform work processes, and gain a competitive advantage.

For late adopters of automation technology, we've heard more than a few myths about its perceived limitations, but here are the realities of what's possible when you inject automation into your research process.

1. Automation Allows You to Do More with Less

Tapping into an automation platform doesn't always mean you're on your own. By partnering with the right provider, you can enjoy access to a team of people that act as an extension of your research team, helping you to build out and establish key processes with minimal time investment from your stakeholders.

Opt for a supplier with a flexible service model that allows you to move between DIY, assisted DIY, and full-service as needed, helping your team complete research projects faster than ever before.

2. Automation Supports Advanced Research

Today's automation platforms are no longer plagued by tons of limitations. Instead, you can build out a survey that meets your full needs, including specialty question types and advanced methodologies.

And unlike omnibus surveys that only target gen pop, you're able to drill down to your precise target market of consumers using demographics and psychographics to get the exact insights you need.

The industry's most innovative automation platforms also offer advanced research tests, including Conjoint, MaxDiff, price testing, heatmaps, shelf tests, and much more, granting you access to previously unavailable tools.

3. Automation Can Increase Data Quality

Automation helps to reduce manual effort and eliminate human error. It doesn't necessarily replace the human component of insights, but it's a game-changer when it comes to data quality and has the potential to completely transform your QA process.

There are innovative bots and tools available that can be built into your research operations to reduce the need for manual data checks and uncover data quality issues that would be undetectable to the human eye.

So, when done right, automation can provide HIGHER quality data than traditional approaches provide.

4. Automation Gives You a Head Start

Some automation platforms come loaded with flexible and customizable templates that allow you to hit the ground running.

You also have the ability to design a study once, to your specifications, then save it as a template to use for future projects, saving you time in the long run.

This helps you create consistency across the organization so that everyone conducts research the same way across different projects or different phases of the same study.

5. Automation Let's You Become a More Integral Part of the Business

Instead of building out an extensive survey over six months, automation allows you to iterate along the way, gaining access to key insights that keep you involved in stakeholder conversations.

You become more relevant, increasing your speed to insight, and empowering you to come to stakeholder conversations with actionable data. Once stakeholders see insights are faster and easier to capture, they'll come to you with more business questions, which you can answer with quick-turn surveys.

The events of 2020 have forced buyers and suppliers to reevaluate their ability to achieve more with less. Despite the negative impacts of COVID-19, both sides have increased tech spending, and many have plans to leverage automation platforms to optimize everything from the analysis of survey and text data to charting and infographics. Expect to see automation adoption continue to grow in 2021 and beyond.

INNOVATION STRATEGY

Is “innovation” just an overhyped buzz term, or an imperative for business success? Well, one way to answer that is to measure how a focus on innovation is integrated into organizational planning. Guess what we find when we look at it that way? It is indeed a significant business priority; the question is how significant is it?

Contrary to what may or may not be popular belief, GRIT does not assume that everyone in the insights industry is obsessed with innovation. As discussed in the Organizational Success Factors section, buyers prioritize innovative focus behind business knowledge and people skills as a staff development area, and suppliers put it behind market research expertise in a pack with people skills and analytical skills. More than one-third of decision makers and influencers in each of those two groups do *not* consider it to be a key priority to develop. So, if innovation is not your “thing” or “bag,” we get it and thank you for reading this section.



The bottom line for innovation is that most buyers and most suppliers believe it is a key skill to develop, but the density of more serious advocates may have increased

We mention this because for every person who thinks that GRIT gives “innovation” too much bandwidth, there are untold multitudes who want to focus on innovation but can’t:

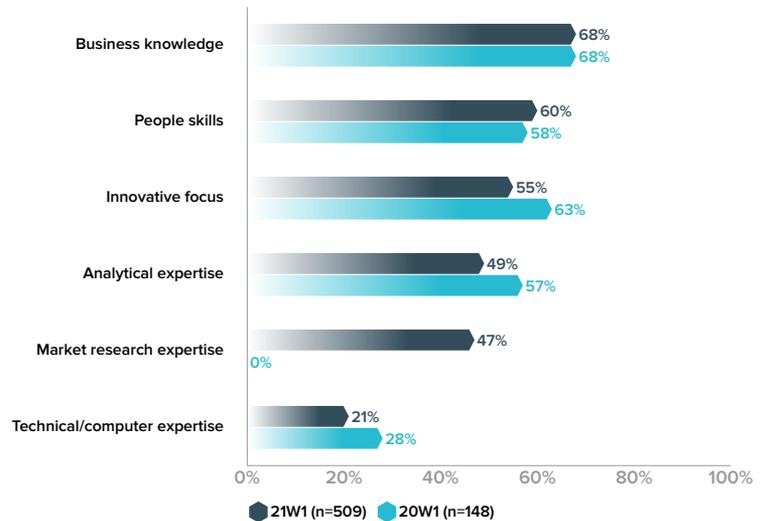
- *...we focus on NONE of these and I think that’s a major problem and I want this to change. The staff that would be in charge of this is too overworked managing day-to-day and we’re unable to do some of these things that we were more or less hired to do.*
- *We’re not doing enough and I know we need to. This is what keeps me up at night.*
- *A group of white men are given a budget to play around with stuff but it’s a completely isolated department.*

Fair point on the effectiveness of innovation departments that exist in isolation. We are obliged to point out, however, 1) that insights professionals who say that innovative focus is a key priority are 58% more likely to also prioritize socially diverse teams and 2) we don’t write the comments, we just report them.

WHO WANTS TO INNOVATE?

Compared to just before the onset of the pandemic, buyer interest in innovative focus as a skill to develop has declined, though it remains a key priority for most buyers (and is also mentioned as an unmet need, so they are indeed paying attention to this idea). The priority for analytical expertise and even technical/computer expertise, which seemed to have no place lower to fall, similarly declined while business knowledge and people skills maintained their importance. Market research expertise, benchmarked for the first time, was not a key priority for the majority of buyers. This cluster of trends is one of the clues that suggest that a significant segment of buyers drew a line between where their activities end and those of external suppliers start. This is one aspect of the “reckoning” we postulated in which different parties responded to the challenges of 2020 by establishing clear domains of activities.

HOW MUCH DOES YOUR ORGANIZATION EMPHASIZE EACH SKILL? % KEY PRIORITY (BUYER)



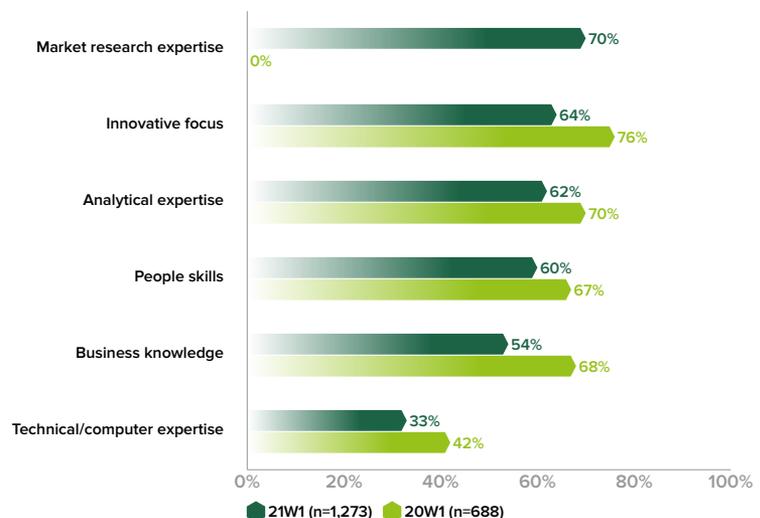
Buyer interest in innovative focus as a skill to develop has declined, though it remains a key priority for most buyers



On the other hand, supplier key priorities dropped for every skill area. While interest in developing innovative staff lessened, so did interest in everything else. As discussed earlier in this report the pandemic seemed to have forced each industry participant to separate the “must-haves” from the “nice-to-haves.” For suppliers, this meant prioritizing 2.7 of 20W1 skills instead of 3.2, which might still seem aggressive.

The bottom line for innovation is that the percentage who believe it is a key priority skill declined among buyers and suppliers, but the density of more serious advocates may have increased.

HOW MUCH DOES YOUR ORGANIZATION EMPHASIZE EACH SKILL? % KEY PRIORITY (SUPPLIER)



The buyers who care most about innovation seem to be more senior people at established companies who are focused on success over the long term

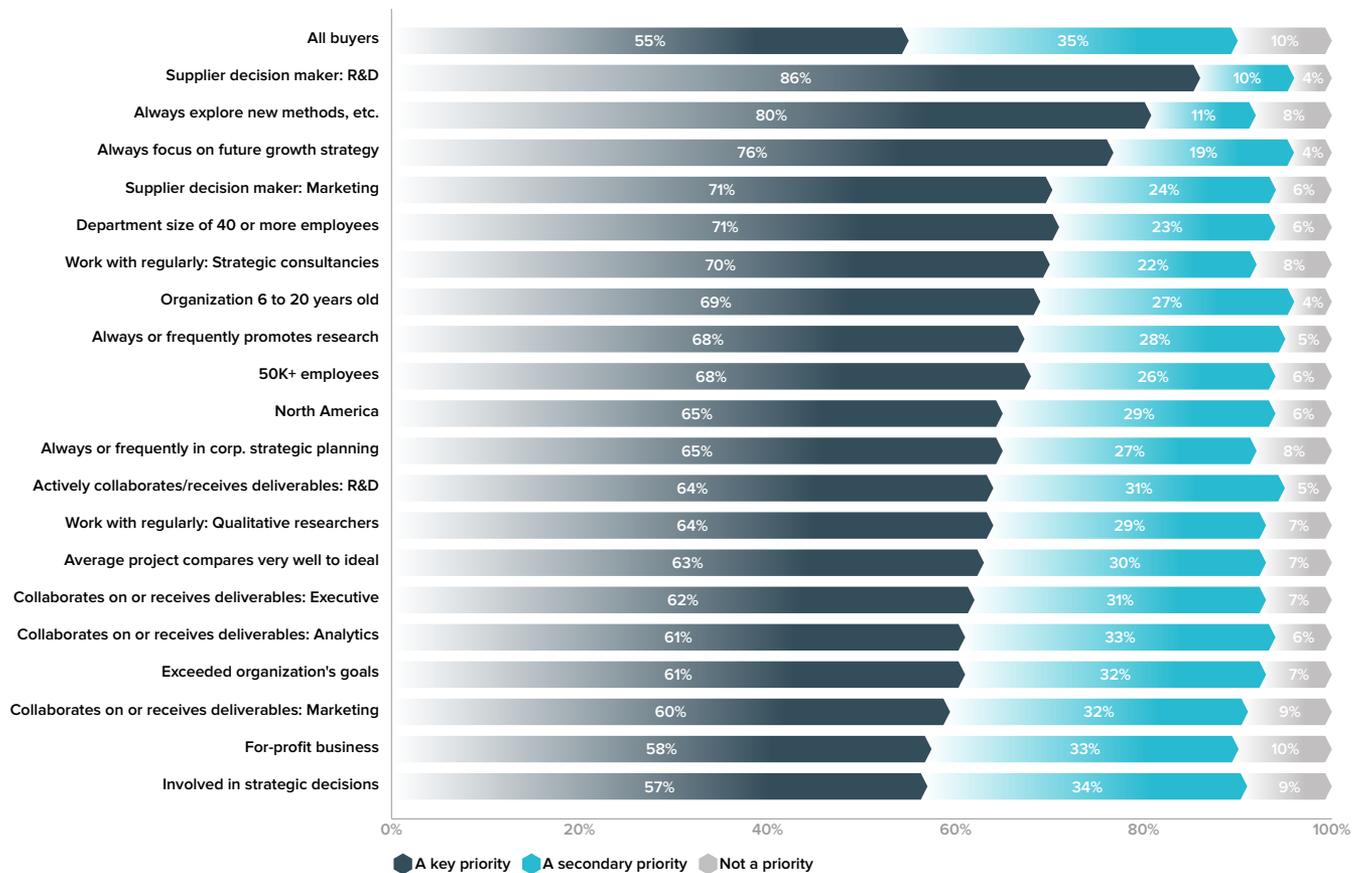


So, who are the buyers who *most* want to innovate? They tend to be from the largest companies with insights departments of 40 or more employees. Their companies are middle-aged (6 to 20 years old), the buyers are involved in strategic decisions. They are more likely to have exceeded their goals and believe their average project compares very well to their ideal.

Innovation advocates are also buyers who explore new methods and ways of doing things,

focus on growth strategy, actively promote their work to appropriate audiences, and are involved in corporate strategic planning. They include those who work regularly with strategic consultancies and qualitative researchers, and marketing and R&D frequently decide which suppliers or methods to use. In short, the buyers who care most about innovation seem to be more senior people at established companies who are focused on success over the long term.

WHO IS MORE LIKELY TO MAKE INNOVATIVE FOCUS A KEY PRIORITY? (BUYER)



The most avid supplier advocates are focused on providing technology or gain significant revenue from it, particularly analytical and quant data collection tools and platforms. Suppliers in corporate executive management are advocates as well as those with five years or less experience working in insights. They come from mid-sized companies, 21 to 500 employees, a size range in which a lot of suppliers seemed to be finding their identities in 2020 as we discussed in the Industry Scope section.

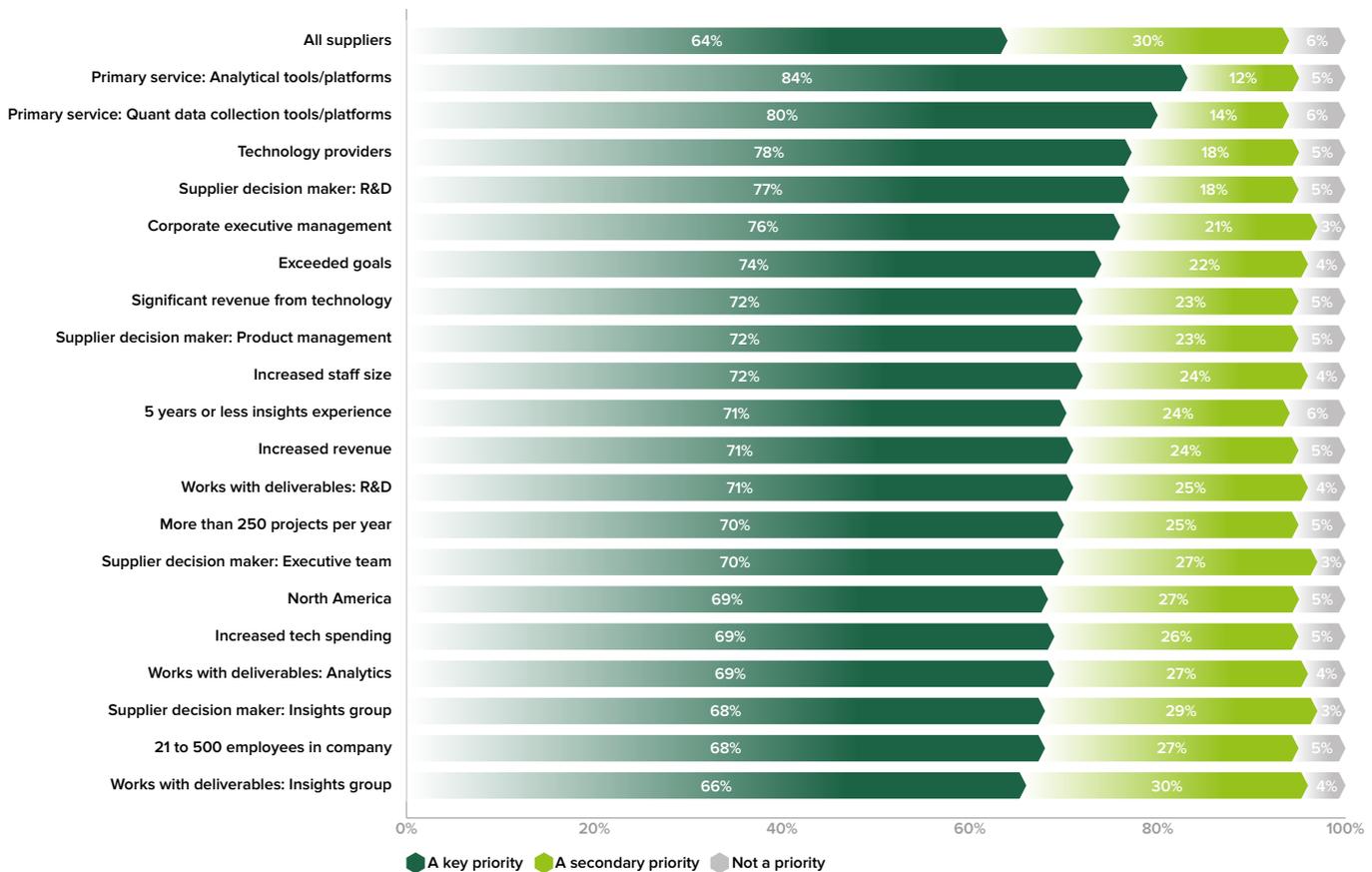
They are successful: their companies exceeded their goals, grew revenue, increased tech investment,

and hired more staff. On average, they conduct more than 250 research projects per year. The 'best practices' they follow are too numerous to mention here. They are hired by R&D, product management, and executive management teams, and R&D is a user of their deliverables. In short, suppliers who prize innovation tend to be up-and-coming, successful technology-related businesses that have significant dealings with clients who have long range, strategic responsibilities.

Suppliers who prize innovation tend to be up-and-coming, successful technology-related businesses that have significant dealings with clients who have long range, strategic responsibilities



WHO IS MORE LIKELY TO MAKE INNOVATIVE FOCUS A KEY PRIORITY? (SUPPLIER)



As a quick reality check, let's remember that most buyers and suppliers say that developing innovative focus is a key priority for their staff, and 90% or more say it is at least a secondary priority. These

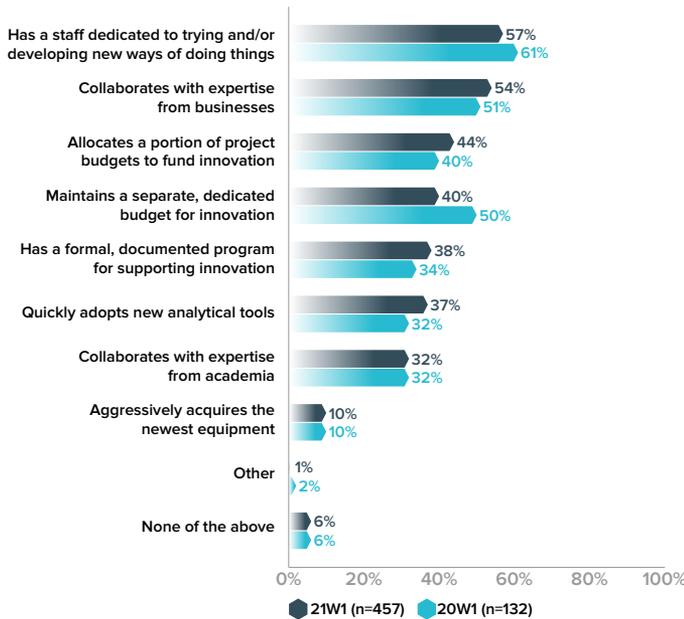
thumbnail sketches of buyers and suppliers who are the strongest advocates do not describe everyone who wants to be more innovative, but they may represent the innovation leaders.

INVESTMENT IN INNOVATION

Narrowing our focus to the 90%+ who see innovative focus as at least a secondary priority, we find that most buyers and suppliers dedicate a staff to trying or developing new ways of doing

things and that most collaborate with experts from businesses. Among suppliers, most also quickly adopt new tools or methods; over one-third of buyers take this approach, too.

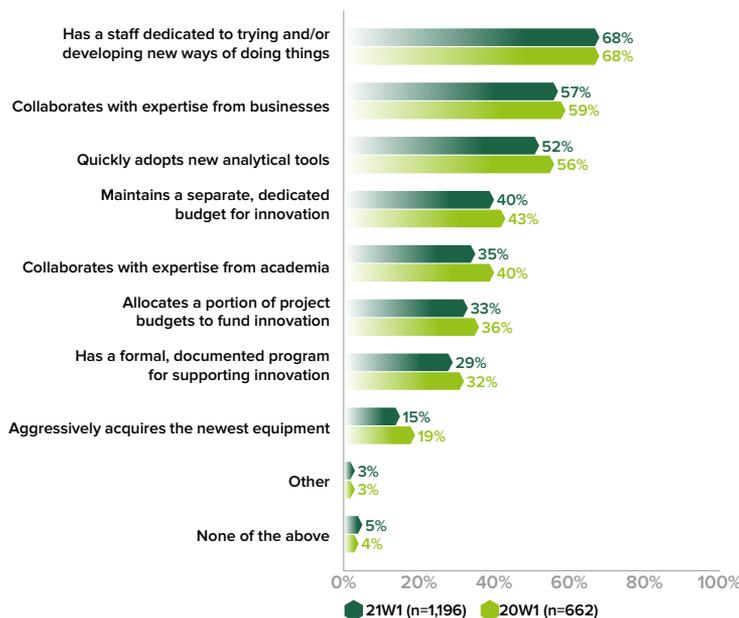
HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY WAVE (BUYER)



Around 40% of buyers allocate portions of project budgets to fund innovation (44%), maintain a separate budget for it (40%), and/or have a formal, documented program for supporting it (38%). Among suppliers, the same proportion maintains a separate budget (40%), but somewhat fewer allocate portions of project budgets (33%) or have a formal, documented program to support innovation (29%). About one-third of buyers and suppliers invest in innovation via collaboration with academic experts.

The popularity of these types of investments remains close to their 20W1 levels. However, maintaining a separate budget has dropped 10% for buyers (from 50%). There was a moderate increase (5%) among buyers for quickly adopting new analytical tools (to 37%).

HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY WAVE (SUPPLIER)



Some GRIT readers have questioned whether it is possible that most buyers and suppliers “dedicate” staff to innovation as opposed to “designating” certain people to be responsible for it from time to time. About half of those who say they dedicate staff also maintain a separate budget for innovation, including 50% of buyers and 52% of suppliers. Among buyers, about half who say they dedicate a staff also have a formal innovation program (48%) while only 37% of suppliers who dedicate staff have a formal program. Overall, 29% of buyers dedicate both staff and budget, 27% have both dedicated staff and a formal program, and 23% have both a dedicated budget and formal program. Among suppliers, 35% have both dedicated staff and budget, 26% have both dedicated staff and a formal program, and 21% have both a dedicated budget and a formal program. So, if we want a more conservative working estimate of how common it is to have staff fully dedicated to innovation, let’s put it at about 20% of buyers and suppliers.

INVESTING IN INNOVATION

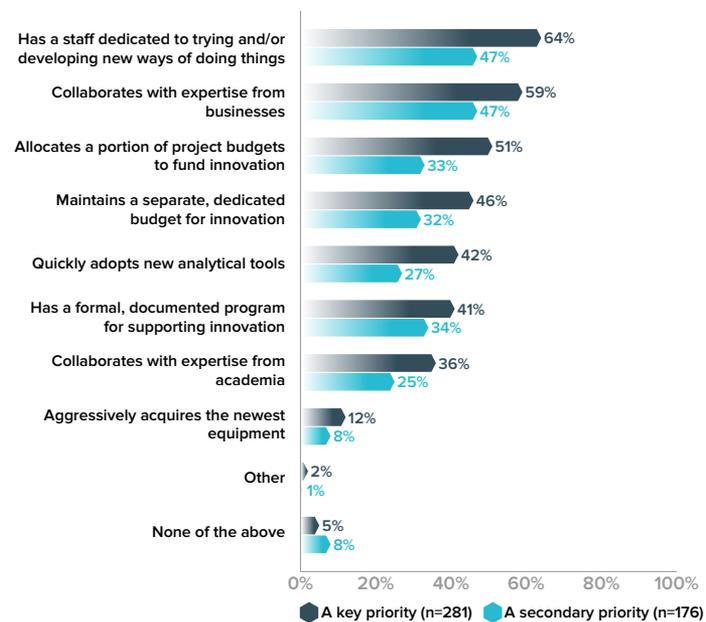
	% Who invest in innovation this way		Rank	
	Buyer	Supplier	Buyer	Supplier
n	457	1,196	457	1,196
Has a staff dedicated to trying and/or developing new ways of doing things	57%	69%	1	1
Collaborates with expertise from businesses	54%	58%	2	2
Allocates a portion of project budgets to fund innovation	44%	34%	3	6
Maintains a separate, dedicated budget for innovation	40%	41%	4	4
Has a formal, documented program for supporting innovation	38%	31%	5	7
Quickly adopts new analytical tools	37%	54%	6	3
Collaborates with expertise from academia	32%	37%	7	5
Aggressively acquires the newest equipment	10%	16%	8	8
Other	1%	3%	9	9
None of the above	6%	5%		
Average number of initiatives	3.2	3.4		

*Rows are sorted by buyer.
Green highlighting indicates top 3 initiatives.*

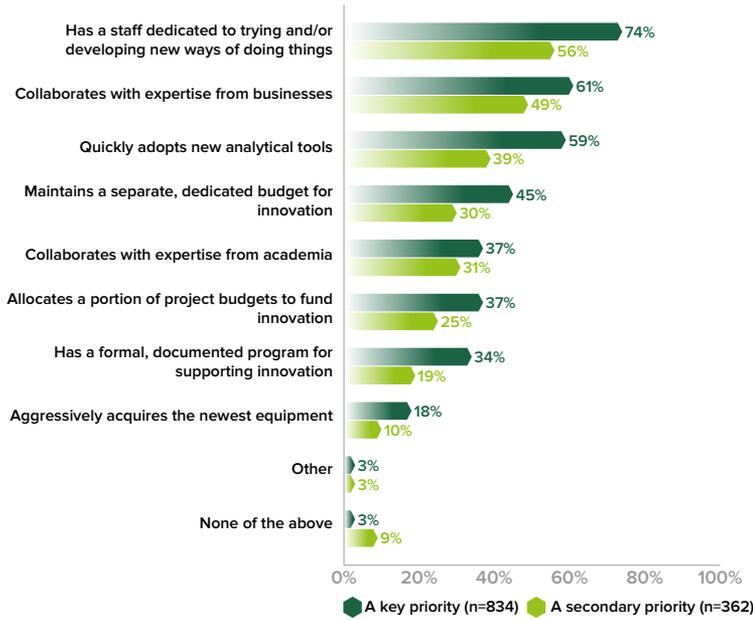
Comparing those for whom innovative focus is a key priority to those for whom it is only secondary may reveal which investments are more effective. Among both buyers and suppliers, those who make innovation a key priority invest in one additional area, on average, than those who consider it to be secondary. For buyers, the gap is 3.6 areas to 2.6, and for suppliers, it is a nearly identical 3.7 to 2.7.

The biggest gaps for buyers are allocating portions of project budgets (+18%), dedicating staff (+17%), quickly adopting new tools (+15%), and maintaining a separate budget dedicated to innovation (+14%). The narrowest gaps are aggressively acquiring the newest equipment (+5%), which very few do, and having a formal documented program (+6%), which more than one-third in each group do. The key takeaway may be that a formal, documented program may not be very effective if there is no plan to fund it.

HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY INNOVATIVE FOCUS PRIORITY (BUYER)



HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY INNOVATIVE FOCUS PRIORITY (SUPPLIER)



For suppliers, the biggest gaps are quickly adopting new tools (+19%), dedicating staff (+18%), maintaining a separate, dedicated budget and having a formal, documented program (+15%). The narrowest gaps are for collaborating with expertise from academia (+6%) and aggressively acquiring the newest equipment (+9%). The key takeaway is similar to the one for buyers, and the difference may be that formal programs among suppliers might have a bit more rigor than the average buyer innovation program since the presence of one is also a gap.

Most buyers with 10,000 or more employees invest by dedicating staff, collaborating with experts from business, allocating portions of project budgets, and maintaining a separate, dedicated budget. For buyers

with between 500 and 10,000 employees, dedicating staff is the only investment made by a majority, and there is no investment that is made by a majority of smaller buyers.

HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY EMPLOYEE SIZE (BUYER)

	All Buyers	500 or fewer employees	501 to 9,999 employees	10,000 or more employees
n	457	112	134	211
Has a staff dedicated to trying and/or developing new ways of doing things	57%	43%	55%	66%
Collaborates with expertise from businesses	54%	45%	47%	63%
Allocates a portion of project budgets to fund innovation	44%	33%	37%	53%
Maintains a separate, dedicated budget for innovation	40%	26%	33%	52%
Has a formal, documented program for supporting innovation	38%	26%	36%	45%
Quickly adopts new analytical tools	37%	31%	36%	39%
Collaborates with expertise from academia	32%	25%	29%	37%
Aggressively acquires the newest equipment	10%	14%	7%	11%
Other	1%	0%	2%	2%
None of the above	6%	10%	6%	4%

Rows are sorted by all buyers.



INNOVATION STRATEGY

Bob Fawson

EVP, Business Operations, Dynata

Email: Bob.Fawson@Dynata.com | Twitter: [@bobfawson](https://twitter.com/bobfawson) | Website: www.dynata.com

LinkedIn: www.linkedin.com/in/bob-fawson-2590168/

Most everything took a hit in 2020, companies tightened their belts and concentrated on the core, cutting costs at the periphery. Understandable maybe, but was it smart?

The GRIT Report highlights a reduction in focus or emphasis on innovation, in both the buyer side and supplier side. On the buyer side, at least, that contrasted with unshifting views on the importance of people skills and business knowledge. So, for some, innovation is on the periphery.

It could have been worse I guess, at least over half of companies, on both sides, have Innovation focus as a key priority.

And that seems strange to me, all businesses ought to have innovation focus as a key priority. Because innovation is not some eureka moment coming from some “skunk works” hiding deep in the basement sucking up hard earned sales dollars. Innovation is just improvement in business process. In an ideal world that is better, faster, and cheaper. In a pragmatic world you will take two out of three.

It does not even have to be a major change. You can employ the marginal gains technique made famous by Sir Dave Brailsford, performance director of British cycling. As he said “If you break down every little aspect of cycling and improve each by 1%, the final result would be significantly different.” For “cycling”, read “your business’s processes”. And this requires every team member to review what they do and why, be open to experiment with it and receptive to change – as long as it is an improvement: better, faster, or cheaper.

When you think about the long history of market research there has not been many real paradigm shifting innovations that came from within the industry. We moved from in-person interviewing to telephone interviewing and then to online interviewing. On the better, faster, cheaper yardstick both were innovations – yet neither the telephone nor the internet was invented by market researchers. And indeed, their adoption by the industry was painfully slow.

While there has been no end of revolutionary, innovative approaches to market research problems these have tended to remain niche or become “blackbox solutions”. Innovations that became commonplace within market research have been fewer and further between. Random Digit Dialling was a product no other business needed or wanted. It was faster, cheaper, and better than directory-based sampling. In our more modern online world, we can look at routers as an innovation: cheaper and faster sampling, better for the participant experience.

So, what should an innovation strategy consist of?

Strategy needs buy-in. And that is in your corporate culture. You never know where the next good idea is coming from, and good ideas need to be implemented.

It also needs Focus. What really drives your business success? For us it is the participant experience, activity levels and longevity. Every potential innovation needs to be judged against that.

And it needs velocity. Constantly seeking opportunity to improve processes and implement change, at speed.

How can we achieve velocity when we all have to focus on our day jobs? Maybe from the intelligent application of AI and machine learning. We have data, lots of it. Let’s set the machine to work, tell us what our participant possibly can’t.

How can we achieve buy-in? The key is transparency. Why did it take so long to adopt new methods as they came on-stream? Probably because suppliers and buyers were not open with each other on the benefits of change. So, before transparency must first come understanding and education, internal and external.

And focus? Without that I would say you have a bigger problem than an inability to innovate!

Across all supplier types, most dedicate staff to innovation. In all but field services, most collaborate with experts from business and quickly adopt new tools. Uniquely, most field services providers

maintain a separate dedicated budget for innovation. As might be expected, technology providers invest in innovation in the most ways, averaging 3.9, while other supplier types average 3.2 or 3.3 ways.

HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY PROFESSIONAL FOCUS (SUPPLIER)

	All suppliers	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	1,196	473	66	301	174	177
Has a staff dedicated to trying and/or developing new ways of doing things	68%	69%	65%	60%	72%	78%
Collaborates with expertise from businesses	57%	54%	49%	62%	55%	64%
Quickly adopts new analytical tools	52%	50%	37%	55%	55%	58%
Maintains a separate, dedicated budget for innovation	40%	41%	57%	33%	38%	48%
Collaborates with expertise from academia	35%	39%	20%	35%	32%	35%
Allocates a portion of project budgets to fund innovation	33%	30%	32%	33%	32%	46%
Has a formal, documented program for supporting innovation	29%	29%	36%	28%	24%	34%
Aggressively acquires the newest equipment	15%	13%	25%	15%	15%	19%
Other	3%	3%	5%	3%	1%	3%
None of the above	5%	6%	4%	5%	2%	2%

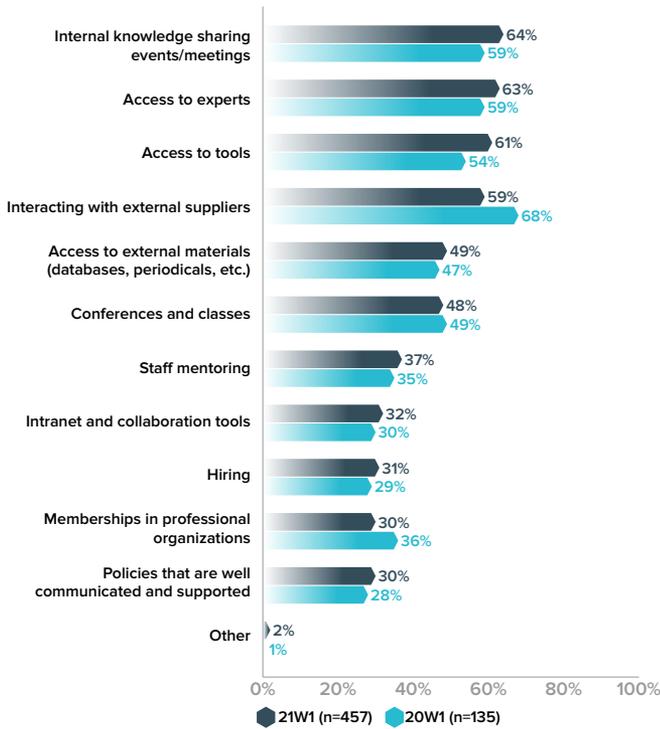
Rows are sorted by all suppliers.

CRITICAL ENABLERS OF INNOVATION

In terms of which activities are critical for developing and maintaining an innovative focus, most buyers conduct internal knowledge sharing events/meetings, provide access to experts and tools, and interact with external suppliers. In what may be another piece of supporting evidence for the “reckoning” theory, supplier interaction as a critical way to ensure innovation decreased from 68% in

20W1 to 59%, and this may have resulted from buyers spending more time with their business stakeholders while leaving suppliers to their work or from the barriers to interaction that the pandemic threw up generally. Other activities are relatively the same as last year, although there was a 6% decrease in professional memberships.

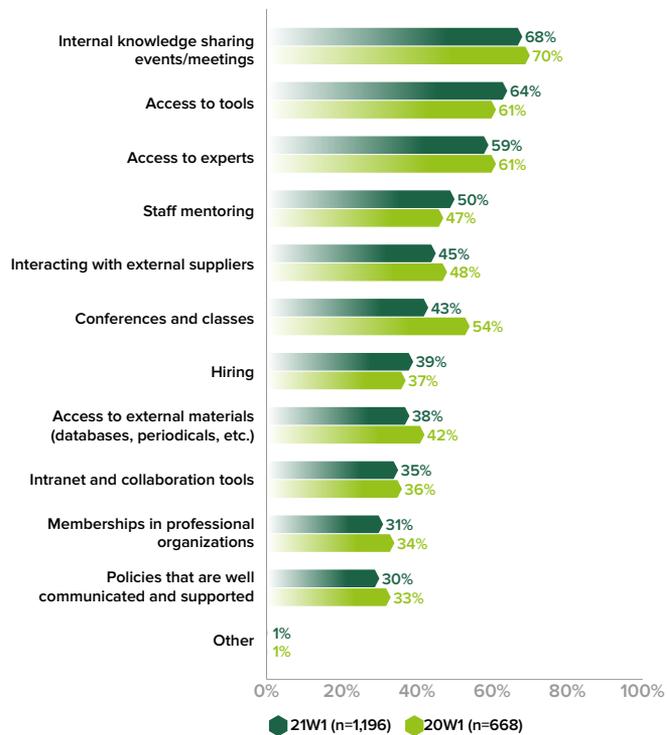
MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY WAVE (BUYER)



Most suppliers also believe that staff mentoring is critical to innovation

As with most buyers, most suppliers think it is critical to conduct internal knowledge sharing events/meetings and provide access to tools and experts. Most suppliers also believe that staff mentoring is critical to innovation. In a sign of the times, conferences and classes dropped from a majority 54% to 43% while other activities continued at similar rates as in 20W1.

MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY WAVE (SUPPLIER)



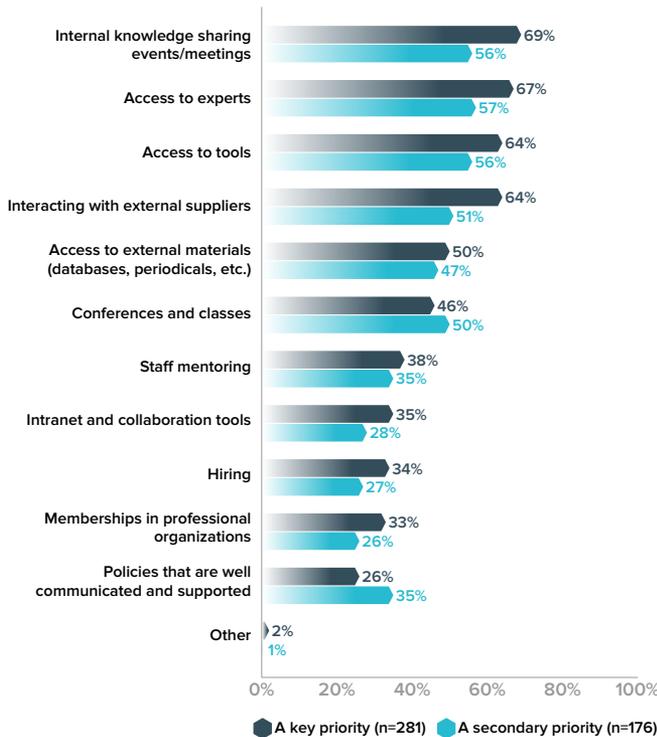
MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? (BUYER, SUPPLIER)

	% Believe critical to innovative focus		Rank	
	Buyer	Supplier	Buyer	Supplier
n	457	1,196	457	1,196
Internal knowledge sharing events/meetings	64%	68%	1	1
Access to experts	63%	59%	2	3
Access to tools	61%	64%	3	2
Interacting with external suppliers	59%	45%	4	5
Access to external materials (databases, periodicals, etc.)	49%	38%	5	8
Conferences and classes	48%	43%	6	6
Staff mentoring	37%	50%	7	4
Intranet and collaboration tools	32%	35%	8	7
Hiring	31%	39%	9	9
Memberships in professional organizations	30%	31%	10	11
Policies that are well communicated and supported	30%	30%	11	10
Other	2%	1%	12	12

Rows are sorted by buyer.

Green highlighting indicates top 3 initiatives

MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY INNOVATIVE FOCUS PRIORITY (BUYER)



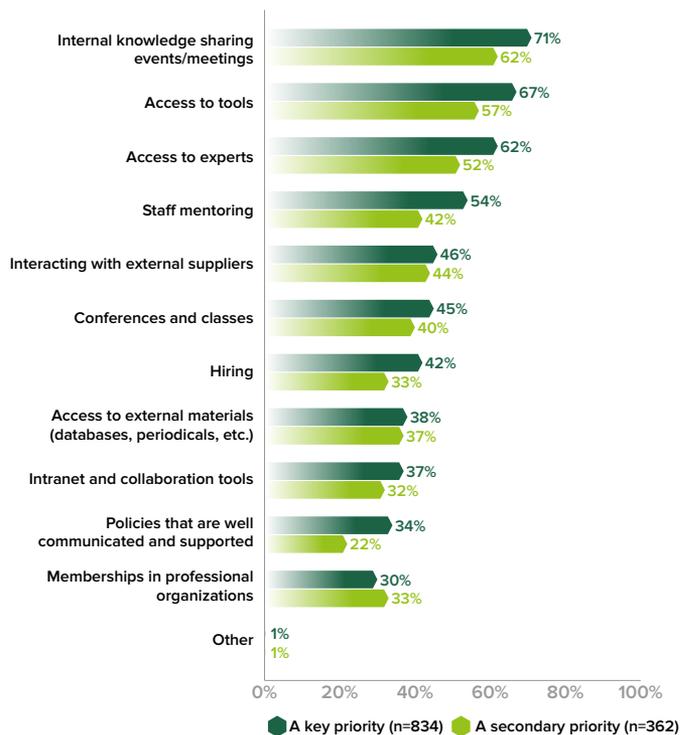
The biggest gaps between buyers who consider innovative focus a key priority and those who consider it to be secondary are internal knowledge sharing (+13%), interacting with external suppliers (+12%), and providing access to experts (+10%). For suppliers, these were staff mentoring (+13%), well-communicated policies (+11%), and access to experts and tools (+10% each). Ironically, well-communicated policies were higher for buyers who consider innovative focus a secondary priority than those who think it is key (+8%). This contrast with suppliers further suggests that supplier programs are more rigorous, on average, than buyer programs.

Most buyers at companies with 10,000 or more employees believe it is critical to conduct internal knowledge sharing events/meetings, provide access to experts and tools, interact with external suppliers, and provide access to external materials such as databases or periodicals. Most buyers at mid-size companies share these beliefs, except for how critical it is to provide access to external materials. Most of the smallest buyers think internal knowledge sharing and access to experts are critical.

This contrast with suppliers further suggests that supplier programs are more rigorous, on average, than buyer programs



MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY INNOVATIVE FOCUS PRIORITY (SUPPLIER)



MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY EMPLOYEE SIZE (BUYER)

	All buyers	500 or fewer employees	501 to 9,999 employees	10,000 or more employees
n	457	112	134	211
Internal knowledge sharing events/meetings	64%	51%	58%	74%
Access to experts	63%	59%	65%	64%
Access to tools	61%	47%	58%	70%
Interacting with external suppliers	59%	46%	53%	69%
Access to external materials (databases, periodicals, etc.)	49%	41%	46%	55%
Conferences and classes	48%	47%	46%	49%
Staff mentoring	37%	38%	31%	40%
Intranet and collaboration tools	32%	19%	34%	37%
Hiring	31%	27%	35%	32%
Memberships in professional organizations	30%	30%	28%	31%
Policies that are well communicated and supported	30%	31%	25%	32%
Other	2%	1%	3%	1%

Rows sorted by all buyers.

Most suppliers of each “big bucket” type believe internal knowledge sharing events/meetings and access to tools and experts are critical. Except for

strategic consultancies (45%), most believe that staff mentoring is critical.

MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY PROFESSIONAL FOCUS (SUPPLIER)

	All suppliers	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	1,196	473	66	301	174	177
Internal knowledge sharing events/ meetings	68%	70%	59%	64%	65%	75%
Access to tools	64%	64%	61%	63%	61%	68%
Access to experts	59%	58%	57%	64%	50%	62%
Staff mentoring	50%	51%	55%	45%	53%	54%
Interacting with external suppliers	45%	47%	48%	47%	36%	44%
Conferences and classes	43%	42%	48%	45%	45%	39%
Hiring	39%	38%	39%	36%	42%	46%
Access to external materials (databases, periodicals, etc.)	38%	39%	34%	42%	36%	32%
Intranet and collaboration tools	35%	31%	45%	31%	34%	48%
Memberships in professional organizations	31%	32%	39%	27%	32%	33%
Policies that are well communicated and supported	30%	28%	41%	25%	34%	37%
Other	1%	1%	4%	0%	1%	2%

Rows sorted by all suppliers.

RESPONSIBILITY FOR INNOVATION

Across buyers and suppliers, the most frequently named owner of the innovation program is the executive or leadership team, but there is not a lot of consensus



Where formal innovation programs exist, GRIT asked who runs it. Given that only 40% of buyers and 29% of suppliers claimed such programs, the GRIT sample sizes can get a little sparse. However, now that we have articulated that caveat, we’ll discuss the findings.

Across buyers and suppliers, the most frequently named owner of the innovation program is the executive or leadership team, but there is not a lot of consensus. The executive team is named by just 37% of buyers, followed by the head of the insights organization (34%), the Chief or Head of Innovation (31%), or someone in the R&D function

(28%). Within each size category, no owner is named by more than 45% of buyers (head of the insights organization, 10,000 or more employees) even though each buyer was allowed to name more than one. For the largest companies, the insights head is followed by the executive team (36%), R&D (34%), and the Chief or Head of Innovation (31%). For mid-sized, Chief or Head of Innovation or the executive team are most likely (34% each). At the smallest companies, it is the executive team (44%) followed distantly by R&D (24%), the Chief or Head of Innovation, and CEO/COO (23% each).

WHO LEADS INNOVATION PROGRAM? BY EMPLOYEE SIZE (BUYERS WITH A FORMAL, DOCUMENTED PROGRAM)

	All buyers with a program	500 or fewer employees	501 to 9,999 employees	10,000 or more employees
n	169	27	52	90
Executive or leadership team	37%	44%	34%	36%
Head of insights organization	34%	14%	23%	45%
Chief or Head of Innovation	31%	23%	34%	31%
R&D head/department	28%	24%	16%	34%
CMO	20%	9%	19%	23%
CEO or COO	14%	23%	10%	13%
Human resources head/department	7%	7%	4%	9%
Chief Learning Officer	4%	5%	2%	4%
Other	8%	10%	12%	5%

Rows sorted by all buyers.

For suppliers, the list of likely owners is somewhat different: the executive or leadership team is named by nearly half (49%), followed by CEO/COO (41%), the Chief or Head of Innovation (31%), and R&D (21%). By supplier type, there are only three instances of an owner being named by at least half: the executive or leadership team for data and analytics suppliers (69%) and CEO/COO for technology providers (56%) and field services (50%). For full service research

providers, the consensus owners are the executive team (48%) and the CEO/COO (43%). For strategic consultancies, it is mostly likely the executive team (48%) followed by the Chief or Head of Innovation (35%) or the CEO/COO (30%). Put simply, leadership of innovation at supplier firms tends to be embedded in the overall corporate leadership rather than in a specialized functional area, such as R&D or an independent innovation team.

Leadership of innovation at supplier firms tends to be embedded in the overall corporate leadership rather than in a specialized functional area



WHO LEADS INNOVATION PROGRAM? BY PROFESSIONAL FOCUS (SUPPLIERS WITH A FORMAL, DOCUMENTED PROGRAM)

	All suppliers with a program	Full service research	Field services	Strategic consulting	Data & analytics	Technology
n	368	172	25	94	56	70
Executive or leadership team	49%	48%	27%	48%	69%	47%
CEO or COO	41%	43%	50%	30%	30%	56%
Chief or Head of Innovation	31%	34%	22%	35%	24%	29%
R&D head/department	21%	24%	19%	14%	13%	34%
Head of insights organization	15%	13%	24%	18%	9%	16%
CMO	7%	1%	20%	6%	5%	16%
Human resources head/department	6%	5%	14%	4%	8%	7%
Chief Learning Officer	5%	5%	20%	1%	4%	4%
Other	6%	5%	9%	6%	3%	7%

Rows sorted by all suppliers.

INNOVATION STRATEGY AROUND THE WORLD

Approaches to innovation differ in different parts of the world, and we'll review them with the quick caveat that some regions have less robust sample, so please take that into consideration when you decide what to accept as fact. Most buyers in North America, Europe, and Asia-Pacific have made innovative focus a key priority, behind business knowledge and people skills. In North America, business knowledge (70%) is well ahead of people skills (59%) and innovative focus (57%), whereas in Europe and Asia-Pacific these three are more

tightly grouped, with the slight edge going to people skills. In the other regions (with a smaller sample size covering a greater area), most buyers name four skills as key priorities to develop: business knowledge (72%), analytical expertise (69%), market research expertise, and people skills (63% each) while innovative focus is fifth (42%). The takeaway for our innovation discussion is that it is a top-of-mind concern in much of the world, though not the only concern.

HOW MUCH DOES YOUR ORGANIZATION EMPHASIZE EACH SKILL? % KEY PRIORITY BY GLOBAL REGION (BUYER)

	North America	Europe	Asia-Pacific	Other regions
n	380	60	46	23
Business knowledge	70%	58%	64%	72%
People skills	59%	60%	66%	63%
Innovative focus	57%	53%	55%	42%
Analytical expertise	49%	42%	47%	69%
Market research expertise	48%	44%	37%	63%
Technical/computer expertise	21%	16%	29%	18%

Rows sorted by North America.

The takeaway for our innovation discussion is that it is a top-of-mind concern in much of the world, though not the only concern



In each region, most suppliers say each skill is a key priority except for technical/computer expertise. In North America, market research expertise (75%) and innovative focus (69%) top the shopping list, while in Europe and Asia-Pacific innovative focus (59% in each) is just behind market research expertise (65% Europe, 64% Asia-Pacific) and in a virtual tie with analytical expertise (59% and 61%, respectively). In Europe, it is also in a virtual tie with people skills (59%) and somewhat ahead of business knowledge (53%), and in Asia-Pacific innovative focus is somewhat more important than business knowledge

(54%) and people skills (53%). In the other regions, analytical expertise (79%) is the most important skill to develop, and a majority also name people skills (58%), market research expertise (57%), and business knowledge (53%). Innovative focus (45%) is at the bottom along with technical/computer expertise (44%). The key learning from our innovation discussion is that innovative focus is a top-of-mind concern for suppliers in North America, Europe, and Asia-Pacific, no more than 6% away from the top skill in any region.



WE IGNORE INNOVATION TO OUR PERIL

Rick Kelly

Chief Product Officer, Fuel Cycle

Twitter: @_rickkelly | Website: www.fuelcycle.com

LinkedIn: www.linkedin.com/in/rhkelly

G RIT 2021 survey results indicate a declining prioritization in research innovation, both on the buyer and supplier side. Even some open-ended responses indicate generalized annoyance with the topic of innovation. Despite the growing apathy toward discussions of innovation, nothing could be more important to research practitioners.

Innovation in market research is largely happening outside the traditionally defined insights industry. While industry insiders regularly have conversations about who is innovative and who is not, we may forget that innovation is happening all around us, perhaps outside the pages of the esteemed GRIT Report. The best explanation for that is that industry practitioners have misunderstood their customers' jobs to be done (JTBD).

Hopefully, all researchers are familiar with JTBD, but a quick summary is that customers "hire" a product, good, or service to fit a specific need in their life. Traditionally, businesses have hired market research firms to identify promising concepts, to optimize brand health, and to identify valuable customer segments, among other things. But there are signs that traditional research practices no longer meet businesses' jobs to be done.

Hypothetically, research utilization should increase during periods of change; business leaders need to increase awareness of customer needs, not reduce. But that's not what happened to the "traditional" research industry last year.

Consider the sheer number of changes that have appeared in the consumer landscape over the past year: COVID-19 lockdowns. 2020 US Presidential Elections. Border closures. Bitcoin boom (and bust?). US Congress authorizes reports on UFOs. Brexit finalized. Stimmy. Supply chain disasters. Record-setting venture capital investments. Inflation risk. It's no wonder Google searches including the word "unprecedented" went up nearly 7x during 2020!

In these (with awareness of its platitudinous), unprecedented times, many traditional market research companies' revenues declined in 2020, despite the need to keep up with rapidly evolving customer behavior. Perhaps it's because traditional research processes don't fit insights' buyers' jobs to be done (JTBD).

In contrast to the traditional research industry, technology-oriented insights companies largely saw their fortunes rise during 2020. In general, insights technologies enable business stakeholders like product managers, marketing associates, and decision makers to make decisions with data at high velocity. Sure, their sampling methods aren't as rigorous as a probability sample, a non-expert may not be aware of the difference between 7-point and 5-point Likert scales, and perhaps they don't come with hands-on human consultation, but they do enable businesses to get enough information to make decisions with confidence at speeds traditional processes don't enable.

The JTBD framework was pioneered by the late Clayton Christensen, who also developed disruption theory. Disruption theory and JTBD are two sides of the same coin – identifying jobs to be done staves off disruption, and vice versa. The connection between JTBD and disruption is that disruptive companies are inferior in many ways to incumbents, but they've identified a specific job to be done that is what a customer needs more than anything else.

While many incumbent businesses in financial services, healthcare, retail, and technology attempt to stave off disruption by identifying their customers' jobs to be done, legacy market research companies are decreasing their attention to their customers' jobs to be done, thus paving the way for their own disruption.

It's thus a tragedy to see declining interest in innovation. Yes, keeping up with new solutions is hard. Many inventions fail. But, fair warning, we stop caring about innovation to our own detriment. Businesses need insights more than ever, and it's up to practitioners whether they will evolve to meet customers' jobs to be done.

HOW MUCH DOES YOUR ORGANIZATION EMPHASIZE EACH SKILL? % KEY PRIORITY BY GLOBAL REGION (SUPPLIER)

	North America	Europe	Asia-Pacific	Other regions
n	840	252	147	34
Market research expertise	75%	65%	64%	57%
Innovative focus	69%	59%	59%	45%
Analytical expertise	62%	59%	61%	79%
People skills	61%	59%	53%	58%
Business knowledge	55%	53%	54%	53%
Technical/computer expertise	33%	28%	39%	44%

Rows sorted by North America.

Most buyers in each region who say that innovative focus is at least a secondary priority invest in it by dedicating staff, and, in North America, just as many collaborate with experts in business (58%). The only other investment that has a majority in any region is maintaining a separate, dedicated budget (53%) in the other regions. In Europe, collaboration with experts in business is also close to a majority (46%),

as it is in Asia-Pacific (45%), although allocating portions of project budgets is slightly higher (48%). None of the differences are statistically significant, but there are two instances where one region is more than 10% different from the others: collaborates with business experts in North America (higher) and maintaining a separate, dedicated budget in the other regions (higher).

HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY GLOBAL REGION (BUYER)

	North America	Europe	Asia-Pacific	Other regions
n	341	53	41	22
Collaborates with expertise from businesses	58%	46%	45%	43%
Has a staff dedicated to trying and/or developing new ways of doing things	57%	51%	60%	69%
Allocates a portion of project budgets to fund innovation	45%	34%	48%	44%
Maintains a separate, dedicated budget for innovation	40%	41%	36%	53%
Has a formal, documented program for supporting innovation	38%	37%	41%	34%
Quickly adopts new analytical tools	37%	32%	43%	31%
Collaborates with expertise from academia	32%	33%	38%	19%
Aggressively acquires the newest equipment	11%	9%	9%	12%
Other	1%	0%	5%	0%
None of the above	7%	9%	0%	6%
Average number of ways invest in innovation	3.2	2.8	3.3	3.1

Rows sorted by North America.

As with most buyers, most suppliers in each region who say that innovative focus is at least a secondary priority invest in it by dedicating staff to it. Most suppliers invest by collaborating with business experts in North America (59%), Europe (52%), and Asia-Pacific (59%), and most in North America and Europe quickly adopt new tools (54% in each region).

North American suppliers stand out as more likely to have a formal, documented program for innovation (34%), but are no more likely to have a dedicated budget than are suppliers in Europe (42%) or Asia-Pacific (46%), so it's not a sure thing that North American suppliers take innovation more seriously.

As with most buyers, most suppliers in each region who say that innovative focus is at least a secondary priority invest in it by dedicating staff to it



HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BY GLOBAL REGION (SUPPLIER)

	North America	Europe	Asia-Pacific	Other regions
n	800	232	132	32
Has a staff dedicated to trying and/or developing new ways of doing things	69%	72%	64%	55%
Collaborates with expertise from businesses	59%	52%	59%	44%
Quickly adopts new analytical tools	54%	54%	44%	49%
Maintains a separate, dedicated budget for innovation	39%	42%	46%	29%
Allocates a portion of project budgets to fund innovation	35%	33%	28%	29%
Collaborates with expertise from academia	35%	42%	28%	34%
Has a formal, documented program for supporting innovation	34%	25%	20%	17%
Aggressively acquires the newest equipment	17%	10%	18%	19%
Other	2%	5%	2%	0%
None of the above	5%	6%	2%	11%
Average number of ways invest in innovation	3.4	3.4	3.1	2.8

Rows sorted by North America.

Most buyers in each region believe five activities are critical to supporting innovation: providing access to experts, conducting internal knowledge sharing events/meetings, providing access to tools, and interacting with external suppliers. In North America as well as the other regions, most buyers

also believe that conferences and classes are critical. The only other activity to be deemed critical by most buyers in any region is providing access to external materials in Asia-Pacific (52%).

In North America as well as the other regions, most buyers also believe that conferences and classes are critical



MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY GLOBAL REGION (BUYER)

	North America	Europe	Asia-Pacific	Other regions
n	341	53	41	22
Access to experts	64%	52%	63%	78%
Internal knowledge sharing events/meetings	63%	69%	67%	53%
Access to tools	61%	62%	62%	60%
Interacting with external suppliers	61%	59%	50%	57%
Conferences and classes	51%	36%	35%	53%
Access to external materials (databases, periodicals, etc.)	49%	49%	52%	47%
Staff mentoring	37%	38%	37%	37%
Hiring	36%	23%	23%	13%
Memberships in professional organizations	33%	28%	21%	22%
Intranet and collaboration tools	32%	36%	31%	22%
Policies that are well communicated and supported	30%	26%	41%	12%
Other	2%	0%	2%	3%
Average number of critical activities	5.2	4.8	4.8	4.6

Rows sorted by North America.

Suppliers are a bit different from buyers. Only four activities are named by most suppliers in each region: conducting internal knowledge sharing events/meetings and providing access to tools and

to experts. Most suppliers in North America and the other regions also say staff mentoring is critical, while most in Asia-Pacific say interacting with external suppliers is critical.

MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BY GLOBAL REGION (SUPPLIER)

	North America	Europe	Asia-Pacific	Other regions
n	800	232	132	32
Internal knowledge sharing events/meetings	70%	71%	59%	53%
Access to tools	67%	55%	59%	67%
Access to experts	60%	59%	55%	63%
Staff mentoring	52%	49%	43%	52%
Conferences and classes	45%	44%	31%	43%
Interacting with external suppliers	43%	47%	52%	46%
Hiring	42%	40%	28%	32%
Access to external materials (databases, periodicals, etc.)	39%	37%	34%	34%
Intranet and collaboration tools	37%	35%	32%	26%
Policies that are well communicated and supported	35%	25%	22%	9%
Memberships in professional organizations	32%	28%	35%	29%
Other	1%	2%	1%	0%

Rows sorted by North America.

When we look at buyers who have a formal innovation program, we reduce the sample even more, so consider results from Europe and Asia-Pacific to be directional, at best. In North America, there is little consensus on who owns the innovation program, and it could be the executive or leadership team (39%), the Chief or Head of Innovation (34%), or the head of the insights organization (32%). Among

the small group of European buyers who have program, it could be almost anybody, but is least likely to be the CEO/COO, HR, or a Chief Learning Officer. With a similarly sized group in Asia-Pacific, it's most likely to be the head of the insights department (47%), followed by the Chief or Head of Innovation (32%) or the executive or leadership team (30%).

WHO LEADS INNOVATION PROGRAMS? BY GLOBAL REGION (BUYERS WITH A FORMAL, DOCUMENTED PROGRAM)

	North America	Europe	Asia-Pacific
n	123	20	19
Executive or leadership team	39%	28%	30%
Chief or Head of Innovation	34%	31%	32%
Head of insights organization	32%	23%	47%
R&D head/department	25%	33%	16%
CMO	19%	32%	21%
CEO or COO	14%	13%	16%
Human resources head/department	4%	4%	14%
Chief Learning Officer	2%	0%	16%
Other	10%	0%	5%

Rows sorted by North America.

Among suppliers, most North Americans say the innovation program is led by the executive or leadership team (54%), and most in Asia-Pacific say it's the CEO/COO (51%). The CEO/COO is second most common in North America and Europe (39% each); in Europe, the most common leader is the Chief or Head of Innovation (46%) which is fourth

in North America (28%) and Asia-Pacific (29%). The executive or leadership team, most common in North America, is third in Europe (35%) and second in Asia-Pacific (38%). Other leaders mentioned by one-quarter of a region or more are R&D in Asia-Pacific (30%) and Europe (28%) and the head of the insights organization in Asia-Pacific (25%).

WHO LEADS INNOVATION PROGRAMS? BY GLOBAL REGION (SUPPLIERS WITH A FORMAL, DOCUMENTED PROGRAM)

	North America	Europe	Asia-Pacific
n	265	66	32
Executive or leadership team	54%	35%	38%
CEO or COO	39%	39%	51%
Chief or Head of Innovation	28%	46%	29%
R&D head/department	18%	28%	30%
Head of insights organization	13%	17%	25%
CMO	7%	5%	10%
Human resources head/department	5%	8%	8%
Chief Learning Officer	3%	2%	17%
Other	6%	2%	7%

Rows sorted by North America.

INSPIRATION TO INNOVATE

Before we move on to The Big Picture and conclude this section, here are a few inspiring ideas about fostering innovation from GRIT participants:

- *[We have a] quarterly innovation review and award for best innovation*
- *[Our organization] sponsors grants for staff to take on innovation projects to do Research on Research*
- *[We] count innovation as one of the key growth drivers for the business*
- *[We] acquire smaller innovative businesses*
- *[Our organization] runs self-funded pilots to test new methodologies*
- *[We] pilot with clients*
- *[Our organization] allows all staff to propose new solutions to almost any process*

THE BIG PICTURE

Although overall interest in developing an innovative focus has declined as a key priority since we last checked at the onset of the pandemic, so has every other skill area, with the exceptions of business knowledge and people skills among buyers. Our thumbnail sketches of the most engaged supporters of innovation suggest that they tend to be those who are responsible for long term success, and we submit for your consideration that a focus on long term success may have also declined in 2020 to allow companies to pay more attention to things like survival.

Also, while innovating insights work may have become a luxury that some could no longer afford, that circumstance seemed to apply mainly to those who were not as committed to it in the first place. This is not to say that they abandoned using innovations, but we suspect that a division of labor emerged across different kinds of buyers and suppliers in which some became more responsible for providing them than were others. We've seen evidence in the GRIT Insights Practice report and in the GRIT Field Guides (as well as this report) that the pandemic put great pressure on companies of all types to adopt new innovations quickly, but not necessarily to develop them in-house.

Taking the big picture view, developing innovative focus endures as a top-of-mind issue across almost every buyer and supplier segment despite the relative decline. The more advanced innovators have gone beyond communicating about how they would like innovation to happen to actually making sure funds are available. This aspect distinguishes the more advanced buyers from the less advanced and seems to be generally assumed to be necessary by suppliers who take innovation to heart.

Some of the things that are working for innovators are making sure that knowledge sharing occurs internally despite the challenges of the pandemic and enabling access to experts. For suppliers, enabling access to tools is an additional best practice, but the advanced supplier innovators also take care to mentor staff, again, despite the challenges of the pandemic.

Perhaps buyers who are innovation-focused can borrow best practices from suppliers, such as mentoring. And, perhaps larger suppliers should consider following buyers' lead and separate innovation development from regular corporate management as a standalone discipline.

We've seen evidence in the GRIT Insights Practice report and in the GRIT Field Guides (as well as this report) that the pandemic put great pressure on companies of all types to adopt new innovations quickly, but not necessarily to develop them in-house





CPG NEW PRODUCT FAILURE IS AN MR INNOVATION FAILURE

Johan Vrancken

Chief Revenue Officer, NAILBITER

Email: johan@nail-biter.com | Website: www.nail-biter.com

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

A top CPG brand just launched a new product, but the sales data coming back are underwhelming. All of the time, money, and energy spent developing a great concept and optimization of the product feels wasted; performance is not where it needed to be. If this story sounds familiar, you aren't alone.

So, what keeps going wrong? Since the 80s, CPG as an industry has incorporated the stage-gate process to enable a certain level of checks and balances before spending millions of dollars to let a new product out into the wild. But that stage-gate process often focuses on methodologies that over-rely on stated reactions in an artificial environment. The arrival of online panels has given us access to affordable greater sample sizes, but it hasn't moved the needle forward in terms of in-market success of new products.

What if we could instead optimize our innovation at shelf or online, at the moment-of-truth quantitatively?

Get closer to reality.

Rather than asking people over-rationalized opinions and burdening them with Likert scales while completing a 30-minute questionnaire, let's move that same person from any kind of survey environment into the first moment of truth, to the moment of purchase in store or online. Let's capture in-store behavior and let's capture immediate reactions, undirected and unbiased. Let's incorporate a suite of existing technologies like video, audio, and augmented reality. Using the right mix of technologies, which people are getting very comfortable with, will help reveal actual shopper preferences versus overly relying on claimed statements or artificial recall. Another important, but often missing element is staying close to the "baby" after the launch to help it survive or to help it flourish even more.

Rethink what matters.

Many of us have spent hours over the years trying to crack the right product concept, as a client or for a client. We also have witnessed respondents evaluate concepts focusing on the claims mentioned, over-rationalizing the importance of them. As an end result, a lot of manufacturers tend to put great importance on the benefit and claims statement while working on their test stimuli. It helps going through the hoops of the stage-gate process, it doesn't help pushing things forward. What we notice through our research at NAILBITER and the norms we have created over the years is that while benefits and claims might help differentiate your offering, it clearly isn't the most important key purchase driver at the first moment of truth. Through observing real behavior at the moment of truth and integrating augmented reality, we can test more complete product concepts much earlier and much closer to the reality at that critical purchase decision moment in store or online.

Time for change.

This year's GRIT report supports the fact that researchers who seek to develop their Innovative Focus skills are more likely to be eyeing their long-term success and exceeding their goals. This is the mentality we all should have- not a competency that is declining in popularity!

As we reenter a consumer landscape forever changed by COVID-19, we need to be ready to do things differently, avoiding falling back into our old habits that were not always effective at answering your innovation questions. Let us all find the courage to challenge the status quo, try new and diverse approaches, and integrate behavioral research at quantitative scale so we can finally see our products attain the success we need.

GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

As we've shown elsewhere, innovation continues to be a critical priority across the industry, and it is also a key brand attribute for both buyers and suppliers. We use that lens to measure brand awareness across both segments because every industry needs to understand its competitive landscape and drivers.

You may be thinking that we are a broken record, playing "innovation, innovation, innovation" incessantly. And maybe there is some truth to that, but we (obviously) think it's pretty important. In our experience, the story of the insights and analytics industry IS the story of innovation, and the companies that have not just innovated well, but have marketed themselves as being at the forefront of innovation are the most successful. Bringing new ideas to life is important, but **ensuring your key constituents know it** is what drives growth. That being the case, tracking brand awareness as it relates to being considered innovative is one of the ways companies measure the ROI of their efforts, and that is what the GRIT 50 is designed to do.

Further, as we have seen consistently in this report, the concept of "innovation" is something to which both buyers and suppliers are keenly attuned. It is often a key part of supplier differentiation strategy, and buyers increasingly prioritize it as a factor in their partner selection process. Suppliers who do a good job of marketing around this brand attribute are rightfully responding to market signals.

Now we need to dive into a few caveats: it is important that we be as upfront and transparent as possible because the GRIT 50 has emerged as such an important metric in the industry. For regular readers this may sound familiar. There are only so many ways we can say the same thing, so much of the next few paragraphs has been repurposed from last year. See, we look for automation efficiency as well!

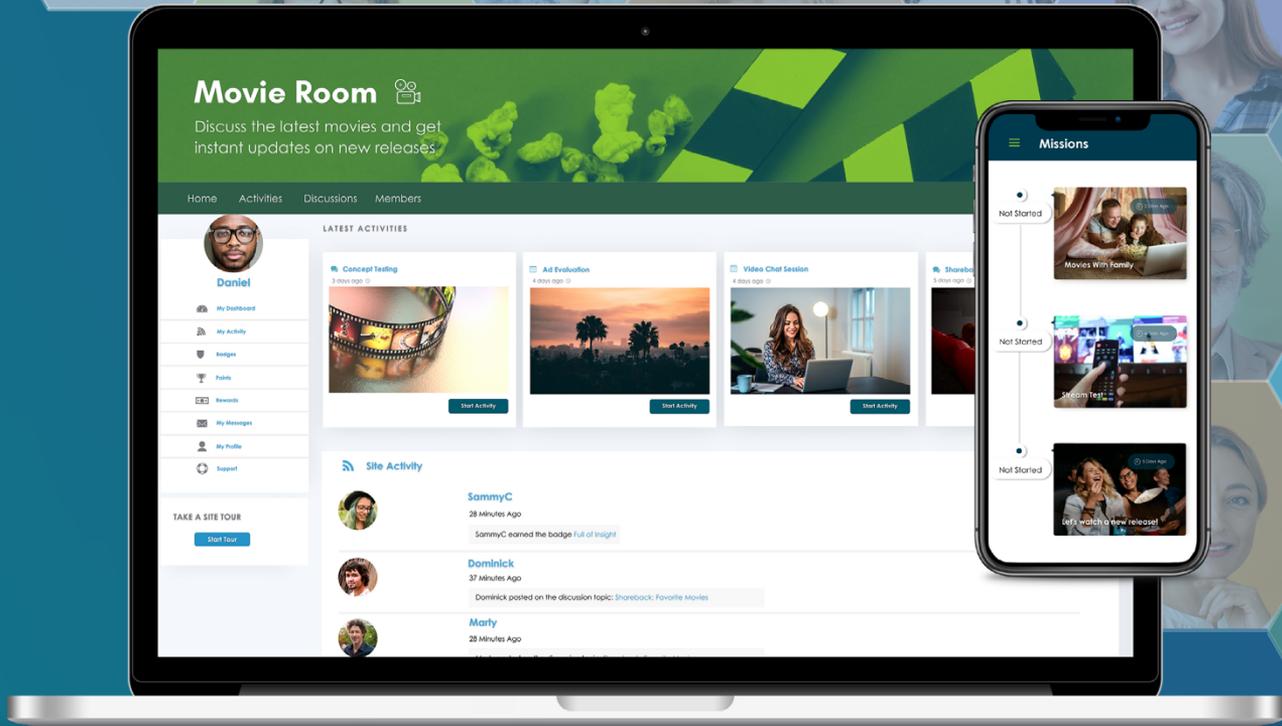
To be clear, and, as we say every year when we publish this list, *"the GRIT Top 50 is NOT intended to evaluate all the real-world innovation successes of insights organizations and make a determination of which suppliers have contributed the greatest good to the most insights professionals; how could such a metric even be developed? What would be the basis for comparison even if using an "expert panel"? Instead, this is a metric of which companies are PERCEIVED to be innovative as a core brand attribute. We want to understand which companies are using the concept of "innovative" to capture mind share in the marketplace, and then to understand what actually denotes "being innovative" in the minds of our respondents. That isn't to say that these companies are not innovative; being industry insiders we would argue that they all are indeed doing their part to earn this perception, and the prevalence of young, smaller companies who are indeed doing new things in the list proves it."*

So, moving past the occasional confusion on what being a GRIT 50 Most Innovative Supplier means and why it is important, we continue to use this as the process for understanding brand awareness in the industry.

Caveats covered, let's refresh everyone on our approach and methodology. The process is simple. Each year we measure how insights suppliers and clients are leveraging the brand attribute of innovation through a simple question series:

In our experience, the story of the insights and analytics industry IS the story of innovation, and the companies that have not just innovated well, but have marketed themselves as being at the forefront of innovation are the most successful





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For this wave, using the aggregate of total mentions, we developed a list of over 1,308 unique companies from 6,852 total responses



Using an unaided awareness verbatim question, we ask respondents to list the insights and analytics suppliers they consider to be most innovative. They can name up to four.

1. We then ask them to tell us of the suppliers they listed, which do they consider to be the *most innovative*.
2. Finally, we ask another verbatim as to what factors make the supplier they chose the most innovative.

We also ask respondents to help us segment the suppliers mentioned in their responses into a few broad categories aligned with our overall segmentation schema. The question text is “Which of these best describes each company you listed?”

- Data & analytics provider
- Full service research provider
- Field services provider
- Qualitative research provider
- Strategic consultancy
- Technology provider

Then, after rigorous data cleaning (see the Appendix for more details- we mean it when we say it is rigorous!) and adhering to a set of rules we established based on industry dynamics, we simply count the mentions of each company. It is a pure “top-of-mind” question type with no prompting from pre-defined lists determined by us; GRIT respondents create the list based on their responses.

We’re often asked how companies can “get on the list,” and our response is always the same: effective marketing. Because of the nature of the question, there is no option but for a company to build organic awareness among insights professionals in connection to the idea of being “innovative.” There are many ways to get there: events, content marketing, educational programs, advertising, word-of-mouth, social media, etc. Regardless of the channels used and marketing tactics employed, every company on the list has become top-of-mind for many in the industry when they think of innovative companies.

While a company’s inclusion and relative position in the GRIT 50 rankings mostly reflects successful marketing, we believe the rankings are also a good proxy for business footprint and growth, based on financial performance information, including funding rounds (in some cases) of the companies listed.

We are also aware that some companies attempt to “game the system” in a variety of ways, but due to our data cleaning and forensics process those efforts are ineffective, perhaps even counterproductive. We catch them and delete them. In this wave, we eliminated hundreds of completed interviews during our data cleaning process and either deleted responses that we felt were likely attempts at “vote stacking.”

On a related note, some have mentioned that the larger companies in the industry have an advantage due to their number of employees who may take the survey. There might be a modicum of truth to that on the surface, but if large companies have an advantage, it is in their reach and marketing budgets, and their employees are legitimate members of the insights and analytics industry, just like you. The in-depth demographic and firmographic analyses we conduct leads us to conclude that the sample is simply too diverse and broad on all measures to be suspect.

And, empirically, the suggestion is demonstrably false: while, of course, the large players are represented here, the majority of the list are smaller to mid-size companies, many of whom have been mentioned nearly as frequently as their larger competitors (or partners.) Also, as you’ll see, we break out mentions by participant type (buyer or supplier) and, in most cases, the upper echelon of companies the buyer-side mentions accounts for a large number of counted mentions. In other words, these suppliers didn’t become large by failing to keep up with the evolving needs of their clients and prospects.

While a company’s inclusion and relative position in the GRIT Top 50 rankings mostly reflects successful marketing, we believe the rankings are also a good proxy for business footprint and growth, based on financial performance information, including funding rounds (in some cases) of the companies listed



For this wave, using the aggregate of total mentions, we developed a list of over 1,308 unique companies from 6,852 total responses. Many of these companies are single mention, so during the coding process we focus on firms with a minimum threshold of mentions and then code them. In this wave we coded 158 companies with multiple mentions, which is similar to 20W1.

Only companies that received 24 or more mentions (up from a floor of 14 in 2020) made it on to the core GRIT 50 list. However, because the industry has continued to evolve, in 2019 we decided it was appropriate to look at more than one list. The reason we included a classification question was to develop sub-lists of companies in those categories, so although the GRIT 50 is still the definitive aggregate list, we have six break-out rankings that we believe are just as important to pay attention to:

- Data & Analytics
- Field Services
- Full Service Research
- Qualitative Researchers
- Strategic Consultancies
- Technology Providers

Although the threshold to be included in these new rankings is lower within each category, candidate companies were pulled from the 158 companies with five or more aggregate mentions. We'll dive deeper into the purpose for this expansion in this section.

In some cases, due to ties, each list may have slightly more than 50 or 25 companies out of fairness to represent those that met the basic threshold within each sub-list while ensuring at least the minimum number of companies were included within these rankings.

As always, a note on our process is warranted.

Because the rankings are derived from verbatims, it's messy. Besides data cleaning for quality control of sample and responses in general, a significant amount of human intervention is needed within the GRIT 50 question set due to name changes, M&A activity, variants, spelling, translations, etc. It's as much an art as a science (but

still a science). As such, we established a few rules to guide our process that are useful to know as you review the list:

- Normalizing all spellings or alternates (ex: Nielson, Neelson, Nelson, AC Nielsen, etc.).
- If a company bought another company and rolled them in as a *division or product*, we recode to the acquiring company (ex: Schlesinger acquiring 20/20 Research)
- If it is a *product or division* of a parent company, we recode to the parent company (ex: Nielsen BASES = Nielsen, Methodify = Delvinia).
- If a parent company has a minority investment, the sub-brands were counted separately.
- If a parent company is consolidating all sub-brands (ex: Kantar and Dynata), all were counted toward the parent company.
- If a company has recently re-branded, old branding was recoded and counted under the new brand (unless the original brand did not migrate to the new entity).
- If two companies have the same name, we default to the larger company as what was intended.

Gobbledygook, comments such as "I don't know", "there are none", "asfadsf," etc. ... we code as "none"

We ignore ties within the list; we determine a logical minimum of mentions and develop a straight rank order based on that.

As you can see, this is a complex process and literally only a few people in the world have the requisite knowledge to do it. It may not be perfect, but we are not aware of any other team that could undertake this with the level of transparency, rigor, and consistency that we achieve. That said, in this wave we did attempt to take that IP and codify it as a series of rules within the Canvs AI platform, and we used their solution (with a lot of hand holding and work from their team!) to automate as much of the first round counting process as possible.

Now, after providing the appropriate context and other details, without further ado, here are the 2021 GRIT 50 rankings:

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
1	Ipsos (incl. all sub brands)	362	1	0
2	Kantar (incl. all sub brands)	345	5	3
3	Hotspex	297	3	0
4	Nielsen (incl. all products and sub brands)	234	8	4
5	Material (incl. LRW and all sub-brands)	233	2	-3
6	Qualtrics	184	7	1
7	SKIM	144	12	5
8	Dynata (incl. all sub brands)	140	9	1
9	Dig Insights (incl. Dig Insights and Upside)	111	10	1
10	Zappi	111	6	-4
11	Behaviorally (does NOT include PRS IN VIVO)	108	Debut	
12	Toluna (incl. all sub brands)	105	15	3
13	Google (incl. all products and sub brands)	93	16	3
14	Remesh	91	28	14
15	Voxpopme	88	11	-4
16	Delvinia (incl. AskingCanadians and Methodify)	83	13	-3
17	quantilope	77	44	27
18	Lucid	74	17	-1
19	Cint (incl. Cint and P2Sample)	71	18	-1
20	AYTM (Ask Your Target Market)	62	20	0
21	GfK (incl. all sub brands)	61	23	2
22	Shapiro + Raj	61	14	-8
23	The Logit Group	57	34	11
24	Reid Campbell Group (incl. Reach3 Insights and Rival Technologies)	56	29	5
25	Recollective	53	39	14
26	Medallia (incl. LivingLens and Medallia)	51	19	-7

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
27	NAILBITER	51	42	15
28	Buzzback	47	49	21
29	Fuel Cycle	47	22	-7
30	McKinsey	47	46	16
31	System1 Group	46	26	-5
32	Forsta (incl. FocusVision, Conformat, and sub brands)	44	33	1
33	Omnicom (incl. C Space, Hall & Partners, and Omnicom)	44	43	10
34	Research Strategy Group (RSG)	41	Debut	
35	Schlesinger Group (incl. OTS, 20/20 Research, and MarketCube)	40	25	-10
36	Macromill (incl. all sub brands)	38	Debut	
37	Potentiate	38	47	10
38	Momentive (formerly SurveyMonkey)	37	Debut	
39	Maru Group (incl. all sub brands)	36	30	-9
40	IRI	35	Debut	
41	Gartner	34	Debut	
42	Insites Consulting (incl. all sub brands)	34	27	-15
43	Streetbees	32	Debut	
44	FlexMR	29	Debut	
45	Suzy	29	Debut	
46	Discuss.io	28	38	-8
47	Amazon (incl. all products)	27	37	-10
48	My-Take	26	24	-24
49	PureSpectrum	26	Debut	
50	TRC Research	26	32	-18
51	Feedback Loop	25	Debut	
52	iTracks	25	debut	

LESSONS FROM THE TOP 10

First, the top 10 remains relatively stable. Although rank order may have changed, with one exception (SKIM), the companies themselves are the same companies that were in the top 10 in 2020 (and most were also there in 2019). Although about half are large companies with large marketing budgets, the others are not (in fact, we can pretty neatly divide the list into over \$500M and under \$50M. Size of marketing budget is not the key determinative factor for ranking in the GRIT 50; the effectiveness of marketing is.

What is the big news here? Well, for the third year in a row Ipsos is considered the most innovative company in the world by GRIT respondents. They continue to be recognized for their efforts to embrace new business models and launch new products to edge out their main competitors. We see signs that Ipsos may very well retain this leadership rank based on how their large competitors are now positioning themselves in the market. Ipsos is relatively unchallenged by several of their traditional competitors (GfK and Nielsen) as those firms seek to differentiate themselves in a variety of ways that create distance between themselves and our traditional view of insights suppliers in the past. In addition, Ipsos has been steadily rolling out a suite of technology-driven products to compete with many emerging tech players, further cementing their brand awareness as it relates to being considered innovative.

That said, Kantar was close on the heels of Ipsos with only 17 mentions separating them and a jump up of three spots from #5 in 2020; much of what we observe about Ipsos is true for Kantar as well, and with Bain Capital now backing them we expect to see significant investments in both organic innovation and acquired innovation over the coming months to further challenge Ipsos as we head into 2022.

Material (formerly LRW), Hotspex and Nielsen round out the top five, with Hotspex holding steady ranked at #3, Material declining three spots and Nielsen moving up four spots from last year.

All three companies have worked hard over the past few years to solidify their brand perception and awareness in a variety of ways (Hotspex is particularly good at targeted marketing), and we expect they will continue to rank highly for the foreseeable future.

Looking at the rest of the top spots, Qualtrics remains a force to be reckoned with (their successful IPO certainly didn't hurt their brand awareness and perception as the leading tech company in the industry). SKIM is #7, moving up an impressive five spots to land in the upper ranks, Dynata and Dig Insights both moved up one spot each to #8 and #9 respectively, and Zappi lost a bit of ground from 2020 by going from #6 in 2020 to #10 in 2020. Dig and Zappi are both interesting since both are relatively young companies but have evidenced incredible savviness in building brand awareness while also earning consideration as innovative companies through a steady stream of groundbreaking product releases.

CHANGES IN THE TOP 50

Looking at the next twenty or so companies, what stands out again is the relative stability of the list of companies compared to last year, although certainly the rankings themselves changed considerably. The first change of note is the debut of Behaviorally at number 11, which is quite a feat considering their recent rebrand from PRS IN VIVO U.S. and the disappearance of their former parent company BVA Group (holders of the PRS IN VIVO name now) from the top 50 entirely. Rebranding is always a bit of a crapshoot, but Behaviorally worked hard to drive awareness of the new brand and it shows through the strong performance in the GRIT 50.

Other notable shifts in forward momentum were Remesh up fourteen positions to #14, Recollective up fourteen to #25, Quantilope with a whopping big jump of twenty six to #17, The Logit Group up eleven spots to #23, NAILBITER moved up fifteen spots to #27 and Buzzback made the second biggest leap forward of twenty one spots to #28. All others in the mid-tier shifted by smaller amounts either up or down the ranks, but still retained solid brand awareness.

For the third year in a row Ipsos is considered the most innovative company in the world by GRIT respondents



Attribute (Net)	Buyer	Supplier	Difference (Buyer – Supplier)
New thinking	32%	21%	+11%
Innovative solutions	29%	25%	+4%
Quick delivery	10%	13%	-4%
Thought leadership	7%	5%	+3%
Deep understanding	4%	4%	0%
Strong business	3%	2%	+1%
Creative problem solving	3%	4%	-1%
Unique offering	2%	5%	-3%
Personalized service	2%	6%	-4%
Easy to work with	1%	5%	-4%
Reliable	1%	2%	-1%
Address difficult challenges	1%	1%	0%
Flexible	1%	4%	-3%
Other	5%	5%	0%

When considering what makes a supplier “innovative”, buyers put a premium on *New thinking* (and a difference of +11%), *Innovative solutions* (+4%) and *Thought leadership* (+3%). Clearly, from a marketing perspective, those suppliers who want to change their brand perception as measured in the GRIT 50 rankings could take these topics and build marketing campaigns around them since they are what buyers are more focused on than suppliers.

At first glance, it seems somewhat tautological (or “obvious” or “lazy” or “silly”) to say that *Innovative solutions* distinguish a particular supplier as “most innovative,” but it is the #2 reason for both buyers and suppliers. The nuance is that a supplier has to have more than *New thinking*, they need put that thinking into practice in a way that solves a real-world problem. What distinguishes one supplier as most innovative versus others is that they introduce useful new products to the market; they don’t just think about it.

Unsurprisingly, there is a high degree of overlap between the topics listed here and those mentioned in other areas of the report, particularly in buzz topics and unmet needs, further supporting the conclusion that the industry is truly focused on a relatively short list of issues that define the current zeitgeist and represent priorities for the supplier community to focus on.

Consistent with other findings as well are the differences in priority or mind share on certain topics between buyers and suppliers. We think it is useful to look at these differences from the buyer perspective, since, after all, they are the ones who ultimately make or break supplier innovation via paying for it.

Interestingly though marginally, buyers were more likely than suppliers to mention *Strong business*, which encapsulates the idea of a business that is on a firm financial foundation. Innovation is fun and exciting, but history is littered with the bones of innovative companies that couldn’t make it financially and ended up leaving buyers high and dry.

That said, although those are areas buyers list as considerations more frequently than suppliers, they are certainly not the only topics. *Quick delivery* may be mentioned more frequently by suppliers than buyers, but it is still the third most frequent topic across both groups and the top unmet need mentioned by both groups. The difference is likely due to the vast gulf that *New thinking* represents across buyers and suppliers, drawing some buyer attention away from “take it for granted” issues, like the need for fast results.



THE PERCEPTION OF INNOVATION: START WITH YOUR COMMUNICATIONS

Lucy Davison

Founder and Managing Director, Keen as Mustard Marketing

Email: lucy@mustardmarketing.com | Twitter: @lkhdavison | Website: mustardmarketing.com

LinkedIn: www.linkedin.com/in/lucy-davison-5a66902/

It may not be new news, but in *How Brands Grow*, Byron Sharp argues that to achieve growth, a brand needs to focus primarily on attracting the largest number of customers possible. Rejecting the idea that brands should encourage existing customers to spend more, Sharp recommends broadly targeted, mass-market communication to attract as many people as possible.

So how does this relate to the Innovation League table in this GRIT report?

It's difficult to remember a year when the likes of Kantar, Nielsen and Ipsos didn't secure a place in the top 10. So, it's easy to see the benefits of being a big brand with broad audience targeting within MRX. As this report mentions, the top 50 companies achieve their positions due to effective marketing of their innovative offering - you're more likely to be mentioned by insights industry respondents if people know who you are and what you stand for. In other words, to the annoyance of many in the insights profession, it is all about being perceived as innovative.

Many companies might feel that they deserve a place in the top 50, and companies further down the list may feel they ought to have been positioned higher. But if your company has only got 50 followers on LinkedIn, or a blog that hasn't been updated since 2018, it's clear you need to stop grumbling and start communicating.

At Keen as Mustard Marketing we always encourage our agency-side clients to have a strong point of view or specialisation - and then communicate the heck out of it. During the client panel at our recent digital event, Insights Marketing Week, Dieter Deceuninck, Global Director Strategy & Insights at Danone, spoke about the importance

of specialisation from the agencies he partners with. 'For me, one of the biggest and most effective ways [for agencies to attract clients] is if someone comes with a point of view,' he said. 'Having that perspective and then translating it into an offer of how to approach a problem is the most effective way [to get my attention].'

This point of difference is something that lots of the growing and emerging companies on the GRIT list do well. Buzzback, for example, has pushed their focused message as an 'innovation insights agency' through much increased communications via PR, social media and the launch of a new website over the past year. To celebrate the business' 20th anniversary, the company's President and CEO Carol Fitzgerald wrote about what the next 20 years in insights will bring. By positioning itself at the forefront of industry change, it is unsurprising that Buzzback has made the second biggest leap on the list, climbing a significant 19 spots to #30.

Remesh has also made a significant increase in their ranking, climbing 14 spots to #14. The company regularly talks about topics such as product innovation and AI, using its blog, social channels, and webinars to push their messages widely. The platform also recently worked with the UN to innovate the organisation's process of peacekeeping in war-torn countries, a partnership that got attention from the media and was covered by The Washington Post.

Securing a spot on the GRIT Innovation League table is just one benefit of boosting your company's marketing, but it is also important to remember that being featured in the list is an example of good marketing in itself. Shouting a little louder about your company messaging can grow your audience exponentially. If you get it right, others will shout about your company for you.

That point is underscored by the rest of the themes since most of the remaining tend to be a bit more “meat on the bone” focused. Both buyers and suppliers agreed that *Creative problem solving*, *Unique offering*, *Personalized service*, *Easy to work with*, *Reliable*, *Address difficult challenges*, and *Flexible* make up the constituent parts of a perception of innovation. However, suppliers put more emphasis on them in terms of frequency of mention, which we would suggest is a good thing; each of these themes seems pretty vital to business success, so when assessing brand perception through the lens of innovation leavening that loaf with a good dose of business fundamentals ensures no one

gets distracted chasing shiny objects that turn out to be bubbles.

The key takeaway here is that for suppliers to be considered innovative they should have three action items:

1. Solve a business problem in a new and impactful way and bring the solution to market
2. Ensure you deliver on the business need fundamentals
3. Build messaging around 1 and 2 into all of your marketing activities

We'll continue to monitor the evolving perception of what makes a company innovative in 2022.

CATEGORY RANKINGS

As mentioned previously, we asked respondents to categorize the Suppliers they listed as most innovative into six groups:

- Data & Analytics Providers
- Full Service Agencies
- Field Service Providers
- Qualitative Suppliers
- Strategic Consultancies
- Technology Providers

Our goal here was to accomplish a few things: to showcase even more companies that are leaders in specific areas, to understand how companies are perceived in the marketplace, and to compare how companies are perceived by the market versus how they position themselves. This is driven from research we have conducted the last several years that indicates there is often confusion in the market due to industry functional fragmentation and compartmentalization, subpar marketing, and evolving industry makeup.

Referring back to the Industry Scope section, it is clear that the insights and analytics industry is transforming due to several drivers: business needs, technology advancements, adjacent category overlap and financial dynamics. Due to that, we think it is important to look at a more granular level on how the makeup of the functional categories

of the supplier community are changing, and what suppliers are winning from a brand awareness perspective. Additionally, taking a look at how suppliers are viewed either in or out of alignment with their positioning is useful guidance for suppliers working to meet rapidly changing market conditions and client needs.

As we look at these sub rankings, a few things to be aware of:

- We needed to make a reasonable cut off level for the rankings and we settled on no more than twenty-five companies in each list and a minimum of at least five mentions as a cut-off.
- In some cases, the minimum of at least five mentions means some lists may be less than twenty-five.
- As usual, we don't really consider “ties” even though often the number of mentions for a company may be the same. That means in some cases we may have slightly more than twenty-five companies listed.
- We used the same “parent company” model as the core GRIT 50 vs. counting sub brands.
- Due to rebranding and M&A activity, a few listings from last year dropped off; we used the highest ranking of a sub brand from last year as the ranking comparison for 2021.



IS MRX FINALLY A TERM OF INNOVATION?

Erinn Taylor

EVP, Product & Platform, Marketing, Canvs AI

Email: erinn.taylor@canvs.ai | Twitter: [@erinn_taylor](https://twitter.com/erinn_taylor) | Website: canvs.ai

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

Signs are showing that Market Research is now a product led industry.

Having nearly 2 decades of supplier side experience building and growing products, I have a long view into an industry that for eternity was considered lagging in terms of innovation. Consolidation often led to innovative startups getting bought and dismantled or run into the ground, just to leave old tactics in place. It was an industry of 'we have always done it this way'. In 2002, after starting at Decipher, I spoke to a group in relation to online data collection and the future. I was thoroughly debunked as spreading witchcraft, with claims this could never lead to valid research. I could have also cleared a forest with the quantity of paper-based crosstabs I was producing for research clients to leaf through and search for insights. The inefficiency of manually searching through 500 pages of numbers for key findings is something most new researchers cannot comprehend.

It is fun to think back when digital online data collection was thought to be a fad. The resistance to the cloud, to digital insights, to AI and machine learning has all faded. In the last 5 years there has been a mounting title wave on the supplier side, with firms transitioning to product-led offerings choosing innovative, agile approaches to solving the consumer feedback issue. Empathy has become a term, and innovation has led small and large firms alike to want to get closer to consumers with more accuracy and greater scale, with an eye on understanding better consumer intent.

Examining the GRIT Top 50 Most Innovative Suppliers this year, it is very apparent this trend is accelerating. Look to organizations like Dynata and Toluna, both with rebrands and both invested in instant insights platforms to drive new revenue and near immediate and differentiated solutions. We have seen staples like SurveyMonkey

recalibrate and emerge as Momentive, strategically driving innovative and re-imagined products like GetSatisfaction. The unlikely pair of FocusVision and Confrimit have reinvented themselves as product led Forsta. Traditional service firms have used consolidations to drive new opportunities, such as Schlesinger and Omnicom/ Interbrand, each ushering in change and innovation, offering leading edge solutions to solve both qualitative and quantitative research needs. Digital marketplaces from Zappi and Fuel Cycle have evolved, combining revolutionary tech to introduce new agile approaches. And let's not overlook the amazing rise and successful IPOs of Qualtrics and Cint; both leading the way with products to generate buyer demanded innovation.

I should not glass over the list leaders like Ipsos and Kantar, who have admittedly driven innovation for years. I would also be remiss to not mention that in nearly every discussion over the past year with various firms, including the Top 50, there was some discussion of AI and machine learning, which reportedly is bringing new life and improved ROI to research processes. Along with AI, organizations were also discussing scalable automated insights, new data sources, and data integration and security.

Looking across the rest of the Top 50, it is undeniable that market research has turned the corner from laggard, service-based only, to product driven, emerging as a leader in innovation. MRX is now driving one of the world's most coveted resources, data, and the insights it provides. At Canvs, I'm excited to continue driving product-led momentum as we innovate AI and NLP to improve time to insight from unstructured data.

- Note that in 2020 we combined Field/Full Services, but due to clear changes in the market in the past year we decided to break them out into separate categories.

Although we do show comparisons between 2020 and 2021 rankings for consistency with the core GRIT 50 rankings, we recommend not putting too much stock in these rankings. The point here is to

understand which companies are gaining traction as being considered top-of-mind potential partners in each category. We know buyers are using diverse portfolios of partners to meet multiple needs, so more and more companies are emerging as part of the consideration set. These companies are the current leaders in that jockeying of position.

Here are the category rankings for 2021:

FULL SERVICE SUB LIST

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
1	Ipsos	261	1	0
2	Kantar	198	2	0
3	Hotspex	177	4	1
4	SKIM	118	8	4
5	Nielsen	108	7	2
6	Material	107	6	0
7	Dig Insights	77	9	2
8	Behaviorally	53	Debut	
9	Toluna	33	10	1
10	Buzzback	33	Debut	
11	System1 Group	33	13	2
12	GfK	32	12	0
13	Macromill	28	Debut	
14	Reid Campbell Group	27	Debut	
15	Research Strategy Group (RSG)	27	Debut	
16	Shapiro + Raj	26	18	2
17	Maru Group	24	17	0
18	Nailbiter	24	Debut	
19	Potentiate	23	Debut	
20	TRC Research	23	Debut	
21	Dynata	22	5	(16)
22	Omnicom	18	Debut	
23	Insites Consulting	18	16	(7)
24	Explorer Research	17	Debut	
25	Zappi	13	21	(4)
26	Blue Yonder Research	13	Debut	

STRATEGIC CONSULTANCIES SUB LIST

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
1	Material	104	1	0
2	Hotspx	64	2	0
3	Kantar	42	8	5
4	Behaviorally	38	Debut	
5	McKinsey	32	14	9
6	Shapiro + Raj	31	6	0
7	Ipsos	20	4	(3)
8	Deloitte	15	25	17
9	Omnicom	13	Debut	
10	Haystack Consulting	13	9	(1)
11	Nielsen	12	10	(1)
12	Research Strategy Group (RSG)	11	Debut	
13	Gartner	11	Debut	
14	SKIM	10	7	(7)
15	Boston Consulting Group	10	Debut	
16	Accenture	9	Debut	
17	Bain	9	Debut	
18	Catalyx	8	24	6
19	Factworks	7	Debut	
20	Dig Insights	6	5	(15)
21	System1 Group	6	15	(6)
22	Forrester	6	Debut	
23	Buzzback	6	22	(1)
24	Insites Consulting	5	12	(12)
25	PricewaterhouseCoopers (PwC)	5	Debut	
26	Newristics	5	Debut	

TECH PROVIDER SUB LIST

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
1	Qualtrics	129	2	1
2	Zappi	78	1	(1)
3	Remesh	57	13	10
4	Voxpopme	55	3	(1)
5	Quantilope	48	Debut	
6	Google	46	10	4
7	Recollective	43	16	9
8	Fuel Cycle	38	6	(2)
9	Delvinia	37	5	(4)
10	Medallia	32	19	9
11	Forsta	28	14	3
12	AYTM	27	11	(1)
13	Toluna	26	18	5
14	Discuss.io	22	22	8
15	Lucid	19	9	(6)
16	Momentive	19	Debut	
17	Reid Campbell Group	18	15	(2)
18	Feedback Loop	16	Debut	
19	Cint	16	4	(15)
20	Suzy	15	Debut	
21	iTracks	12	Debut	
22	My-Take	12	8	(14)
23	FlexMR	11	Debut	
24	Dynata	11	Debut	
25	Amazon	11	Debut	
26	Microsoft	11	17	(9)
27	IBM	11	21	(6)

DATA & ANALYTICS PROVIDER SUB LIST

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
1	Nielsen	75	1	0
2	Kantar	63	5	3
3	Dynata	54	2	(1)
4	Google	37	6	2
5	Ipsos	31	3	(2)
6	Hotspex	30	4	(2)
7	Qualtrics	27	8	1
8	IRI	26	16	8
9	Toluna	24	12	3
10	Cint	19	Debut	
11	Delvinia	18	24	13
12	GfK	17	15	3
13	Lucid	12	23	10
14	Logit Group	12	26	12
15	Zappi	11	7	(8)
16	Quantilope	11	Debut	
17	NAILBITER	10	Debut	
18	Morning Consult	10	Debut	
19	Mintel	10	Debut	
20	Black Swan	10	14	(6)
21	Tableau	10	Debut	
22	Euromonitor	10	Debut	
23	AYTM	9	18	(5)
24	Streetbees	8	Debut	
25	Facebook	8	Debut	

QUALITATIVE RESEARCH SUB LIST

2021 Rank	Supplier Name	Total Mentions	2020 Rank	Change
1	Voxpopme	22	1	0
2	Remesh	19	14	12
3	Ipsos	15	5	2
4	Kantar	14	7	3
5	Hotspex	11	4	(1)
6	Schlesinger Group	11	19	13
7	Nielsen	10	11	4
8	NAILBITER	10	7	(1)
9	Cint	8	Debut	
10	iTracks	8	21	11
11	Behaviorally	7	Debut	
12	Happy Thinking People	7	15	3
13	Insites Consulting	6	8	(5)
14	AYTM	6	Debut	
15	FlexMR	6	Debut	
16	Quantum	6	Debut	
17	Sylvestre & Co.	6	Debut	
18	Dynata	5	10	(8)
19	Streetbees	5	Debut	
20	Qualtrics	5	12	(8)
21	Lucid	5	Debut	
22	Recollective	5	22	0
23	Watch Me Think	5	Debut	



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Price and bottle size.

Ingredients, smell, and cost.



Price, moisturizing ingredients, scent.



Size of product, smell, ingredients, price, *is it on the FDA do not buy list*



Alcohol percentage, no perfume, trusted brand.



Percentage of alcohol, brand.



, good ingredients, s like alcohol.

00:03:34

212

Segments

Share

End



When shopping for a hand sanitizer, what factors do you consider?

Common Topics

OPINION

↓↑ AGREE

Ingredients, smell, and cost.

78%

Price, moisturizing ingredients, scent.

78%

remesh

FIELD SERVICES SUB LIST

2021 Rank	Supplier Name	Total Mentions
1	Dynata	38
2	Logit Group	27
3	Lucid	26
4	Cint	18
5	Delvinia	15
6	Toluna	14
7	DISQO	11
8	Canadian Viewpoint	11
9	Ipsos	10
10	Schlesinger Group	9
11	Prodege	9
12	Kantar	5
13	Qualtrics	5
14	InnovateMR	5
15	Leger	5

BRAND POSITIONING: EVERYTHING TO EVERYBODY OR SPECIALIZATION?

Many Suppliers earned positions on multiple category lists, and while we won't argue against the immeasurable value of that additional exposure, we can't help but think that the multiple-list distinction is somewhat dubious and counter-productive, at least for many companies.

If it has not been made clear in other sections of this report and in previous GRIT reports, let's be clear now: we believe that a brand is marketing itself optimally if the market has a single, top-of-mind consensus opinion regarding which category best represents it. If a brand appears on multiple category lists, we see that as an indication that marketing resources are being wasted, and the Supplier is not getting maximum ROI. Make no

mistake, there is definitely a market for "one-stop-shops", especially those with global scale and deep talent bench strength across a wide variety of issues; Ipsos, Kantar, GfK et al are good examples of how this can work well. We also agree diversification is a sound business strategy. However, is it always advantageous for smaller companies? We think not, especially when it comes to marketing and brand positioning. Being known as a leading specialist is a far more focused way to maximize your marketing investments.

To be *perfectly* clear: we have no issue with the fact that Suppliers, on average, earn significant revenue from multiple service categories – that's just good business. We have no issue with companies who have a strong presence in multiple categories because they own subsidiaries who have strong brand identities – that's just good brand management. However, we do object when Suppliers dilute their brand by cultivating multiple identities in the market – that's just wasteful. We believe that a brand can have many offerings, but should grow and maintain a single consensus image.

When we compile supplier rankings within service type, we see evidence of sub-optimal returns on brand investments. Our first takeaway is that an insights professional's direct experience with a supplier dominates their image of it; brand marketing does not, and consistent brand positioning is not part of their direct experience. Similar to the adage of the blind man and the elephant, depending on how you interact with a supplier you may see it differently. For large organizations that offer a wide breadth of services such as Ipsos, Kantar, Nielsen, etc...that is unsurprising and perhaps even on-brand.

However, for suppliers that we think of as having a clean categorical fit, but that the insights world at large experiences differently than we do, we would urge caution and a re-examination of your strategy to ensure it is aligned with market trends and is focused on creating differentiation in a crowded market.

While it is certainly true that market conditions may demand evolution (technology companies needing to offer services to be competitive for instance), and that there may be legitimate overlap in brand perception in some segments (qualitative research and field services providers come to mind), the risk of being seen as “me too”, especially against larger organizations with more marketing budget to spend, shouldn't be discounted.

We looked at all of the companies in the sub lists with an eye towards who was on multiple lists and how many they appeared on, to illustrate the caution here.

Appearing on multiple lists may be absolutely on strategy for *these* companies (their CMO will have to answer that question), but the point is other suppliers may not want to take away from this *that they need to as well*. We recommend giving careful thought to finding what makes you different and focusing your marketing on optimizing that.

As a point of comparison, clearly many Suppliers do not have the same disconnect because they appear on only one list, and their consensus category assignment by respondents fits with their intended positioning. Based on this, we don't believe the disconnect arises from lack of knowledge in the market since many of the assigned categories match what we ourselves would have chosen for these companies.

Perhaps the core lesson of this section is the old saw “To thine own self be true”; companies would do well to identify who they are, what they want to be known for and what makes them different. Once that step is complete, they can then focus all of their marketing resources on ensuring their targets understand it too.

SINGLE-MENTION CATEGORY COMPANIES

Black Swan	Data & Analytics
Euromonitor	Data & Analytics
Facebook	Data & Analytics
IRI	Data & Analytics
Mintel	Data & Analytics
Morning Consult	Data & Analytics
Tableau	Data & Analytics
Canadian Viewpoint	Field Services
Disqo	Field Services
InnovateMR	Field Services
Leger	Field Services
Prodege	Field Services
Blue Yonder Research	Full Service
Explorer Research	Full Service
Macromill	Full Service
Maru Group	Full Service
Potentiate	Full Service
TRC Research	Full Service
Happy Thinking People	Qualitative Research
Quantum	Qualitative Research
Sylvestre	Qualitative Research
Watch Me Think	Qualitative Research
Accenture	Strategic Consultancies
Bain	Strategic Consultancies
Boston Consulting Group	Strategic Consultancies
Catalyx	Strategic Consultancies
Deloitte	Strategic Consultancies
Factworks	Strategic Consultancies
Forrester	Strategic Consultancies
Gartner	Strategic Consultancies
Haystack Consulting	Strategic Consultancies
McKinsey	Strategic Consultancies
Newristics	Strategic Consultancies
PWC	Strategic Consultancies
Amazon	Tech Provider
Discuss.io	Tech Provider
Feedback Loop	Tech Provider
Forsta	Tech Provider
Fuel Cycle	Tech Provider
Medallia	Tech Provider
Microsoft	Tech Provider
Momentive	Tech Provider
My-Take	Tech Provider
Suzy	Tech Provider

DIFFERENCES BY BUYER VS. SUPPLIER

When we take a deeper look at the GRIT Top 50 by a few other variables we get slightly different rankings that yield interesting insights into what works from a marketing and branding perspective across segments.

Since the GRIT 50 is primarily a marketing effectiveness metric and the core target segments in the industry are buyer and supplier, understanding mind share for each segment can be useful to gauge how effective (or not effective) targeted marketing campaigns are as they relate to innovation perception.

When we sort by number of mentions by buyers vs. suppliers, the upper tier changes considerably. Let's look at buyer mentions first:

TOP 10 BY BUYER MENTIONS

Supplier Name	Buyer Mentions
Kantar	179
Hotspex	150
Ipsos	139
Nielsen	117
Qualtrics	48
Google (incl. all products & sub brands)	42
McKinsey	29
Dig Insights (incl. Dig Insights and Upside)	28
Zappi	27
Macromill	27

First, this should put to rest the argument that the GRIT 50 ranking is skewed by employees of large companies. We find the same large companies listed here (Kantar, Ipsos, Nielsen, Qualtrics) here solely on the basis of buyer awareness. Secondly, Google, McKinsey and Macromill move considerably into the top ranks driven by strong buyer awareness as well. However, the real story is three smaller companies (Hotspex, Dig Insights and Zappi) with an outsized showing among buyer respondents far in excess of their marketing budgets or staff size.

This adds much credence to the argument we have made that while large companies certainly have an advantage due to sheer mass when it

comes to brand awareness, small companies can do very well when they execute highly targeted marketing campaigns across multiple channels to capture mind share as well. When we factor in the attributes of "why innovative" as core components of the messaging, it is clear small companies can have an outsized ROI related to building brand awareness even when competing in a noisy market against more well-funded competitors.

It is also interesting that only two "ResTech" companies make the buyer list (Qualtrics and Zappi) and with far fewer mentions than the leading full service agencies. This adds more credence to our previously mentioned hypothesis that 2020 prompted a "reckoning" wherein the gaps in offerings from the technology provider segment were misaligned with some buyer needs and those buyers started to re-engage with the full service supplier base to help address those unmet needs, albeit likely looking for some kind of synthesis of the benefits of technology combined with the benefits of service-based organizations.

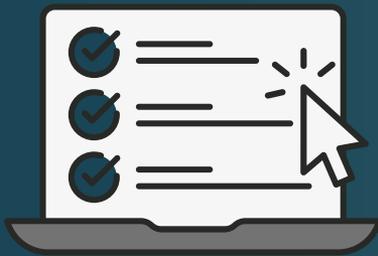
Shifting now to look at a supplier-centric reorder, we see a list that is largely similar to the overall GRIT 50 list in terms of companies on it, with one difference; Zappi drops off and Behaviorally moves up (although, to be fair, we should mention the difference between mentions for each is only ten).

TOP 10 BY SUPPLIER MENTIONS

Supplier Name	Supplier Mentions
Material	294
Ipsos	225
Kantar	182
Hotspex	149
Qualtrics	136
Skim	132
Dynata	129
Nielsen	117
Dig Insights (incl. Dig Insights and Upside)	98
Behaviorally (does NOT include PRS IN VIVO)	96

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While the list itself remains similar, the rankings change quite dramatically with Material taking the top spot from Ipsos by quite a wide margin, while the overall differences between each company are more closely clustered together than in the buyer only ranking. It is also interesting that yet again only two “ResTech” companies make the top tier cut (Dynata and Qualtrics), with the remaining list being companies mostly positioned as full service agencies, although certainly all are also known for utilizing new technologies as well.

Now, remembering that this only measures brand awareness as it relates to a perception of innovation which is largely driven by marketing effectiveness, we have a few ideas on why the differences.

First, it could be reflective of competitive intelligence efforts; as leading companies in the industry, of course their competitors are paying attention to press releases, news, presentations, newsletters, etc... in order to stay abreast of what is

happening in the market. If that is the case, hats off to the GRIT respondents for giving credit where it is due even to competitors!

Second, many of these companies function as both buyers and suppliers to *other suppliers*, so the larger supplier community may have an insider view of the innovative solutions these companies offer because they are engaged with those solutions themselves.

Lastly, as industry leaders they are the “market makers,” and as such all eyes are always on them anyway; President Kennedy’s famous motto “where we go one, we go all” functions as a business truism too.

For suppliers who want to achieve solid brand recognition among their target segments, be it buyers or other suppliers, these are useful examples to benchmark their efforts against. These companies conduct their marketing efforts in a more industry-wide way, and here we see how those efforts are paying off.

THE BIG PICTURE

As we have said before, the GRIT Top 50 is designed to do two things: identify how much the brand attribute of innovation drives brand awareness and define what the term innovation means to the insights industry. Our belief, based on market dynamics, financial performance, M&A activity and other independent measures, is that the more strongly a supplier is connected with the attribute of innovation, the more likely they are to succeed in the marketplace.

To help drive that result, we suggest that the supplier community work to sharpen their messaging using the findings we have uncovered, use the channel their audience is most plugged into, and

increase their overall reach to penetrate more into the mind share of the industry.

The shifts in the rankings show how newer companies continue to disrupt the status quo while perfecting their marketing, earning the awareness of the industry in the process. This competitive pressure is forcing incumbent larger players to up their own game and work hard to stay ahead of the pack, which is illustrated by the strong performance of companies like Ipsos and Kantar. This all points to a healthy and dynamic industry where no one can rest on their laurels, and we look forward to seeing how things shift again in 2022.



THE MOST IMPACTFUL TEAMS ARE FORCE MULTIPLIERS

Roddy Knowles

VP of Research, Feedback Loop

Email: Roddy.Knowles@feedbackloop.com | Twitter: [@RoddyKnowles](https://twitter.com/RoddyKnowles) | Website: www.feedbackloop.com

LinkedIn: www.linkedin.com/in/roddyknowles

As I look at the landscape of research innovation on the client side, three key trends stand out: commitment to a research tech stack, adoption of agile approaches, and democratization of research. At Feedback Loop, we have a unique window onto research innovation happening both within and outside of research teams at brands. And as such, I hear many perspectives on what's working - and what isn't - not just from researchers but from non-researchers whose day-to-day decisions are informed by research.

The clients that appear on this year's list - as well as those who are change makers but didn't appear on the list - are committed to building, maintaining, and continually improving their research tech stack. In speaking with research leaders who are driving innovation in their organizations, the conversation often turns to their research stack. They recognize that there is no one research tool to rule them all. They grasp the necessity of having different solutions to meet a variety of needs coming from their stakeholders. They understand which products are fit for which purposes. They value external partnerships, continually look for gaps in their stack, and actively evaluate new and better tech-driven approaches to doing research.

Client-side research teams continue to rely more heavily on technology over time because they need to move faster, be more efficient, and provide data/insights at the speed of business decision making. Embracing a more agile approach to research is part of this trend. Amongst this year's list - and reflective of the broader landscape - are teams at different stages on the agile adoption curve. But nearly all of them realize that to be truly ingrained in and impactful to the broader business, agile research is critical. And agile research prowess will soon become table stakes for research teams

in many industries, especially those where digital products are core. Not only can agile research de-risk decisions small and large, but it also opens up new opportunities and white spaces for research to be utilized. There are still countless instances where decisions are being made without any research at all - but shouldn't be.

Going beyond just championing agility, many innovative research teams are also actively democratizing research. Historically, researchers have kept the keys to their castle well-guarded. They've wanted all research to come through them so they can enforce best practices and ensure reliable data is used in making business decisions. While this is a noble pursuit and in many instances is warranted, it has been and continues to be a hindrance to unleashing the power of research throughout an organization. The most forward-thinking and successful research teams I've encountered have been actively working to put the right tools in the hands of non-researchers to allow them to conduct their own research. This, of course, doesn't mean letting them run amok. Nor does it mean losing control over how research is done. In practice, it means providing ways to conduct research with guardrails - tech-enabled or human - that allow those who aren't trained researchers to ask questions and get answers. Done right, research teams can foster more interest in leveraging research, provide more data to inform more decisions, and increase the visibility and impact of their teams.

Research teams who craft their tech stack, embrace agility, and democratize research will not just succeed, but will become force multipliers in their organizations. And these are the teams who we should expect to push our industry forward - and to appear on this list in years to come.

GRIT TOP 25 MOST INNOVATIVE BUYERS

Innovation isn't just an imperative for suppliers; many buyers have made this a focus of their business, including within their insights organizations, and these companies set the standard for everyone year-after-year.

To accompany our review of the most innovative suppliers, we asked participants for the most innovative buyers or brands. The data was collected in the same way as for the innovative suppliers. The buyer data focuses on the top 25 mentions as the numbers tend to aggregate on a few companies and then dissipate faster than is the case with suppliers.

In total we received 5,359 responses that we coded down to 162 discrete companies, and the Top 25 is comprised of companies that had 34 or more mentions. As in the supplier rankings, this is a far greater frequency of responses than in previous waves.

Historically, the buyer list has shown remarkable stability, and this year mostly continued that trend, although a few companies did debut on the list (or at least came back after dropping off previously). However, the top 10 companies remain fundamentally unchanged other than some slight swapping of rank position. For years, P&G and Unilever have been mobbing back and forth between #1 and #2, and this year was no different. As the largest spenders in the largest spend sector (CPG) in the world it should come as no surprise that they extend a massive influence in perception on this question. As the undisputed market makers that work with literally hundreds of supplier partners of all kinds, their ranking here is largely driven by experience from the supplier community as well as their significant participation in industry events as speakers sharing their innovation stories. In short, their domination is well earned.

As we look at the remainder of the list, 21 of the 25 have all been mainstays on the leaderboard for many years, however we do see four newcomers (at least in 2021) emerge: Nike (#12), Netflix (#15), J&J (#18) and Tesla (#25). We'll have to watch Tesla in the future in case Elon Musk decides to tweet about this and send their ranking to the moon in the future!



The table below shows the rankings for 2021, along with the rankings from 2020. The table also shows the change in rankings, from 2020 to 2021, the

number of mentions in 2021, the location of the brand's HQ, and its broad category.

Brand	2021 Rank	2020 Rank	Mentions	Country	Category
P&G	1	1	372	USA	CPG
Unilever	2	3	349	UK	CPG
Google	3	2	338	USA	Technology
PepsiCo	4	4	249	USA	Food & Beverage
Amazon	5	6	201	USA	Technology
Coca-Cola	6	5	165	USA	Food & Beverage
Facebook	7	7	139	USA	Technology
Apple	8	9	138	USA	Technology
Nestle	9	14	93	Switzerland	CPG
Microsoft	10	10	83	USA	Technology
Mars Wrigley	11	8	81	USA	Food & Beverage
Nike	12	NA	66	USA	Apparel
Colgate-Palmolive	13	11	66	USA	CPG
Clorox	14	12	61	USA	CPG
Netflix	15	NA	57	USA	Media
McDonald's	16	13	55	USA	Food & Beverage
Mondelez	17	15	52	USA	Food & Beverage
J&J	18	NA	52	USA	CPG
Disney	19	17	47	USA	Media
Reckitt Benckiser	20	20	47	UK	CPG
AB InBev	21	16	39	Belgium	Food & Beverage
Royal Bank of Canada	22	19	38	Canada	Finance
L'Oréal	23	18	38	France	CPG
Samsung	24	20	34	Korea	Technology
Tesla	25	NA	34	USA	Automotive



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INNOVATIVE AND NOT SO INNOVATIVE INDUSTRIES

The Top 25 innovative companies come from just seven categories, with over 75% from just three: CPG, Technology and Food & Beverage. Those categories are widely considered to be on the forefront of innovation across all sectors, so it makes sense that they push that through their insights function as well.

As well as looking at which brands comprise the Top 25, and which categories they are from, it is interesting to note the categories that *do not appear* in the Top 25. If we compare to the standard sector question GRIT asked buyers to answer, the missing categories include:

	GRIT Sample	GRIT Top 25 Buyers
Consumer non-durables	30%	24%
Consumer durables	13%	32%
Health care	11%	0%
Financial services	8%	4%
Media/entertainment/sports	6%	8%
Retail	6%	0%
Information technology	5%	24%
Not-for-profit	3%	0%
Education and government	3%	0%
Professional services	3%	0%
Telecommunication services	3%	0%
Automotive	2%	4%
Hospitality/travel	1%	0%
Industrial products	1%	0%
Other	4%	0%

Considering that we have GRIT respondents from those categories and that each is a relatively large contributor to global spend within the industry, are those types of companies really not considered innovative with respect to insights? Or perhaps they just do not talk about the innovative work

they do, limiting brand awareness of the “cool stuff” they are working on? We suspect the latter, so if being considered innovative is an important KPI for companies that are in those sectors, perhaps they need to do what others have done to get what they got too?

THE BIG PICTURE

To summarize, there are a few clients that really stand out as innovative to a wide range of insights professionals, and then some that have a reputation for innovation among a narrower set.

For those clients that drive innovation forward in a very public way, we assume innovative focus is a core corporate value ingrained throughout the organization. For companies that make their commitment to innovation apparent to their suppliers and their peers, and in this study, GRIT recognizes that effort.



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FINAL THOUGHTS

TIME TO INSIGHTS

The right answer tomorrow is often not as good as a decent answer today. When a decision is required, it will be made – with the best information available. ‘Available’ is an important word in that sentence when it comes to the impact on the insights industry.

There are several key trends that are reflected in this wave and previous waves of the GRIT Report. Time to insights is a key trend, but it is also the catalyst for a few others – such as AI, automation, and other technology application for the research industry.

In the almost year and a half since the beginning of the pandemic, a lot has changed, and it changed faster than many of us have ever seen. Markets changed, businesses changed, consumer needs changed, and consumer behavior changed – all almost overnight. And the need for answers had a distinct urgency. So much so that Faster Time to Insights is the number one unmet need identified by both buyers and suppliers of research.

In the overall research process, there are many different processes that influence time to insights. Some of the more notable are internal intermediaries that need to influence some portion of the design or deliverables, procurement that makes sure money is spent wisely, distribution of the insights after a study is completed, and many others.

Some of these other business processes that aren’t traditionally thought of as the “research process” are having an impact on the time to insights construct.

We’ve noted to varying degrees in this and the prior wave of GRIT that buyers (and influencers of buying decisions) of research are slowing shifting away from insights and into the functional areas. This is especially true for CX, usability, pricing, channel optimization, and even

product development (particularly late stage). This shift reduces the “intermediary” time for the user of the research to get access to the results by taking a step out of the business process.

Data democratization (meaning, in its most benevolent definition, having the right insights to the right person at the right time) is another technology solution that reduces the friction of the business process and allows for more timely decisions. One part of the democratization equation lies in knowledge management platforms that allow for information to be disseminated easily to a wide group of users – and not be held hostage. The other part of the democratization equation is the easy (and validated) application of tools in the hands of the end users. ‘Validated’ is an important construct in this piece – and the insights team has an important role in making sure that the approach meets the standards of good information.

Knowing that speed (which was once measured in weeks or months, is now measured in days or hours) is of the essence and the single biggest unmet need, there is an opportunity to differentiate the research process through technology-enabled tools. But there is also an opportunity to think about the business processes to reduce the time to insights. The evidence suggests that this is – and will continue to be – a big priority.

A handwritten signature in black ink, reading 'Gregg Archibald'.

GREGG ARCHIBALD
Managing Partner,
Gen2 Advisors

APPENDIX METHODOLOGY AND SAMPLE

At the beginning of this report, we discussed our unique approach to involving people in the GRIT survey, one that allows us to get the broadest possible sample across the insights and analytics industry without having to pre-define the insights and analytics industry. The greatest benefit of this practice is that GRIT participation form-fits to the industry as it evolves rather than forcing the industry into a box constructed according to the whims of our prejudices. The risk of this non-discriminatory approach is that sample composition can vary from wave to wave due to factors that might have nothing to do with industry evolution, confounding how we interpret changes over time.

After much consideration and for the first time, we have applied weights to the data to ensure that we are representing a consistent population over time. We selected a couple of respondent characteristics that we do not track and that should be stable over time and used those to determine weights that would align this wave with the 20W2 participant population. These weights have been applied throughout this report, except for the GRIT Top 50 Most Innovative Suppliers, the GRIT Top 25 Most Innovative Buyers, and the text analytics.

We recognize that some people are motivated to take the spring survey because of the GRIT 50 and GRIT 25, and, as long as they are legitimate insights professionals, every participant gets an equal “vote,” if that’s how they’d like to think of it. As discussed earlier, the GRIT 50/GRIT 25 tracks the reputation for innovation that buyers or suppliers have cultivated among insights professionals based on some combination of their achievements, their marketing efforts, and the enthusiasm that their constituents have for this topic. If people are willing to take a comprehensive survey to completion, are qualified to do so, and answer honestly and professionally, we are fine with them having their

say on the GRIT 50 and GRIT 25 because they care about it. However, we are not as comfortable with them having a disproportionate impact on the other 95% of the research, and this is one of our motivations for applying weights.

In the interest of transparency, we might take this opportunity to explain our weighting process, but we’d prefer to keep that to ourselves for now so that we do not bias future participants who might be tempted to change how they participate if they had this knowledge. Suffice to say, the weights are based on characteristics that are important for ensuring representativeness, but they are not anything that would be tracked because they would only be expected to change glacially, if at all. We realize that glaciers are moving much faster these days, but that’s not really the point. We also realize that this “hear me now, believe me later!” attitude probably does little to pump you up, but we were going more for “relieved and comforted” than “pumped up.”

The data in this section are weighted and presented so that you can understand the distributions behind the other numbers in the report.

GRIT BUYER PARTICIPANTS BY VERTICAL FOCUS

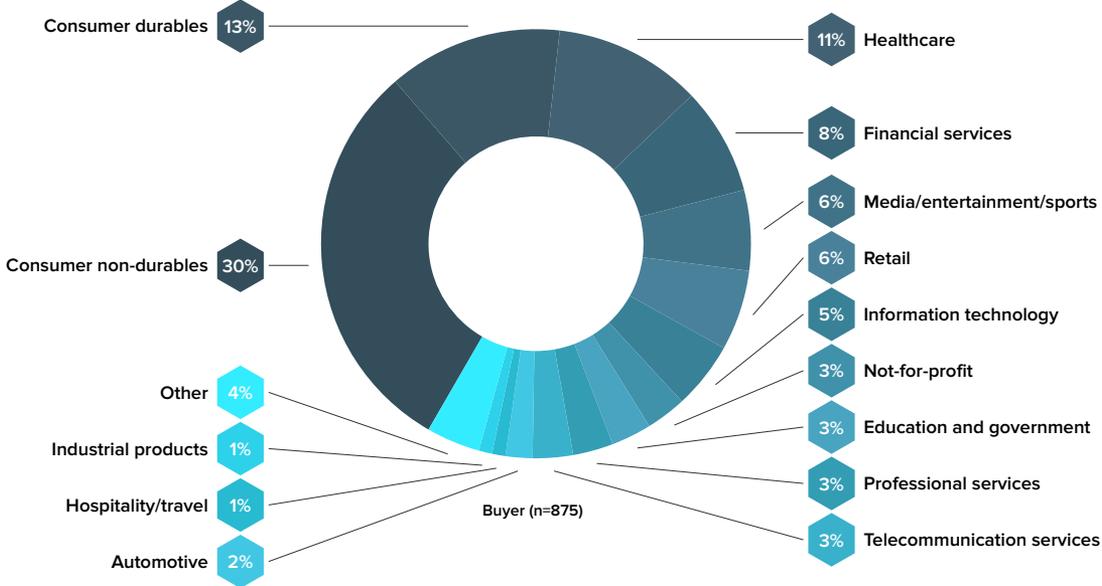
The GRIT buyer population is well-rounded, covering many industry sectors, which ensures a wide breadth of experience and perspectives from our client-side colleagues. With the addition of the NewtonX recruitment, we bolstered the buyer sample and deepened our reach into some verticals. Spending within the insights and analytics industry is largely driven by consumer non-durables, which is also the single largest buyer segment within GRIT at 30%, followed by consumer durables (13%), healthcare (11%) and all others in single digit percentages.

With the addition of the NewtonX recruitment, we bolstered the buyer sample and deepened our reach into some verticals



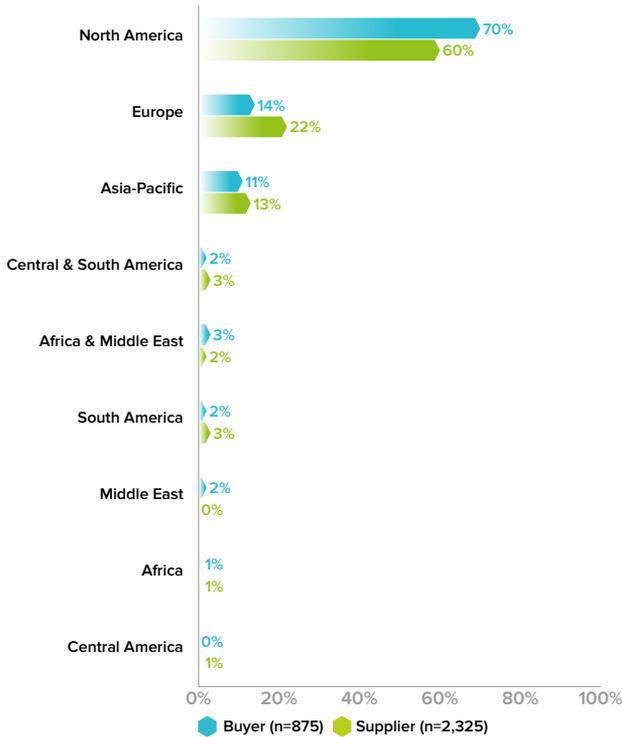
VERTICAL FOCUS (BUYER)

With a total sample of 875 buyers representing at least 15 verticals, this edition of GRIT delivers robust perspectives from the buyer-side of our industry.



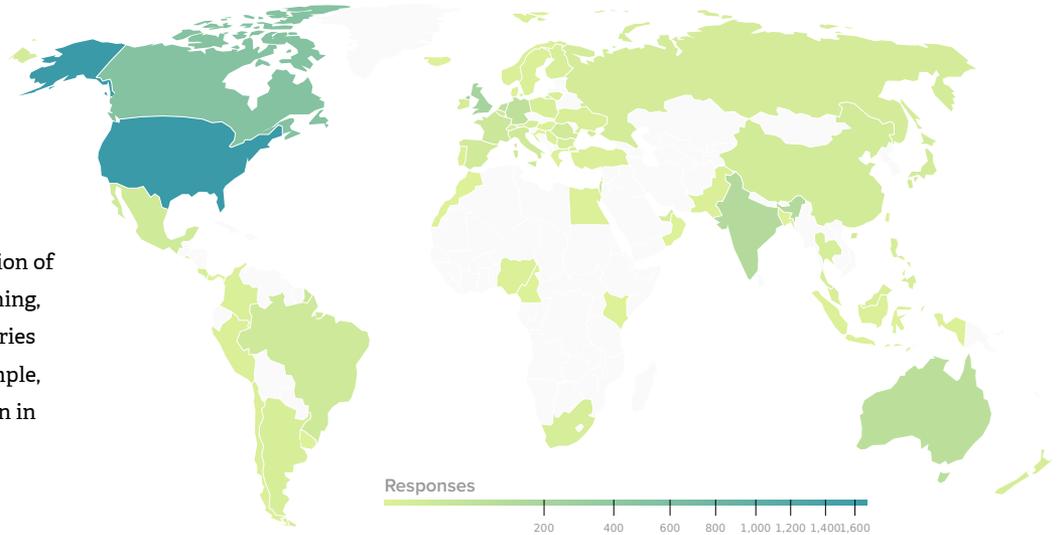
GRIT PARTICIPATION BY REGION

GRIT RESPONDENTS BY GLOBAL REGION (BUYER, SUPPLIER)



As one might expect with a weighted data set, our sample distribution across global regions is similar to earlier waves. In a typical wave, most of it is from North America, followed by Europe in the 20% to 25% range, with Asia-Pacific being about half of Europe. The buyer distribution leans more heavily to North America while suppliers have stronger representation from Europe than do buyers. In this wave, 70% of buyers came from North America compared to 65% last wave and 62% in 20W1. It should be noted that the booster sample of buyers mentioned earlier in this section was entirely from North America; without them, the percentage of buyers from North America would be at its usual level, about 65%.

In exploring the physical location of GRIT participants via IP matching, we find that 82 different countries are represented within the sample, with respondent density shown in the map.



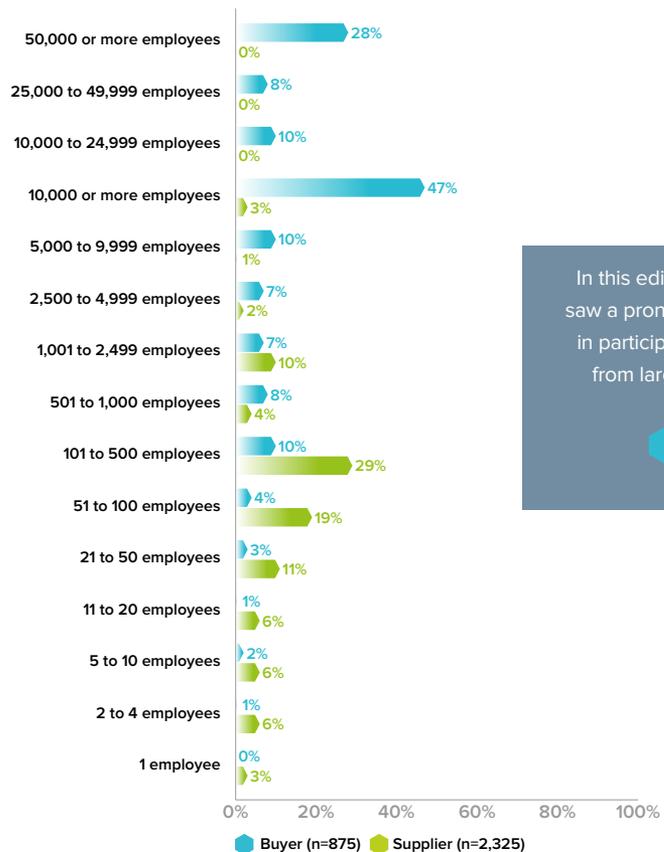
GRIT PARTICIPATION BY SIZE OF ORGANIZATION

In this edition of GRIT, we saw a pronounced increase in participation by buyers from large companies. In the current wave, the median buyer company size is 5,000 to 9,999 employees. In 20W2, it was also 5,000 to 9,999 employees. In 20W1, however, it was 2,500 or more employees because that was as high as the answer scale went. Despite the hardships inflicted by the pandemic, GRIT was able to scrape up enough cash to give buyers their own set of size categories and add four more breaks to their upper end. Now we can report that the percentage of buyer participants from companies of 25,000 or more employees increased in this wave from 25% to 37%, and this is not a result of the higher incident of buyers from North America.

On the supplier side, GRIT's generosity only extended to two additional size breaks, but at least suppliers don't have to share with buyers anymore. Despite the additional size breaks, the median supplier size has been 51 to 100 employees in each of the last three waves. The percentage with 2,500 or more employees has hovered between 5% and 10%.

Overall, we consider this shift to be supportive of the reliability of our reported findings, and ultimately the actionability of the recommendations.

GRIT PARTICIPANTS BY COMPANY SIZE (BUYER, SUPPLIER)

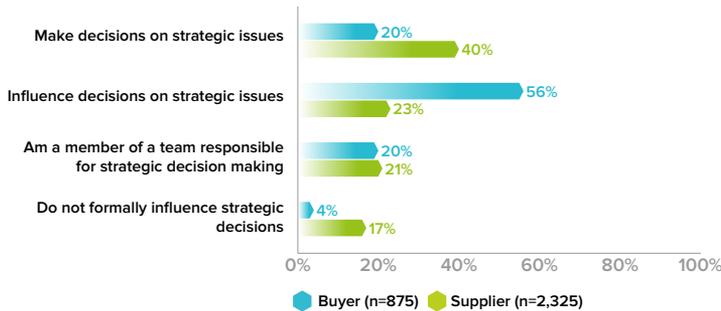


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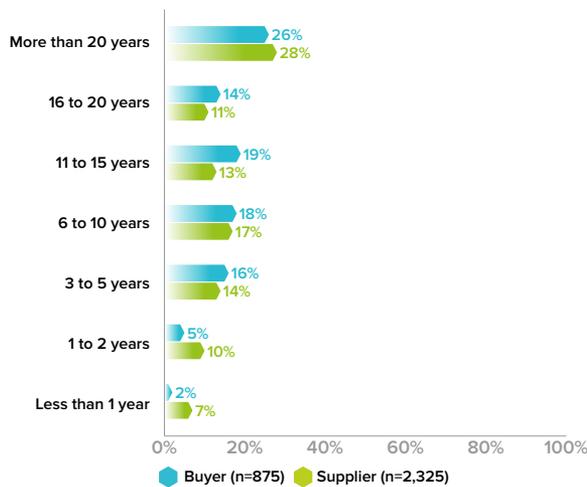
GRIT PARTICIPANT EXPERIENCE AND SENIORITY

ROLE IN STRATEGIC DECISIONS (BUYER, SUPPLIER)



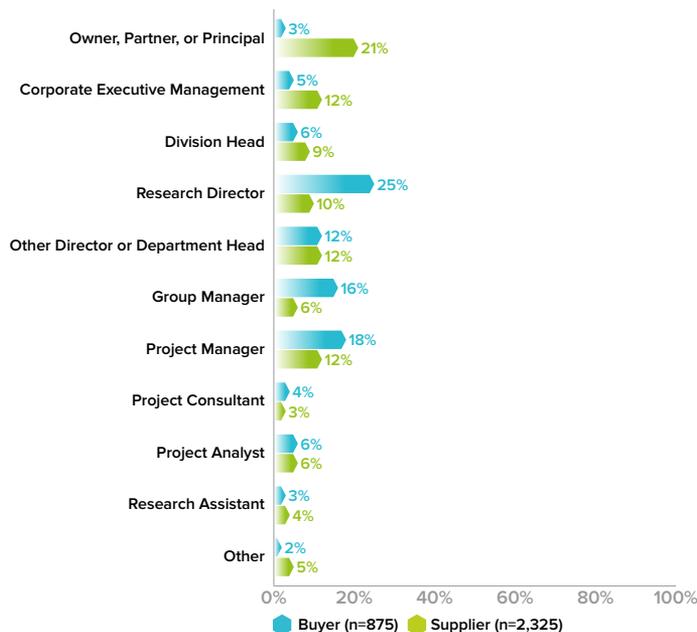
The GRIT sample is comprised of largely senior level research professionals. A whopping 87% (net) of GRIT respondents identify themselves as involved in strategic decisions within their organizations.

LENGTH OF TIME WORKING IN INSIGHTS (BUYER, SUPPLIER)



Unsurprisingly with such a large contingent of decision makers, 54% of respondents have worked within the insights and analytics industry for over ten years (with 28% for over twenty years), 32% between five and ten years and the remainder under two years.

GRIT PARTICIPANT ROLE OR POSITION (BUYER, SUPPLIER)



Concomitantly, the majority of GRIT respondents are in senior-level roles within their organizations.

DATA CLEANING

To ensure the quality of the GRIT data overall and the fairness of the GRIT 50 and GRIT 25, a set of flags has been developed and applied, and these evolve with each wave. Each flag carries a different level of severity from “instant death” to “mild symptoms,” and each respondent is considered case-by-case according to their set of flags. Although our team is foaming at the mouth to share details on all the ways we check the data, unfortunately, we have to curb that rabid dog. We did not endure seemingly endless hours of painstaking design, aggravating data review, and iterative assessments with the objective in mind of publishing the definitive *Dummies Guide to Cheating on GRIT*. A lot of dummies got caught this time, and it’s too bad their employers and colleagues can’t know about it.

First and foremost, we deeply, deeply appreciate the time and effort participants invest in completing the GRIT survey, and we also understand that two different participants may be equally invested but have different styles of answering. So, we take an “innocent until proven guilty” mindset and look at as much detail as possible before making a decision to remove a survey.

If we feel the preponderance of evidence indicates that the respondent was not paying enough attention, attempted to manipulate results, or was not qualified to answer these questions, we pass a “guilty” judgment. We do not take this responsibility lightly, feeling the equal weight of fairness to people who volunteer their time and thoughts while participating in the survey and fairness to GRIT readers who don’t want to be confused and frustrated when reading the report.

So, while we are committed to transparency, that commitment does *not* extend so far as to leave the front door of the house unlocked with a note that says “door is unlocked” while we road trip to San Diego. However, we would like to share some of our approach....as obliquely as possible. Some of the flags involved include:

- Standard data cleaning flags
- Contradictory responses
- Efforts to bring more attention to certain companies, brands, or issues beyond what the survey asks
- Responses and patterns that suggest they are not insights professionals
- Patterns across different surveys suggesting conspiracies or multiple surveys from the same individual
- Juvenile or profanity-laced responses or verbal attacks on individuals

In some cases, a flag may be glaring enough to call for immediate removal, but, in most cases, we consider the entire context before taking action. In fact, sometimes the flags are glaring enough to call for immediate removal from professional associations, but, unfortunately, all respondents, criminal or not, are entitled to equal protection under the law, so we cannot dox them.

In addition to the survey level, we also look at the response level and make adjustments as needed. For example, in the current survey, there are a lot of questions where company names are entered, and they are not always entered accurately. As detailed in the *GRIT Top 50 Most Innovative Suppliers* section, we read each one and standardize the spelling. In some cases, such as companies unfamiliar to us or entries that are ambiguous, we have to do further research to determine which company was intended.

First and foremost, we deeply, deeply appreciate the time and effort participants invest in completing the GRIT survey



Another step we take at the response level concerns the myriad “Other (specify)” entries. If a verbatim indicates that they fit our definition of a response choice on the pre-defined list, we will recode it. Sometimes, a respondent will use a verbatim to request a change to the answer to another question, and, in other cases, the response may have a ripple effect requiring several questions to be recoded so that the respondent can be represented as they intended.

All told, we removed hundreds of cases that we felt did not meet our quality standards. We hope this data cleaning discussion communicates the strong sense of the rigor and seriousness with which we approached it.

We would end with a warning to those who took a less than professional or a blatantly dishonest approach to the survey, but let’s not kid ourselves. They’re not reading this report. We can only hope, as Travis Bickle once did, that someday a real rain will come and wash all this scum off the streets.

For anyone who encouraged these miscreants, Sam Spade’s words at the end of *The Maltese Falcon* (the novel and the movie) come to mind:

When one of your organization gets killed it’s bad business to let the killer get away with it. It’s bad all around – bad for that one organization, bad for every detective everywhere.

In other words, when people within our industry take surveys pretending to be someone else, make up false answers, or encourage others to do so, it’s bad for every one of us everywhere. Among suppliers, the skill they named as the #1 priority was market research expertise. Here’s your first lesson: don’t undermine someone else’s work because you’ll end up undermining the whole damn industry, yourself included. For those of you coming from a technology background, maybe this phrasing will resonate: an insights professional may not injure the industry or, through inaction, allow the industry to come to harm; it’s okay to obey orders given by your employer, except where such orders would conflict with the First Law.

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Concept Originator &

GRIT Executive Editor

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Questionnaire

Gregg Archibald – Gen2Advisors

Leonard Murphy – GreenBook

Lukas Pospichal – GreenBook

Nelson Whipple – GreenBook

Project Coordinator

Kristine Mensching – GreenBook

Design Partner

Keen as Mustard

Idea Highway

Research and Production

AYTM – Ask Your Target Market

Canvs

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Gen2 Advisors

Idea Highway

Infotools

Data Collection & Processing

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Displayr

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Data Access

KnowledgeHound

Infotools

Infographic

AYTM – Ask Your Target Market

Publication

GreenBook

Commentary Providers

AYTM

Behaviorally (Formerly PRS)

Cint

Dynata

EyeSee

Feedback Loop

FUEL CYCLE

GutCheck

Infotools

InnovateMR

Insights Now

Keen As Mustard

Maru Group

NAILBITER

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Op4G (Opinions4Good)

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Displayr

Quest Mindshare

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Opinions4Good

Quest Mindshare

Relative Insights

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Rival Technologies

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A.C. Nielsen Center for Marketing Analytics and Insight (at The Wisconsin School of Business)

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Australian Market & Social Research Society (AMSRS)

AYTM – Ask Your Target Market

Azure

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BAQMaR

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Cranbrook Search

CTR

Cubic Index

CX Network

Dynata

G3 Translate

Gen2 Advisors

Harpeth Marketing

Hotspex

IleX LATAM

Insights Association

Insights Now

KnowledgeHound

Lightspeed

Little Bird Marketing

Lynx Research Consulting

Maru/Matchbox

Michigan State University

MROC Japan

MRS

mTAB

Multivariate Solutions

NewMR

Newristics

Next Gen Market Research
(NGMR)

OdinText

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Pureprofile

PureSpectrum

Qualitative Research Consultants
Association (QRCA)

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Researchscape International

SampleCon

Stakeholder Advisory Services

System1 Group

The Research Club

Toluna

TriggerPoint

University of Georgia | MRII

University of Texas

What Next Strategy & Planning

Women In Research

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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.



Canvs

canvs.ai

Canvs AI is an emotion and behavior insights platform that understands how consumers feel, why they feel that way, and the business impact those feelings and behaviors create for brands through analyzing digital conversations, such as open ended text prompts in surveys, online product reviews, or from social comments on Twitter, Facebook, Instagram and YouTube. Canvs' patented AI and machine learning SaaS platform and APIs is possibly the largest ontology built to understand how people speak in a modern world, using the various ways that people communicate digitally, including emojis and slang, and works hard to understand misspellings and group topics in smarter ways than simple word clusters. Canvs is utilized by major media firms, fortune 5000 companies and research and marketing agencies to get closer to the consumer to help validate business decisions and understand how content is performing.



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www.gen2advisors.com

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Idea Highway

www.id-highway.com

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



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communicating data, research & insight

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KnowledgeHound

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Cint is a global software leader in digital insights gathering. The Cint platform automates the insights gathering process so that companies can gain access to insights faster with unparalleled scale. Cint has the world's largest consumer network for digital survey-based research, made up of over 144 million engaged respondents across more than 130 countries. Over 2,500 insights-driven companies use Cint to accelerate how they gather consumer insights and supercharge business growth. Cint Group AB (publ) is listed on Nasdaq Stockholm.



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Infotools is an award-winning software and services provider, with particular expertise in processing, analyzing, visualizing and sharing market research data. The company offers a powerful cloud-based software platform, Harmoni, which is purpose-built for market research data, together with data experts who can drive data harmonization, insights discovery, analysis, visualization and reporting. Established in 1990, and with a presence in the US, Europe, South Africa and New Zealand, Infotools works with some of the world's best-known brands, including Coca-Cola, Shell, Orange, Samsung and Mondelez.



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Toluna is a technology company that delivers real-time insights at the speed of the on-demand economy. We do what no other insights company can. We combine innovative technology, award-winning research design, vertical expertise and a panel of over 36 million consumers.

REPORT AND QUESTIONNAIRE CONTRIBUTORS



Gregg Archibald – Gen2 Advisors

Gregg Archibald is a marketing researcher and strategist dedicated to helping the research industry benefit from the consumer and technology changes that

are making the field both more challenging and more exciting. He is the Managing Partner for Gen2 Advisors – a strategy and consulting firm for the marketing research industry. Gen2 Advisors works with both client side organizations and supplier organizations to capitalize on the changes for business transformation and success. Working with several Fortune 100 organizations has framed the vision of the future in client needs and opportunities.



Lukas Pospichal – GreenBook

I lead GreenBook towards its goal of providing insights professionals with engaging, useful, and forward-looking resources. During my tenure as Managing

Director, we have transformed GreenBook from its origins as a business directory into a leading marketing, content, and community platform serving the global insights industry. I received my graduate degree in management from the University of Economics in Prague and completed a marketing program at HEC in Paris. I love mountains, good beer, and refilling energy on hikes and bike trips with my family.



Leonard Murphy – GreenBook

Leonard Murphy is the executive editor and producer at GreenBook: guru in residence, influencer-in-chief and product mad scientist. Over the last 15 years, Lenny

has served in various senior level roles, including CEO of full service agency Rockhopper Research, CEO of tech-driven BrandScan360 and Senior Partner of strategic consultancy Gen2 Advisory Services. His focus is on collaboration with organizations to help advance innovation and strategic positioning of the market research industry, most prominently as the Editor-in-Chief of the GreenBook Blog and GreenBook Research Industry Trends Report, two of the most widely read and influential publications in the global insights industry.



Nelson Whipple – GreenBook

Nelson brings over 30 years of market research experience to his consulting projects and role as Director of Research for GRIT. Much of his career has

involved quantifying, analyzing, and simulating customer preferences to inform product development and marketing decisions in B2C and B2B markets such as mobile devices, personal financial services, CPG, industrial equipment, telecom services, and retail.



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Simple Admin

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