



GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT



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CONTENTS

3	Foreword
4	Executive Summary
6	Methodology and Sample
8	Buzz Topics
12	Opportunities & Challenges
26	The Business Outlook
48	Organizational Success Factors
58	Industry Benchmarking
64	GRIT Top 50 Most Innovative Suppliers
78	GRIT Top 25 Most Innovative Clients
86	Market Research Industry Lumascope
98	Conclusions & Final Thoughts
99	APPENDIX – Methodology and Sample
104	APPENDIX – Business Outlook
124	APPENDIX – Lumascope Index
127	APPENDIX – Data Cleaning
128	Acknowledgments

COMMENTARY

11	Research Automation Is Driving Insights Activation, and Whether You Realize It or Not, It's Impacting Your Career – <i>Dyna Boen, Survata</i>
15	Beyond the Eureka Moment: How a Knowledge Sharing Culture Drives Innovation – <i>Mark Hammer, Bloomfire</i>
19	The Benefits of Automation and AI: Moving from Concept to Reality – <i>Melanie Courtright, Dynata</i>
23	Amplifying Your Growth Strategy: Why Client ROI Should Drive Innovation – <i>Andy Ellis, Lucid</i>
25	Industry Challenge: Making the Strategic A&U Agile – <i>Matt Warta, GutCheck</i>
41	Beautiful Chaos: The Cambrian Explosion of Research Tech – <i>Mike Stevens, Insight Platforms & What Next Strategy</i>
51	We Get Better With Help From Our Friends – <i>Annie McDannald, Civicom</i>
53	So you want to be innovative? Here's what it takes. – <i>Jim Longo, discuss.io</i>
55	Organizational Success Factors: Measuring Impact Maximizing Impact One Story at a Time – <i>Carl Wong, LivingLens</i>
57	Culture Change Needed for ResearchTech to be Effective – <i>Raj Manocha, Methodify</i>
61	The changing face of value: clients want new technology, data analytics, and strategic consultancy – <i>Dr Uwana Evers, Pureprofile</i>
63	The Purpose of Research Innovation – <i>Alex Hunt, PRS IN VIVO</i>
77	The Power of Innovation: What Makes a Supplier Innovative and Why is it Important – <i>Frédéric-Charles Petit, Toluna</i>
85	How Do You Become the Most Innovative Client Insight Organization? First, Adopt an Innovation Mindset – <i>Julio Franco, Zappi</i>
87	Is there an optimal client research organization? The data doesn't tell us – <i>Rick Kelly, Fuelcycle</i>
91	The Best of Both Worlds: Human Experience & Automation Fuse to Create The Next Evolution in Research – <i>Lev Mazin, AYTM</i>

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OUR PARTNERS...





FOREWORD

Welcome to the 25th edition of the **GreenBook Research Industry Trends Report**, using data collected in Q1 & Q2 of 2019. For several years we have designated each wave of the GRIT Report by referencing the quarters that it covers, but earlier this year we decided the GRIT program needed a refresh, and as part of that we have restructured each report topically to focus on different aspects of the industry. Thus, this can be considered the inaugural edition of the new **GRIT Business & Innovation Report**.

As the name suggests, the intent was to redesign both the questionnaire and the report to focus on large issues related to the *business of research vs the process*. The next edition of GRIT later this year will tackle the nuts and bolts of the industry. Of course, because GRIT is the primary vehicle to quantify the role and impact of innovation in the research space, innovation as a principle is the primary lens we use in understanding the business itself.

What does that mean in terms of content? Well, we decided for this report to focus on a few key topic areas: the *Buzz topics* the industry is paying attention to, *Opportunities & Challenges* for both organizations and the industry as a whole, quantifying a variety of critical *Organizational Success Factors*, mapping the industry with a new *Lumascapes*, understanding the current business outlook, refreshing our benchmarking section and of course, a perennial favorite, the *GRIT Top 25 Clients* and *Top 50 Suppliers* considered to be most innovative.

We have also shifted some analyses to a new Appendix section where you can access descriptions of methodologies and a deeper dive into certain topics/descriptions. We consider these sections important and valuable, but our hope is repositioning them in the layout increases usability of the overall report.

That is the high-level structure, but there are some surprises herein as we decided to dig deep while also maintaining as much consistency with previous waves as possible. Like the industry as a whole is doing, we wanted to keep the best of the tried and true while embracing the new to deliver more value and impact.

The end result of this work to refresh and repurpose the GRIT report series is a publication that we believe to be simply stellar and unlike any other industry report in our space. We know the industry depends on GRIT to both track and predict for strategic planning purposes and we've kept that need as our touchstone in all decision making. You'll let us know whether we have really succeeded, but we think you'll be pleased with the result.

As always, in preparing for this wave of the study, issues with balancing form factor considerations (mobile vs. desktops), keeping respondent engagement high, ongoing optimization of question design, and of course the tension between tracking questions and new areas we want to explore on length of interview are real challenges that impact not just us, but the industry as a whole. This is an ongoing effort and we'll continue to fight the good fight along with all of you.

Last but not least before you dive into the new report, acknowledgments must be given. GRIT is a community effort and our authors, commentary providers, sample partners, advertisers, and most especially research partners make it all possible. Special thanks go out to the organizations who helped with data collection and analysis: AYTM – Ask Your Target Market, Deckchair Data, Dynata, Gen2 Advisors, Infotools, Lightspeed, NewMR, OdinAnswers, OfficeReports, Potentiate, Market Research Institute International, Stakeholder Advisory Services, and students from the Michigan State University MMR program. We couldn't pull this off without their generous time, energy, and expertise.

Enjoy!

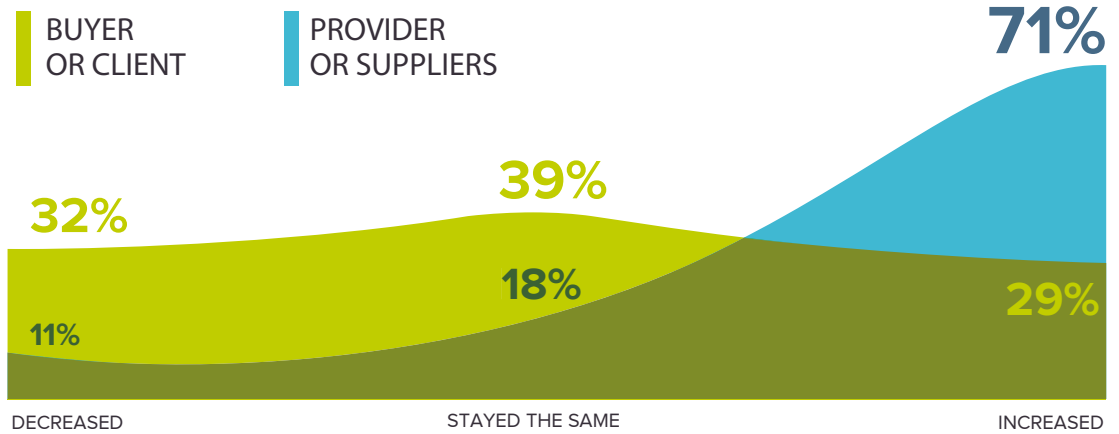
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EXECUTIVE SUMMARY



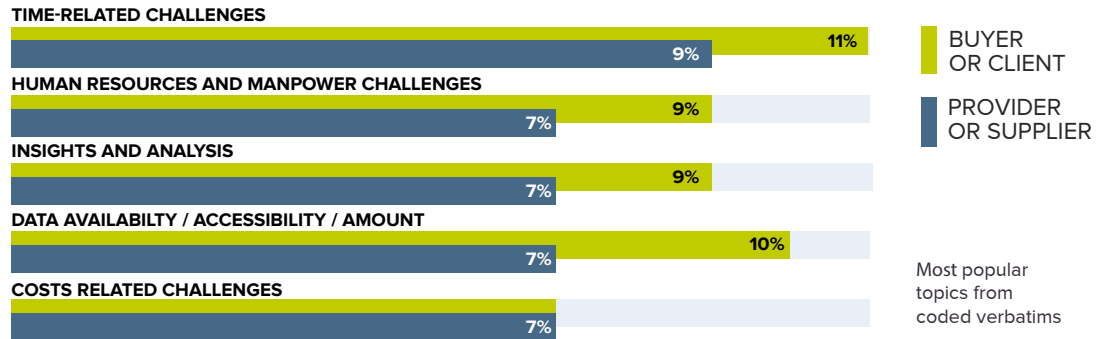
The apparent disconnect between reported growth in client budgets and supplier revenue continues. We can only surmise that more companies are taking pieces from the same pies, but thankfully they continue to be large pies.

BUSINESS OUTLOOK



Despite high levels of optimism, there are challenges the industry must face such as the perennial issues of time, resources, and delivering impact. However, we also see opportunities to solve some of these via AI, automation, and data synthesis.

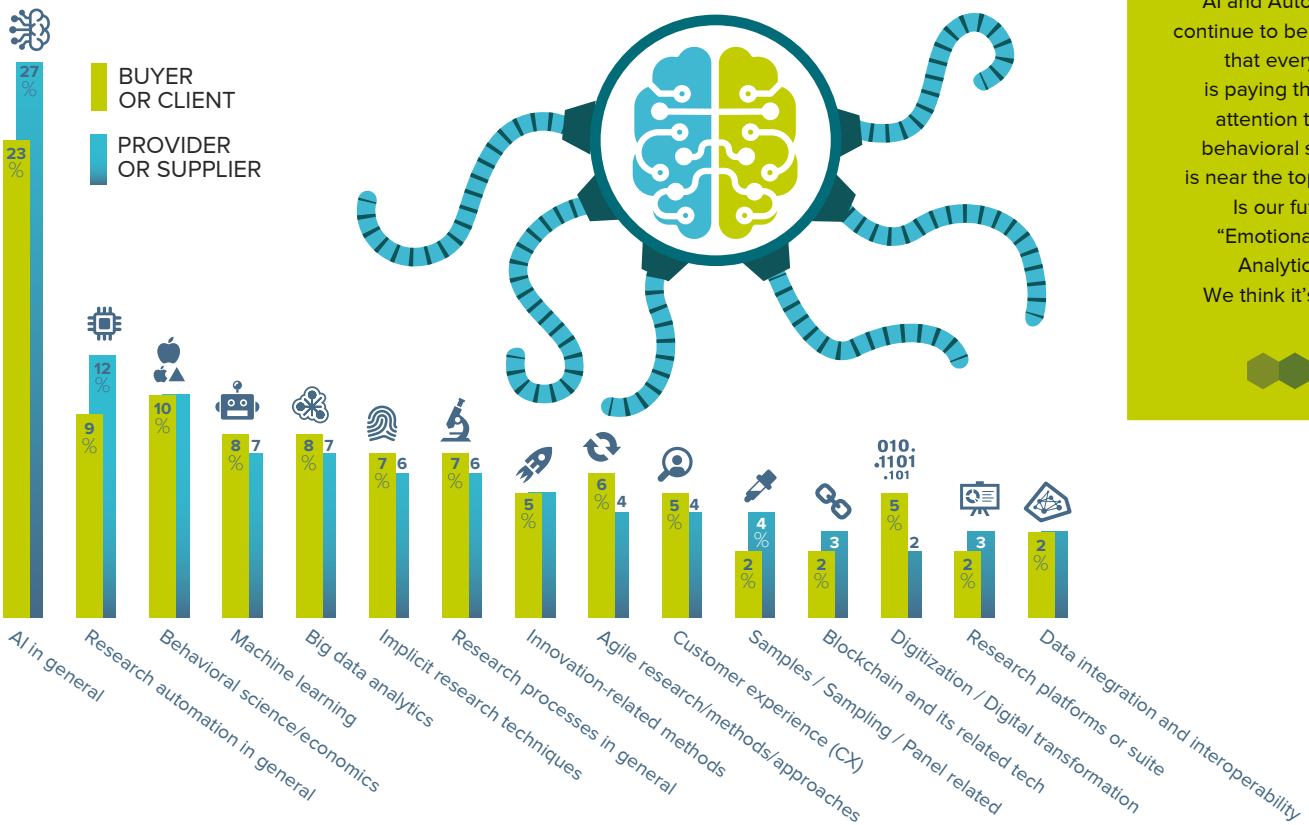
TOP CHALLENGES



MOST INNOVATIVE CLIENT LIST IS STABLE

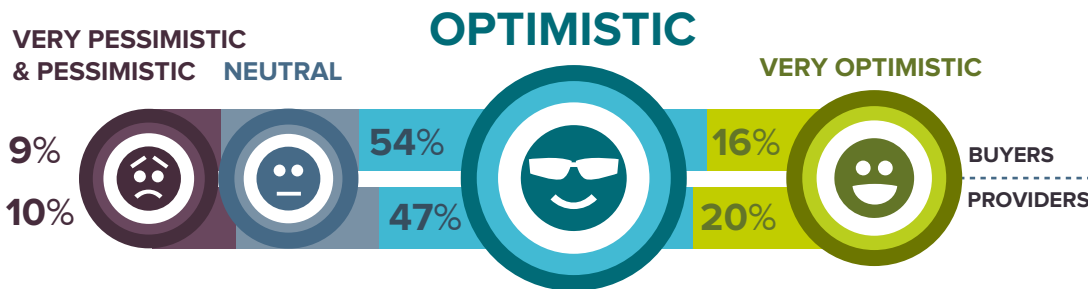
- 1 Unilever
- 2 P&G
- 3 Google
- 4 Coca-Cola
- 5 PEPSICO
- 6 amazon
- 7 facebook
- 8 Nestlé
- 9 Microsoft
- 10 Apple

BUZZ TOPICS: AI AND AUTOMATION STILL IN THE LEAD



AI and Automation continue to be the topics that everyone is paying the most attention to, but behavioral science is near the top as well. Is our future "Emotional AI & Analytics"? We think it's likely.

OPTIMISM ABOUT THE INDUSTRY



The future's so bright, we gotta wear shades seems to be the prevailing sentiment for the industry, and in almost equal measure for both Buyers and Providers.


SUPPLIER RANKING CONTINUES TO SHOW CHANGES





METHODOLOGY AND SAMPLE

For this report, the analysis is based on 2,880 completed interviews



Before diving in, a preliminary note on the naming convention for all trending data is warranted. GRIT editions have historically been described by the time period each study was fielded and published. This is the Q3-Q4 2018 edition because data collection occurred in November and December of 2018 and it is being published in Q3 2019. However, going forward we will also be interchangeably using the **GRIT Business & Innovation Report** designation. Over time we'll likely do away with the Quarterly designations entirely, but we'll allow for a transition period in our descriptions, as the new conventions take hold.

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 providers and clients.

As has been true for the past several waves, more of the respondents come directly through GreenBook email invitations than all other sources combined, and respondents from the United States comprise over half of all responses.

For this report, the analysis is based on 2,880 completed interviews after rigorous data cleaning, although for some questions, base sizes may be lower due to skip patterns, rotations, routing, and other factors. Unless otherwise noted, all analyses should be assumed to be based on the total sample.

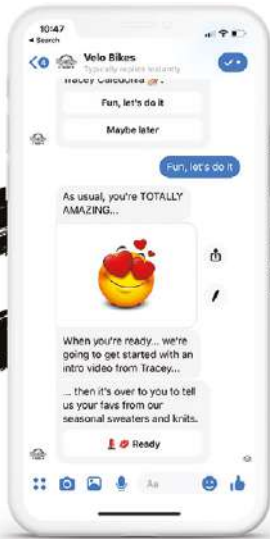
The sample size for this latest wave is similar to previous waves; GRIT historically has a sample size for our Q1/Q2 wave of between 2500 and 3000 completes.

Some differences in countries and regions exist as well, so some variances should be expected in certain findings based on sample artefacts. However, we have strived to call out regional differences in our analysis when that appears to be a significant factor in results. Overall, we see the composition of the sample remaining fairly stable both in terms of firmographics and regionality.

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

Because of the unique sampling approach we use, once data collection is completed, we go through a rigorous cleaning process to remove duplicate responses, low quality responses (it does happen, even with researchers as the sample universe), and any other type of response that we determine to be subpar. This is particularly important with the GRIT Top 50 lists to remove bias due to "vote stacking". In this wave we removed almost 1,000 responses we considered to be suspect for a variety of reasons.

RIVAL



GOODBYE SURVEYS... HELLO CHATS!

According to a recent research-on-research, 93% of respondents prefer chat surveys over traditional surveys.

[LEARN MORE: RIVALTECH.COM/GRIT](https://rivaltech.com/grit)

The mix of respondents has varied slightly through the waves of this study, this study, but within narrow bands. For this edition, we hold steady at 71% of respondents identifying themselves as being suppliers (n=2036) and 29% identifying themselves as clients (n=824). There is little difference regionally in this mix.

This wave does have the largest percentage of buyers in the history of GRIT, a fact that is particularly important based on our goal of understanding broader, systemic topics within the industry and to accomplish an effective mapping of the current sectors.

WAVE

COUNTRY	2014 Aug	2015 Feb	2015 Oct	2016 Feb	2016 Oct	2017 Feb	2017 Oct	2018 Feb	2018 Oct	2019 Apr
Insights Buyer or Client	26%	20%	22%	22%	20%	25%	22%	25%	26%	29%
Insights Provider or Supplier	74%	80%	78%	78%	80%	75%	78%	75%	74%	71%

THE BIG PICTURE

The combination of the large sample size globally, the diverse professional affiliation, and the deeply experienced nature of our participants, ensures that GRIT is the single best source of insights into the leaders of the insights and analytics industry. Both of the buyer, and supplier sides of the table. That said, we need to remind our readers that despite the robust sample size and high quality of participants, *the GRIT Report is not a census*

or representative sample, but rather a snapshot of the widest swath of insights professionals we can achieve. The report and its findings are representative of this sample, and although we believe it to be broadly representative of the industry, there are most certainly some geographical and industry subset gaps. With that in mind, **it should be read as "strongly directional"**.

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





BUZZ TOPICS

In this edition of GRIT, we wanted to understand what buzz topics our respondents were paying attention to, so we simply asked them in a verbatim question. The joys of good old-fashioned human coding delivered some valuable insights that are aligned with topics we have been exploring for several years now, as well as those that seem to dominate trade publications and events.

The biggest finding? Well, when a vote is won by those in favor they say “the ayes have it”. In this case it’s the “I”s, as in the “AI”s!

Artificial Intelligence (AI) is the clear winner in the Buzz Topics section of this year’s GRIT report. Just over one in four responders (26%) spontaneously mentioned this, trumping Automation (11%), Behavioral Economics (10%) and Big Data (7%). We see this across the globe with 27% of Europeans, 29% of Asians and 25% of Americans mentioning AI. Interestingly the buzz is across all stages of the research process, both Suppliers and Buyers were likely to mention AI, Buyers being slightly less likely to mention it than suppliers (23% vs 27%). If we also add in those saying Machine Learning or Deep learning, this rises to 33% – over one in three.

There is surprising consistency between Buyers and Suppliers on many mentioned topics, but also some interesting differences. Perhaps the best way to sum up the comparison is that topics related to “process” or “how to” are mentioned more by Suppliers, but those related to “Impact”, including the old trifecta of “faster, cheaper, better” are as likely or more likely to be mentioned by Buyers.

Since the dominant topic was AI, it’s worth exploring that a bit more.

What AI means to each responder is unknown of course since we only asked for buzzwords. As computer scientist Larry Tesler said; “Artificial Intelligence is whatever hasn’t been done yet”. Given the real pressure both Buyers and Suppliers are under to generate insights from complex data sets, ever more quickly, we can imagine that many may have been thinking about insights generation – finding patterns and correlations in and across data sets. Others may have been thinking about the creative process of survey and questionnaire design. Still, others may have been following Stan Sthanunathan’s view that the A in AI could be “augmented” rather than “artificial”.

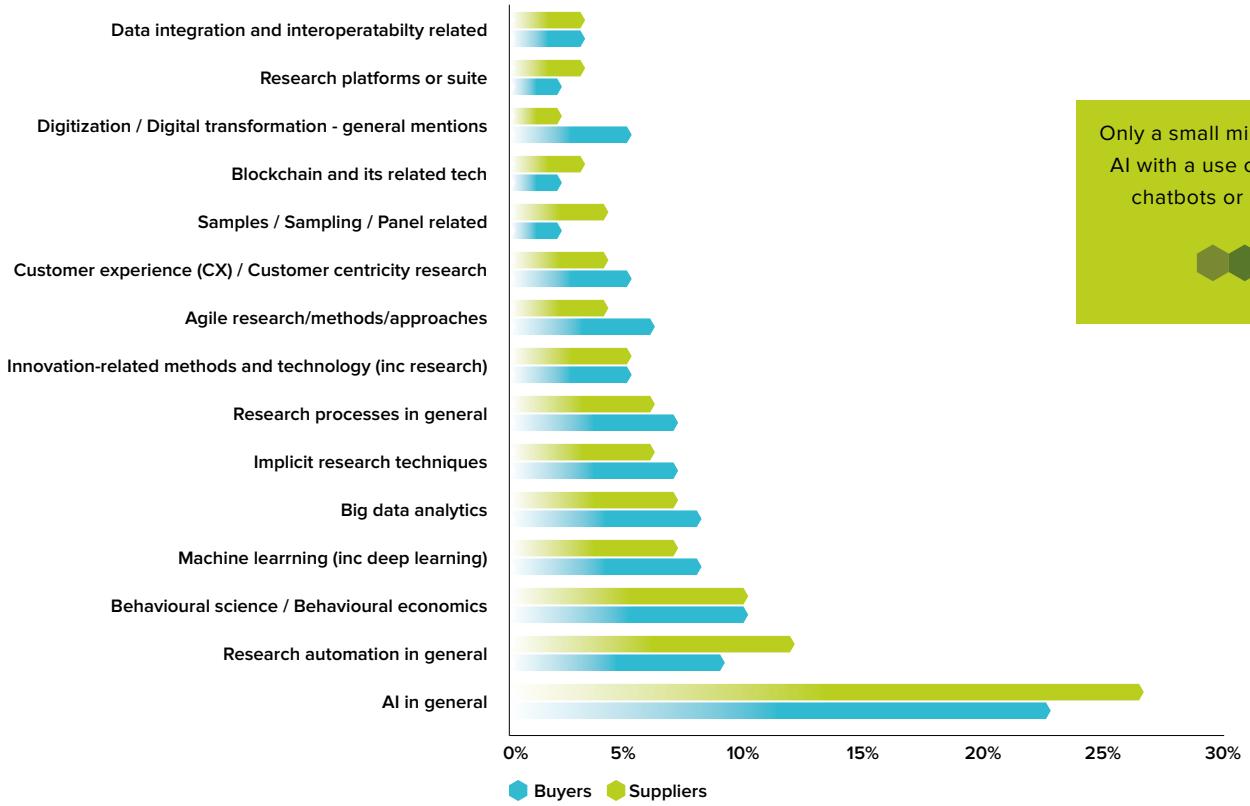
Only a small minority clarified AI with a use case – mainly chatbots or surveybots. This could herald a massive change in data collection modality – will the chat/survey bot speak or type its questions?

Further evidence that AI means different things to different people is seen when we contrast the views of those optimistic and those pessimistic about the future. A third of Optimists for the Insights Industry (35%) said AI or Machine Learning was a buzzword, seeing great potential perhaps for new and valuable insights. However, the same number (36%) of Pessimists also mentioned it. Perhaps they see AI as a threat to the human side of the equation or are fearful of “artificial stupidity” being the outcome.

Artificial Intelligence (AI) is the clear winner in the Buzz Topics section of this year’s GRIT report

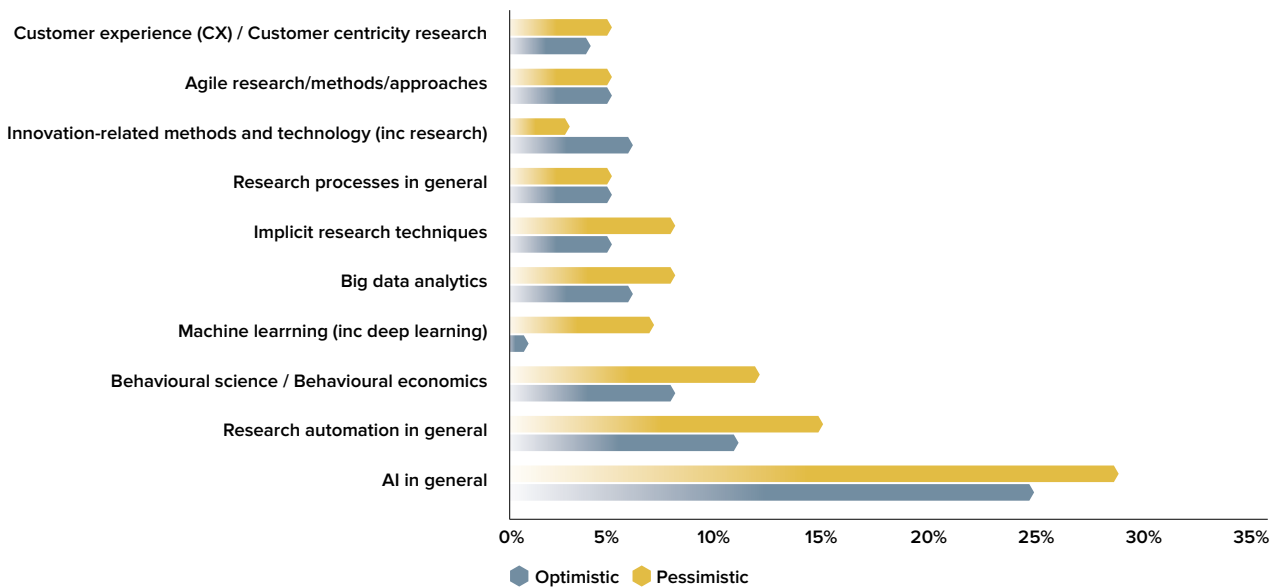


BUZZ TOPICS BUYER VS. SUPPLIER



Only a small minority clarified AI with a use case – mainly chatbots or surveybots

TOP 10 BUZZTOPICS BY LEVEL OF OPTIMISM IN THE INDUSTRY



Behavioral Economics was more likely to be mentioned in North America and Europe than in Asia or Latin America



Clearly machines should be able to take out some of the grunt work from the research process, and that machine need not necessarily have a lot of intelligence, just be faster. Over one in ten (11%) mentioned Automation. Almost as many Buyers (9%) as Suppliers (12%) said it, indicating that the pressure to produce research more quickly is felt all the way through the production chain. As with AI, this buzzword is being heard all over the globe.

Where we do see inter-regional differences is in the last two of the widely mentioned buzzwords. Big Data was somewhat more likely to be mentioned in Asia and Central/South America than it was in North America or Europe. In contrast Behavioral Economics was more likely to be mentioned in North America and Europe than in Asia or Central/South America.

Of the surprises in the results of this open-ended question perhaps the largest was Blockchain and associated technologies, mentioned by just 3% of responders. Another was data visualization and dashboards, also at 3%. When prompted on data

visualization and dashboards as buzz topics in previous GRIT reports, visualization had been ranked higher than Automation or AI. It could possibly be the advances in the availability of visualization and dashboards means this buzz has become a reality? The same could be said for Agile research. Mentioned by 4% of this waves' responders; could this also have become mainstream? For Blockchain, it had been seen as a "game changer" by a minority in the last report, perhaps this technology awaits a compelling use case in market research?

If, as William Gibson said, "the future is already here, it's just not evenly distributed", then we should see the buzzwords of the future hidden amongst the data and it should be surprising. For us the two surprising buzzwords mentioned were Implicit Research Techniques – emerging more strongly out of Europe and closely allied to System1 vs System2 (which was also mentioned), and then, completely out of left field: Sustainability. We must watch with interest how (and indeed if) conversations on these topics develop between now and the next GRIT report.

THE BIG PICTURE

For us the two surprising buzzwords mentioned were Implicit Research Techniques – emerging more strongly out of Europe and closely allied to System1 vs System2 (which was also mentioned), and then, completely out of left field: Sustainability



As we have seen for several years now, technology is the driving force of the industry, but that is deeply coupled to specific goals: decreasing costs, increasing efficiency, and delivering more impact that produces business results. Like in most other industries, the big bets seem to be on AI/Machine Learning/ Automation being the tools that are worthy of consideration, and presumably, experimentation or

eventual implementation. Regardless of the specific topic, the gating criteria of cheaper, faster, better have been, and will continue to be, the lens through which the industry determines which topics are worthy of attention, and it will also be how GRIT will determine what topics are worth further exploration in subsequent editions.



RESEARCH AUTOMATION IS DRIVING INSIGHTS ACTIVATION, AND WHETHER YOU REALIZE IT OR NOT, IT'S IMPACTING YOUR CAREER

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When I grow up, I want to be a market researcher. I was actually a technology consultant and network administrator that fell into market research. My first assignment in the industry included drafting documents for client kick-off meetings and training C&R Research on how to program online surveys. But I got my “big break” when I moved to Minneapolis, tasked with what seemed like the BHAG (Big Hairy Audacious Goal) of the day – moving all General Mills quantitative research to the Internet. Thousands of research studies later, it seems a relatively easy ask by today’s standard.

They say you can’t become what you don’t see. When I moved to Minneapolis, my client was Gayle Fuguitt, the VP of Consumer Insights at General Mills. She was the epitome of strategy and insights. Not only was Gayle the toughest “boss” I’ve ever had, but she was also an absolute visionary - she saw what research automation would bring before it was a “thing”. What was masterful about Gayle is that she was ferociously strategic, she used her vision to propel her career to the highest level. In doing so, she lifted up her entire insights organization and made them thought leaders of a new paradigm: online research.

Research automation has defined the careers of a generation of insights leaders. We’ve accomplished so much. Today online surveys are now table stakes; online samples, also tables stakes. It’s expected that surveys and samples are supported cross-device and with a high-degree of quality. We’ve layered on tools to make it so - data quality tools, programmatic sampling tools, agile research tools, and data visualization tools. All these capabilities have no doubt helped us save time and money, but has this changed the way we use insights? Has all this automation actually made insights more actionable? It seems to me that despite 20 years of research automation, the insights, no matter how compelling, are still locked in a PowerPoint deck.

While the means to the ends have drastically improved, the role of the insight’s leader has remained relatively the same: influencer. Why? Because of the PowerPoint conundrum. With many

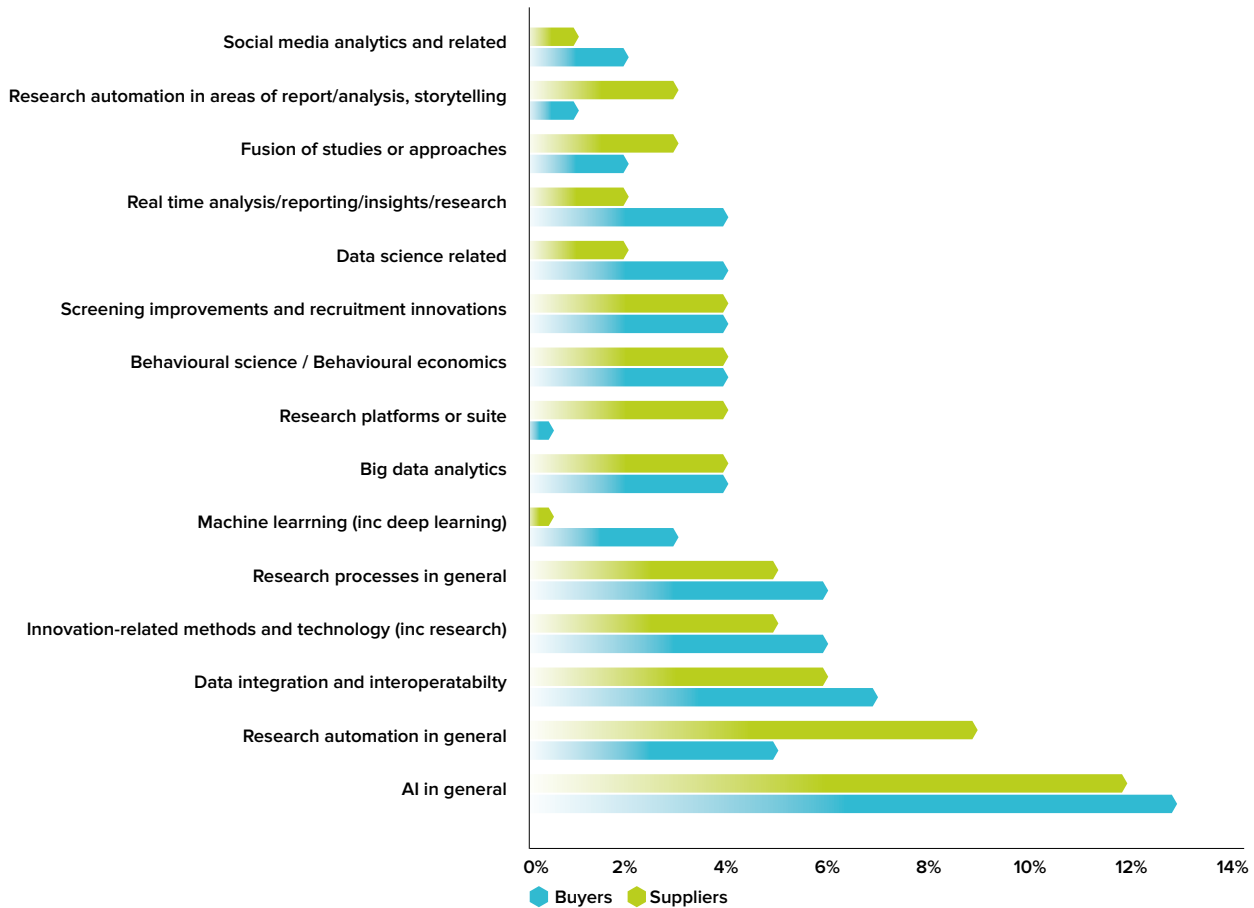
years of experience since those first assignments in our industry, everything in my being tells me that things are about to change - again. The future of the insights career is to move from influencer to driver of marketing and this means moving beyond the PPT. The next generation of leaders, the ones who will rise to the highest levels, the ones who will lift up their organizations, will be the ones who use research automation as a foundational launch pad to truly improve how we use insights, not just how we collect and display them.

The research career is evolving, and here’s why I think so... eMarketer’s Jasmine Enberg reported on March 28th, 2019 that ad spending is continuing to rise across the globe, with digital driving most of the growth. Additionally, we already know that earlier this year digital ad spending surpassed traditional ad spending (TV), for the first time in history. Digital ad spending is now 54.2% of total ad spend. This matters because research informs advertising and advertising budgets are usually 10X higher than research budgets.

It’s never been more important for researchers to elevate themselves from influencer to driver of marketing. The movers and shakers in our space are about to change everything from brand tracking to creative tests. This is so exciting, because for the first time ever, this change in ad spending, coupled with the advancements in research automation, are making it possible for us to digitally activate insights at a scale our industry has never known.

Additionally, as I observe insights leaders, across tech, CPG, and retail, they’re a lot like my previous colleagues at General Mills. They’re intelligent, tech-savvy workers who have chosen market research as their career path. They’re connecting the dots by partnering with brand managers, marketing teams, and ad agencies to take advantage of these new capabilities. These leaders are also ferociously strategic, and they’re the ones that are going to break through the PowerPoint and truly, digitally, activate insights.

INDUSTRY OPPORTUNITY BUYERS VS. SUPPLIERS



Diving deeper into the verbatims looking for additional context we found that while the consensus is that AI is the most beneficial opportunity, there's no consensus on what aspects of the research process will most benefit from Artificial Intelligence and machine learning ("AI/ML", as many respondents put it). Suggested applications spanned the research process, with respondents mentioning behavioral observation, facial recognition, quantitative and qualitative data collection, verbatim translation, verbatim coding, real-time alerts, Big Data analytics, qual/quant integration, data synthesis, decision-making models, and forecasting. As one corporate insights professional in a large European enterprise put it, "Leveraging Artificial Intelligence to step change the market research chain so that we (humans) can spend our time more effectively and efficiently".

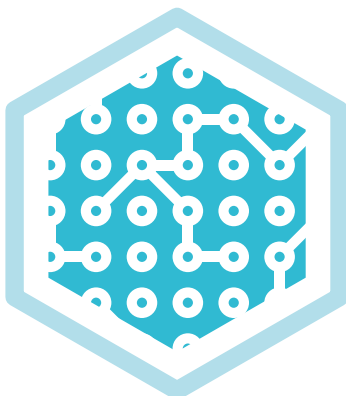
Some took a similar view for automation. "Researchers spend way too much time on project management, data processing, analytics, and creating reports of research results", said a respondent from a mid-sized U.S. supplier. "This process needs to be automated and streamlined end to end". A full-service research provider wants "intelligent automation of as much of the data collection value chain as possible, which frees up human resources and brainpower to make sense of the data and extract meaningful insights". Many respondents focused on the power of automation to improve reporting and analytics, especially for quantitative studies. Suppliers were almost twice as likely to refer to automation as buyers (9% vs. 5%), which is not surprising given the greater scale of research that suppliers are responsible for.

A full-service research provider wants "intelligent automation of as much of the data collection value chain as possible, which frees up human resources and brainpower to make sense of the data and extract meaningful insights."

Big Data was seen as both an alternative to traditional data collection and a supplement. As a European midsize supplier said, *“Big Data is the most powerful tool now in any industry, especially in Insight and Analytics. The innovative methods of collecting and analyzing data can save a lot of money for field work”*. But many more believed that Big Data should augment and be integrated into traditional quantitative studies. *“We still need a way to blend digital/big data with small data”*, said a corporate insights professional at a U.S. enterprise. *“I’ve seen some efforts focused in explaining longitudinal information using sentiment analysis of social listening, but we need to go deeper to really complement and learn”*.

Other items mentioned by respondents, each with an illustrative quote, include:

- **Data integration and interoperability (6%)** – *“The integration of data sources: From primary, secondary and client-side data, finding the right way to integrate each source for each business questions will be a game changer”*.
- **Innovation-related methods and technology (5%)** – *“How to leverage innovation to make an impact and action. How to bridge the gap between tech developer/innovator and marketers, as it seems like they speak different languages”*.
- **Quick project turnarounds / Enable faster decisions (1%)** – *“Continue to work on solutions that provide a quick turnaround time yet are still grounded in strong methodologies – speed continues to be of essence when working in the end-user corporate environment”*.
- **Big data analytics (4%)** – *“Synthesizing data sets across studies or across clients; for instance, look at the insights gleaned from meta-study analysis in pharma. Traditional research and sampling companies are sitting on a mountain of data that is very rarely being used beyond answering the questions at hand”*.
- **Research platforms or suite (5%)** – *“The evolution of online market research automation platforms to break out of the limitations of ‘black box’ automation while still allowing researchers to benefit from the simplicity of a guided interface but with the ability to easily customize the research tests to fit their unique research environment”*.
- **Machine learning / deep learning (4%)** – *“Machine learning for coding open-ends and being able to apply a trained dataset to survey scores and skim content to make connections and analysis that wouldn’t have been found otherwise”*.
- **Sampling-related innovations and improvements (1%)** – *“Accurate & reliable mobile/geofence-triggered, on-location survey sampling – i.e., the ability to locate and then verify online survey respondents when they are physically at the point of purchase, whether that is inside a retail store or on a car dealership lot”*.
- **Behavioral science / Behavioral economics (4%)** – *“Opportunity for more System1 / unconscious research as the majority of research still relies on System2 / rational responses, which we know accounts for a minor part of human decision making.”*



“Big Data is the most powerful tool now in any industry, especially in Insight and Analytics. The innovative methods of collecting and analyzing data can save a lot of money for field work”



BEYOND THE *EUREKA* MOMENT: HOW A KNOWLEDGE SHARING CULTURE DRIVES INNOVATION

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For insights professionals, the ideal outcome to any research project seems simple. After reviewing the data, your team has a eureka moment, and this new realization leads to valuable insights that become the foundation for a ground-breaking innovation that leads to new products and great success.

As much as we like to mythologize the eureka moment, innovation doesn't occur in a single flash of brilliance. And while creative, novel ideas may sometimes seem to appear out of the blue, they're actually the result of a new perspective or a combination of ideas that came before.

Innovation within your business doesn't come from a single study or report that your team compiles. It occurs when you make connections between different pieces of information and collaborate across functions. That can't happen unless you take a bottom-up approach to innovation.

What Is a Bottom-Up Approach to Innovation?

Taking a bottom-up approach to innovation means that you are democratizing information and insights across your company—and encouraging people at all levels of the organization to follow their curiosity and learn from their peers in different departments. This is still a challenge for insights teams across industries. Only 17% of respondents in the Business & Innovation GRIT Report said that they always promote research to the broadest appropriate audiences.

To foster an innovative environment, insights teams must distribute their research to stakeholders across the organization, not just to the line managers who commissioned the project. Ideas often come from unexpected places, and combining the expertise of employees from across the organization allows your teams to make the kinds of connections that lead to innovation.

There are two additional key components to bottom-up innovation: giving employees the opportunity to ask their peers questions and the space to fail safely.

Asking questions is important because it helps your teams identify sources of expertise, gaps in existing knowledge, and new areas for exploration. Inviting customer-facing teams to ask questions about your latest market research report, for example, can help you discover areas for future studies or to discover new applications for existing research that you might have missed otherwise.

Ideally, employees should have access to a platform that lets them search for questions that have already been asked and publish questions that haven't so that the Q&A process is as efficient as possible. After all, no subject matter expert wants to answer the same question over and over again.

Giving employees space to fail safely is a matter of leaders promoting a culture of experimentation. Leaders must show their team members that making a decision and failing (or getting an unexpected outcome) is more valuable than not making a decision at all. Leaders should also encourage their team members to document and share the outcome of their experiments so that others can build on what they've learned.

Innovation Starts With a Knowledge Sharing Culture

Innovation doesn't occur in a vacuum. Insights teams need to share their learnings with stakeholders across the organization, welcome input and questions from their co-workers across functions, and synthesize existing research. It's only when ideas from all these different sources come together that something new can emerge.

OPPORTUNITIES & CHALLENGES: INDUSTRY CHALLENGES



After asking about opportunities, we asked respondents about challenges related to the industry as a whole vs. their organization.

We asked “What do you consider to be the greatest challenge for growth and impact in the Insights & Analytics industry?”.

As we shall see, text analytics reveal the same themes for industry and organizational challenges, suggesting that respondents may be projecting issues facing their own organizations onto the industry as a whole.

The larger the word or phrase, the more respondents who used it in their response.

Respondents may be projecting issues facing their own organizations onto the industry as a whole

“The greatest challenge impacting innovation and growth is [sufficient] resources.”

Delving a bit deeper for context, a few quotes are worth surfacing to illustrate the biggest challenges to the industry:

- **A limited client appetite for innovation.** “People talking about change and innovation but never actually doing it”. “Resistance to change or discomfort in embracing new methodologies”.
- **Getting from data to insights.** “Too much technology that promises cheaper, faster, better insights, which is not possible. The pressure to get faster and cheaper results is cutting down on thinking time and quality insights”.

- **Pace of change.** “Since change is the only constant, evolving continuously while doing what we used to do earlier is a challenge. We need to strike balance between what was traditionally done and where all we can adopt new agile ways”.
- **Excessive workloads.** “We are not staffed properly with enough or the right people to help lead these initiatives”.
- **Resource constraint.** “The greatest challenge impacting innovation and growth is [sufficient] resources”.

We see little significant differences among any subgroups or regionally; like buzz topics and opportunities, these challenges cut across the industry.

OPPORTUNITIES & CHALLENGES: ORGANIZATION OPPORTUNITY

We asked respondents to think about their own organizations by asking “What do you consider to be the greatest opportunity for innovation that would deliver the most benefit in your organization?”

Looking at thematic differences by Buyer or Supplier shows a similar alignment as previously noted.

The larger the word or phrase, the more respondents who used it in their response.

BUYERS



SUPPLIERS



Narrowing down from the industry as a whole to their own organization, automation edged out AI/ML. Buyers were more likely to mention AI, while suppliers focused on automation (which can of course be powered by AI) to achieve what buyers say they want: research and data that deliver insights.

Despite the organizational focus of this question, differences by type of organization were rare. For instance, respondents were interested in innovation and AI in similar proportions, regardless of the type of organization they worked for.

Rather than looking at the total N, an analysis just by those who answered the question gives a bit more nuance.

Survey platform providers were disproportionately interested in automation (26% vs. 16% overall), while other software providers were much more interested in voice, video, and immersive technology (19% vs. 3%).

Corporate insight professionals had the highest need for speed: 11% vs. 6% for quick project turnarounds that enable faster decisions. They also had twice the need for operational efficiencies to enable more time for interpretation: 9% to 4%.

The key takeaway from the responses to the opportunity questions is once again that technology is viewed as the path to driving new value for the industry, albeit the end goals may be slightly different for Buyers vs. Suppliers. In the next section we'll see whether these opportunities correlate with self-identified challenges.

Narrowing down from the industry as a whole to their own organization, automation edged out AI/ML



Corporate Insight Professionals had the highest need for speed: 11% vs. 6% for quick project turnarounds that enable faster decisions



ORGANIZATIONAL OPPORTUNITY BY PRIMARY FOCUS

Organizational Opportunity	Total	Cell in Focus	Type
NET	100% 2315		
Research automation in general + Research automation in areas of report / analysis, storytelling + Research automation in data collection/Testing	16% 373	26% †	Survey Platform or Software Provider
Innovation-related methods and technology (inc research) + Sampling related innovations and improvements + Innovation-related methods and technology (inc research)	13% 304		
AI in general + AI – Chatbots / Bots / Survey bots / Chatbots for survey + AI for insights + AI-Robotics + Machine learning (inc deep learning)	12% 282		
Big data analytics + Data science related + Data driven strategy or technology or innovations + Data integration and interoperability	12% 274	28% †	Business Intelligence, Analytics, or Big Data Solutions Provider
Software as a service (SaaS) + Real time analysis/reporting/insights/research + Research platforms or suite + Digital qualitative platforms or tools + Research tools and UI improvements and innovations	11% 260		
Business consultancy/ Full consultancy services or solutions + Soft skills, ideas generation and talent development + Marketing / Reaching out to clients / Getting more clients or sales + Better storytelling / Intuitive story telling tools + Focus in the area of client servicing / client success + Data visualization (inc dashboards)	7% 151		
Quick project turnarounds / Enable faster decisions	6% 144	11% †	Corporate Insights Professional
Other research methods or techniques + eCommerce studies + Cultural analysis + Shopper Research + Sensory Research + Traditional or legacy research methods/approaches/thinking + Crowd sourcing + Customer experience (CX) / Customer centricity research + Mobile based surveys	6% 134	16% †	Other (please specify)
Operational efficiencies + Enablement of (To free up) human resources for meaningful human thinking, interpretations and insights + Efficiency / Doing things efficiently + Agile research/methods/approaches + Research processes in general	4% 97	9% †	Corporate Insights Professional
Cheaper to market/Pricing attractiveness/Cheaper costs to business/ Reduced costs	3% 81		
Voice-related technology (inc voice-to-text, speech recognition) + Visual/ Video-related technology + Immersive technology	3% 70	19% †	Other Software Provider (Statistical, Text Analytics, Visualization, etc.)
Behavioral science / Behavioral economics	3% 65		
Digitization / Digital transformation – general mentions	3% 62		
Text analytics + Sentiment analysis + Social media analytics and related	3% 60		
Fusion of studies or approaches	2% 50		
Passive data collection + Implicit research techniques + Location-based research + Internet of Things	2% 48		
Fraud (inc professional respondents) detections and prevention + Privacy, GDPR, NDA and other personal data security related + Transparency	1% 29		
Others + NLP + Identifying emerging/future trends + Focus on new product or service development / early stage development + Blockchain and its related tech + Collaborations / cooperation + Improvements relating to media buy and its efficiency + Screening improvements and recruitment innovations + Maintaining/Increasing quality research standard + Personalization and customization + UX, UI related research (inc web design/development)	15% 348		
None + Not sure / No comments / Don't know	4% 87		

Total sample: Unweighted; base n = 2315; total n = 3041; 726 missing
Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)



THE BENEFITS OF AUTOMATION AND AI: MOVING FROM CONCEPT TO REALITY

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According to the research participants in the new GRIT report, the greatest opportunities for innovation within their companies can be found at the intersection of creativity, talent, and technology.

It's no surprise that the promise of automation and Artificial Intelligence were the strongest themes when researchers were asked what drives innovation in their companies. But what's most interesting in their responses, is *how* these technologies could spur innovation. Researchers have moved beyond seeing automation and AI as nebulous benefits, to envisioning a new reality.

Many researchers don't see automation and AI as driving innovation themselves, but rather as technologies that enable humans to drive innovation. Automation and AI have the ability to relieve talented people of mundane tasks, freeing up valuable time to focus on the creative work of innovation.

Prior GRIT reports have revealed the surprising amount of time researchers spend checking data, creating charts, and doing calculations. We now have tools to "automate data cleaning, analyze open-end responses", "streamline processes", read and record invoices, "gather all innovation, insight and trends into one single platform that everyone can easily access", "allow natural language processing and coding of open-ended text", and take on "repetitive business practices" of all types. The ideal tool, said one researcher, performs at the "sweet spot of speed and substance in a simple and secure way".

With many traditional research tasks taken out of human hands, organizations can leverage their talents to explore less traditional approaches. For example, cross-functional workshops to forge unlikely collaborations and unexpected connections or seek out unexplored alignments and opportunities to expand beyond their core client set.

"The amount of reliable and available data out there is breathtaking", said one researcher. Technology lets us leverage it by "defining and addressing precision targets...within an ecosystem", delivering "better machine learning algorithms for psychological research techniques", "[analyzing] data on a wider scale instead of just on a project scale", and providing "game-changing" topic modelling.

With these tools, "we are expanding into more of a consulting role using market research components and other forms of intelligence to provide context and insight to our clients", said one researcher. Forging connections to give context to our data is a clear theme in the promise of innovation: for example, marrying behavioral with survey data and layering in digital data. We need to "move beyond just survey data and learn to process and analyze larger structured data sets", said one researcher.

Successful implementation of AI, technology, and automation isn't a given of course. There were some words of caution too. One researcher noted that overly sophisticated tools can be inefficient, and we must balance automation and flexibility. "Embracing innovation just because it's new technology without understanding what the data generated means", is a risk, said one researcher. Another said we must "accept that failure [equals] learning with new technology. It's what innovation is all about".

The power of automation and AI lets us operate more efficiently and at scale, giving us time for higher level thinking, imagining, and communicating. The challenge is to use the time and talent within our organizations to be adventurous, collaborate, think both more broadly and deeply about our clients' business problems, try new approaches, be agile, and think differently over and over again until true solutions emerge. As one researcher put it, using tools that "squeeze more value from data, connect disparate dots and visualize in a compelling way". An industry that has been very slow to change may, thanks to AI and automation, be on the crest of a wave of creativity.

OPPORTUNITIES & CHALLENGES: ORGANIZATION CHALLENGES

With challenges around resources such as time, staff, data, and technology being most frequently mentioned



As noted before, respondents see similar challenges both for their organizations and the industry as a whole.

In looking at thematic analysis again, we see several issues rising to the top that can be summed up with the verbatims that deliver context.

TERMS MENTIONED BY 100+ RESPONDENTS

Word	Frequency	Example Quote
Clients	165	"The link with the client, I believe that behind every successful agency there is a successful client. More clients are needed who wish to innovate together with the agencies."
Research	119	"Lack of understanding of how research output is harnessed and put to action by client. Also very little appreciation for research, especially in Asia."
Change	117	"The mindset of the insights & analytics buyers has also not changed significantly for the last few decades. For the industry to evolve, the buyers need to evolve. While everyone might talk about the changes required, the buyers are not ready to change their behavior and accept the tradeoffs that come with adoption of technology."
Lack	113	"Lack of awareness and familiarity of the potential of the different consumer sources, lack of clear business objectives or action standards, lack of effective integration between IT and digital infrastructure."
Time	111	"Increasingly high demand for tighter timelines and more complex studies. A complex study takes time – if you rush it, the insights suffer. Not sure clients understand that."
Need	106	"We need to rework our business model, especially as it relates to speed, to better fit client needs. Experimentation is fine, but new tech or techniques alone will not help."
Data	104	"Too much data. It can be easy to feel that the more data you have, the better your understanding, however having a few data points from the most accurate measures is vital for the best decision making."



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A more detailed analysis via coded verbatims shows a similar clustering of challenges, with challenges around resources such as time, staff, data, and technology being most frequently mentioned. As usual, we see a general alignment between buyers

and suppliers, although more process-oriented challenges are aligned to suppliers while more impact related challenges are top of mind for buyers.

The correlation between buzz topics and challenges and opportunities are unmistakable.

ORGANIZATIONAL CHALLENGES BUYERS VS. SUPPLIERS





AMPLIFYING YOUR GROWTH STRATEGY: WHY CLIENT ROI SHOULD DRIVE INNOVATION

Andy Ellis

Chief Revenue Officer and Managing Director, North America, Lucid

Website: luc.id

It's no secret that innovation is a driver of success. Our industry has seen the impact that automation and programmatic sampling has had on the world of online research. We've fundamentally changed the insights space by combining research with technology – and the results have been phenomenal. In fact, 75% of GRIT respondents' organizations are actively exploring new methods, technologies, business models, and partners. 83% said their organizations are also focused on future growth strategy. So, it's clear that innovation is the key to growth – the tricky part is identifying the right direction to drive that innovation.

It's important to consider why market research innovation has been so successful in the first place. While innovation is impressive in its own right, the impact of technology goes beyond mere functionality. It's made a real difference in our clients' businesses. Programmatic sampling has made research more accessible to the masses, while enabling businesses to run faster, easier, more frequent studies. This has done more than improve the sample procurement process; it's created new opportunities for researchers and sample suppliers across the globe.

However, new technology alone doesn't guarantee business growth. Our continued growth is attributed to the ROI we provide to clients – and that means our clients' needs should be leading the industry's innovation efforts.

Interestingly, only 37% of GRIT respondents said their organizations measure the ROI of the projects they conduct. This is surprising, as client success ultimately determines our success. Clients use our technology for one simple reason: to increase ROI for their own businesses. If our solutions don't meet those needs, we run the risk of becoming obsolete. Without measuring the ROI of these projects, it's nearly impossible to identify nuances that can improve or inhibit our clients' growth. Plus, without an in-depth understanding of current client ROI, market research organizations will struggle to penetrate new markets.

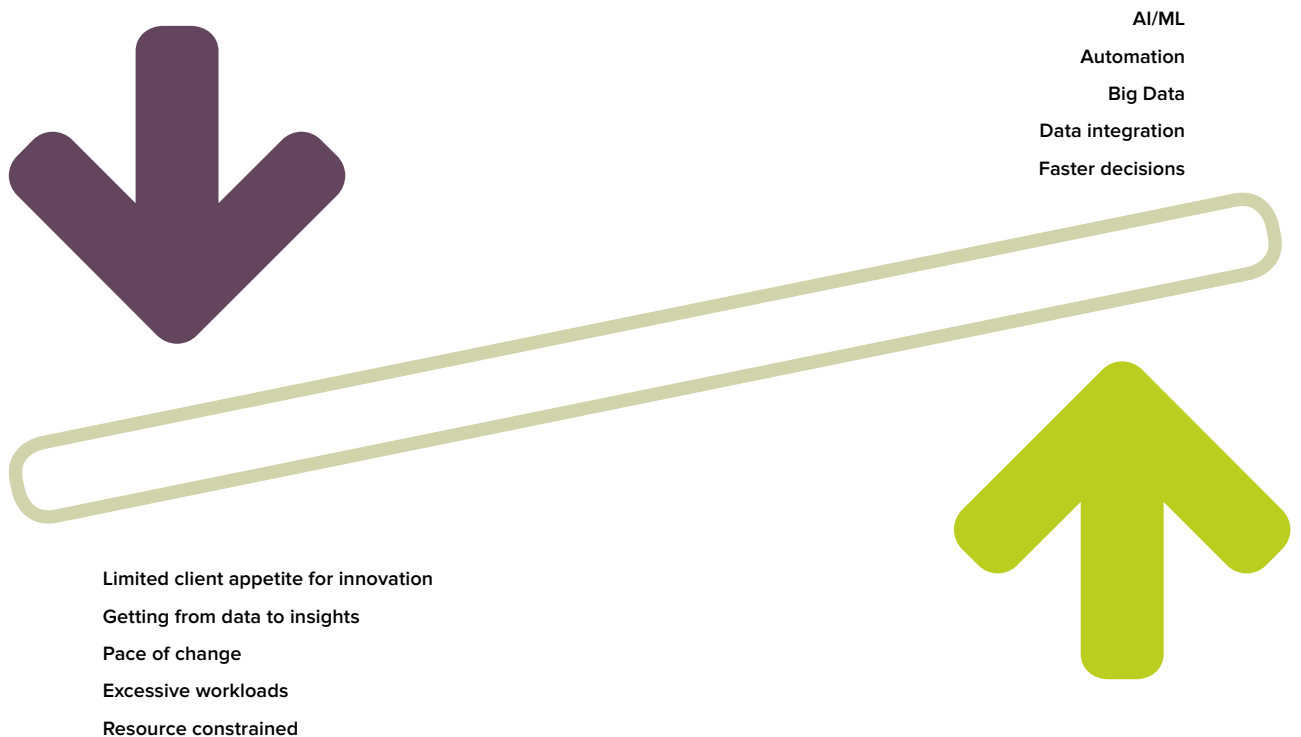
When approaching strategic work, it's easy to take a step back, look at the most evident data in front of us, and outline a strategy based on those facts. While that approach clearly has merit, a strong strategy for innovation also requires taking a granular, scalable approach to identifying the benefits clients receive from our products. After all, they're the ones using our products – so their needs should inform our innovation. Rather than always leading the client toward new technologies, we must allow them lead us as well.

Innovation is constantly evolving and requires ongoing effort. Technology that was once new has become the norm, and many organizations are wondering what's next. I know this much is true: the first wave of market research innovation has already happened, and it's time to prepare for the next one. Innovation won't stop with programmatic and automation. I firmly believe that "what got you here won't get you there" – if you've found a successful method for achieving your business goals, that's great. However, continuing to implement that method, without innovating, will eventually render it unsuccessful. This is a valuable lesson that Lucid lives by, and it's one that everyone in the insights space should put into action.

THE BIG PICTURE

There is a high correlation between challenges and opportunities, so to an extent the industry does seem to have a direction to address some issues. The opportunities address these challenges directly and indirectly.

Challenges and Opportunities for the Research Industry



AI/ML, automation, Big Data and data integration all promise to help organizations get from data to insights faster, while working around staffing limits and resource constraints. To break through the limited client appetite for innovation, however,

these technologies will need to make business cases that cannot be refused. The insights and analytics industry of the future will rely on technology an order of magnitude more than today's industry already does.

The insights and analytics industry of the future will rely on technology an order of magnitude more than today's industry already does





INDUSTRY CHALLENGE: MAKING THE STRATEGIC A&U AGILE

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Growing revenue in an agile way is a strategic priority for most companies; there's an abundance of data supporting this.

GRIT reported an increase from 36% to 51% for those who said their organization is always focused on future growth strategies, one of the largest changes of any measure. To fuel these strategies, marketers often turn to attitudes and usage (A&U) studies to understand market or growth opportunities by understanding whom to target, with what and how, and what competitive dynamic exists. In the last four years, the percentage of market research budgets for A&Us has more than doubled, from 5% to 12% (source: ESOMAR), while the need for agility has gone from being the exclusive domain of software developers to a required attitude and capability to stay competitive. And consumer insights is no different. Based on a recent survey we conducted, 71% of consumer insights professionals used agile market research in the last six months. The issue is agility is not traditionally associated with strategic research.

To explore this, let's remember where we've seen agile research predominantly applied in market research. Since 2012, it's gained significant traction. In this first wave, automation took center stage and was applied to tactical research like copy and concept testing, both standardized studies with straightforward design and analyses. While budgets for these studies remained stagnant over the last four years at 2%, clients are doing significantly higher volumes of testing as they're able to do more with the same budget, iterating toward success versus only testing for validation.

So, what if strategic research like the A&U was more accessible and agile? We could conduct it more often, faster, and make an enormous impact.

The ideal agile strategic research solutions must encompass the following:

- Experts who design studies, weaving in unique business context, to meet client business objectives. Sixty-nine percent of insights buyers have understanding of goals and strategies as a top priority.
- A robust, flexible technology platform that enables:
 - Configurable study design for questions and consumer segments studied.
 - A mixed methodology approach (qual, quant, primary, third party data, etc.) that answers who, what, where, when, why, and how.
 - Real-time data cuts to help researchers—using multiple methodologies—identify audience themes for persuasive storytelling.

These elements enable strategic research, like the A&U, to exploit market opportunities more often. As an example, one of our clients needed to prove source of volume for a new product innovation, including cannibalization risks for existing SKUs. Through survey and behavioral data analysis they were able to identify and profile the audience who would drive their growth, understanding their needs, interests, and preferences. To gauge product reactions, our team also analyzed qualitative video testimonials among the potential switchers, highlighting the most important product features and benefits to focus on. In two weeks, for the price of a traditional copy test, our client was able to answer the right questions in a holistic manner and identify sources of incremental revenue to gain a competitive edge, which will allow them to bring a compelling case to their retail partners.

An increasing amount of budget dollars will continue to move toward more strategic research to identify truly proprietary growth opportunities. Those able to conduct this research with agility will reap the benefits of this, much like we've seen with more tactical research. Bringing agile strategic research to growth initiatives is the next wave of agile, wherein we help businesses achieve success with more clarity and ease than ever before.



THE BUSINESS OUTLOOK

OVERVIEW

Long-term industry viability depends on the ability of internal insights departments and external suppliers to demonstrate how they contribute to real business value



For most Insights and Analytics players, the industry is enjoying good times, though not without creative tension. Many success stories are driven by a “micro” focus – e.g., suppliers focusing on specific areas of technical or methodological expertise. Overall, however, the essential nutrient of the industry, spending, is driven by “macro” circumstances, i.e., the overall management and financial performance of buyer companies. Insights and Analytics departments can and do play critical roles in that success (or, in some cases, lack of), but they do not play every role. As this GRIT report’s Benchmarking section alludes, long-term industry viability depends on the ability of internal insights departments and external suppliers to demonstrate

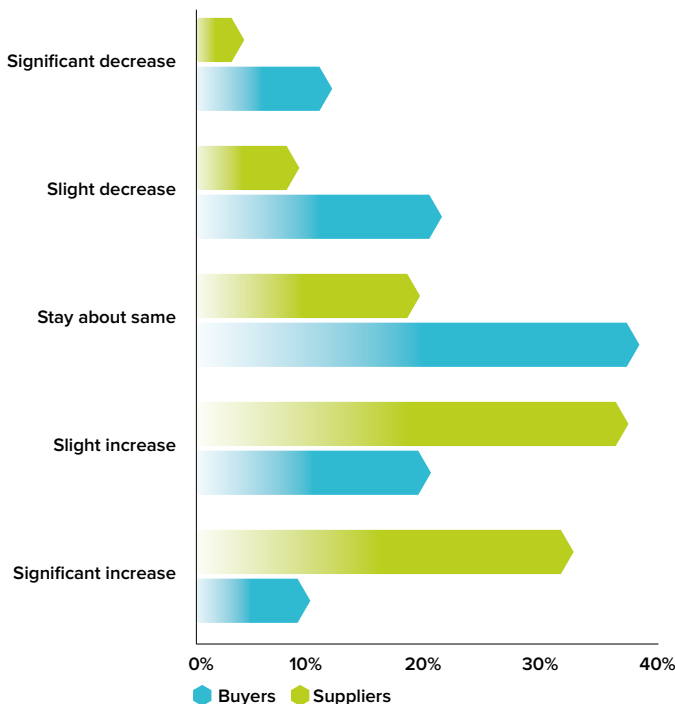
how they contribute to real business value. Certainly, “faster” and “cheaper” ways of generating insights produce easily measured, demonstrable value, at least in the short term, but “better” ways – ones that provide long term business value – are more difficult to prove and at least equally essential.

In this GRIT period, research budgets were generally flat, but most suppliers experienced revenue increases. Equivalent proportions of buyers saw research budgets increase as decrease, 29% to 32%, but that does not imply equivalent “pro-research” and “anti-research” camps. Whereas a budget increase usually signals that business leaders support the value provided by the insights group, a decrease sometimes occurs when a group is providing great value, but doing it more efficiently. This latter situation raises a “macro” question of why the business values cost reductions more than reinvesting budget in insights-driven growth.

By comparison, 71% of suppliers reported revenue growth to only 11% reporting a decrease. Revenue increases were usually outcomes of a more aggressive business development approach, successful communication of how the client will benefit from the work, or a combination of both.

Relative to their performances against their own research, analytics, and insights goals, most buyers and suppliers felt successful. Across buyers and suppliers, 90% felt they at least met their goals, with 47% of buyers and 57% of suppliers believing they exceeded them.

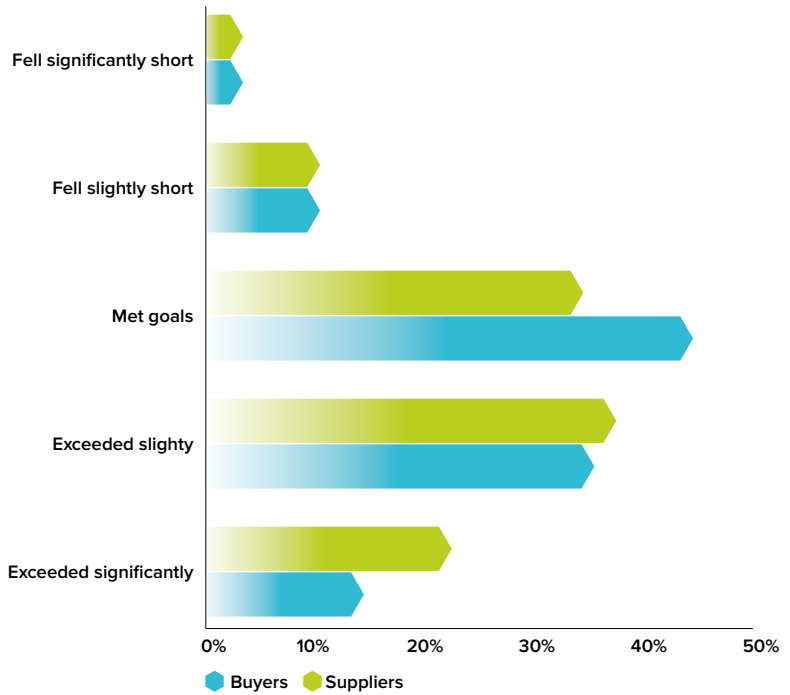
BUYER RESEARCH SPENDING & SUPPLIER REVENUE TRENDS



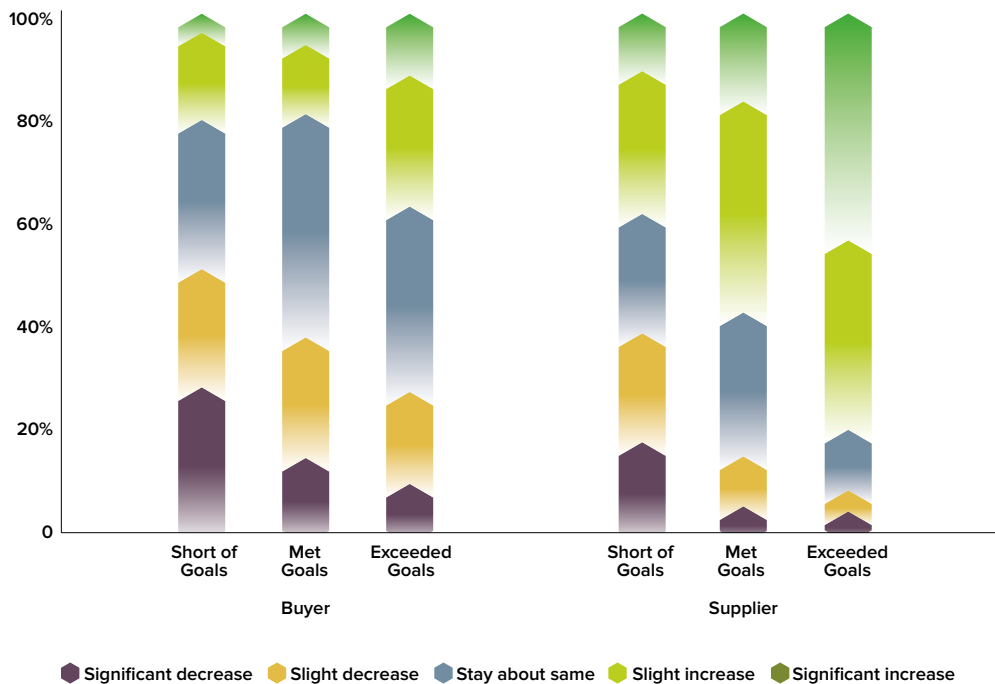
Among buyers, falling short of goals carried a penalty: nearly half (49%) lost budget. Among those who exceeded their goals, 38% experienced budget increases (versus only 20% for those who met or fell short of goals). However, 25% of exceeders lost budget, suggesting that decreasing costs (and therefore budget) was one of their goals.

For suppliers, the relationship between revenue trend and performance toward research, analytics, and insights goals is more linear: 83% of those who exceeded goals increased revenue while only 5% decreased. Among those who merely met goals, 59% increased revenue, while only 40% of those who did not meet goals increased revenue, equivalent to the 37% who lost revenue. The fact that so many suppliers who fell short of goals increased revenue suggests either that inertia in the market protects some suppliers from losing revenue (at least short term), or that unrealistic goals were set in the first place. While some may be able to take comfort in the benefits of inertia, there is a greater upside to establishing appropriate goals and exceeding them.

BUYER & SUPPLIER PERFORMANCE AGAINST RESEARCH, INSIGHTS, AND ANALYTICS GOALS



BUYER & SUPPLIER PERFORMANCE AGAINST GOALS BY SPENDING/REVENUE TREND



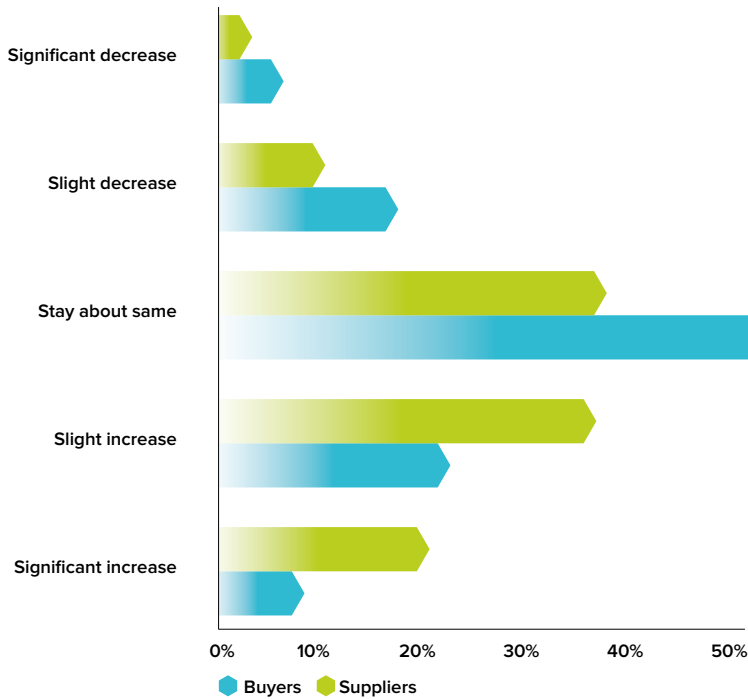
71% of suppliers reported revenue growth to only 11% reporting a decrease



83% of those who exceeded goals increased revenue while only 5% decreased



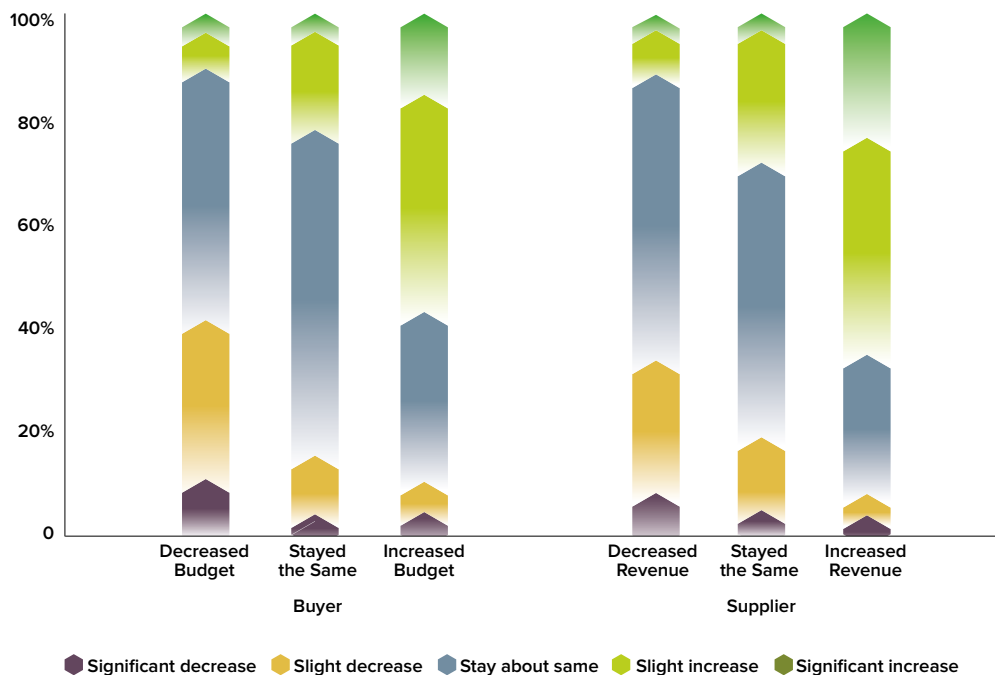
BUYER & SUPPLIER DEPARTMENT SIZE TRENDS



Somewhat parallel to the budget and revenue trends, department size trends were flat(-ish) for buyers and positive for suppliers (54% increased staff compared to 21% who decreased).

Among buyers, an equivalent amount increased their department size (28%) as increased their budgets (29%). Decreases in budgets (32%), however, did not always translate into decreases in staff (11%), suggesting that budget decreases may be a product of efficiency or other changes to the insights process that do not endanger headcount. Among suppliers who increased revenue, 66% increased staff while only 6% decreased.

BUYER & SUPPLIER DEPARTMENT SIZE TREND BY SPENDING/REVENUE TREND



Budget decreases may be a product of efficiency or other changes to the insights process that do not endanger headcount



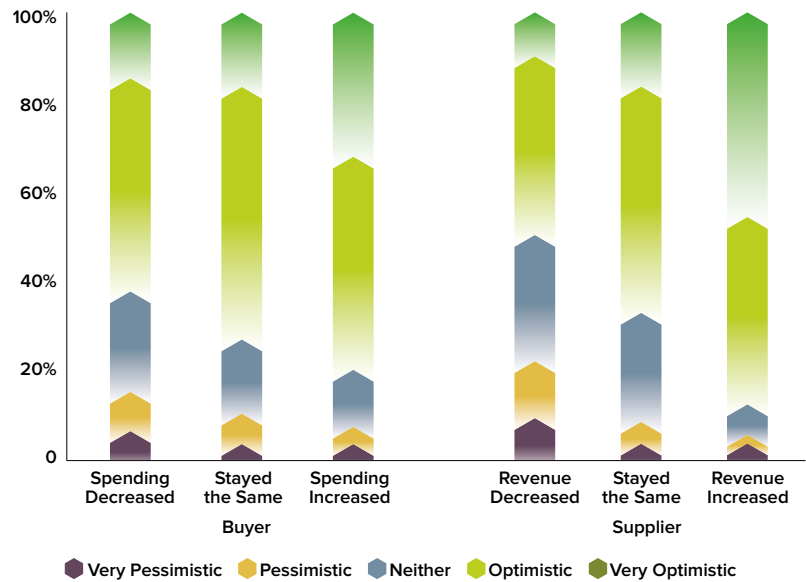
Research spending was tied to buyer optimism about their personal insights role. While most professionals were optimistic regardless of the trend, optimism was strongest where budgets increased, weaker where they stayed the same, and weakest where they declined. It is not clear whether the differences were due directly to the signals sent by the research budget trend or indirectly via whatever corporate situation caused the trend.

As would be expected, supplier revenue trends, which have a much more direct relationship to overall business viability than research budgets, have a much stronger correlation to optimism/pessimism about the individual's future role.

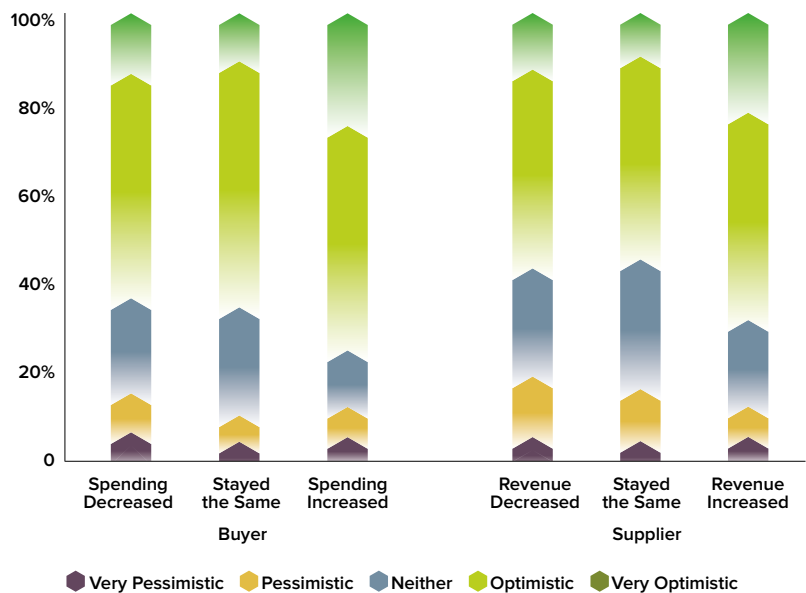
Although concern about one's own role is influenced by budget and revenue trends, these trends do not always affect the individual's perspective on the industry. Those experiencing budget or revenue growth are more positive about the industry, but the fall off for those in stagnant and declining situations is not as dramatic as it is when they consider their personal role.

In summary, declines in research spending may be carefully planned or the outcome of circumstances, but department growth and staff confidence tend to increase when budgets increase; trading budget water or sinking inhibits department growth and confidence. For suppliers, revenue growth is associated with growth in staff size and confidence; however, suppliers who experienced revenue growth despite falling short of their goals may be in for a rude awakening if they do not revise their goals or their approach to them.

OPTIMISM ABOUT OWN INSIGHTS ROLE BY SPENDING/REVENUE TREND



OPTIMISM ABOUT INSIGHTS INDUSTRY BY SPENDING/REVENUE TREND

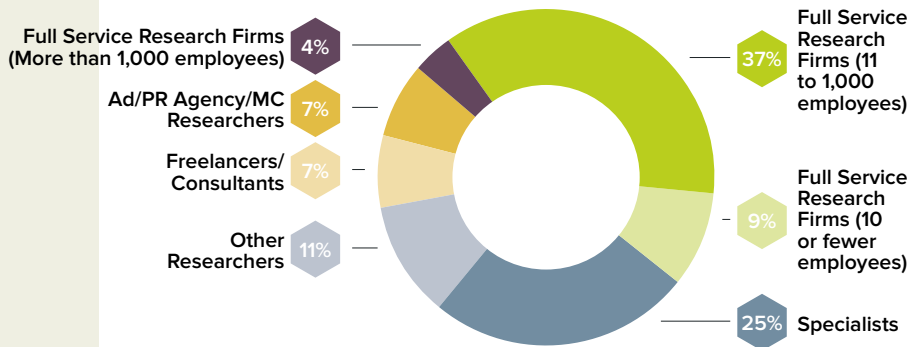


Suppliers who experienced revenue growth despite falling short of their goals may be in for a rude awakening if they do not revise their goals or their approach to them



PROFESSIONAL FOCUS

SUPPLIERS



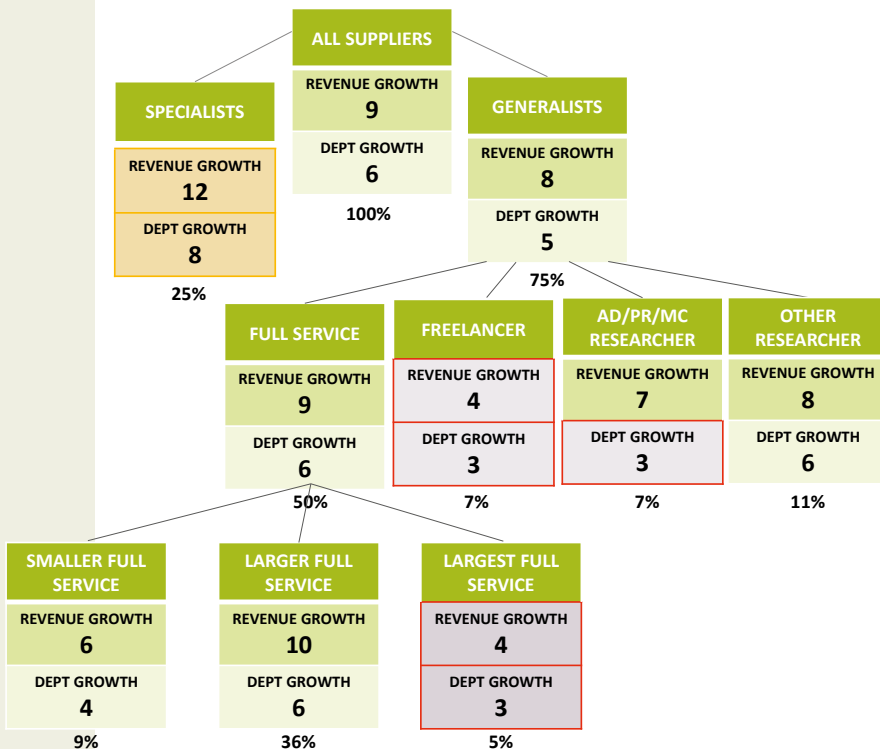
As the Insights & Analytics industry expands, so do the uncertainties about its boundaries



As the Insights & Analytics industry expands, so do the uncertainties about its boundaries. As the professional activities and skills related to identifying insights that can improve marketing evolve farther and farther beyond the traditional core sets, it becomes more difficult to define a “market insights professional” using traditional criteria. The GRIT process recognizes this and continues to adapt to this ever-emerging reality by revising the measurement instrument, revisiting sampling procedures, introducing the Lumascope analysis, challenging how we structure the industry, etc.

Our analysis of the Business Outlook sharpens if we look beyond our traditional buyer/supplier structure and incorporate professional focus and size, key dimensions related to spending and revenue trends. The following break out of suppliers supports this analysis:

Breaking suppliers out in this way highlights how trends affecting the business outlook differ across types. In the following diagram, the 5-point scales used for revenue and department size trends have been reduced to a single score that incorporates the direction of change as well as whether it was “significant” or ‘slight.’ The score is a similar concept to a net promoter score: significant increases have a weight of 2; slight increase, 1; stayed the same, 0; slight decrease, -1; significant decrease, -2, etc.



The diagram demonstrates that suppliers, overall, experienced positive trends for revenue and department growth, but the trends differed according to professional focus. Specialists (sample, data collection, survey platform, and software/ analytics providers) experienced more growth than Generalists as a whole, and more than any specific type of Generalist.

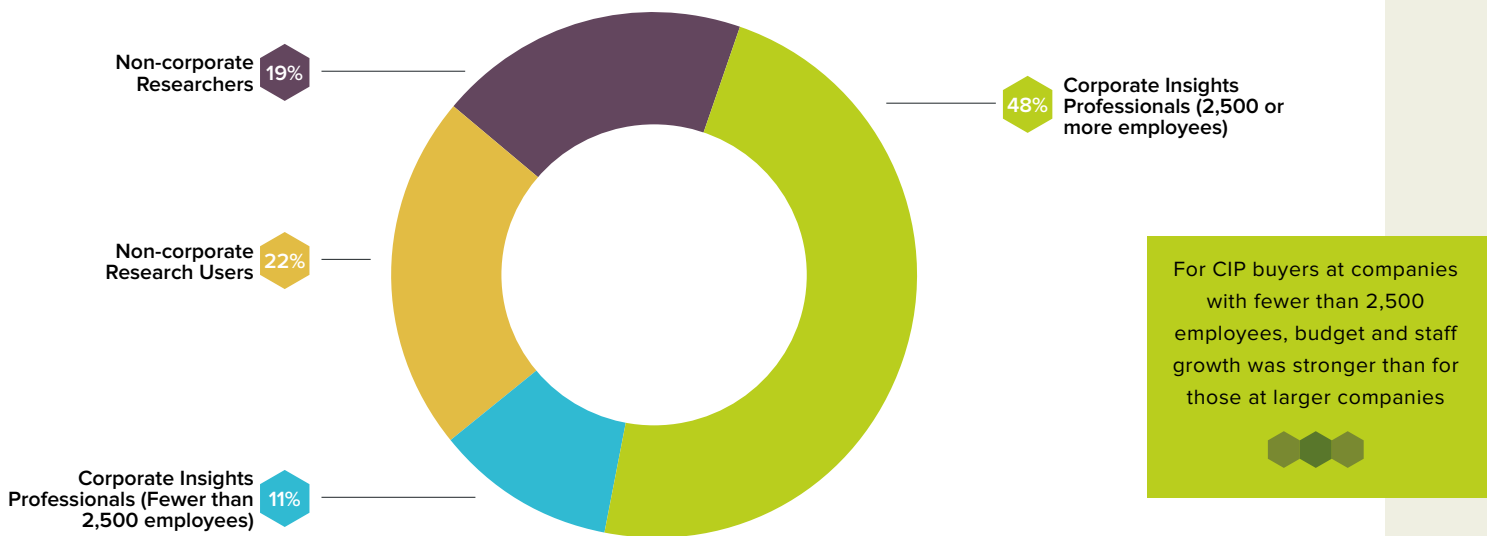
Among Generalists, Freelancers/Consultants and Full-Service suppliers with more than 1,000 employees had the most restricted growth, while Full-Service Suppliers with 11 to 1,000 employees and Other Researchers (including academics, not-for-

profit, and those who develop insights from acquired research) had the strongest revenue and department growth. Advertising, PR, and Management Consultancy researchers also had strong revenue, but did not appear to re-invest it in staff growth.

Specialists (sample, data collection, survey platform, and software/analytics providers) experienced more growth than Generalists as a whole, and more than any specific type of Generalist

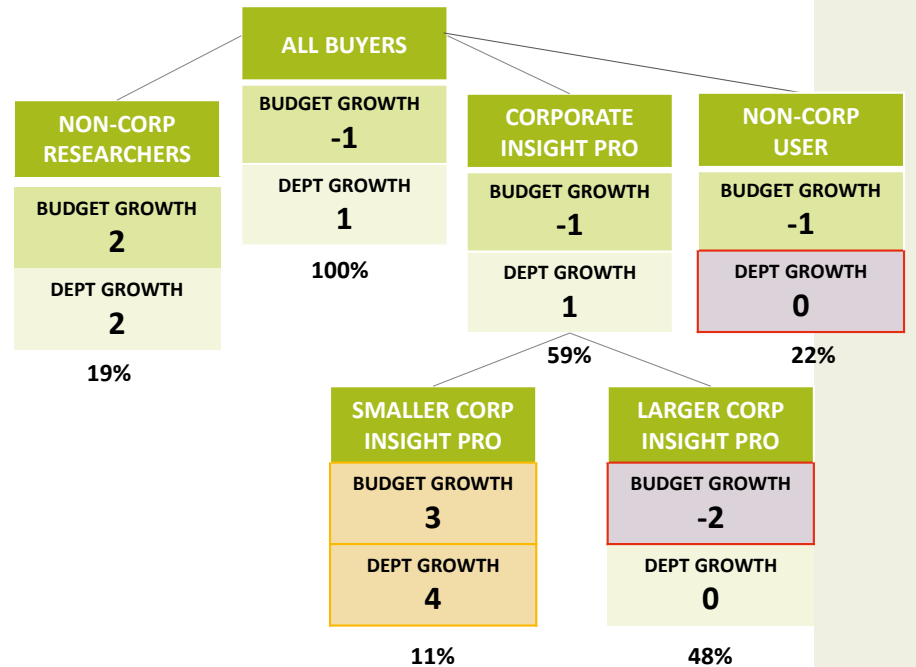
Similarly, buyers can be restructured as follows:

BUYERS



For CIP buyers at companies with fewer than 2,500 employees, budget and staff growth was stronger than for those at larger companies

For buyers, recent performance on spending and department growth was flat within each major type, but differed within Corporate Insights Professionals (CIP). For CIP buyers at companies with fewer than 2,500 employees, budget and staff growth was stronger than for those at larger companies.



BUYER TRENDS

Buyer spending trends are influenced by company characteristics and the scope, practices, and performance of the insights function. In the table below, buyers fitting one or more of the descriptions

in the second column are more likely to have experienced budget increases; those in the third column, decreases.

	More Likely to Increase Budget	More Likely to Decrease Budget
Percent of Buyers	29%	32%
Company Characteristics	<ul style="list-style-type: none"> • Mid-sized; 21 to 500 employees • Younger; operating for 20 years or fewer • North American • Media/entertainment • Services; professional and financial • Tech; information technology and telecommunications 	<ul style="list-style-type: none"> • Very large; 2,500+ employees • Older; operating for 20+ years • European or Asian • Consumer staples
Insights Function		
Scope	<ul style="list-style-type: none"> • Smaller budgets; under \$1M • Lower annual project volume; 50 or fewer 	<ul style="list-style-type: none"> • Larger budgets; over \$30M • Higher annual project volume; 250+
Practices	<ul style="list-style-type: none"> • Project partners <ul style="list-style-type: none"> • More likely reliant on strategic consultancies and technology providers • Less reliant on full-service research and qualitative providers • More likely to give clients access to dashboards/visualization tools 	<ul style="list-style-type: none"> • Project partners <ul style="list-style-type: none"> • More likely reliant on qualitative research providers • More likely to be involved in strategic planning at business unit level • Less likely to: <ul style="list-style-type: none"> • Actively promote the research • Give clients access to dashboards/visualization tools
Performance/ outcomes	<ul style="list-style-type: none"> • 50%+ projects exceeded objectives • Average project compares “very well” to ideal • Exceeded their department goals • Increased department size • Stronger optimism about own role and insights industry in general 	<ul style="list-style-type: none"> • Fewer than 20% of projects exceeded objectives • Less likely to say average project compares “very well” to ideal • Fell short of their department goals • Decreased department size • Less optimistic about own role

Budget increases tended to be associated with younger companies that have lower budgets and project volumes; their insights functions may be in the process of growing. Where budgets declined, companies are more likely to have complex needs and the insights functions are more likely mature; given the rate of technological change, their attention may be more focused on streamlining and simplifying their insights activities.

Where project performance exceeded objectives or compared more favorably to ideal projects, fewer projects were executed. When hundreds of projects are conducted rather than tens of them, there are probably more variations. Some of those may be worth the time and attention investment to exceed their objectives and make them excellent, but there are likely many commodity projects for which optimization is a waste of resources.

Prioritization of strategic consultancies and technology providers as partners is higher for those whose budgets increased; higher reliance on them may be more necessary for growing companies than for mature ones, and, if those projects require more budget, that alone might account for some of the budget increases. Also, the companies for whom budgets decreased did not indicate that such providers had a low priority, only that they held no distinct position in their portfolio of partners.

Taking the characteristics and practices of companies with growing versus declining budgets at face value, it may seem as though budget increases are not necessarily so invigorating and decreases are not so traumatic. We may reach a different conclusion if we look at the outcomes: where budgets increased, insights departments were more likely to have exceeded their goals, their departments were more likely to increase, and they felt more positive and confident about their roles and the industry in general.

By contrast, those whose budgets declined more likely fell short of their department's goals, decreased their department size, and felt less secure about their role at their company. The contrast suggests that while budget reductions may be a deliberate and rational response to the natural corporate life-cycle, something about the management of this particular life-stage seems to make it more difficult for insights departments to meet their goals or to feel confident about their jobs. Also, while insights departments with one or more of the listed characteristics were likely to experience a budget decrease, many of them did not, leading to the question of what these particular companies are doing that results in such negative consequences.

Prioritization of strategic consultancies and technology providers as partners is higher for those whose budgets increased



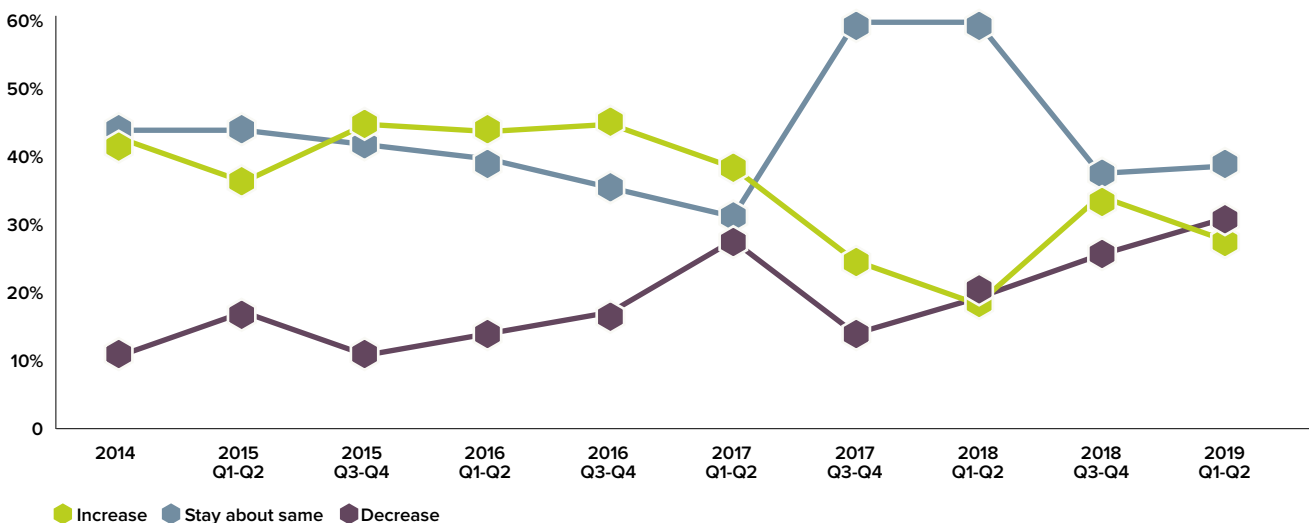
Something about the management of this particular life-stage seems to make it more difficult for insights departments to meet their goals or to feel confident about their jobs



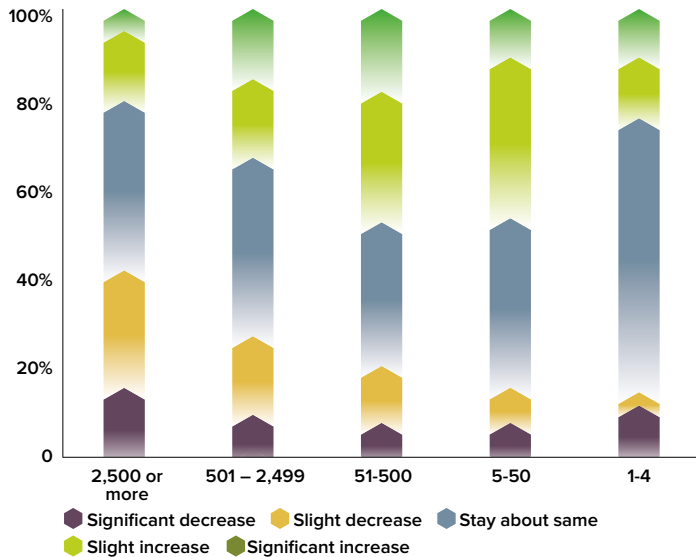
For the first time, the proportion reporting a decline exceeds the proportion reporting an increase



RESEARCH SPENDING TREND (BUYERS)



RESEARCH SPENDING TREND BY EMPLOYEE SIZE (BUYER)



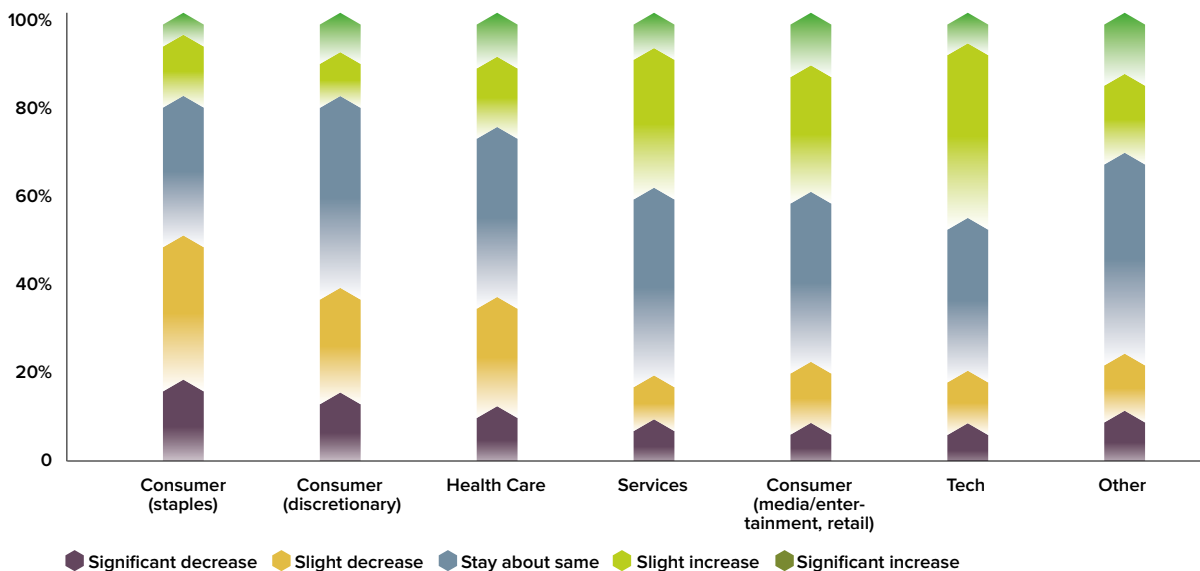
Looking to trends over time, the proportion of buyers reporting a decline in research spending continued to increase, as it has since the Q3Q4 GRIT report of 2017. As a matter of fact, for the first time, the proportion reporting a decline exceeds the proportion reporting an increase. The proportion who increased has remained relatively steady since its peak from Q3Q4 2015 through Q3Q4 2016 when it was in the mid-40%. Perhaps indicative of the turbulence or creative tension in the Insights and Analytics industry, about two-thirds of buyers report change of some kind, in stark contrast to the more stable period from Q3Q4 2017 to Q1Q2 2018 when nearly 60% of buyers reported no change.

With respect to employee size, spending is most stagnant among companies with fewer than five employees. Spending increases peak among buyers with 5 to 500 employees; decreases are most frequent among those with 2,500 or more employees.

Spending increases were most frequent among tech, consumer media/entertainment/retail, and services

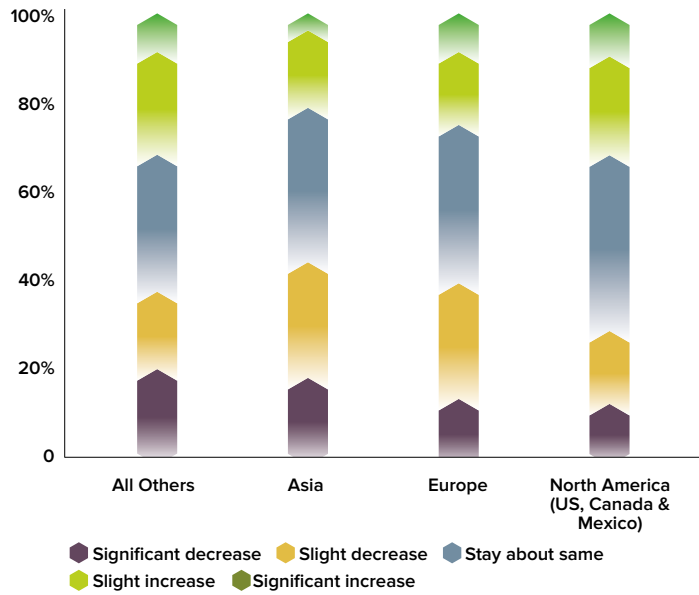
With respect to industry, spending increases were most frequent among tech, consumer media/entertainment/retail, and services. Declines were sharpest among consumer staples, health care, and consumer discretionary. Arguably this trend could be boiled down to spending increases occur in vibrant industries, and decreases take place in categories having a tougher time getting growth.

RESEARCH SPENDING TREND BY INDUSTRY (BUYER)



With respect to global regions, North America had more increases than other regions (similar to “all others” if statistical significance is ignored); Europe and Asia saw the most declines in spending.

RESEARCH SPENDING TREND BY GLOBAL REGION (BUYER)



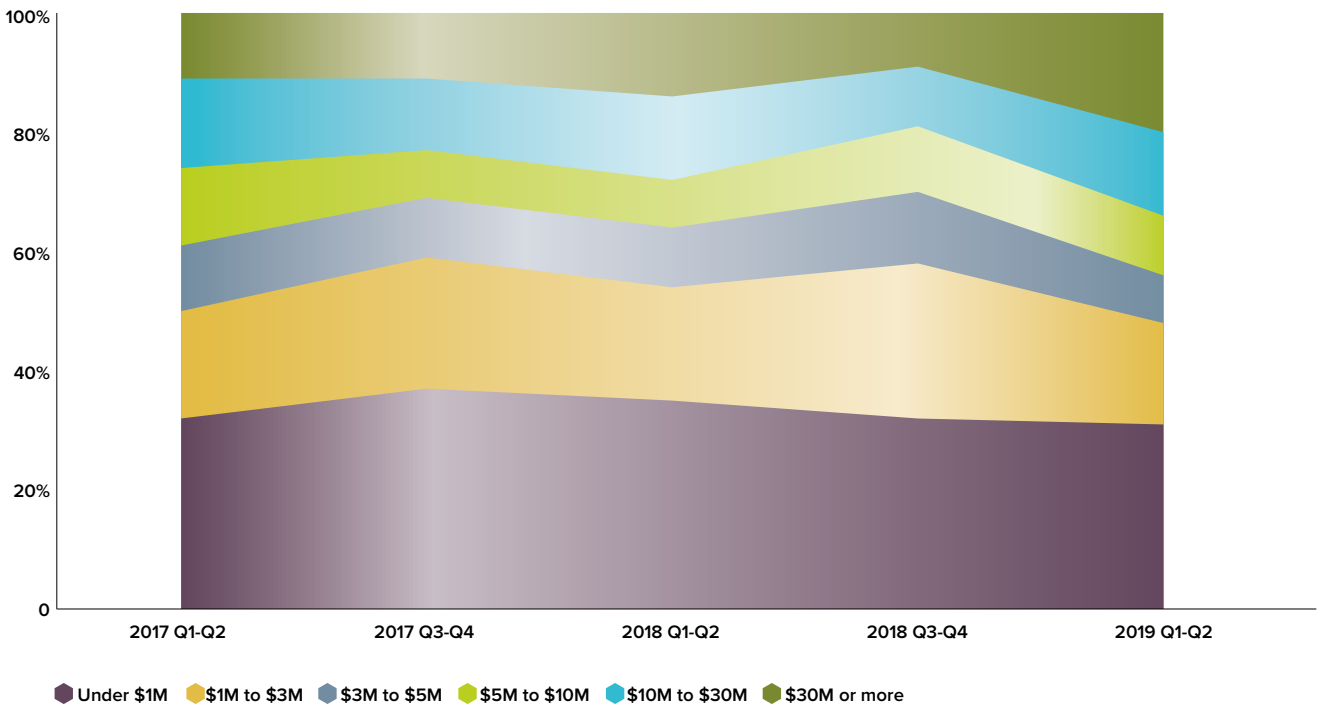
Spending increases were most frequent among tech, consumer media/entertainment/retail, and services



Looking at the absolute budget size, as in the past, about one in three buyers had research budgets under \$1M. Unlike past GRIT waves, the proportion

of buyers with budgets in excess of \$30M is nearly double its historic proportion.

ANNUAL RESEARCH BUDGET (BUYER)



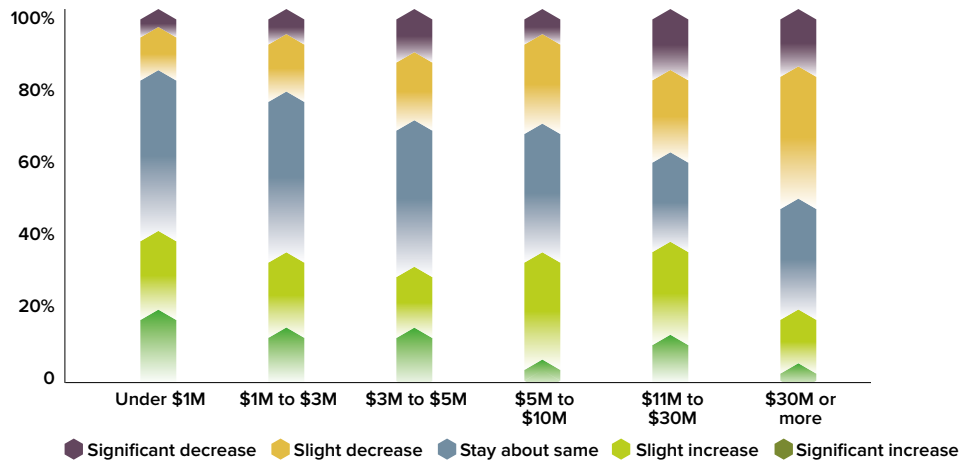
Budgets were most likely to decline for those who relied heavily on a full-service provider (most or second most frequent) and did not heavily rely on a technology provider



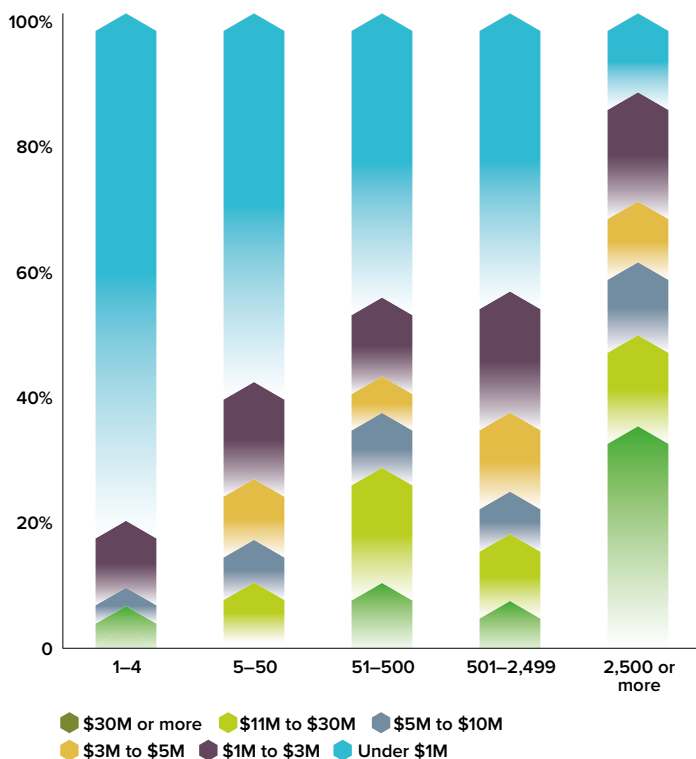
Spending increases were fairly constant across budget sizes, except for a drop-off among budgets of \$30M or more. With that exception, at least 29% of budgets increased in each category (compared to 17% for \$30M+). Budgets of \$3M or more were more

likely to experience decreases (31% or more) than smaller ones (23% or less). More than half of budgets of \$30M+ reported decreases (53%), compared to only 17% who reported an increase.

RESEARCH SPENDING TREND BY TOTAL ANNUAL RESEARCH BUDGET (BUYER)



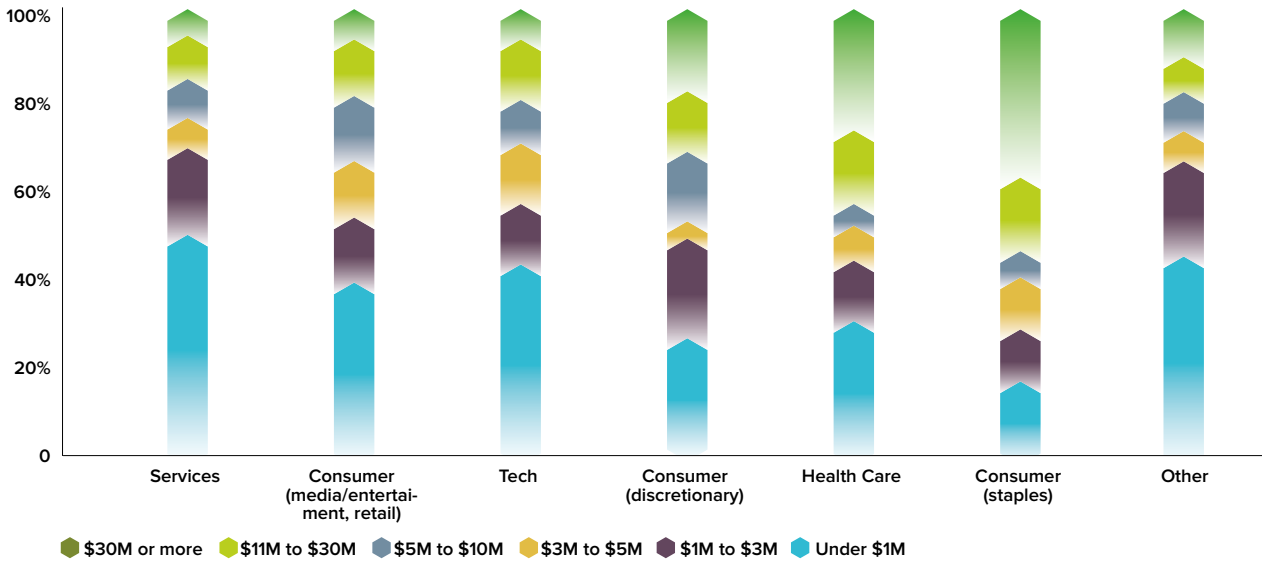
TOTAL ANNUAL RESEARCH BUDGET BY EMPLOYEE SIZE (BUYER)



Among buyers with \$30M+ budgets, budgets were most likely to decline for those who relied heavily on a full-service provider (most or second most frequent) and did not heavily rely on a technology provider. These buyers also did not exceed their goals (met them or fell short), and reported that half of their projects or fewer exceeded expectations. They were also more likely to say the reason for the budget decline was due to focusing on efficiency and bringing work in-house. However, given their own evaluation of their performance and the performance of their projects, it seems as though their efficiency efforts have not borne fruit yet. With respect to employee size, the very largest companies have the largest budgets; the smallest companies have the smallest budgets. In the 51 to 2,499 employee range, however, there is some variation. Similar proportions have budgets under \$1M, but companies with 51 to 500 employees are more likely to have budgets of \$5M or more compared to companies in the next largest category.

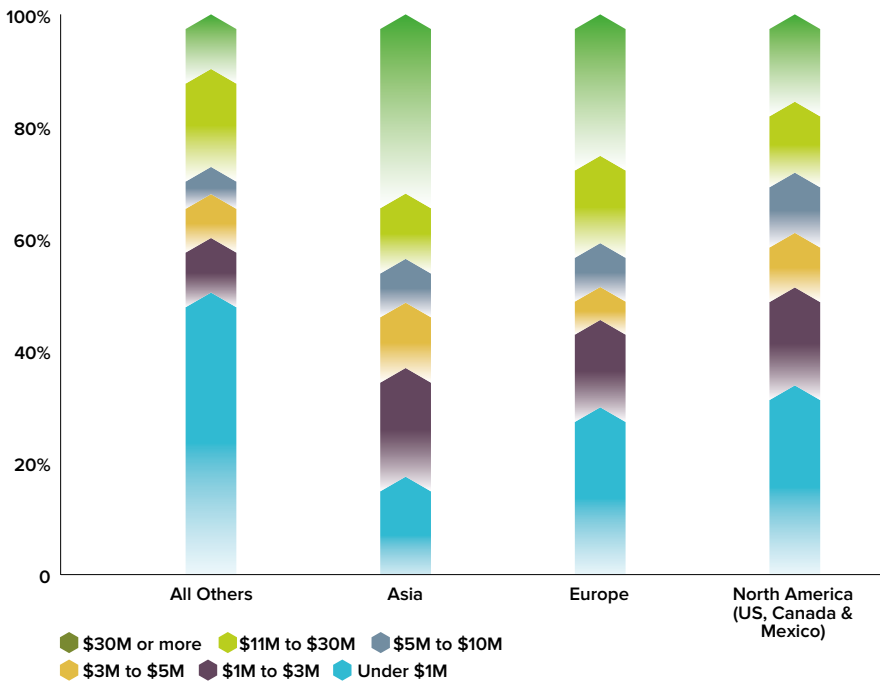
By industry, the largest budgets (\$30M+) are concentrated within consumer staples, health care, and consumer discretionary.

TOTAL ANNUAL RESEARCH BUDGET BY INDUSTRY (BUYER)



By global region, Europe and Asia are most likely to have budgets in excess of \$30M.

TOTAL ANNUAL RESEARCH BUDGET BY GLOBAL REGION (BUYER)



By industry, the largest budgets (\$30M+) are concentrated within consumer staples, health care, and consumer discretionary

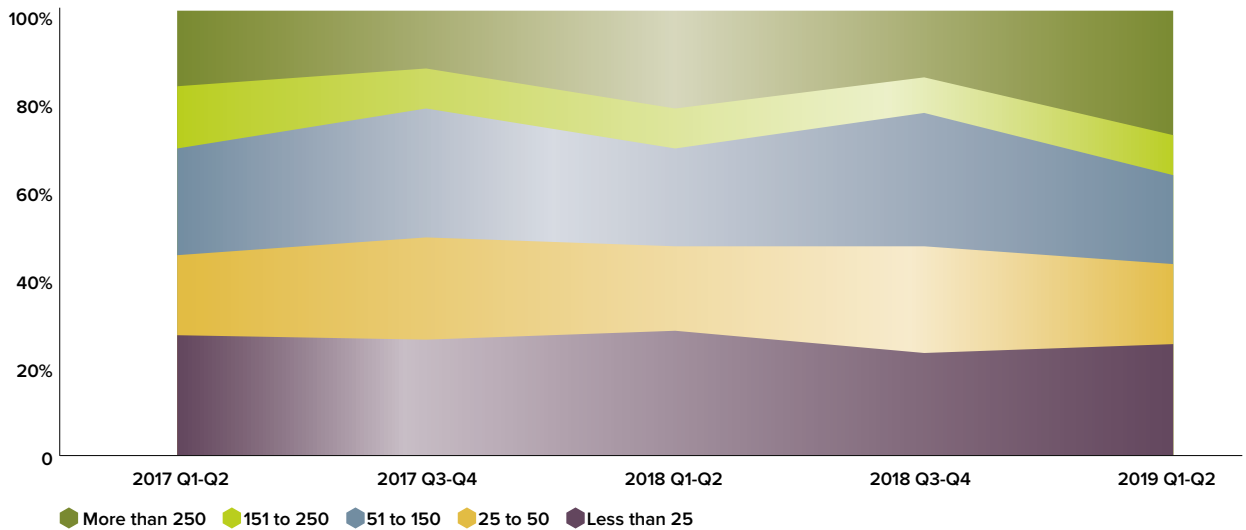


Buyers who are more likely to execute 250+ projects per year exceeded their own goals, decreased spending, decreased department size, and always or frequently execute almost all of the activities described in the Benchmarking exercise

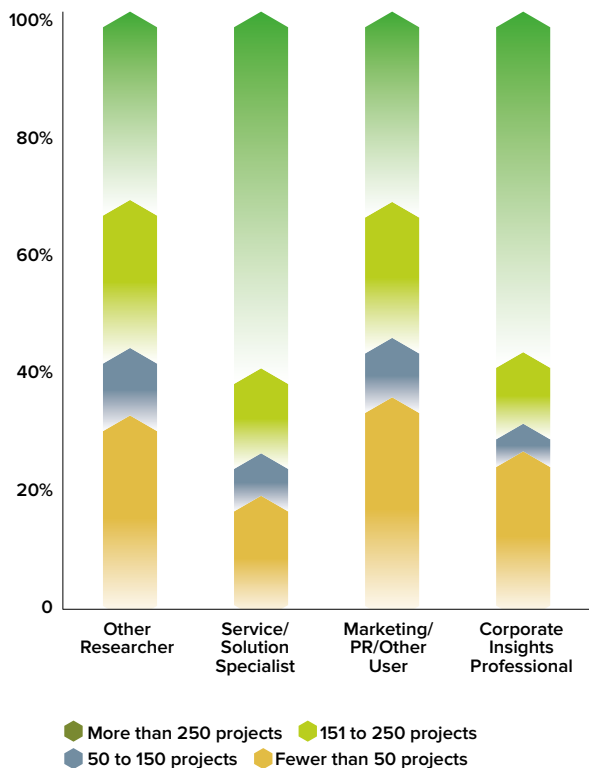


With respect to project volume, the proportion of buyers executing fewer than 25 projects per year has held steady over the years (around 25%), while the 250+ category has spiked to 28%.

ANNUAL NUMBER OF PROJECTS (BUYER)



ANNUAL PROJECT VOLUME BY BUYER PROFESSIONAL FOCUS (BUYER)



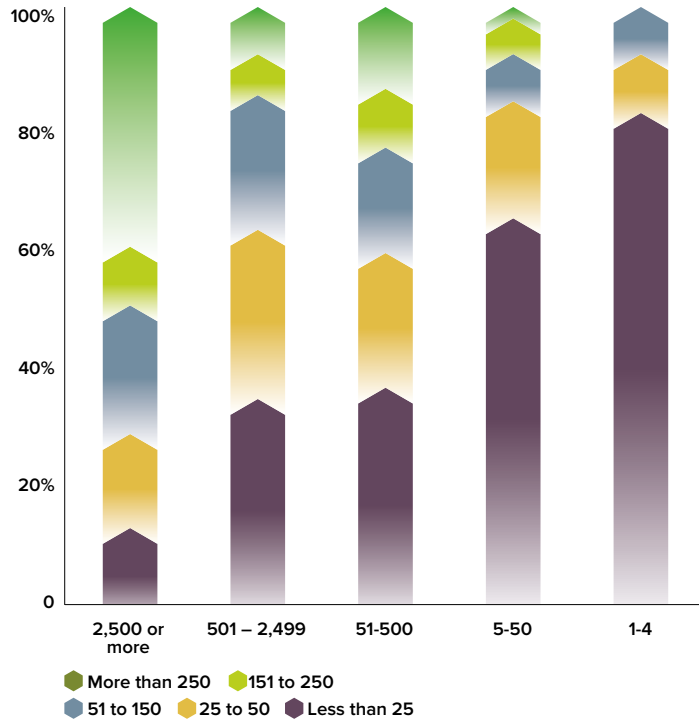
Higher project volume is driven by Corporate Insights Professionals; nearly 60% conduct 250+ projects per year (as noted in the Methodology section, we had a slightly higher proportion of Corporate Researchers this year). Among service and solution specialists who classify themselves as buyers, a similar proportion conduct 250+ projects, but they represent a much smaller portion of the overall market and are likely insights intermediaries.

Buyers who are more likely to execute 250+ projects per year may be somewhat predictable based on characteristics we've seen so far: 2,500+ employees, budgets of \$30M+, consumer staples industry, Europe or Asia, and 16+ years in business. Other characteristics may be more surprising: they exceeded their own goals, decreased spending, decreased department size, and always or frequently execute almost all of the activities described in the Benchmarking exercise.

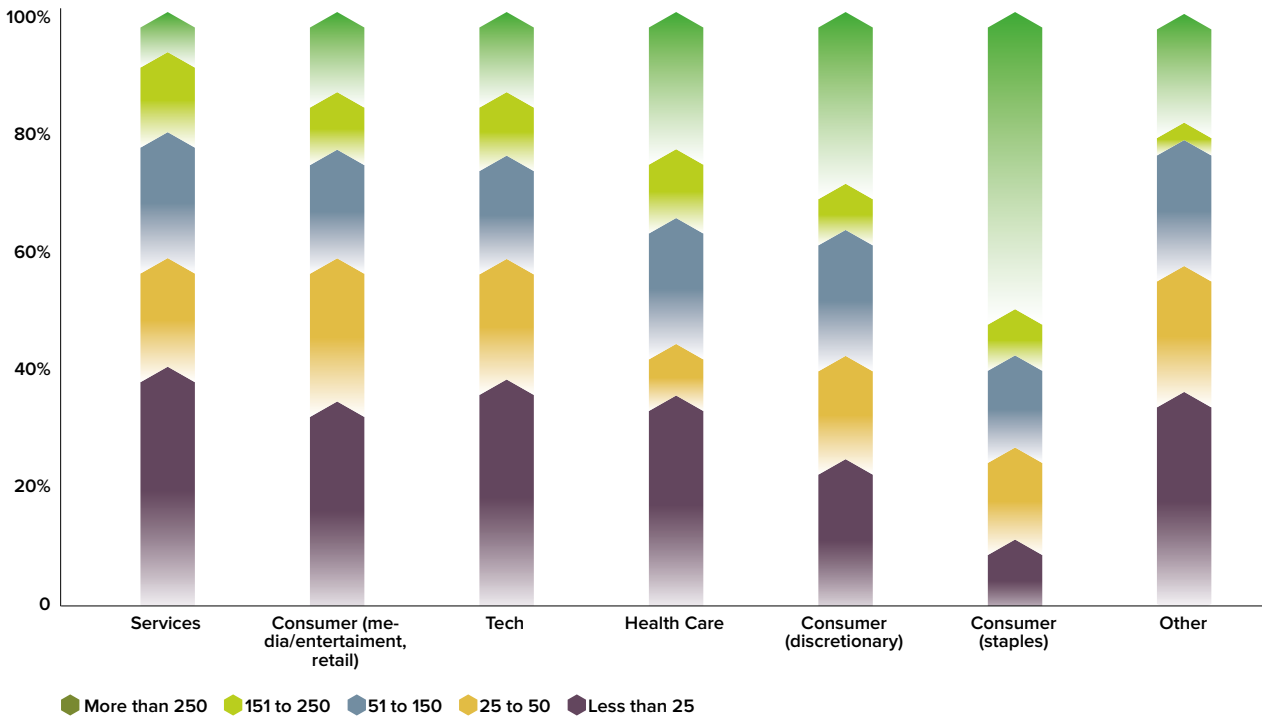
Project volume increases gradually among companies with less than 2,500 employees. Past that point, the number of projects increases dramatically, possibly due to the greater complexity of such businesses. Complexity would drive the need to explore more markets, segments, products, and so on.

Consumer (discretionary, staples) and health care, in addition to having the highest proportions of very large budgets, have the highest proportions of project volumes in excess of 150 per year. As with very large budgets, the smallest project volumes are concentrated in consumer (media/entertainment, retail), services, and other sectors.

ANNUAL NUMBER OF PROJECTS BY EMPLOYEE SIZE (BUYER)

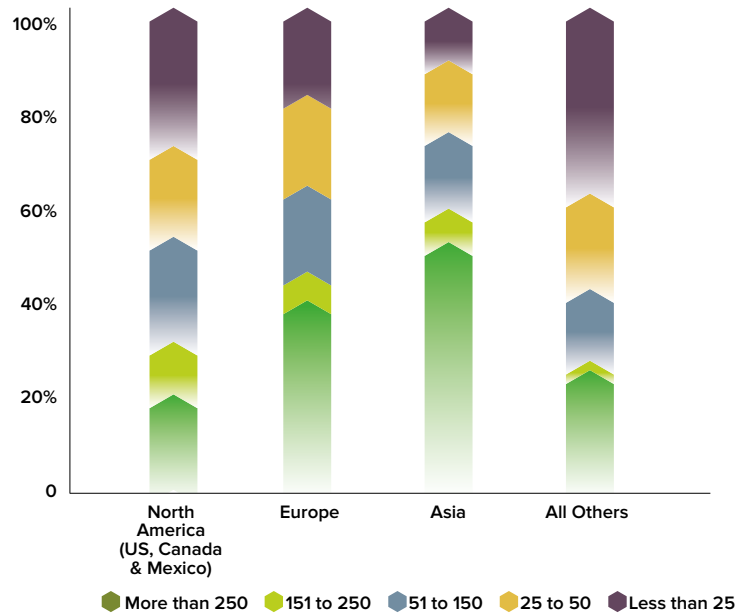


ANNUAL NUMBER OF PROJECTS BY INDUSTRY (BUYER)

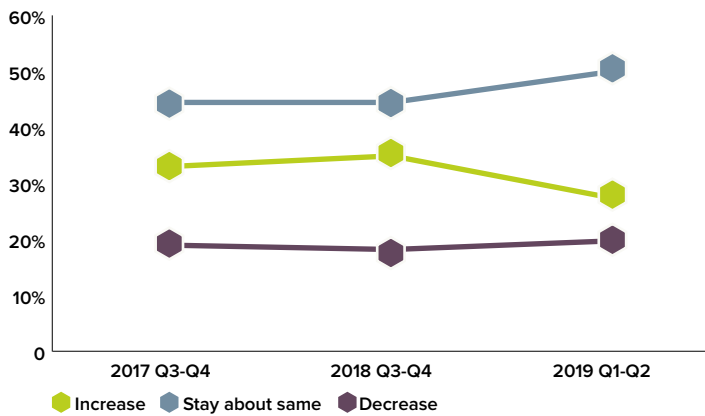


Europe and Asia have the highest proportion of buyers executing 250 or more projects annually.

ANNUAL NUMBER OF PROJECTS BY GLOBAL REGION (BUYER)



CHANGE IN DEPARTMENT SIZE (BUYER; FULL-TIME EQUIVALENT POSITIONS)



Finally, with respect to department size, overall, the proportion of buyers who report an increase is greater than the proportion of those reporting a decrease, but the gap is the smallest it's been since GRIT began tracking this metric.

The proportion of buyers who report an increase is greater than those reporting a decrease, but the gap is the smallest it's been since GRIT began tracking this metric

Characteristics of buyers who were more likely to have increased department size include:

- Media/entertainment industry
- Not in Europe or Asia
- 51 to 2,499 employees
- Exceeded their goals and more than half of their project exceeded the objectives
- More likely to prioritize working with data and analytics and technology providers, less likely to prioritize full-service research providers
- Function as data analysts or inhouse research providers
- Always measure project ROI and promote the value of their research



BEAUTIFUL CHAOS: THE CAMBRIAN EXPLOSION OF RESEARCH TECH

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Wow, this industry is getting crowded. New startups are popping up like those baby Godzilla things in Cloverfield. The sheer volume of research tech feels overwhelming to a lot of people.

Not me. I love it. Bring it on.

Some people say our industry is cautious and slow-moving. Go tell that to 20 of the top 50 on the GRIT Tech List who barely existed five years ago. Or to the huge long tail of emerging solutions identified as great innovators. Or to the 900+ software and data platforms that researchers now have available to them.

It's about diversity as well as volume. When I look at the top 50 lists - not just Tech, but Analytics, Qual, Strategy, all of them - I'm struck by the sheer breadth of this industry. Video analytics. Thousand-person discussion groups. Turnkey ad testing. Integrations with CRM platforms, programmatic ad networks and design prototyping software. Visualisation. Mobile eye tracking. Crowdsourcing. It goes on.

Tools, methods and data sources that were unimaginable a few years ago are now widely used in agencies and insight teams.

AI might be a big fat lie. Not my words. Those of Eric Siegel, former Assistant Professor of Machine Learning & AI at Columbia University. His point is that Artificial Intelligence isn't such a helpful label.

I get it. Ask ten people for a definition of AI and you'll get 12 answers.

And so it seems in our industry. In the latest GRIT survey, buyers and suppliers identified AI as the biggest disruptive trend they face. But none of us seem to agree on what AI really means. It's like we're all feeling a different part of the elephant in the dark.

Maybe that doesn't matter. In a few years, 'artificial intelligence' will probably sound as quaint and redundant as *computerisation* or *the information superhighway*.

But whatever we think it means, we're all convinced that AI will be big.

Services matter more than ever. At one end of the spectrum sit agencies and consultants, terrified that software will eat their business. At the other end are investors who think their research tech bets should deliver gross margins of 80%+. Somewhere between terror and delusion lies the reality of our industry: that software and services create mutual value.

Agencies aren't going anywhere, they're just changing. And software can't do without people. Very few companies in the GRIT Top 50 Tech list are pure-play software platforms; most have teams of on-boarders, researchers, analysts, project managers and tech support staff.

Software is creating jobs in our industry, not killing them.

Buyers and suppliers talk at cross-purposes. Both groups seem to want the same things from technology: take away grunt work, do things faster, add more value.

But the two groups describe these benefits in quite different terms. In the GRIT survey, buyers are twice as likely to focus on outcomes like 'faster decisions' and 'more time for interpretation'. Suppliers more often talk in process terms about 'research automation' and efficiencies.

Memo to every supplier: speak your customers' language.

And there's more. At IIEG Europe, Nestlé admitted to using over 100 different insight platforms; Unilever CMI told us how they trialed more than 800 startups in 5 years. But even these large, experimental buyers don't reflect the whole breadth and diversity of what's innovative in insight.

There are teams in CX, UX, digital, social and analytics who use research tech extensively - but don't fall under insight teams and are not in scope for the GRIT study.

So who still thinks we're a cautious and slow-moving industry?

SUPPLIER TRENDS

Supplier revenue trends are influenced by specialization and size, as well as competitive priorities, practices, and performance



Supplier revenue trends are influenced by specialization and size, as well as competitive priorities, practices, and performance. In the table below, suppliers fitting one or more of the

descriptions in the second column are more likely to have experienced revenue increases; those in the third column, decreases.

	More Likely to Increase Revenue	More Likely to Decrease Revenue
Percent of Suppliers	71%	11%
Company Characteristics	<ul style="list-style-type: none"> • Mid-size to larger; 11 to 2,499 employees • Younger; operating for 20 years or fewer • North American or European • Specialist; software/analytics, survey platform/software, sample, or data collection provider • Full-service research (larger) 	<ul style="list-style-type: none"> • Very large; 2,500+ employees • Smaller; 10 or fewer employees • Older; operating for 20+ years • Generalist; full-service research (smaller and largest) and freelancers/consultants
Priorities	<p>Must be best-in-class or among leaders</p> <ul style="list-style-type: none"> • Using new types of data • Collect data effectively • Analyze data powerfully • Synthesize data from multiple sources • Analyze multiple data streams • Conduct meta-analysis 	<p>Not something we do/doesn't impact success</p> <ul style="list-style-type: none"> • Using new types of data • Analyze data powerfully • Assess likely success of recommendations • Synthesize data from multiple sources • Analyze multiple data streams • Conduct meta-analysis
Practices	<ul style="list-style-type: none"> • More likely to "always/frequently" engage in all practices 	<ul style="list-style-type: none"> • Less likely to "always/frequently" engage in all practices
Performance/outcomes	<ul style="list-style-type: none"> • 50%+ projects exceeded objectives • Average project compares "very well" to ideal • Exceeded their organization's goals • Increased staff size • Stronger optimism about own role and insights industry in general 	<ul style="list-style-type: none"> • 50% or fewer projects exceeded objectives • Less likely to say average project compares "very well" to ideal • Met or fell short of their organization's goals • Did not increase staff size (same or decreased) • Less optimistic about own role and about industry

At a high level, supplier revenue trends are not complicated to understand. Revenue increases are more likely to occur for suppliers who specialize and full-service research providers with 11 to 2,499 employees. For many specialists, their specialty is – or recently was – their “brand”; their expertise category is growing along with their name recognition and specific offerings. Their services match up well with emerging market demands, and, once they have an audience, their value proposition and how they fit can be clearly articulated.

Full-service providers ranging from 11 to 2,499 employees also experienced more increases than the general market. As generalists, their positioning may be more difficult to articulate in an elevator speech, but they are large enough to have an established client base and, likely, name recognition.

Revenue increases are also associated with striving to be a leader – if not best-in-class – in a variety of areas focused on data and analytics. This speaks to a focused strategy to differentiate in one or more specialty areas in order to compete more effectively as the insights industry continues to absorb more data and ways to analyze it. Note that “consulting” areas such as delivering results or understanding client objectives did not stand out as strongly as

data and analytics. This is not to say that these aspects are neglected, but they are not differentially driving revenue increases, either because they are foundational to all segments or because suppliers choose to excel in specialty areas and strive for competence in “consulting” areas.

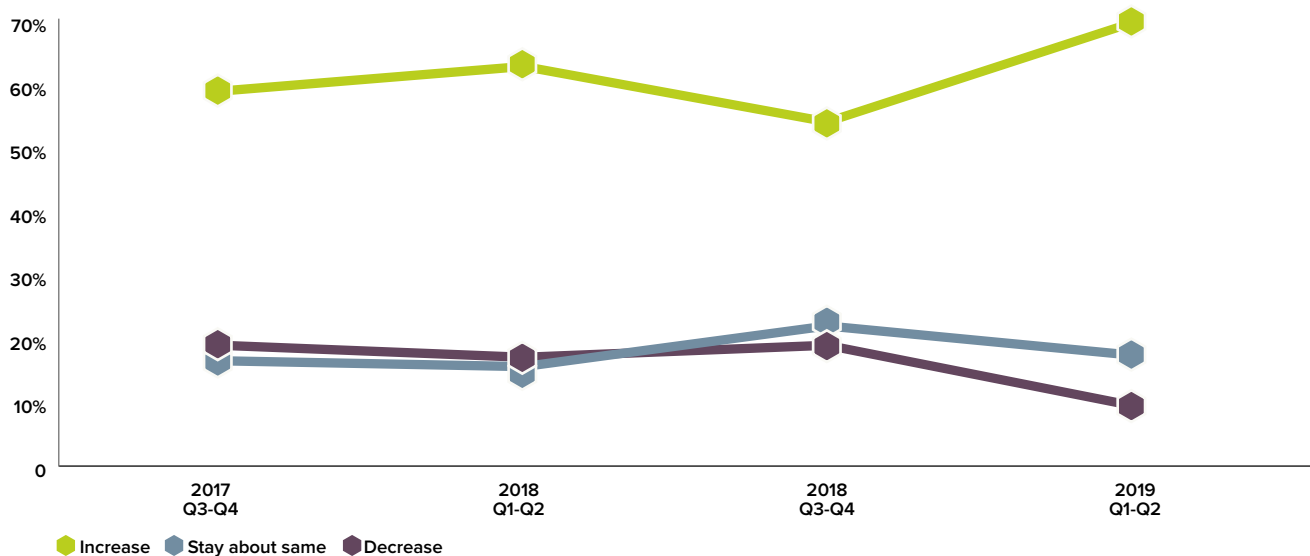
Revenue decreases were associated with very small and very large generalists. Smaller generalist firms lack brand recognition and the resources to promote themselves to new customers, making them dependent on repeat business from a handful of clients. The largest full-service suppliers, on the other hand, may have challenges similar to the largest buyers – for example, managing the complexity their size creates while trying to align their operations with emerging challenges. Also, the smallest and largest generalists do not express any focused areas in which they strive to differentiate. The smallest may lack resources, and the largest ones, many of which have experienced recent mergers and acquisitions, may need to focus on getting their houses in order before they can focus their teams in a distinct, unified direction.

Looking at trends over time, the proportion of suppliers reporting revenue increases is at its highest level since GRIT first began tracking it in 2017.

The smallest and largest generalists do not express any focused areas in which they strive to differentiate



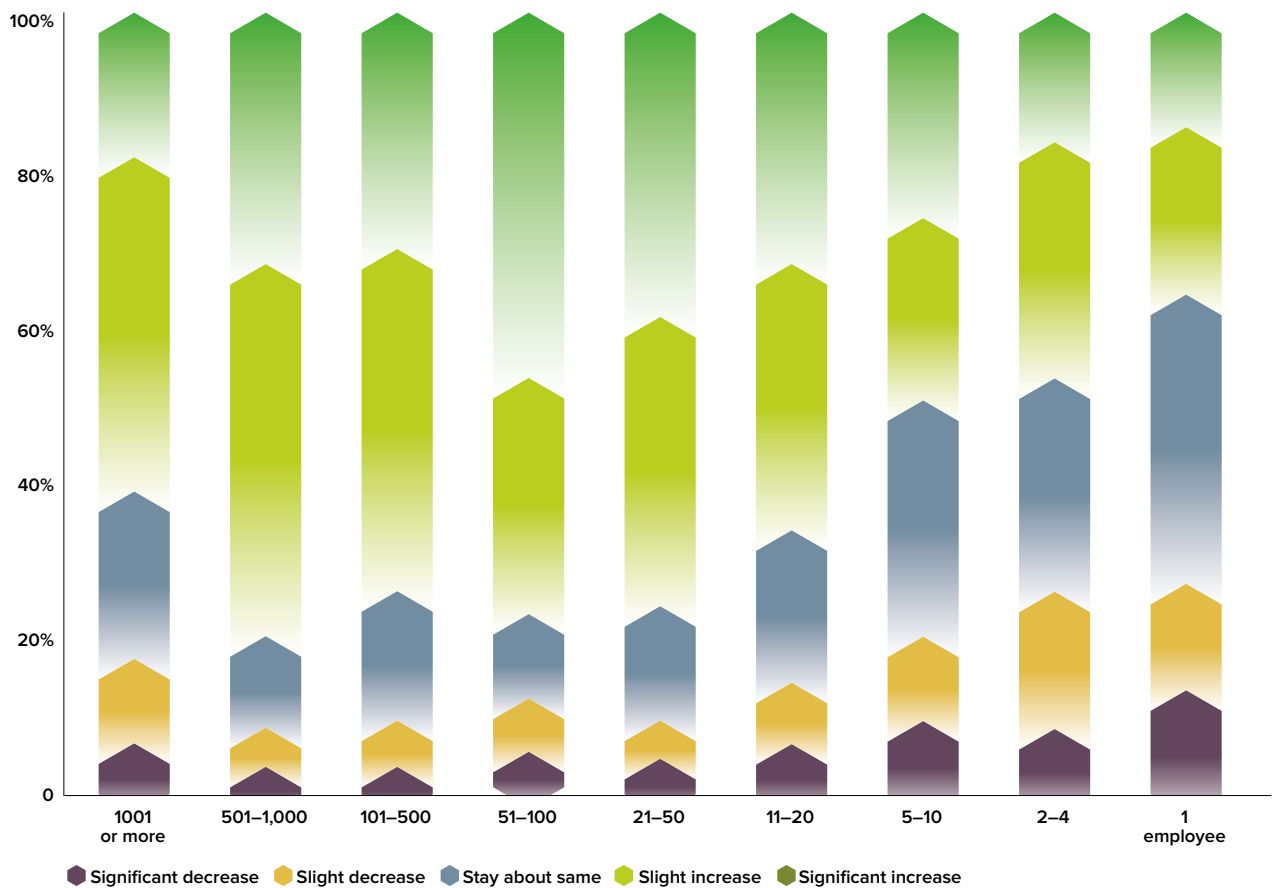
REVENUE TREND (SUPPLIER)



The momentum may be partly driven by the evolution of the mix of suppliers by professional focus and size since the first report. The current wave includes higher percentages of survey platform/software suppliers and full-service research suppliers with 11-500 employees (two of the stronger growth segments).

With respect to employee size, revenue increases peak among suppliers with 21 to 1,000 employees, while those with 1 to 10 employees have the most decreases. Suppliers with more than 1,000 employees experienced more decreases and fewer significant increases than other large suppliers.

REVENUE TREND BY EMPLOYEE SIZE (SUPPLIER)



Revenue increases are also associated with striving to be a leader – if not best-in-class – in a variety of areas focused on data and analytics



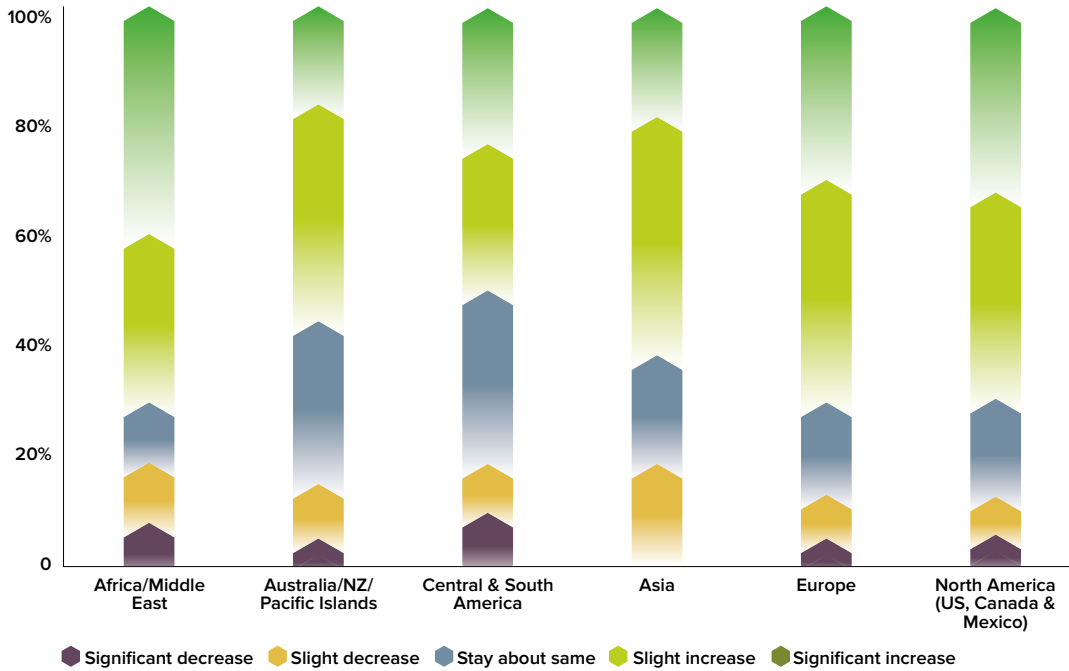
By global region, revenue increases were strong in North America, Europe, Asia, and Africa, though somewhat softer in Asia due to the lack of “significant” increases. In Central & South America

and New Zealand, Australia, and the Pacific Islands, more than 50% of suppliers saw increases, but those regions had the highest proportions of stagnant or declining revenues.

The proportion of suppliers reporting revenue increases is at its highest level since GRIT first began tracking it

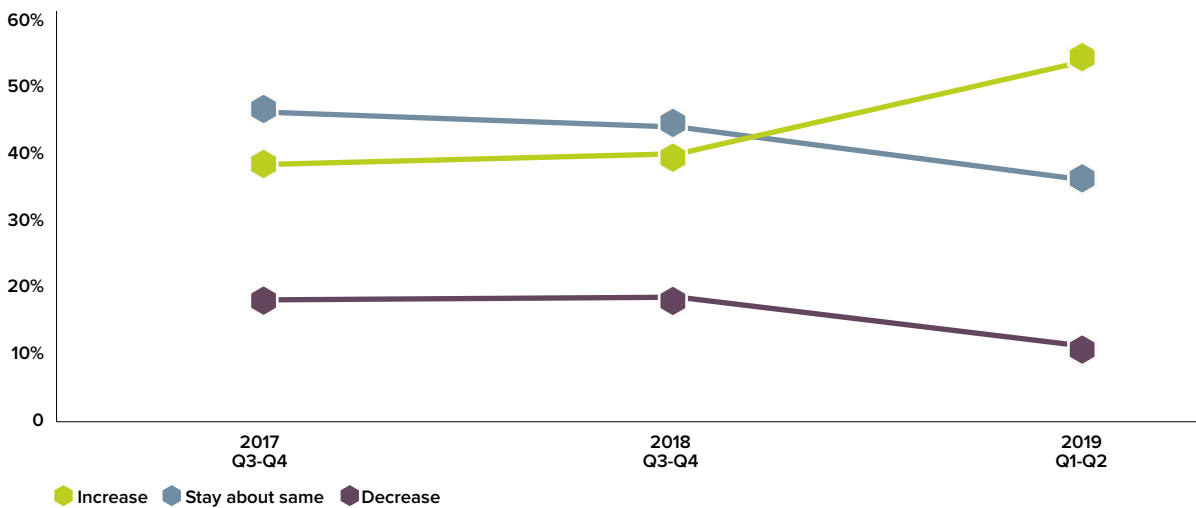


REVENUE TREND BY REGION (SUPPLIER)



As revenue grew, department sizes also grew; few suppliers reported decreases.

CHANGE IN DEPARTMENT SIZE (SUPPLIER; FULL-TIME EQUIVALENT POSITIONS)



As revenue grew, department sizes also grew; few suppliers reported decreases



Suppliers who were most likely to have increased staff size also saw increased revenue: specialists, full-service suppliers with 11 to 1,000 employees, and those in North America. Those most likely to decrease include Advertising, PR, and Management Consultancies and suppliers in Asia. Advertising, PR, and Management Consultancies increased revenue, but may have decided against reinvesting in staff. Suppliers in Asia grew revenue, but it was a “soft” growth, as mentioned earlier.

Supplier staff trends were also related to other kinds of success. Suppliers that exceeded their goals and suppliers for which most of their projects exceeded the objectives in the project brief were more likely to increase staff; those who met or fell short of their goals, and those for which fewer than half of their projects exceeded the objectives in the project brief, decreased staff.

THE BIG PICTURE

Additional analyses with a deep dive into growth drivers and decline amelioration strategies can be found in the Business Outlook appendix. We encourage you to review them, since some insights generated there play a part in our Big Picture summary.

Overall, insights professionals share strong feelings of optimism about their roles and their field, and the Insights and Analytics industry looks healthy, as a wide majority of suppliers enjoyed revenue increases. Optimism and growth reign despite – or because of – intense struggles for constrained client budget dollars across competitors both familiar and unfamiliar. Clients and suppliers alike face constant pressure to adapt to new challenges and assess emerging opportunities as the ubiquitous “faster, cheaper” mantra often reveals its true identity as “do more with less”.

The difference between clients whose budgets increased and those whose decreased is like day and night. Budgets tend to increase when business leaders have to manage increasing complexity, see market insights as an important tool for managing the complexity, and believe their insights department delivers solid business value. Budgets tend to decrease when business leaders are unaware of the value of insights, dismissive of it, or simply lack the resources to invest in generating insights. Companies in both situations want to take advantage of innovations in order to increase the speed and reduce the cost of insights work, but the former tend to reinvest the savings to address more business challenges while the latter tend to use it to invest in another area of the company or, often it seems, to prop up a sagging bottom line. Predictably, insights professionals in the former situation are more optimistic about their roles than those in the latter.

Optimism and growth reign despite – or because of – intense struggles for constrained client budget dollars across competitors both familiar and unfamiliar



Budgets tend to increase when business leaders have to manage increasing complexity, see market insights as an important tool for managing the complexity, and believe their insights department delivers solid business value



On the supplier side, specialists are thriving, as are full-service providers who make data and analytics expertise a priority focus, have the means to invest in it, and the agility to align their organization behind it. The smallest and largest generalist suppliers are more likely to struggle; the former, due to lack of resources to invest in competing more effectively in a fast-changing market, and the latter due to the effort required to define and align a complex organization to compete effectively against a bevy of more nimble, cost-effective challengers who meet defined client needs. On the client side, very large organizations face similar challenges relative to defining areas of focus and aligning all their different components. Considering the level of M&A activity occurring within the upper echelon of the supplier community right now and reported struggles for growth from many of those same companies, this should come as no surprise. In many ways, specialized skills or tools and the ability to match them to the right situations are keys for suppliers to win battles against competitors, and it is equally critical for clients to understand their value and where they fit so they can produce insights efficiently and effectively. Yet, when discussing the reasons behind their spending and

revenue trends, up or down, clients and suppliers kept returning to the more general and timeless themes of “business value” and “customer focus”. Insights buyers explained that recognized value was instrumental in gaining budget while failure to perceive value contributed strongly to losing it. Suppliers explained that revenue increased when they focused on delivering client-defined business value and decreased when they lost that focus. Both client-side insights professionals and external suppliers expressed awareness that they need to align with the business needs of the end user or immediate client in order to be successful, and that business value is generally some function of “faster”, “cheaper”, and “better”.

At this moment in time, those who compete on “faster and cheaper” seem to recognize the need to be “better”, and those who compete on “better” seem to recognize the need to be “faster” and “cheaper”. According to GRIT participants, positive outcomes will continue to be driven by a “faster, better, cheaper” formula, and learning the right formula will depend on understanding how the customer defines those three elements, overall and for specific circumstances.

On the supplier side, specialists are thriving, as are full-service providers who make data and analytics expertise a priority focus, have the means to invest in it, and the agility to align their organization behind it



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Positive outcomes will continue to be driven by a “faster, better, cheaper” formula, and learning the right formula will depend on understanding how the customer defines those three elements, overall and for specific circumstances.



ORGANIZATIONAL SUCCESS FACTORS

In keeping with our ultimate vision of building analytical models that could be highly correlative to success as measured against budget/revenue growth as the dependent variable, we asked a series of questions related to aspects of organizational

success. Although the primary purpose of these data is as inputs to models we are developing and the Business Outlook and/or Benchmarking sections, it's useful to look at several of them individually as well.

ORGANIZATIONAL SUCCESS FACTORS: PARTNER USE

These results do bear out other results we have recorded here that indicate the demise of the full-service research supplier may have been too hastily reported

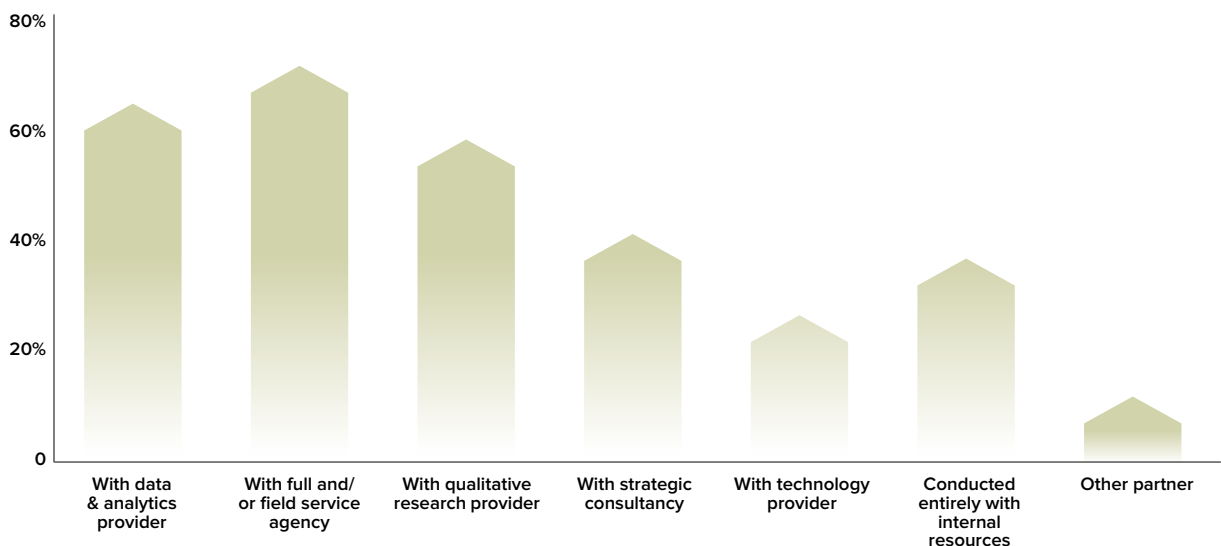


First, we asked respondents how frequently they selected vendors that fit within our big bucket category structure for projects. We included a "DIY" option here as well to begin getting a handle on how often self-serve tools are part of the selection mix.

The question text was "Of the projects you work on for your company, you may conduct them with outside providers or you may conduct entirely internally. Which of the following describes how you most frequently conduct projects? Please rank from Most frequent to Least frequent."

Using a "Top 3 Box" analysis gives us a good estimation for vendor type selection frequency.

PARTNER USE (IN TOP 3 MOST FREQUENT)



Full Service (72%) and Data and Analytics (65%) are the most frequently selected partner type, with technology partners the least frequently chosen at 27%, followed by internal resources (38%). We see no noticeable differences in these results across geographies or organization size/sector.

These results do bear out other results we have recorded here that indicate the demise of the full-service research supplier may have been too hastily

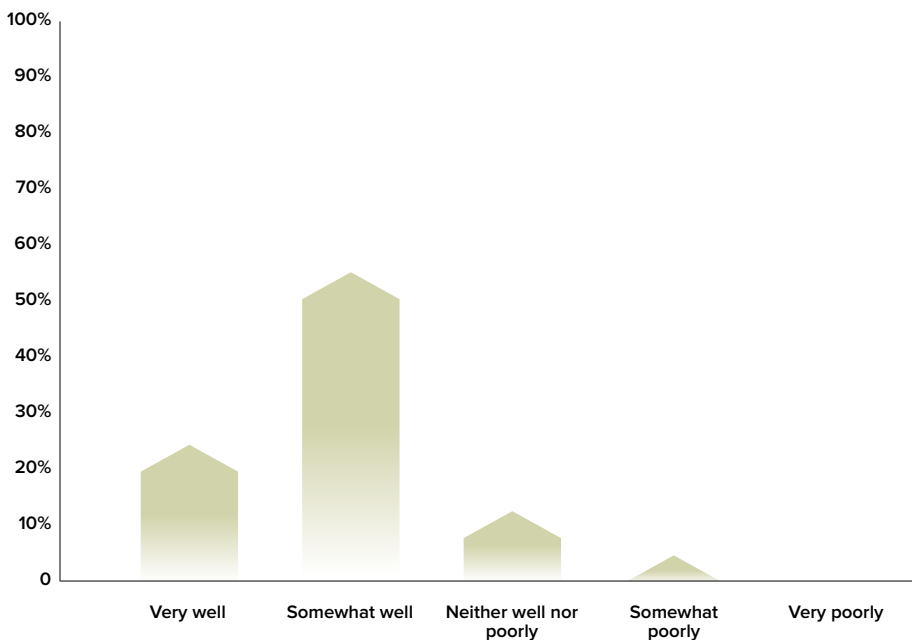
reported. Although “in-sourcing” is still a significant model, as observed earlier, challenges around time and resources are likely still a limiting factor of wholesale adoption until automation can further address those challenges. That said, GRIT data still is strongly indicative that technology providers are significant growth drivers of the industry, so we expect to see these data change as that pace continues into the foreseeable future.

ORGANIZATIONAL SUCCESS FACTORS: PROJECT SUCCESS

For several years we have been gauging how well GRIT respondents think that projects meet the needs of the business. The question text was “The industry continues to discuss how research can deliver impact, and the project is the primary vehicle for how that can happen. When thinking about all of the projects you work on for your company, and the final deliverables when the project is complete, what percentage of projects that you work on fall

into these categories?”, with the categories being “Exceeds the needs of the business as outlined in the project brief”, “Meets the needs of the business as outlined in the project brief”, or “Does not meet the needs of the business as outlined in the project brief”, with percentages to select. We have rolled those percentages up into a more traditional five-point scale for simplicity of reporting.

PROJECTS THAT MEET NEEDS OF THE BUSINESS



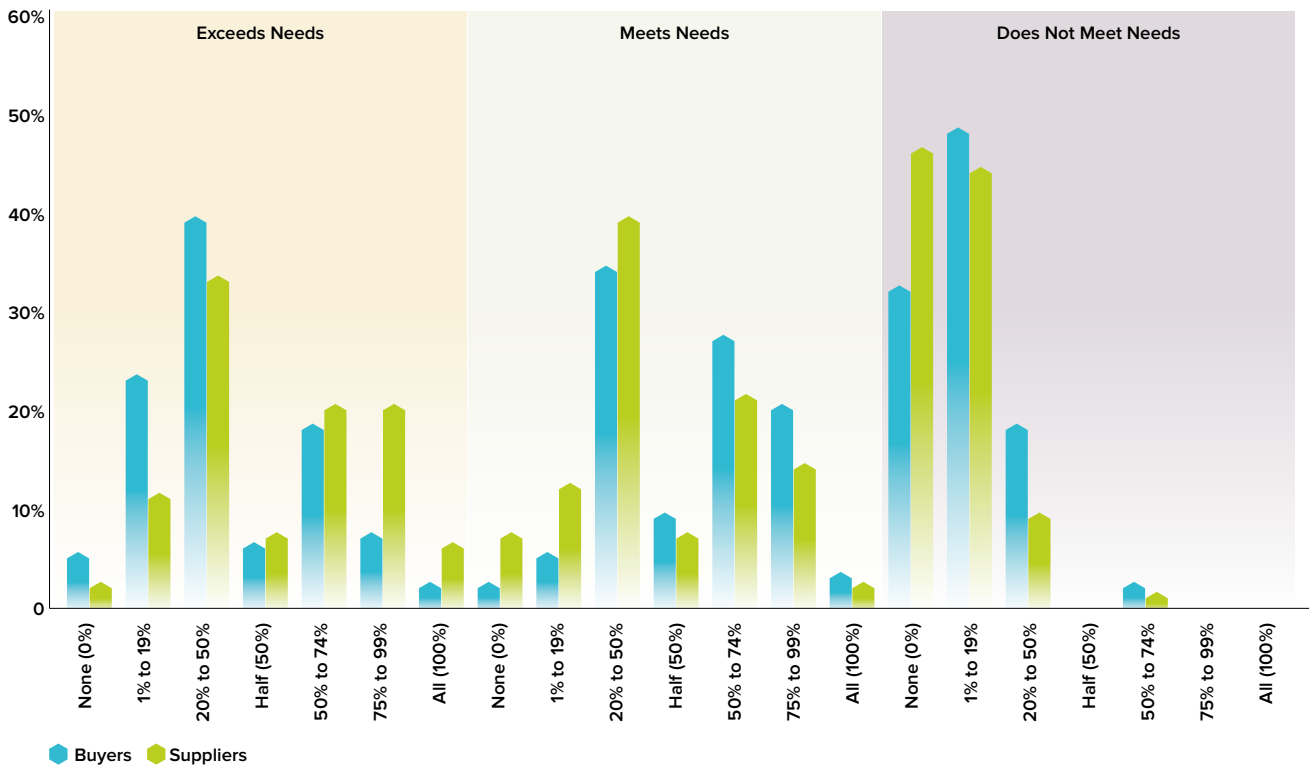
When drilling down into the detail and looking by buyers vs. supplier, the story isn't quite so rosy



In looking at the aggregate, rolled up responses, things don't look so bad: 57% of all respondents report that projects do somewhat well in meeting the needs of the business and 27% do very well. Only 3% fall into the poorly category.

However, when drilling down into the detail and looking by buyers vs. supplier, the story isn't quite so rosy.

PROJECTS THAT MEET NEEDS OF THE BUSINESS DETAIL %



Buyers tend to be more critical than suppliers, with more suppliers stating that no projects fail to meet the needs of the business and that more projects exceed the needs of the business, an opinion not necessarily aligned with buyer experience

The results are less than inspiring. Perhaps the best summation is "hit or miss". There is wild inconsistency within each category on what percentage of projects Exceed, Meet or Do Not Meet the needs of the business, and while it is true that only a small percentage overall fail to meet the needs of the business, on a per project basis the number is higher than we would have expected. Unsurprisingly, buyers tend to be more critical than suppliers, with more suppliers stating that no projects fail to meet the needs of the business and that more projects exceed the needs of the business, an opinion not necessarily aligned with buyer experience if the buyer evaluation is limited to supplier-involved projects. If the buyer evaluation

also applies to factors unseen by suppliers, such as the performance of their own staff or projects conducted without a supplier, then the buyers' more critical assessment may apply to their own contributions.

This lack of consistency for project expectations could have many drivers: lack of clear objectives, change in specifications, budgetary limits, poor communication of results, lack of action based on results, or a dozen other things. While we did not delve into the specific causes for a negative view, we did ask some additional questions, including our benchmark analysis, that give clear direction on what can help ensure more projects are successful.



WE GET BETTER WITH HELP FROM OUR FRIENDS

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In research, as in most industries, there is a constant ebb and flow of organization to organization movement through collaborations, partnerships, mergers, and acquisitions. We ourselves, and/or many of our colleagues, have also grown careers through experiences with several different research organizations, sometimes even shifting from the researcher side to the supplier side. This dance-like movement is part of the current that keeps our industry alive and evolving. There is exceptional opportunity that arises out of these movements, as well.

Most companies will come to a precipice where they must decide where their offerings end and someone else's begin. Clients are constantly in need of more streamlined solutions, and simplified communication. Working with fewer suppliers puts a cap on how many cooks are in the kitchen adding ingredients to your project success. There is always a necessity to have everything your client needs at your fingertips, and that can be virtually impossible to deliver upon with the many moving pieces and solutions that successful research requires. Perhaps if you are hesitant to take on and master a new offering, you should consider working with a company that is already an established expert. Enter the trusted partner relationship.

In January of 2019, Civicom Marketing Research Services announced our strategic alliance with the Schlesinger Group. Over a cup of coffee, a couple of industry colleagues chatted about how their organizations could possibly work together to increase not only potential business development opportunities, but the ease of project success and the relative quality standard, particularly for online qualitative research recruitment and execution. The strength in the Schlesinger Group's extensive experience supporting and recruiting for online qualitative research, combined with the solutions and exceptional commitment to quality and project success that Civicom delivers, resulted in a solution that more effectively drives smooth and successful research for you, the researcher. What developed from that point were several exciting, higher level conversations resulting in the growth of a partnership that builds on the well-established reputations of both organizations.

So often, usually with a sincere intent to protect themselves, organizations can miss the chance to evolve into something more by communicating more openly with outsiders. Fortunately, in this industry we do not have a shortage of people that communicate for a living and so opportunity abounds. The beauty of a partnership is that you have control over who your partner will be. You want to partner with an organization that echoes your company's values, quality standards, and commitment to success. Your partnership should have a solid foundation paired with healthy communication. You have to have a clear understanding of the value that the partnership brings to your organization and also the value that you are bringing to the table for your partner.

One of the most critical pieces of these conversations surrounds the need to set expectations. Remember the Pygmalion Effect: What one person (or company) expects of another can come to serve as a self-fulfilling prophecy. Set your expectations accordingly. Remember to consider your policies when it comes to security and privacy. With standard regulations and laws such as HIPAA and GDPR in the EU, you need to make sure that your partner holds their organization to the same level of compliance and security that you do. It's possible you may need to re-evaluate your company's policies to be compliant in light of your partnership. From the beginning you also want to establish where one role ends and the other begins and how to communicate and disseminate any changes in process internally. Then collaborate on how your clients and their processes may be affected by your alliance and finally shift your attention to how your partnership is communicated to your clients.

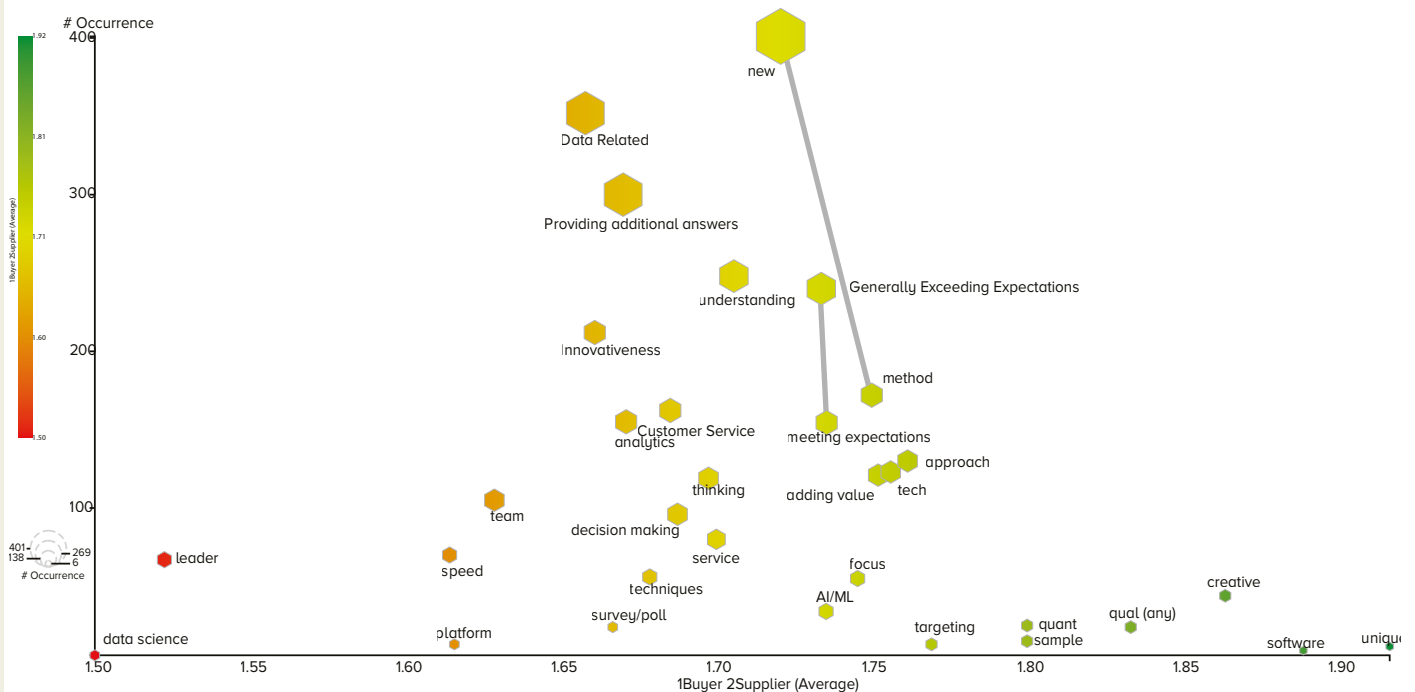
Establishing a partnership can enable you to expand your client offerings, enrich your reputation by association, attain greater industry exposure, and drive future success and experience. Consider how a friendly conversation over coffee might enable you to take your company and this industry to the next level.

ORGANIZATIONAL SUCCESS FACTORS: MEASURING 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 response and we received 1,284 responses.

We then used text analytics to understand the dominant themes for both buyers and sellers.



Buyers tend to focus on business impact and suppliers tend to focus on implementation as default context for evaluating success

Both groups agreed that the most obvious way to measure success was whether a project met, exceeded, or failed to meet expectations, did it add value or did it provide something “new”. That is good alignment.

However, buyers were also focused on speed, data delivered, additional answers provided, service, and aid in decision making as significant evaluation factors.

Suppliers, on the other hand, included creativity, uniqueness, the methodology deployed and the use of technology as part of their measurement process.

As we have seen many times already in this report and will see again from here, buyers tend to focus on business impact and suppliers tend to focus on implementation as default context for evaluating success. That is reasonable based on the roles of each in the value chain, but there needs to be alignment on shared KPIs between the key stakeholders. We would suggest that the real measure of expectations is around creating business impact. Luckily GRIT provides direction on defining what impact is in the upcoming benchmark section.



SO YOU WANT TO BE INNOVATIVE? HERE'S WHAT IT TAKES.

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The outlook for innovation in the Research industry is split. On one hand, according to the GRIT Report, 40% of respondents stated that their organization is “always” exploring new methods, technologies, business models, and partners and 35% stated that they’re “frequently” looking. On the other hand, the Report states that one of the greatest challenges faced by the industry is a lack of willingness to embrace innovation. Is the industry all talk, no action when it comes to innovation? The answer is: it depends.

At Discuss.io, we’ve seen both sides of this coin. Some brands are there, others have not yet caught up. But there’s hope. Some of our best client relationships are with brands who a year prior told us that their culture would never accept innovation. Whereas previously, the push for innovation most often came from leadership, in recent years, we’ve noticed a greater clamoring for innovation coming directly from individuals and teams. People are searching for new ways to gather insights efficiently so they can compress product development timelines. They’re seeing that the brands perceived as most innovative are winning market share at an outsized pace.

Nonetheless, brands are clear about one thing: they’re looking for **partners** when it comes to enabling innovation within their organizations. We’ve learned a lot over the past couple of years of developing these partnerships with brands. From what we’ve seen **in organizations where innovation is successful, the following also exists:**

Culture-Fit

Innovation is born out of countless strategic decisions, alignment, and an openness to change. Embracing innovation means that you’re opening the door for experimentation and risk-taking. That can feel like a scary concept but one that needs to be accepted and conveyed to all employees. It’s important that leadership’s commitment to innovation is **visible**. In some organizations, that means launching an innovation “lab” or dedicated team. In others, we’ve seen new roles crop up where it’s someone’s job explicitly to explore new tools and techniques.

Buy-In

Ultimately, buy-in needs to come from both directions. Senior-level buy-in **shifts culture**, team-level buy-in **drives change**. If punished for taking risks, employees will avoid experimentation and stick to what they know. If not accompanied with metrics, leadership will dismiss experiments as a waste of resources.

In our experience, team-level buy-in can be achieved in a number of different ways, ranging from assigning an internal champion and doing lunch-and-learns, to full-blown live workshops. We’ve found that people are most likely to embrace change when they are able to experience it for themselves.

Ease-of-Use

It’s technology’s job to enable users to do more, faster, by streamlining processes through automation and uncovering hidden truths through AI. Innovative technology should accompany larger innovative strategies to deliver results that are **radically superior** to or impossible via analogue alternatives.

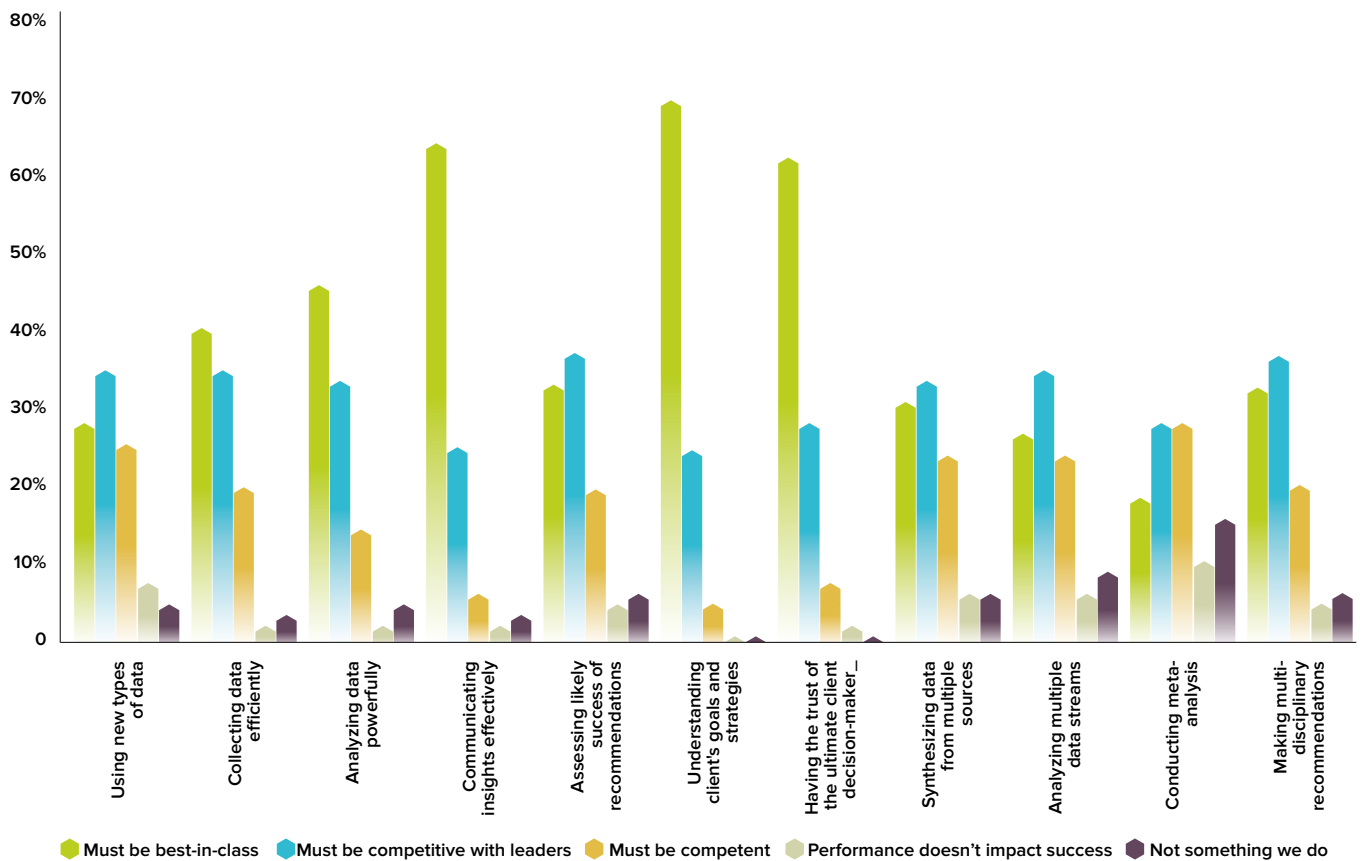
For example, our clients tell us that they often shave four to six (4-6) weeks from their research timelines, resulting in products launching in market, at times, a full fiscal quarter ahead of schedule. **Talk about radically better results!** The results of their innovation is also felt on a cultural level. Clients often tell us that they know their initiatives are a success by how often the C-Suite and their teams cite consumer verbatims in meetings. With each quote, the culture becomes more consumer-centric – a major pillar of innovation.

Respondents to the GRIT survey are frustrated by the pace of innovation in their organizations, with good reason. We caution the slowest-adopters: if you don’t embrace innovation and disrupt yourself, someone else will. Optimistically, we’ve seen grassroots movements be successful and are sensing an increasing openness to innovation coming from within brand teams. When this openness is paired with a healthy partnership and easy-to-use, innovative technology, the course is clear for innovation to disrupt even the most historically traditional organizations.

ORGANIZATIONAL SUCCESS FACTORS: CRITICAL PRIORITIES

Finally, we wanted to understand how suppliers were prioritizing a variety of factors within their organization’s strategic plan. We asked “How critical are each of these skills or initiatives to your company’s success?”

CRITICAL PRIORITIES



3 factors rose to the top for nearly half of respondents as “must be best-in-class”: Understanding client’s goals and strategies, having trust of the end-client and communicating insights effectively



Three factors rose to the top for nearly half of respondents as “must be best-in-class”: Understanding client’s goals and strategies, having trust of the end-client and communicating insights effectively. Roughly a third also cited efficiency in data collection and analytical power as also being the highest priority. Our key takeaway on this is once again a need to balance the tactical aspects of research (speed) with the strategic (impact).

If we assume an organization that doesn’t do something hasn’t made it a priority, then we see that conducting meta-analysis, analyzing multiple data streams, and making multi-disciplinary recommendations were highest, although all were under 11%, however no one rated these as highest priorities either indication the industry has yet to widely embrace utilizing different data sources and/or skillsets as part of their core function.



ORGANIZATIONAL SUCCESS FACTORS:

MEASURING IMPACT MAXIMIZING IMPACT ONE STORY AT A TIME

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How do we make a significant impact to drive insight-led change in the organization? For me, it is the #1 measure of insight effectiveness – making an impact.

Results from this year's survey show that buyers judge a project's success on its business impact. They want projects to meet their expectations, add value, provide additional answers or that much anticipated 'something new'. Importantly, they also want projects to aid decision making and they need it at speed. These feel like reasonable demands on a project, and, what's more, they're not new or surprising. So, why aren't we getting it right more of the time?

Only 17% of buyers feel the research they conduct compares 'very well' to their view of the 'ideal project', which means many projects are missing the mark when it comes to delivering impact. A killer insight on its own just isn't enough. Our ability to communicate insights effectively has a major influence on whether a project will be deemed a success. As an industry we seem acutely aware of this, with nearly half of supplier respondents selecting 'communicating insight effectively' must be best-in-class' as being a critical priority. If we improve our ability to communicate effectively, we improve the impact we have.

Creating a Reaction = Action

A lot of data debates happen because of our obsession with metrics. Of course, metrics are important but alone they often aren't the trigger for action. Those data debates tend to continue until you establish a connection to the customers' emotions. Great customer stories are a simple but extremely effective way to tap into that emotion. They force senior stakeholders to see the inescapable truth through passionate, articulate customers talking about their experiences.

Imagine if you lined up 'in the flesh' 20 actual customers to talk to your leadership team succinctly about a key issue for them. Video storytelling and analytics is the closest you can get to that, putting the customer in front of leaders every day, and if you want to make an impact, it's a great place to start!

So, why isn't there more video and stories your organization? The reality is that for decades, our industry has struggled to work effectively with video as a data asset. It has been cumbersome and hugely labor-intensive. But technology can take all of that pain away.

Here are some stats that demonstrate why video should be part of your storytelling toolkit.

- Your time to make an impact is short and shrinking – less than 2 minutes (Facebook, Twitter). Video is the ideal medium to tell a powerful story in a limited space of time. Powerful stories drive change!
- Viewers retain 95% of a message when they watch it in a video, compared to 10% when reading it in text (Wirebuzz)
- 59% of executives would rather watch video than read text. (Insivia.com)
- Technologies such as LivingLens enable you to produce a video story in 5% of the time versus conventional methods (LivingLens data)

The Insight Function Evolution

As data collection and elements of analysis become more automated, our role as both a function and as individuals is evolving. Insight isn't the sole domain of those who work in the 'Insight' function anymore. Areas such as social media data analytics, more sophisticated understanding of behavior through passive collection, greater focus on CX and UX, and other customer data rich functions with growing data science capabilities are entering the insight domain, and rightly so. Now that data and analytics are spread across the client organization, there is uncertainty, and a battle, as to who will own 'insight' in the future, and the consequences for the vendor ecosystem are significant, too. How can we truly help the people we work with within our clients become the owners of insight in the future? Fundamentally, the role of many insight professionals is changing into that of change agents, and we need to aid that as quickly and effectively as possible. We have to make sure we are delivering significant value, and that is all about delivering impact.

Our technologies and people are enabling clients to emotionally connect with who the customer really is, and to dramatically increase senior stakeholder engagement as a result. That is what we are all striving for. Fundamentally, our job is to influence senior people in the organization; we have to make an impact, to ensure insight driven change makes it to the top of their 'to do' lists.

THE BIG PICTURE

Buyers still prefer to use supplier partners for most of their needs, but the bar is being raised on what it takes to be considered successful



Buyers still prefer to use supplier partners for most of their needs, but the bar is being raised on what it takes to be considered successful. Delivering efficiencies is vitally important, but so is being deeply collaborative and engaged to understand the needs of the client and ensure that the project delivers to meet (or exceed) those needs.

At the same time, there are opportunities to deliver more value through technology (speed/cost/scale) and enhanced services (account engagement, recommendations, innovative thinking) that can earn more business. Ultimately, if suppliers make buyers look good, then buyers will have every reason to continue to use them. But in a highly competitive landscape, there is little reason to settle for subpar performance; we are after all only as good as our last project.

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February 25-26, 2020 in Amsterdam
iiex-eu.insightinnovation.org

IleX Behavior UK

November 18, 2019 in London
iiex-be.insightinnovation.org

IleX North America

April 14-16, 2020 in Austin
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Sponsorship and exhibition opportunities are available. Contact **Matt Gershner** at sales@greenbook.org for details.



CULTURE CHANGE NEEDED FOR RESEARCHTECH TO BE EFFECTIVE

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How business units work alongside one another and how much autonomy employees are given to make decisions fast are two of the most significant factors contributing to how well companies are adapting to constant change. If an organization is structurally unsound or if policies are outdated, adoption of new technologies will fail.

While these basic tenets are widely accepted, the 2019 GRIT report revealed some rather startling facts about how teams are working together, from setting realistic goals to measuring performance of all investments to gauge their effectiveness. Sixty percent of respondents, for instance, selected 'sometimes/rarely/never' when asked if they measure the ROI impact of projects undertaken, a number that has remained fairly consistent over the past three years. Further, only one-quarter say they are always involved in strategic planning sessions at the corporate or business unit level. GRIT survey respondents have expressed an increase in regular interaction with senior stakeholders over the past three years, but when it comes to 'ensuring all research initiatives are aligned with senior stakeholders' business objectives, only 38 percent say this always occurs.

What can be done to improve upon measurement and team dynamics, giving your company a better chance at success when implementing change?

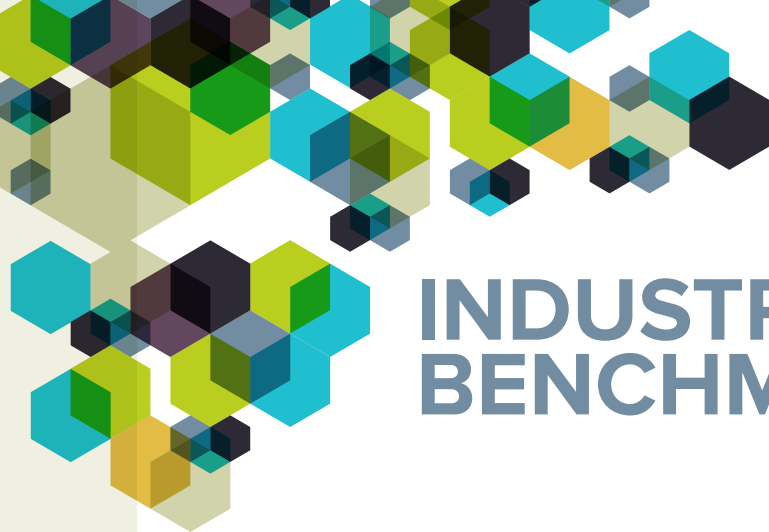
The first priority has to be ensuring all employees understand their role, what changes will occur, and how they are expected to deliver on their part within that change plan. The responsibility for structural or organizational change cannot rest solely with operations personnel; leadership has to be involved at every stage.

When Canada's biggest national bank, RBC, sought to incorporate more customer insights more often throughout their marketing process to make better, faster business decisions, they worked with our customer success team at Methodify to establish success metrics, customize training for their marketing and market research teams and to fit it into their daily routines with ease. The result? According to Tim Lauber, Director, Client Experience and Design at RBC, the ability to use an intuitive automated platform to provide research-based recommendations rooted in data has given the RBC leadership team confidence that they are moving in the right direction. "Methodify has helped our Insights team deliver fact-based decisions as fast as the market moves, empowering the Insights team to keep up with the fast-pace of requests for facts to support complex decisions", explained Lauber. "Using Methodify's tools, we've evolved alongside the market, not fallen behind".

Once employees are personally invested in the success of the strategy, the groundwork can be laid for the investment in ResearchTech to be successful.

Next, companies must set realistic goals and as they apply those goals outline how they will be measured along each step of the process. Each member of the team must also have a clear grasp of his or her role within the overall organization, have a solid understanding of implementation, and the expected outcomes of transformational change before it is implemented, to ensure successful adoption of that change.

While ResearchTech gives companies the ability to make faster and better business decisions, how the technology's benefits are articulated and how seamless the technology fits into their existing daily work routines will impact the success of the investment against the company's bottom line. If the foundation is not solid, building upon it will also be unstable.



INDUSTRY BENCHMARKING

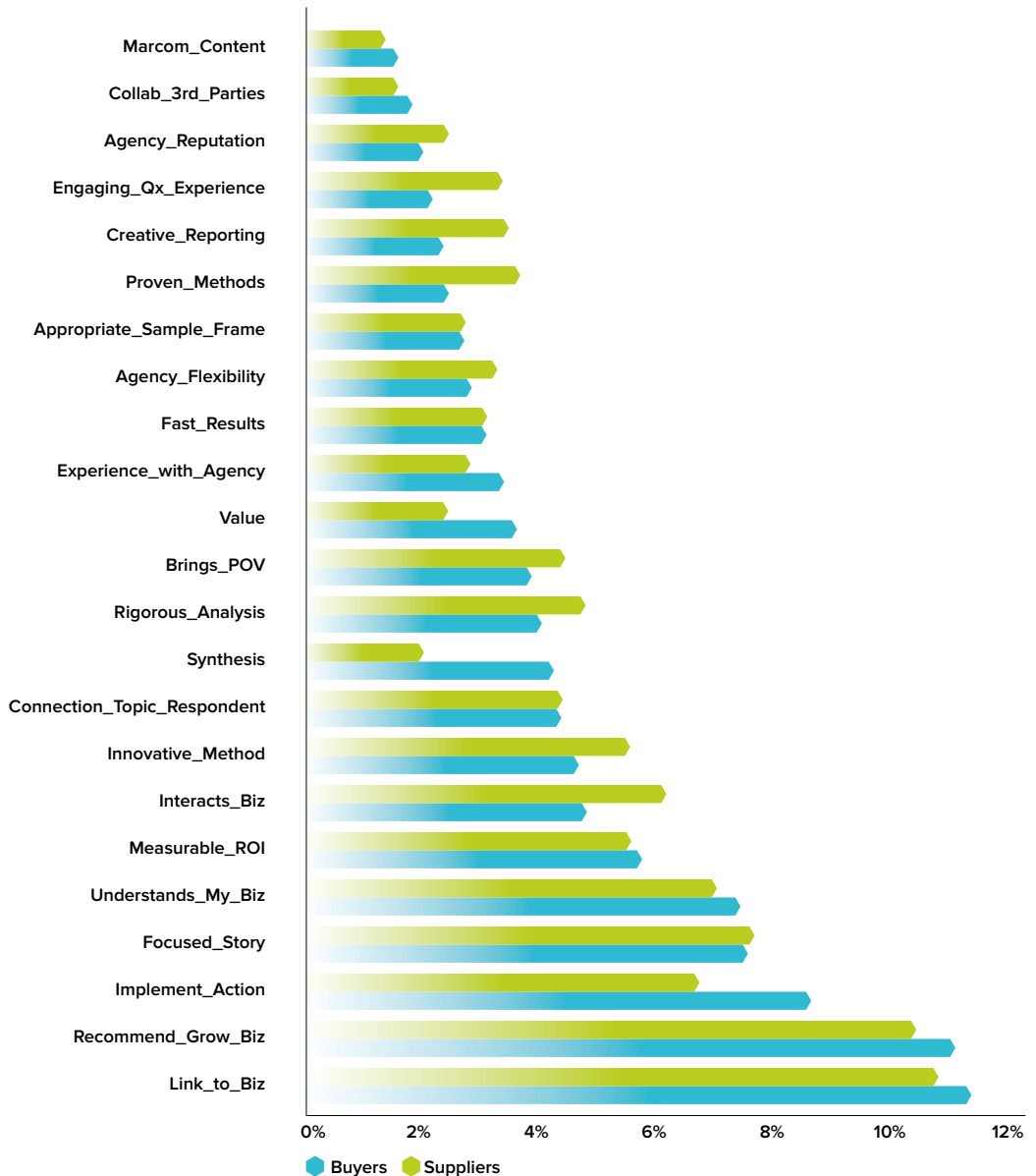
While the issue of survey engagement is critical, there is an argument to be made that it is a foundation element of service, delivered as table stakes



This wave of GRIT survey is our second, and most comprehensive, opportunity to benchmark the priorities research buyers and suppliers place on various aspects of the research efforts they conduct. A MaxDiff exercise helped us define these priorities.

As hoped, our growing benchmark database continues to reveal insights that some will find exhilarating while others will perceive as the storm clouds darkening further.

SCORE COMPARISON



Roughly seven in ten in each group said they were either very optimistic or optimistic



As with the early indicators we found last wave, there is consensus among buyers and suppliers that the most important elements that lead to maximum impact when executing a research study are:

- Clear linkage to business objectives
- Delivering recommendations that help grow the business
- Executives implement action based on the results
- Providing a focused story
- Agency understands my business

Just below the top five sits 'generates a measurable ROI'. What **doesn't** make the short list, however, continues to be very telling. The most notable of these include:

- The reputation of the agency
- The use of proven methodologies
- Creative reporting
- An engaging survey/interview experience for participants

Let's talk about these for just a moment – the implications are substantial. First, all four of these elements are deemed more important by research suppliers than buyers. Research buyers live in a world where proving their worth is the ticket to the coveted 'seat at the table'. They get no points for the specific agencies they use, the methods employed, unique respondent engagement strategies or for the creativity of reports. They are expected to manage their projects to success in a way that adds to the required business knowledge of the executives with whom they interact. Research suppliers who believe these are differentiating points of communication should have gotten the message long ago they are marching to the wrong drummer. Creativity in reporting is of no use if it doesn't answer business questions or provide a concise, focused story suitable to the attention span of the typical executive. While the issue of survey engagement is critical for those who depend on surveys, there is an argument to be made that it is a foundation element of service, delivered as table stakes. On its own, it will not differentiate one research supplier from another unless, of course, the supplier fails to do this.

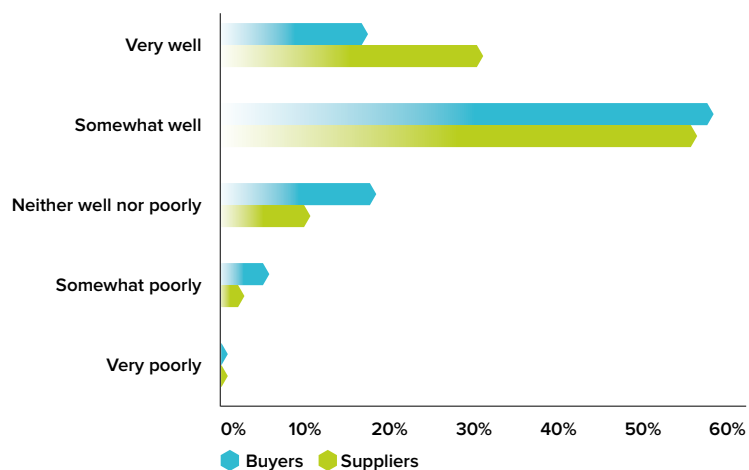
The same can be said of 'fast results'. Previously, and often, lauded as an important element of research efforts, it now falls in the middle of the pack – only half as important as any of the top five attributes leading to the impact of a research effort. This could well be because the need has been recognized and the shift to speed is clearly recognized in practice. One can simply look at the number of agencies promising results in days, if not hours, compared to several years ago. Agile research techniques have been broadly adopted to facilitate decision making. DIY platforms and automated products have taken out large chunks of production time historically required to execute research. Research buyers voiced the need for a change in timeframes for delivery and it appears that the urgent need has been at least partially satiated.

Research firms, large and small, must focus on elements that will differentiate them in a market where commoditization rules. A reputation for being a true partner to the executive team is built on a consistent, positive experience with an agency's performance – not what it says about itself in advertising, public relations or blog posts. While research suppliers believe they are doing a good job of delivering against their ideal project practices (31% believe they are delivering against the ideal project specified in the MaxDiff exercise **very well**), research buyers are more pessimistic (only 17% provide the same response).

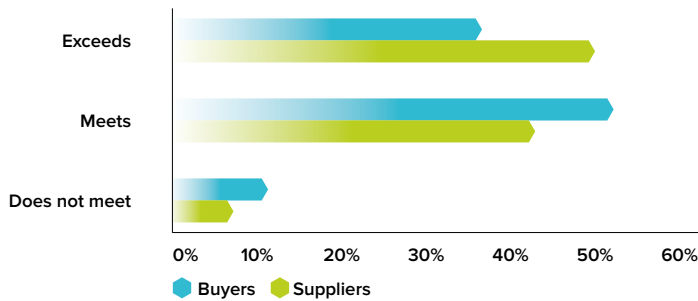
Research firms, large and small, must focus on elements that will differentiate them in a market where commoditization rules



COMPARISON OF THE AVERAGE RESEARCH PROJECT TO THE IDEAL



PROPORTION OF PROJECTS AT EACH LEVEL OF MEETING BUSINESS OBJECTIVES



As the responses indicate and as previously pointed out, research suppliers felt they exceeded the business needs as outlined in the project brief fully half the time. One might question the veracity of this claim based on the response of research buyers – just more than one-third make this claim. The good news is that few projects (11% research buyers/6% research suppliers) were reported to **not** meet the requirements of the project brief. This leaves a large segment of projects that simply meet the needs as outlined in the project brief. This may be fine, but simply meeting the need smacks of a commodity purchased to fulfill a specific function – not one designed to add value. Additionally, one does not build relationships with longevity simply by meeting

There is a deeper part to this story. The data argues that specialist firms and consultancies do a much better job on this than other types of firms. This wave, we asked a question concerning the proportion of projects completed that exceeded the needs of the business, met the needs of the business or did not meet the needs of the business.

needs, nor can simply meeting needs support any form of pricing that results the higher gross margins necessary to drive growth in a business.

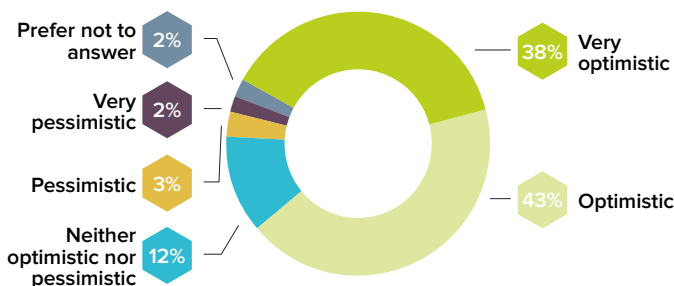
There is further evidence to support this point. Research buyers were additionally asked the types of outside partners with whom they worked. When partnering with a data and analytics partner, the average proportion of efforts that exceeded the business needs was 40%. When partnering with technology firms, that proportion inched up to 41%. However, when partnering with a strategic consultancy, 46% of the projects exceeded the needs of the business. Where is the proportion of projects that exceeded business needs the lowest? When partnering with a full-service firm or field agency (31%); the largest legacy portion of our industry.

The good news is that few projects (11% research buyers/6% research suppliers) were reported to not meet the requirements of the project brief



OPTIMISM REMAINS THE VIEW OF THE DAY

OPTIMISM ABOUT THEIR RESEARCH COMPANY (AMONG RESEARCH PROVIDERS)



This is the second wave of GRIT where we asked a question about respondents' optimism about the future. Research suppliers and buyers express optimism about the future of the company they work for (suppliers) or their insights role (buyers). Roughly seven in ten in each group said they were either very optimistic or optimistic.



THE CHANGING FACE OF VALUE: CLIENTS WANT NEW TECHNOLOGY, DATA ANALYTICS, AND STRATEGIC CONSULTANCY

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Industry research and analysis provides information to help clients develop new products and advertising strategies, make strategic decisions and gather demographic information. The industry has performed well over the past five years, with demand steadily rising for a range of services.

Our industry is becoming solutions-driven, rather than product/service-driven, particularly when solving information problems to improve companies' decision-making processes. Research suppliers should not underestimate the importance of understanding what research buyers deem crucial, and tailor their offerings accordingly.

What research buyers want

The GRIT analysis is clear. For maximum impact when conducting a research study, clients want to work with firms that understand their business. They want research that clearly links to their business objectives. They want analysis delivered in a focused story. They want practical recommendations that help grow their business. They need their executives to be able to implement action based on the research results. The generation of measurable ROI is also deemed important, although it did not make the top five elements of an impactful research project.

Interestingly, less important factors for clients when choosing to work with research providers are the reputation of the company, the use of proven methodologies, creative reporting, and the provision of an engaging survey/interview experience for participants. These elements are not deemed sufficient, or even necessary, to deliver quality research.

Exceeding expectations

The types of partners more likely to exceed expectations include data and analytics companies, technology firms, and strategic consultancies. These firms are often forward-thinking and challenge

the status quo. Technology companies provide agile research techniques, including DIY customer insights platforms and automated products, to drastically reduce the time required to conduct research. Unsurprisingly, for many in the industry, buyers who prioritize use of full-service firms and field agencies at the exclusion of other types of providers have the lowest proportion of projects that exceed expectations.

Looking to the future

Consumer sentiment and business confidence are anticipated to remain positive over the next five years, supporting industry growth. IBISWorld (2019) predicts that industry revenue in Australia is forecast to increase at an annualized 2.1% over the five years through 2023-24, to \$3.5 billion.

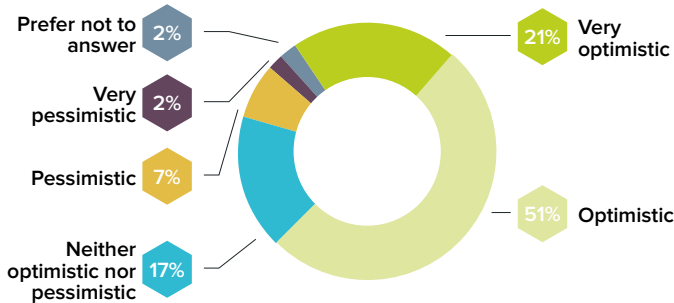
The majority of research buyers and suppliers responded that they are optimistic about the future of the industry, and this optimism has increased since the last round of GRIT. Our industry needs the right people to drive forward strategic consultancy, technology development, and insightful data analytics delivery.

Rising demand for research and statistics relating to audiences on new digital platforms and advertising effectiveness represents future potential opportunity in our industry. While firms will face challenges developing effective measurement systems, those who develop their own technology will likely maintain competitive advantage over the next five years.

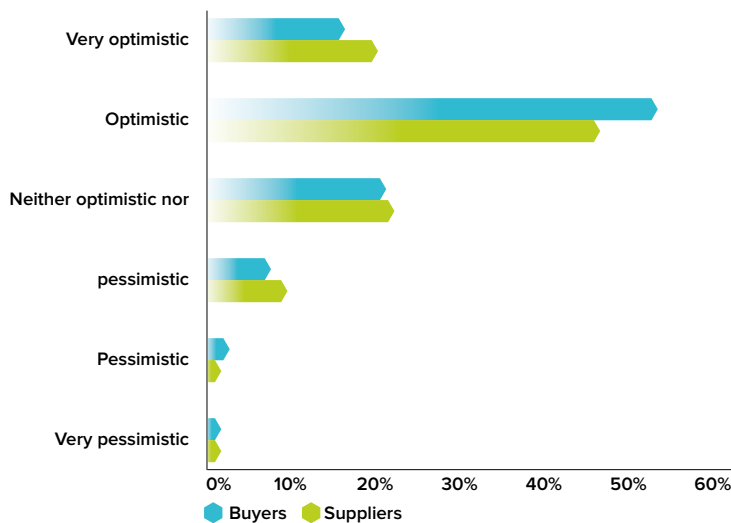
Benchmarking in the market research industry

Best practice in our industry comes down to the delivery of consistent, positive experiences for our clients that exceed their expectations. Firms that dedicate resources to the development of technology that solves problems, the provision of strategy that aids executive decision-making, and data analytics solutions that drive business performance will lead our industry forward.

**OPTIMISM ABOUT THEIR RESEARCH DEPARTMENT
(AMONG RESEARCH BUYERS)**



OPTIMISM ABOUT THE INDUSTRY



The good news in this wave of the GRIT survey is the increased optimism among research suppliers – a ten percentage point increase over the last wave of the GRIT (70%, Wave 2 – 2018 ‘very optimistic’ or ‘optimistic’ about the future of their company versus 80% in the current wave). This is driven by a 15-percentage point increase in the ‘very optimistic’ response

Research buyers’ optimism about the future of their insights department has changed more modestly in the positive direction – up six percentage points over the last wave of GRIT for those responding either ‘very optimistic’ or ‘optimistic’.

Among buyers and suppliers, more than two-thirds express optimism about the future of the industry – a comforting thought, albeit similar to our findings in the last wave of GRIT. As might be expected, the highest driver of optimism for both suppliers and clients is how insights revenue/spending has changed over the previous year. There are some interesting differences between them, however. Clients who have a focus on ROI tend to be more optimistic than those who do not. For suppliers, a focus on innovative methods tends to drive optimism. These results are quite tantalizing, as they again indicate some possible mismatch in values between clients and suppliers. This is an area where we will be exploring the rich data available over the coming months.

THE BIG PICTURE

Our key takeaway from the benchmark section is that the definition of value for our industry, long in a period of transition, is experiencing greater clarity – strategic consultancy, technology and data analytics

Our key takeaway from the benchmark section is that the definition of value for our industry, long in a period of transition, is experiencing greater clarity – strategic consultancy, technology and data analytics. Research suppliers and buyers that have made this transition fully understand it requires not just a well-planned and executed strategy but also ensuring the right people are in place who can bring these much-needed skill sets to our industry.

Those who have embraced these ideas are optimistic and experiencing growth from it. Those who have not are more pessimistic, and perhaps rightfully so. Based on our models, we believe a formula for success is readily apparent, although certainly issues about positioning and messaging to differentiate organizations from the pack exist and may create different challenges that will need to be addressed.



THE PURPOSE OF RESEARCH INNOVATION

Alex Hunt

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At PRS IN VIVO, we're thrilled to see this year's GRIT report renamed the "Business & Innovation Report". It represents the evolutionary thinking for the industry that is both essential and overdue.

We're proud of our own company's rich history of research innovation, having pioneered behavioral in-context technologies such as eye-tracking decades ago. But more than ever, we believe it is important to articulate innovation's true purpose in consumer research: creating better real world outcomes and delivering business growth for our clients.

GRIT survey participants still express optimism for the industry's future, in part because of innovations. Clients this year however, compared with previous studies, seem more hesitant.

One reason is the certainty that simply gathering data is no longer sufficient for clients' own stakeholders. Priorities are intensifying; the need for the insights function to take responsibility for driving business growth changes the support CMI teams require from their partners.

What clients crave are innovations that make sense of any available data, through a predictive and contextual understanding of how, and as importantly, why, consumers behave as they do.

So, what are the organizational success factors that ensure research innovation leads to better real world outcomes?

There are 50 suppliers in this year's report recognized for innovation (we are immensely proud that PRS IN VIVO is, for the first time, one of them). But simply creating something "new" is not why the "most innovative" stamp is awarded.

The GRIT data validates that, where innovations serve their purpose, there is a combination of three essential elements: the thoughtful

application of the right technology, a validated process for applying behavioral science to understand consumer decision-making, and talent committed, as well as an infrastructure, to operationalize creative human expertise.

- If innovative technology enables faster data gathering and analysis, streamlines a process, or creates more agile, responsive ways to react to clients' questions, great. But the innovation must be accelerating "best practices" that simply took too long previously to be part of decision-making cycles. Using technology to simply make bad decisions faster and cheaper doesn't create better outcomes for buyers.
- Partners must be genuine masters of the scientific principles of behavior in order for the innovations they create to be effective. True behavioral practitioners, with a deep understanding about the constants in human decision-making, will uncover consumer insights that identify optimal opportunities for brands to influence choice, even as the omni-channel shopper context evolves.
- Lastly, to create truly successful innovations, partners need talent with deep domain and human expertise. This can be in a sector or – as is the case with our terrific team at PRS IN VIVO – a specific discipline of business, like how to improve shopper and product experiences. Operationalizing human creativity, on top of innovative technology, ensures the resulting guidance will be impactful towards measurable business growth.

Innovations like AI, and machine learning applied to analytics, VR/AR, and integration of alternate sources of behavioral data, are reasons to be optimistic about the future of research. But as an industry, we must embrace one fundamental objective; ultimately, we owe our clients purposeful innovation, and a relentless commitment to sustainable, real world outcomes. Growing our clients businesses is the best way to grow our industry. It's a challenge our talented team of behavioral and domain experts at PRS IN VIVO commit to delivering on every day.

GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

For almost a decade the GRIT Top 50 has been one of the key metrics many companies use to understand their position in the marketplace. It has also become a badge of honor, with many companies proudly proclaiming their rankings in their own marketing campaigns. However, being on the GRIT Top 50 serves a far more useful purpose than an accolade; fundamentally, it is a brand tracker using the attribute of “innovation” as the key metric. It has become a reliable way for the players in the insights and analytics ecosystem to measure their own brand awareness and perception.

The process is simple. Each year we measure how market research suppliers and clients are leveraging the brand attribute of innovation through a simple question series:

1. Using an unaided awareness verbatim question, we ask respondents to list the research companies they consider to be most innovative. They can list up to five companies.
2. We then ask them to tell us of the companies they listed, which do they consider to be the most innovative.
3. Finally, we ask another verbatim as to why they consider their most innovative firm to be most innovative.

We added a new question this year and asked respondents to help us segment the companies mentioned in their responses into a few broad categories. The question text was “Using the following categories, which best describes each company you listed”?

1. Data & analytics provider
2. Full and/or field service agency
3. Qualitative research provider
4. Strategic consultancy
5. Technology provider
6. Other (please specify)

We then simply count the mentions of each company after data cleaning and adhering to a series of rules we establish based on industry dynamics. It is a pure “top of mind” question type, with no pre-defined lists determined by us; GRIT respondents develop 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 Top 50 rankings mostly reflect 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 process those efforts are ineffectual, and in fact counter-productive. We catch them and delete them. In this wave we eliminated nearly 1000 completed interviews during our data cleaning process.

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, and there might be a modicum of truth to that on the surface, but in our analysis we

Being on the GRIT Top 50 serves a far more useful purpose than an accolade; fundamentally, it is a brand tracker using the attribute of “innovation” as the key metric

look at IP addresses and email domains and we have never seen evidence that this is a significant factor; if large companies have an advantage, it is in their reach and marketing budgets, not in “stacking votes”. This is also borne out by the in-depth demographic and firmographic analysis we conduct; the sample is simply too diverse and large on all measures to be suspect.

For this wave, using the aggregate of total mentions, we developed a list of over 1,847 unique companies (slightly up from 2018) from 6,663 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 145 companies with 5 or more mentions.

Only companies that received 18 or more mentions made it on to the core GRIT Top 50 list. However, as the industry has continued to evolve we decided it was appropriate to look at more than one list. The reason we included a classification question was to develop sub-list of companies in those categories, so although the GRIT Top 50 is still the definitive aggregate list, we now have 6 new rankings that we believe are just as important to pay attention to:

1. GRIT 50 Data & Analytics Providers
2. GRIT 50 Full/Field Service Agencies
3. GRIT 50 Qualitative Suppliers
4. GRIT 50 Strategic Consultancies
5. GRIT 50 Technology Providers
6. GRIT 50 Emerging Players

Although the threshold to be included in these new rankings is lower within each category, candidate companies were pulled from the 145 companies with 5 or more aggregate mentions. We’ll dive deeper into the purpose for this expansion in this section.

As always, a note on our process in 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. As such, we established

a few rules to guide our process that are useful to know as you review the list:

1. Normalizing all spellings or alternates (ex: Nielson, Neelson, Nelson, Nielsen, etc.).
2. If a company bought another company and rolled them in as a *division* or *product*, we recode to the acquiring company (ex: Dynata & Critical Mix, LRW & Tonic).
3. If it is a *product* or *division* of a parent company, we recode to the parent company (ex: Nielsen BASES = Nielsen, Methodify = Delvinia).
4. If a parent company has maintained separate branding for a sub brand (ex: Kelton & LRW or MetrixLab & Macromill), the parent company and sub-brands were counted separately.
5. If the parent company is simply a holding company (ex: Omnicom and C Space, M/A/R/C, Hall & Partners), the sub-brands were counted separately.
6. If a parent company has a minority investment, the sub brands were counted separately.
7. If a parent company is consolidating all sub brands (ex: Kantar and Dynata), all were counted toward the parent company.
8. If a company has recently re-branded (ex: System1, Dynata), old branding was recoded and counted under the new brand.
9. If two companies have the same name, we default to the larger company as what was intended
10. If a company has split, we count both (ex: Vision Critical & Maru)
11. Gobbledygook, comments such as “I don’t know”, “there are none”, etc... we code as “none”
12. We ignore “ties”; we determine a logical minimum of mentions closest to 50 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’s a good thing the GRIT team is obsessed with following and understanding the industry so we have that knowledge inhouse!

Now, after providing the appropriate context and other details, without further ado, here are the 2019 GRIT Top 50 rankings:

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 1,847 unique companies (slightly up from 2018) from 6,663 total responses



RANKING OF THE TOP 50 MOST INNOVATIVE SUPPLIERS

2019 Rank	Company Name	Mentions	2018 Rank	Change	2019 Rank	Company Name	Mentions	2018 Rank	Change
1	Ipsos	292	2	1	26	Fuel Cycle	45	21	(5)
2	Kantar	287	1	(1)	27	20/20 Research	33	27	0
3	Nielsen	220	4	1	28	Discuss.io	33	20	(8)
4	LRW	207	10	6	29	KnowledgeHound	33	Debut	Debut
5	Zappi	203	9	4	30	Kelton Global	32	Debut	Debut
6	Hotspex	194	8	2	31	iTracks	32	Debut	Debut
7	System1 Group	169	3	(4)	32	Protobrand	32	50	18
8	Qualtrics	156	13	5	33	TRC Market Research	29	31	(2)
9	Dynata	130	5	(4)	34	IBM	26	Debut	Debut
10	Insites Consulting	111	7	(3)	35	Periscope by McKinsey	26	Debut	Debut
11	Voxpopme	108	15	4	36	Streetbees	26	35	(1)
12	Delvinia	98	29	17	37	Black Swan Data	24	Debut	Debut
13	LivingLens	85	48	35	38	Hall & Partners	23	34	(4)
14	PRS IN VIVO	84	Debut	Debut	39	Gongos	22	Debut	Debut
15	AYTM	84	23	8	40	IRI	22	Debut	Debut
16	Google	83	16	0	41	Join the Dots	22	Debut	Debut
17	Lucid	81	14	(3)	42	Maru/Matchbox	21	42	0
18	Remesh	80	26	8	43	Gutcheck	20	30	(13)
19	Dig Insights	71	25	6	44	C Space	19	36	(8)
20	Toluna	68	11	(9)	45	1Q	19	Debut	Debut
21	SKIM	56	17	(4)	46	Microsoft	19	Debut	Debut
22	Focus Vision	53	24	2	47	Upside	19	Debut	Debut
23	GfK	51	6	(17)	48	De la Riva Group	18	33	(15)
24	Shapiro & Raj	47	19	(5)	49	Schlesinger Group	18	37	(12)
25	MetrixLab/Macromill	46	28	3	50	Vision Critical	18	22	(28)

The big story is a new number one, albeit it was a close thing: Ipsos is now considered the most innovative company in the world by GRIT respondents! After years of being in the top five, this year Ipsos was recognized for their continual efforts to embrace new business models and launch new products to edge out the 2018 number 1, (and 2019 number 2) Kantar. The difference between the two was only five mentions, so we expect the rivalry to continue, especially as they leverage their size as two of the largest research companies in the world to continue to stay ahead of the field in both applied innovation and marketing.

Nielsen comes in a somewhat more distant third, again very much in line with a trend we have seen since inception of the GRIT Top 50 with the “Big 3” holding significant mindshare for GRIT respondents. Being avid industry observers and also the industry’s premier marketing platform, we see the high rankings of the large global players as well-earned; they have clearly been leading with innovation in their communications efforts, achieving big impact in their brands’ perception around the “innovation” attribute.

The lesson from the Big 3 hasn’t been lost on their surging competitors however: LRW has become a force to be reckoned with, jumping from 10 in 2018 to 4 in 2019. We should also mention that the company is somewhat at risk of the “house of brands” issue that used to negatively impact the Kantar group of companies before they rebranded all as Kantar; LRW has maintained Kelton Global as a separate brand (ranked 30 in their own right); if we could have legitimately counted Kelton Global using the rules we set forth, LRW would have been ranked 3rd, and been closer to Kantar than Nielsen was. Regardless of that, LRW has leveraged their ever-increasing size (both organic and through acquisitions) and reach to become a very serious competitor to the Big 3 in terms of mindshare.

Rounding out the top five, Zappi moved up four positions from 2018 and joins the upper echelon at number 5 in our ranking. This is a remarkable achievement for a company that is only six years old and has not reached real scale yet, and is a testament

to their breakthrough as the leader in the research automation category as well as the hard work they have put into marketing. They are prolific marketers across all channels and their leaders are ubiquitous at events and across social media. All other suppliers should pay close attention to Zappi as inspiration for their own efforts.

The rest of the top 10 shows quite a bit of movement (as does the rest of the list), with significant upward movement by Hotspex and Qualtrics, and down ranking by System1, Dynata and Insites Consulting, although all holding in the upper ranks.

The top 10 companies can be loosely segmented into 3 buckets:

1. Next Generation Consultancies (System1 Research, InSites Consulting, LRW)
2. Tech Players (Hotspex, Dynata, Qualtrics, Zappi)
3. Behemoths (Ipsos, Nielsen, Kantar)

This basic categorization applies to the remainder of the list, with more of the first two dominating as we move past the top 10.

It’s also worth mentioning that three of the Top 10, LRW, Hotspex and System1 Group are redefining the role of insights and marketing by integrating the two to a great extent, while also leveraging a mixture of technology, consulting, and actual marketing execution all under one roof. We’ve been thinking about the development of the “Full Stack” model in insights and analytics, mostly with an eye towards technology-focused companies building in service capabilities but this trend may indicate a corollary in more service-driven business we can call the “Full Cycle” model: insights-driven suppliers functioning as a one-stop shop to help clients to engage, understand, and activate their target populations in a virtuous circle. Both “Full Stack” and “Full Cycle” models appear very much in line with the challenges and opportunities we previously discovered, as well as aligned to the factors that are driving growth.

The bifurcation of the industry between technology and service is undeniable, and the wall between insights and marketing is still largely in place for many suppliers, but perhaps these barriers are becoming more porous, creating even more opportunities for value creation, impact, and innovation.

Ipsos is now considered the most innovative company in the world by GRIT respondents!



The lesson from the Big 3 hasn’t been lost on their surging competitors



Both “Full Stack” and “Full Cycle” models appear very much in line with the challenges and opportunities we previously discovered, as well as aligned to the factors that are driving growth



The surge of new entrants indicates that the industry continues to look outside of the “usual suspects” for solutions to the issues previously identified in the Challenges section



Volatility defines the remainder of the list, with 13 debuts (We should note that under new leadership, industry stalwart PRS IN VIVO has introduced a new suite of behavioral science and technology powered shopper solutions and consequently invested significantly in marketing efforts to reposition the company, an effort that has paid off in their high ranking debut. PRS IN VIVO debuted at an impressive #14, with Knowledgehound at #29, Kelton Global at #30, and iTracks at #31 Non-traditional suppliers IBM and Periscope by McKinsey debuted at #34 and #35 respectively indicating the increasing expansion of the industry

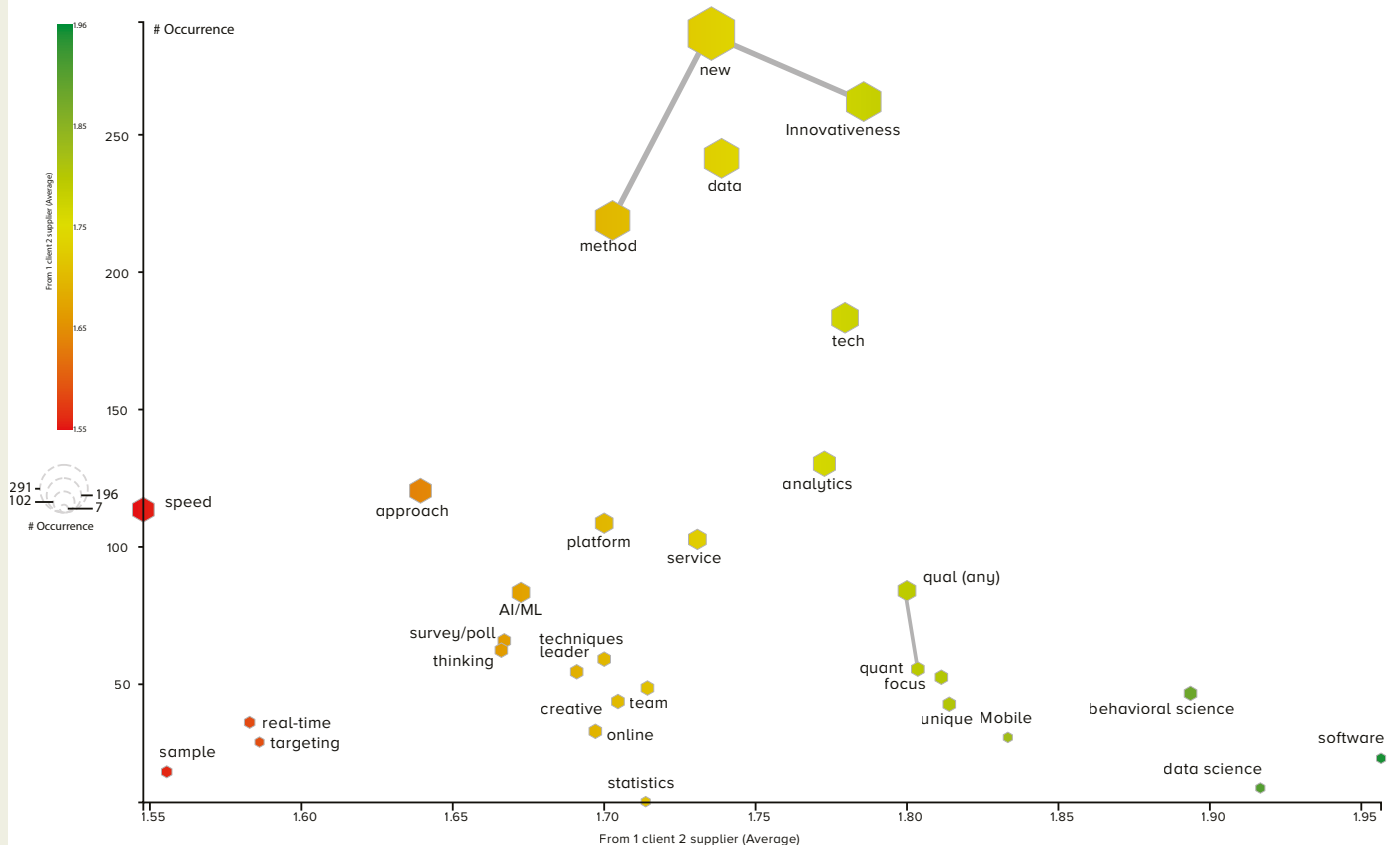
into new areas and new suppliers. Black Swan Data came in at #38, Gongos at #39, IRI at #40, Join The Dots at #41, and start-ups IQ at #45 and Upside at #47. The other notable debut, similar to IBM and Periscope by McKinsey, was Microsoft at #46. The surge of new entrants indicates that the industry continues to look outside of the “usual suspects” for solutions to the issues previously identified in the Challenges section.

On the significant upward movement trend, we see significant leaps from AYTМ and Remesh (8 spots each), Delvinia (17 spots), Protobrand (18 spots) and LivingLens with a whopping 35 spot leap.

WHY ARE SUPPLIERS CONSIDERED INNOVATIVE?

In terms of why these companies are innovative (beyond the use of words like ‘new’ and ‘innovative’), we used advanced text analytics from our friends

at OdinAnswers to look at the verbatims to get an understanding of what was driving interest from a commercial perspective. The analysis is telling:



When asked to explain their choices for describing marketing research suppliers as innovative, once again this year, there are clear differences between suppliers and clients. In fact, if anything the differences are even more pronounced. While suppliers think in terms of more explicit tactical features referencing specific technologies and methodologies, clients on the other hand are far more likely to mention more tacit features like speed, targeting (related to sample and data assets), and more service-based attributes such as the team, leadership, and service. AI also shows up here, again dovetailing well with a theme we have identified throughout this edition. In essence, what buyers consider innovative is how well offerings address their challenges around speed, cost, and resources.

Suppliers are seemingly more likely to mention items which they feel help them win contracts, help them stand out from the competition, and execute effectively. Technology, data analytics, behavioral science and methodology are the drivers of what suppliers consider innovative.

Where there is commonality between the two groups is data and innovation in general (described in verbatims as “new”); all stakeholders understand that we can do better to get more useful data, and ultimately all innovation is judged by its ability to deliver on that front.

It seems that a truly innovative business needs to balance the speed and flexibility required to stay current technologically and methodologically with the softer, human side of the business.

All stakeholders understand that we can do better to get more useful data, and ultimately all innovation is judged by its ability to deliver on that front



SUB CATEGORY RANKINGS

The roots of GreenBook are based on developing directories of the industry, which means a taxonomic view of the sector. We view the industry through categorical structures. With that default perspective, over the history of GRIT we have worked to implement a cohesive and flexible segmentation model using our taxonomic expertise. Our screening questions were the beginning of this process, and last year we implemented our Lumascope model to expand on our vision of creating the most comprehensive segmentation model of the insights & analytics industry available. In this wave, we took that a step further and inserted a “big bucket” classification question into the GRIT Top 50 section to help tie everything together further.

As mentioned previously, we asked respondents to categorize the companies they listed as most innovative in six groups:

1. Data & Analytics Providers
2. Full/Field Service Agencies
3. Qualitative Suppliers
4. Strategic Consultancies
5. Technology Providers
6. “Other” (Emerging Players)

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 are positioned by their own employees via the Lumascope (which we cover in the Gritscape section of this report).

The result is six new “GRIT Top 50” sub-category lists for each segment.

All of the rules we developed for the main GRIT 50 list were applied here as well, with the additional filter of looking at mentions just within the category.

There is a significant amount of overlap with the main list (often with the same company appearing on multiple lists), but also many entrants that did not qualify for the GRIT Top 50 but have strong category-specific showings. Highlighted companies in these tables are those that did not appear in the core GRIT 50 list due to a smaller number of mentions.

The result is six new “GRIT Top 50” sub-category lists for each segment



DATA & ANALYTICS

	Mentions	Rank
Nielsen	102	1
Kantar	66	2
Dynata	52	3
LRW	49	4
Ipsos	44	5
Zappi	41	6
Qualtrics	35	7
Google	34	8
Delvinia	29	9
Hotspex	29	10
AYTM	28	11
System1 Group	27	12
IRI	20	13
Toluna	20	14
GfK	16	15
PRS IN VIVO	15	16
Black Swan Data	15	17
Dig Insights	15	18
Numerator	14	19
MetrixLab	13	20
1Q	12	21
SKIM	12	22
LivingLens	11	23
KnowledgeHound	10	24
Lucid	10	25
DISQO	8	26
Voxpopme	8	27
Mintel	7	28
RIWI Corp.	7	29
Tableau	7	30
TRC Market Research	7	31
IBM	6	32
Amazon	5	33
EnviroNics	5	34
Euromonitor	5	35
Infotools	5	36
NPD Group	5	37
Odin Text	5	38
ProtoBrand	5	39
Remesh	5	40
YouGov	5	41
Insites Consulting	4	42
Kelton Global	4	43
Buzzback	4	44
Gutcheck	4	45
Periscope by McKinsey	4	46
Mfour	4	47
Microsoft	4	48
Sentient Decision Science	4	49
Streetbees	4	50

FULL AND/OR FIELD SERVICE

	Mentions	Rank
Ipsos	176	1
Kantar	136	2
Nielsen	74	3
Hotspex	74	4
LRW	71	5
System1 Group	69	6
Insites Consulting	58	7
Dynata	45	8
PRS IN VIVO	42	9
Dig Insights	38	10
SKIM	28	11
MetrixLab	23	12
Zappi	20	13
Lucid	19	14
GfK	18	15
Shapiro & Raj	17	16
Delvinia	15	17
Toluna	15	18
Join the Dots	14	19
AYTM	13	20
TRC Market Research	12	21
20/20 Research	11	22
Hall & Partners	11	23
Maru/Matchbox	11	24
Schlesinger Group	11	25
YouGov	11	26
Fuel Cycle	10	27
MMR Research	10	28
Qualtrics	10	29
Streetbees	10	30
Gongos	9	31
Gutcheck	9	32
Prodege	9	33
Burke	8	34
De la Riva Group	8	35
ProtoBrand	8	36
Kelton Global	7	37
C Space	7	38
Buzzback	7	39
Reach3 Insights	7	40
Veylinx	7	41
Directions Research	6	42
Focus Vision	5	43
C+R Research	5	44
Field Agent	5	45
Harris	5	46
Hypothesis Group	5	47
InnovateMR	5	48
Irrational Agency	5	49
M3 Global	5	50

QUALITATIVE RESEARCH

	Mentions	Rank
Ipsos	32	1
Kantar	24	2
Hotspex	20	3
Remesh	17	4
Discuss.io	15	5
Insites Consulting	13	6
Voxpopme	13	7
System1 Group	11	8
iTracks	10	9
Nielsen	9	10
LivingLens	9	11
Shapiro & Raj	8	12
Dynata	7	13
20/20 Research	7	14
Brado Creative Insights	7	15
DScout	7	16
PRS IN VIVO	6	17
AYTM	6	18
Hall & Partners	6	19
Happy Thinking People	6	20
Schlesinger Group	6	21
Toluna	6	22
LRW	5	23
Brand Dynamics	5	24
Digsite	5	25
GfK	5	26
Qualtrics	5	27
The Sound	5	28
TRC Market Research	5	29
Zappi	5	30
Fuel Cycle	4	31
Protobrand	4	32
Quantium	4	33
Streetbees	4	34
Watch Me Think	4	35
Focus Vision	3	36
C Space	3	37
1Q	3	38
BrandTrust	3	39
CRIS Research	3	40
De la Riva Group	3	41
Gartner	3	42
Insights Now	3	43
Maru/Matchbox	3	44
Periscope by McKinsey	3	45
Respondent.io	3	46
ThinkGen	3	47
Kelton Global	2	48
Catalyx	2	49
Environics	2	50

STRATEGIC CONSULTANCY

	Mentions	Rank
LRW	77	1
Hotspex	60	2
Kantar	54	3
System1 Group	54	4
Insites Consulting	32	5
Ipsos	30	6
Nielsen	29	7
Kelton Global	19	8
Shapiro & Raj	19	9
PRS IN VIVO	18	10
Dig Insights	16	11
SKIM	16	12
Periscope by McKinsey	14	13
Gongos	10	14
Protobrand	9	15
MetrixLab	8	16
C Space	7	17
De la Riva Group	7	18
Reach3 Insights	7	19
BVA Group	6	20
Accenture	6	21
Bain & Company	6	22
Deloitte	6	23
Directions Research	6	24
GfK	6	25
Isobar	6	26
Join the Dots	6	27
Zappi	6	28
Happy Thinking People	5	29
TRC Market Research	5	30
TriggerPoint	5	31
Discover.ai	4	32
Egg Strategy	4	33
Forrester Research	4	34
Hall & Partners	4	35
IDEO	4	36
Insights Now	4	37
LivingLens	4	38
Qualtrics	4	39
Sentient Decision Science	4	40
Delvinia	3	41
20/20 Research	3	42
Black Swan Data	3	43
Catalyx	3	44
Facebook	3	45
Fresh Squeezed Ideas	3	46
Google	3	47
Harris	3	48
Hypothesis Group	3	49
Lucid	3	50

TECHNOLOGY

	Mentions	Rank
Zappi	127	1
Qualtrics	99	2
Voxpopme	80	3
LivingLens	58	4
Remesh	55	5
Delvinia	48	6
Google	40	7
Focus Vision	39	8
Lucid	38	9
AYTM	34	10
Fuel Cycle	26	11
Toluna	24	12
iTracks	20	13
KnowledgeHound	20	14
Dynata	18	15
IBM	16	16
Discuss.io	16	17
Upside	13	18
Rival Technologies	12	19
Microsoft	11	20
Vision Critical	11	21
20/20 Research	10	22
Apple	10	23
GroupSolver	10	24
SurveyMonkey	10	25
Amazon	8	26
Recollective	8	27
Sawtooth Software	8	28
Tableau	8	29
Cint	7	30
Hotspex	7	31
Mfour	7	32
PureSpectrum	6	33
Kantar	6	34
Nielsen	6	35
Black Swan Data	6	36
Discover.ai	6	37
DScout	6	38
Indeemo	6	39
Infotools	6	40
Kuaizi	6	41
Lumen Research	6	42
Protobrand	6	43
Q Research Software	6	44
QualSights	6	45
Quantilope	6	46
SurveyGizmo	6	47
GfK	5	48
Gutcheck	5	49
Medallia	5	50

OTHER/EMERGING PLAYERS

	Mentions	Rank
Lucid	11	1
System1 Group	8	2
Dynata	7	3
Ipsos	6	4
LRW	5	5
Hotspex	4	6
Zappi	4	7
AYTM	3	8
Google	3	9
P2Sample	3	10
Qualtrics	3	11
Voxpopme	3	12
PRS IN VIVO	2	13
Delvinia	2	14
PureSpectrum	2	15
Insites Consulting	2	16
Buzzback	2	17
Canadian Viewpoint	2	18
Eyeka	2	19
Fuel Cycle	2	20
LivingLens	2	21
Pollfish	2	22
Prodege	2	23
Remesh	2	24
Toluna	2	25
TriggerPoint	2	26
BVA Group	1	27
Focus Vision	1	28
Kantar	1	29
Amazon	1	30
Brandwatch	1	31
Cint	1	32
Deloitte	1	33
DISQO	1	34
EMI	1	35
Facebook	1	36
GfK	1	37
Gongos	1	38
GroupSolver	1	39
IDEO	1	40
InnovateMR	1	41
Irrational Agency	1	42
Isobar	1	43
KnowledgeHound	1	44
MaritzCX	1	45
Market Logic	1	46
Maru/Matchbox	1	47
Microsoft	1	48
mTAB	1	49
OdinText	1	50

While we appreciate the efforts to carve out new categories for themselves, the industry still primarily thinks along the qual/quant and tech/service quadrants, so an effort needs to be made to map their efforts at differentiation to the existing paradigm as a point of reference



The first five categories are self-explanatory, but the “Other” deserves a bit more attention. This was an “other/specify” in the questionnaire and the results were all over the place. In some cases, respondents were clearly attempting to break out of the pack by creating new categories for these companies, but we generally were able to map them back to the big buckets and include them there. That left us with a few legitimate “others” which we identified as having a major attribute in common: they are mostly technology-driven companies who are pioneering new methods or a differentiated value prop from traditional players. While we appreciate the efforts to carve out new categories for themselves, the industry still primarily thinks along the qual/quant and tech/service quadrants, so an effort needs to be made to map their efforts at differentiation to the existing paradigm as a point of reference.

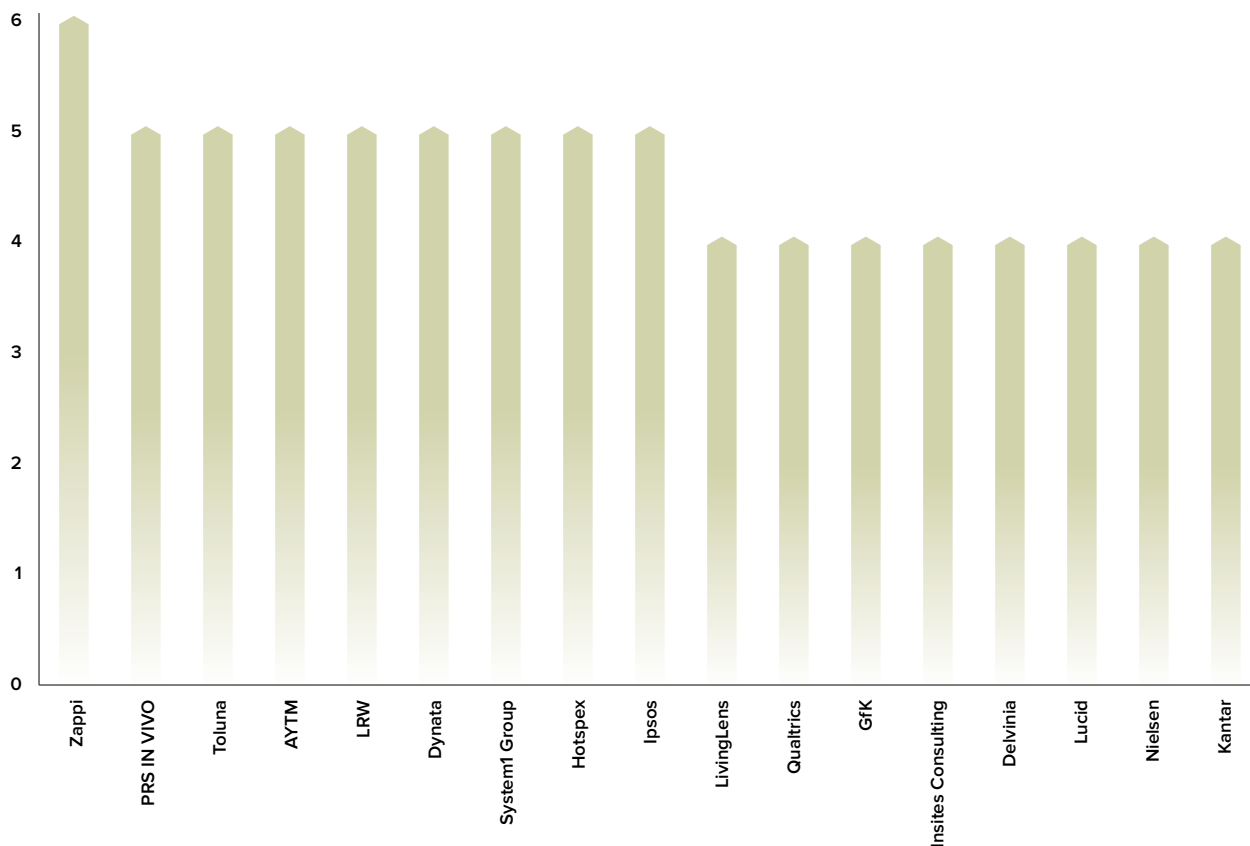
Our first takeaway is that the respondent’s experience with a company dictates how they see them. Similar to the adage of the blind men and the elephant, depending on how you interact with a company you may see them differently. For large organizations that offer a wide breadth of services such as Ipsos, Kantar, Nielsen, etc. that is unsurprising and perhaps even on-brand, but for a company like Zappi for instance that touts itself purely as a technology provider it is curious that respondents see them as fitting into all six categories! The same is true for many other companies that we think of as having a very clean categorical fit, but respondents have challenges in categorizing them.

Here is a look at a few of the companies that appear in four or more category lists as an example of this possible positioning confusion:

There is significant risk for more focused organizations of potential buyers being confused as to their offerings and not including them in their consideration



NUMBER OF INCLUDED CATEGORIES



Clearly many companies do not have the same challenge because they do only appear on one list, and their categorical assignment by respondents fits with the positioning of the company (20/20 Research and Schlesinger for instance in Qual). Based on this we don't believe the issue was lack of knowledge by the respondents since many of the assigned categories match what we ourselves would have chosen for these companies.

Is this an example of suppliers increasingly trying to be "all things to all people", a symptom of "experiential tunnel vision" by respondents, or is it indicative of a challenge companies have in clearly communicating their positioning? Or is it a mix of all three?

In the Lumascope section we'll explore this more and look at the differences between how companies "self identify" vs. how they are perceived, however the answers are not as clear as we would like. Our working hypothesis is that the lowest common denominator here is how suppliers market and position themselves; it is the only means they have in impacting positioning perception. For those that are "one stop shops" this may not be a challenge, but there is significant risk for more focused organizations of potential buyers being confused as to their offerings and not including them in their consideration.

DIFFERENCE BY REGION AND BUYERS VS. SELLER

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 in different parts of the world and across segments.

When looking at the subset of the Top 20 by region, it's no surprise that we see North America as the largest source of mentions, with one exception: Insites Consulting has very little mindshare in North America, but is very strong in Europe. Conversely, we see that LRW, Delvinia, Remesh and Dig Insights enjoy significant brand awareness in North America, but have not gotten through to respondents in other regions. All other companies reflect a relatively

well-balanced brand awareness by region. Of course, the Big 3 lead based on their global scale, although smaller companies like Zappi, Hotspex, and System 1 do well globally too without the benefit of the same global presence as the industry leaders. It is interesting to note that the overall number 1, Ipsos, is not number one in any one region. It reaches global number 1 by being strong everywhere.

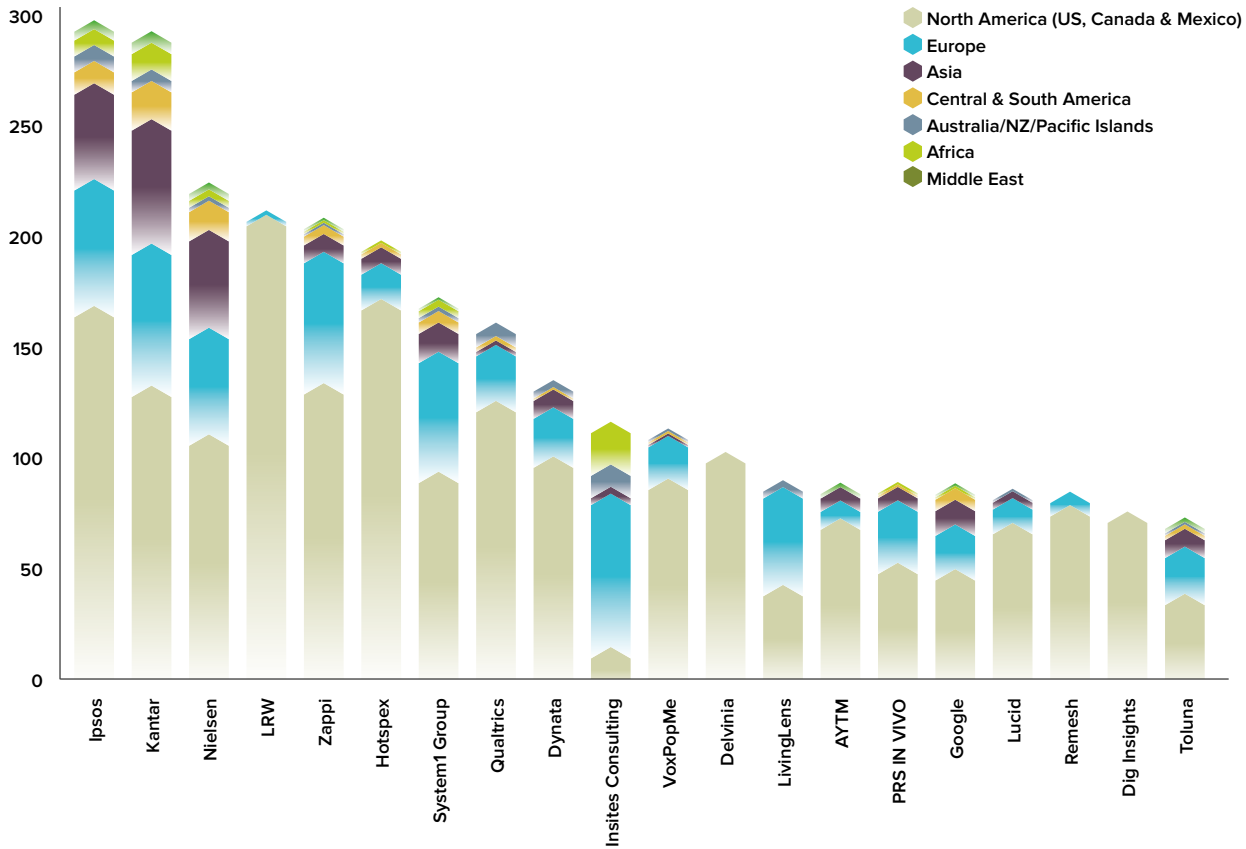
Also of interest is that although Nielsen is by far the largest organization in terms of revenue, their mindshare is smaller globally, which could be a reflection of Nielsen's efforts to not be considered a research provider but rather a data platform.

Next, it is instructive to look a bit deeper at the regional breakout by buyers vs. supplier to assess the audiences these companies are appealing to (whether they mean to or not!). For the sake of readability, we only looked at the Top 10 from the core GRIT Top 50 rankings.

It is interesting to note that the overall number 1, Ipsos, is not number one in any one region. It reaches global number 1 by being strong everywhere



GRIT TOP 20 BY REGION



GRIT TOP 10 BY REGION / BUYERS VS. SUPPLIER

	North America (US, Canada & Mexico)		Europe		Asia		Central & South America		Australia/NZ/Pacific Islands		Africa		Middle East	
	Client	Supplier	Client	Supplier	Client	Supplier	Client	Supplier	Client	Supplier	Client	Supplier	Client	Supplier
Ipsos	59	105	29	28	31	12	4	6	0	7	3	4	1	3
Kantar	60	68	35	29	35	21	7	10	3	2	4	8	3	2
Nielsen	40	66	33	15	24	20	6	7	0	2	1	2	2	1
LRW	22	183	1	1	0	0	0	0	0	0	0	0	0	0
Zappi	50	79	29	30	6	2	1	3	0	1	1	0	0	1
Hotspex	79	88	6	10	1	6	0	2	0	0	0	1	0	0
System1 Group	23	66	9	45	2	11	1	4	2	0	0	3	0	1
Qualtrics	27	94	6	19	1	1	0	2	1	5	0	0	0	0
Dynata	16	80	0	22	2	6	0	1	1	2	0	0	0	0
Insites Consulting	2	8	9	60	2	1	0	0	5	5	4	15	0	0

These companies conduct their marketing efforts in a more industry-wide way and here we see how those efforts are paying off



Hotspx is considered the clear leader in innovation by buyers in North America, while LRW (which interestingly does not sell to suppliers) is the undisputed leader among suppliers. We also see Insites Consulting as being considered most innovative by suppliers in Europe and Africa by a clear margin, and by buyers in Oceania. Ipsos and Kantar dominate all other regions across both buyers and suppliers, again a reflection of their strong presence in those markets.

For suppliers wishing to achieve solid brand recognition among clients/buyers, these are useful examples to compare 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 said before: “The GRIT Top 50 is designed to do one thing: identify how much the brand attribute of innovation drives brand awareness and 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. While we are far away from developing a predictive model to quantify this, anecdotal evidence certainly points in the direction of a strong relationship”. This story remains the same in 2019, although we are moving closer to having models that can predict market success as we have shown in other sections of this report.

We also see evidence of potential brand confusion across many suppliers, especially newer firms working to differentiate themselves from legacy providers. Whether this is due to limits of

understanding by the market or challenges with marketing by these companies is to be determined, but in the meantime we can only suggest that the supplier community work to sharpen their messaging, use the context their audience can relate to, and increase their overall reach to penetrate more into the mindshare of the industry.

The volatility in the rankings shows 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 sharpen their own efforts, up their own game, and work hard to stay ahead of the pack, which is illustrated by the strong performance of companies like Kantar and Ipsos. 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 2020.

We can only suggest that the supplier community work to sharpen their messaging, use the context their audience can relate to, and increase their overall reach to penetrate more into the mindshare of the industry





THE POWER OF INNOVATION: WHAT MAKES A SUPPLIER INNOVATIVE AND WHY IS IT IMPORTANT

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The fast-paced global economy presents consumer insight professionals and marketers with tremendous challenges. They must make decisions faster than ever before, with the success of key product launches and marketing campaigns dependent on their ability to make not just any decision, but the right one, right now.

These factors put tremendous pressure on businesses, with established companies being challenged by new entrants that have the potential to become the next unicorn. Alongside them, thousands of small startups failing every year. According to a study of the turnover in the S&P 500 index conducted by Innosight, about 50 percent of the index will be replaced over the next ten years. Everyone must adapt to survive. The situation is similar to the impact of global warming in the Arctic, the ice sheet is melting faster and faster - for business change is compounding.

In today's globalized, digitized world, businesses must get the right products to market fast and continually adapt to conform to ever-evolving consumer needs. Any company that expects its customers to wait for months or years for new products or services will not survive.

Despite these challenges, forward-looking businesses are thriving by putting the consumer first, and bringing them into the heart of all aspects of decision-making. Successful businesses turn to innovative consumer insight providers to bring them ever-closer to their consumer. It is also critical that suppliers empower their clients by providing them with the capability to drive innovation within their organization, operate in a more agile way, and stay ahead of industry disruption all with a holistic approach to delivering quality insights.

Real-Time Consumer Engagement – Critical to Driving Success in a Disruptive Market

Innovative providers offer a blend of advanced technology and expertise needed to cope with a crowded marketplace with constantly new competitors and consumer preferences that change in an instant. End-to-end digital platforms open up the ability to engage with consumers in real-time, coupled with the integration of multiple data sources – from behavioral through stated data to deliver insights on demand. These innovative supplier solutions empower brands with the ability to truly understand the consumer in one place, all at the push of a button, in more profound ways than ever before.

No matter how fast the market and consumer needs change, brands have the ammunition they need to stay ahead in a disruptive market. True collaboration with consumers and deeper insights into their behaviors and attitudes give brands a deep and dynamic understanding of customers' needs to strengthen performance.

Innovation to Drive Better Insight and New Ideas

Companies that fail to innovate fall behind, and consumer feedback is critical to unlocking new ideas vital in staying ahead. Understandably, businesses of every size are turning to future-focused providers to unlock new opportunities that arise from deeper consumer understanding and anticipating needs. Today's consumer insights solutions make it possible for brands to gain the deep insights they need when they need them. The idea is innovation with a purpose, not just for the sake of innovation.

Power Through Agility with Quality Woven Throughout

Along with speed, businesses need agility to navigate through today's complex marketplace. They must be ready to adapt at a moment's notice, providing access to insight support to an ever-expanding group of team members throughout their organizations to make key decisions. More than ever, insights need to support agile product development and a host of new marketing processes — **all** with a short window of time available for feedback. Instant access to insights is vital so researchers can stay informed continuously. While many believe that agility is akin to the need for speed, it's much more than this and today's innovative supplier must provide real-time insights that empower agility but with a laser focus on quality to stay ahead of disruption in the marketplace.

Working with Innovative Suppliers Provides Confidence

In the latest GRIT survey, 75 percent of respondents said they *always* or *frequently* explore new methods, technologies, and business models when it comes to their approaches to consumer insights, proving that businesspeople around the globe now insist that their suppliers employ innovative techniques and technologies across the board. It also indicates that suppliers must apply agnostic or 'best fit' solutions at all times.

Businesses are turning to innovative suppliers for the confidence they need to inject speed and agility into their decision-making. This may be the very best insurance to ensure that they will continue to thrive in the future.



GRIT TOP 25 MOST INNOVATIVE CLIENTS

To accompany our review of the most innovative suppliers, we asked participants who the most innovative clients are (and why). The data was collected in exactly the same way as when we asked about the most innovative suppliers, with the exception that we did not ask respondents to categorize the companies into a segmentation scheme. The same rules were used, including not utilizing ties, although we did include the tie rankings from previous waves for consistency.

The client data focuses on the top 25 mentions as the numbers tend to focus more on a few companies and then dissipate faster than is the case with suppliers.

The table below shows the rankings for 2019, along with the rankings from 2015 to 2018. The table also shows the change in rankings, between 2018 and 2019, the number of mentions in 2019, and the location of the brands HQ and its broad category. Where cells are grey it means they were not in the top 25 that year.

STABILITY AT THE TOP OF THE TABLE

This stability indicates that being innovative requires long-term commitment



Unilever, Google and Coca-Cola have been in the top four for all of the last five years. P&G is currently ranked 2nd and has been in the top six every year. Beyond the top four, all of this year's top ten have been within the top eleven for the last four years. This stability indicates that being innovative requires long-term commitment.

There are some key similarities within the top ten. Eight of them are USA brands, they all come from one of two mega-categories (CPG/beverages and Online/IT). But there are plenty of brands that are American, that play in the same space, but which do not score so highly.



GRIT TOP 50 MOST INNOVATIVE CLIENTS/BUYERS

Brand	2019 Rank	2018 Rank	2017 Rank	2016 Rank	2015 Rank	Change from 18	Mentions	Country	Category
Unilever	1	1	1	2	3	0	380	UK/Netherlands	CPG
P&G	2	2	6	1	1	0	292	USA	CPG
Google	3	3	2	3	4	0	256	USA	Online
Coca-Cola	4	4	3	4	2	0	182	USA	Soft Drink
PepsiCo	5	5	5	6	10	0	168	USA	Soft Drink
Amazon	6	6	8	7		0	155	USA	Online
Facebook	7	7	4	8	19	0	114	USA	Online
Nestle	8	9	9	9	11	1	72	Switzerland	CPG
Microsoft	9	11	10	11	7	2	71	USA	IT
Apple	10	8	7	5	6	-2	68	USA	IT
Mars Wrigley	11	20				9	50	USA	Confectionary
Netflix	12	10	12			-2	46	USA	Online
McDonald's	13	15			0	2	40	USA	Fast Food
Johnson & Johnson	14	18	15	20	9	4	39	USA	Pharma / CPG
AB InBev	15					DEBUT	37	Belgium	Alcoholic Beverages
L'Oreal	16	19				4	37	France	CPG / Personal Care
Nike	17		21	14		REENTRY	36	USA	Sports
Danone	18	21	22	25	20	3	33	France	CPG
Merck	19	17	24			-1	33	USA	Pharma
Diageo	20	13				-7	30	UK	Alcoholic Beverages
Heineken	21	14	11	12	18	-6	30	Netherlands	Alcoholic Beverages
Royal Bank of Canada	22					DEBUT	30	Canada	Finance
Clorox	23		24	24		REENTRY	29	USA	CPG
Samsung	24	12	18	13	15	-11	29	Korea	IT
Uber	25	22	24			-1	29	USA	Transport

THE CATEGORIES LESS MENTIONED

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, or which are barely reported. The missing categories include:

- Auto
- Transport (there are no airlines, boat or train companies – just Uber)
- Telco (there are two handset manufacturers, Apple and Samsung, and two mobile operating system manufacturers, Apple and Google), but no Telcos
- Retail (Amazon is listed as Online and MacDonald's as Fast Food, but there are no conventional retailers)
- Finance, with just one entry, Royal Bank of Canada at 20

The top ten in North America comprise the same ten as the global list, with minor changes in ranking



THE GLOBAL PICTURE

The table below shows the top ten for different regions. We restrict the list to the top ten as the base for some regions means the mentions below the top ten can be too small to feel confident about.

Rank	Total	North America	Europe	Asia	Rest of the World
1	Unilever	P&G	Unilever	Unilever	Unilever
2	P&G	Google	P&G	P&G	Coca-Cola
3	Google	Unilever	Google	Coca-Cola	Google
4	Coca-Cola	Amazon	PepsiCo	PepsiCo	P&G
5	PepsiCo	PepsiCo	Coca-Cola	Google	Facebook
6	Amazon	Coca-Cola	Amazon	L'Oreal	Amazon
7	Facebook	Facebook	Danone	Nestle	PepsiCo
8	Nestle	Microsoft	Diageo	Netflix	Nestle
9	Microsoft	Apple	Heineken	Amazon	Samsung
10	Apple	Nestle	Facebook	Apple	AB InBev
Base	1226	762	262	118	84

The main message is one of consistency, the brands that top the total list mostly top the list in each of the regions, with a few changes in order and few changes in the brands mentioned.

The top ten in North America comprise the same ten as the global list, with minor changes in ranking. The two European brands Unilever and Nestle rank lower in North America and the more American brands rate a little higher.

In Europe, the top of the table is the same as the global list. Danone, Diageo and Heineken join the top ten, with Nestle, Microsoft and Apple dropping out of the top ten.

In Asia, the top two from the global list, Unilever and P&G, top the Asian list. The only addition to the list is L'Oreal, with Microsoft dropping out of the list to make space for it.

We should be careful with the rest of the world for two reasons, 1) it has the fewest responses and 2) it includes Africa, South and Central America, Middle-East, Australia and New Zealand, i.e. a wide range of locations. However, even with these caveats, the main message is one of consistency. Only two brands are added to the top ten, Korea's Samsung, and Belgium's AB InBev. To consumers, AB InBev is better known for its beer brands such as Budweiser, Corona, Stella Artois, and it has a very big presence in Latin America and Africa.

BUYERS VERSUS SUPPLIERS

The table below shows the top ten for both Clients and Suppliers.

Once again, the main message is one of consistency. The top ten for clients are in the top ten list for suppliers. One difference is that Clients are much more inclined to list Unilever than P&G. Among Suppliers P&G is ahead of Unilever by 196 mentions to 192 mentions. Among Clients Unilever is ahead of P&G by 188 mentions to 96.

Rank	Total	Clients	Suppliers
1	Unilever	Unilever	P&G
2	P&G	P&G	Unilever
3	Google	Google	Google
4	Coca-Cola	PepsiCo	Coca-Cola
5	PepsiCo	Amazon	PepsiCo
6	Amazon	Coca-Cola	Amazon
7	Facebook	Apple	Facebook
8	Nestle	Facebook	Microsoft
9	Microsoft	Nestle	Nestle
10	Apple	Microsoft	Apple
Base	1226	435	791

WHAT IS A CLIENT?

In the increasingly complex world of insights, the boundary between the definition of supplier and client are becoming less clear



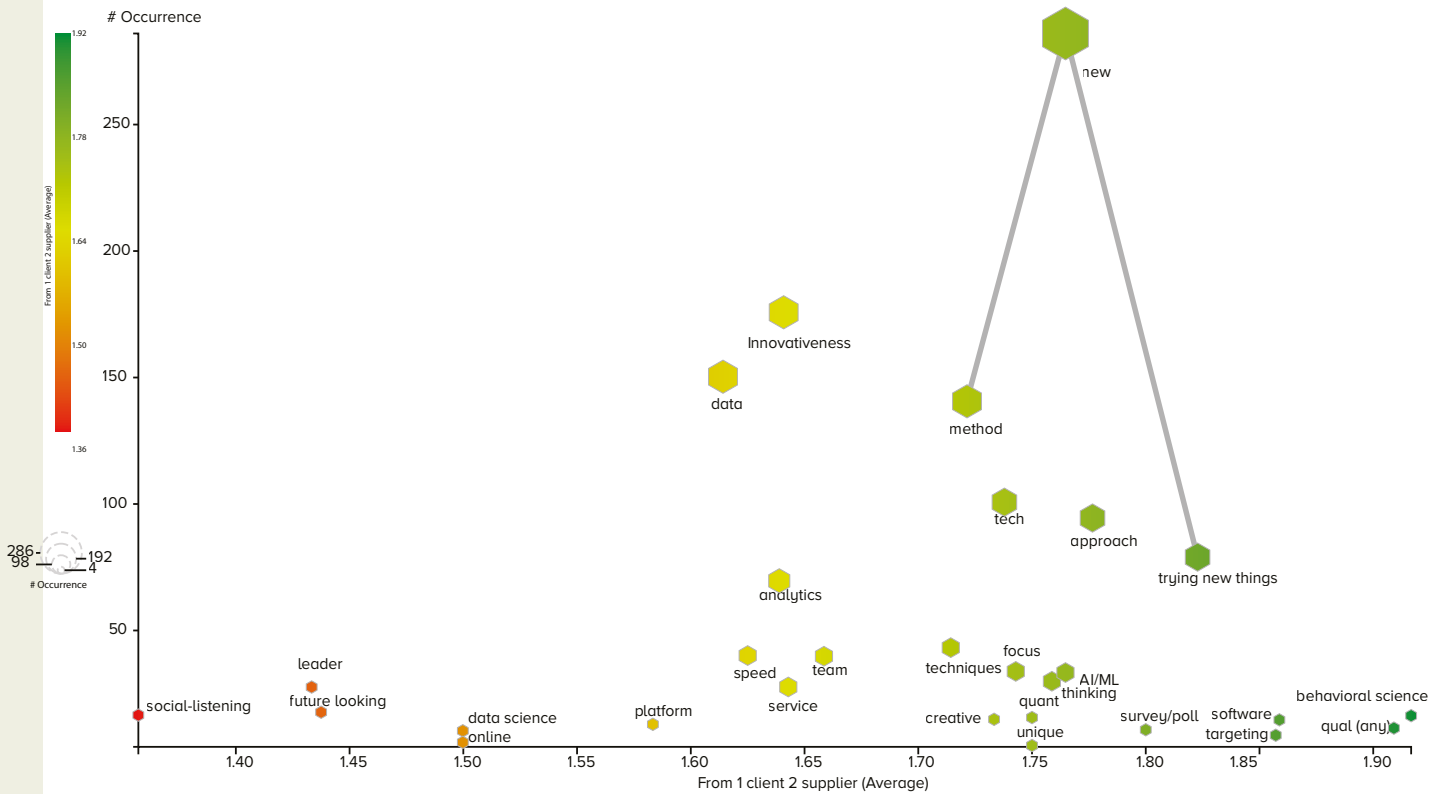
In the increasingly complex world of insights, the boundary between the definition of supplier and client are becoming less clear. The client of a panel company may be a market research agency, companies such as Google, Facebook and Alibaba both buy and sell research. However, to maintain consistency with previous waves the client-side was defined in the survey as “A client-side

organization is defined as an organization that commissions research or data analysis projects using external suppliers.”, i.e. this definition excludes market research agencies (who are eligible for the Innovative Suppliers list), but it does include a few clients, such as Google who also appear on the Suppliers list.

WHAT MAKES A CLIENT INNOVATIVE?

As we did for the GRIT 50 Supplier list, we used text analytics on the responses to the verbatim question of why respondents considered the companies they

listed as innovative, and looked at the differences between how buyers vs. suppliers answered the question.



“ OUR ENTIRE BUSINESS IS *changing* AND CONSUMER INSIGHTS EMPOWER US TO BE MORE *agile...*”

We need
INSIGHTS ON DEMAND ”

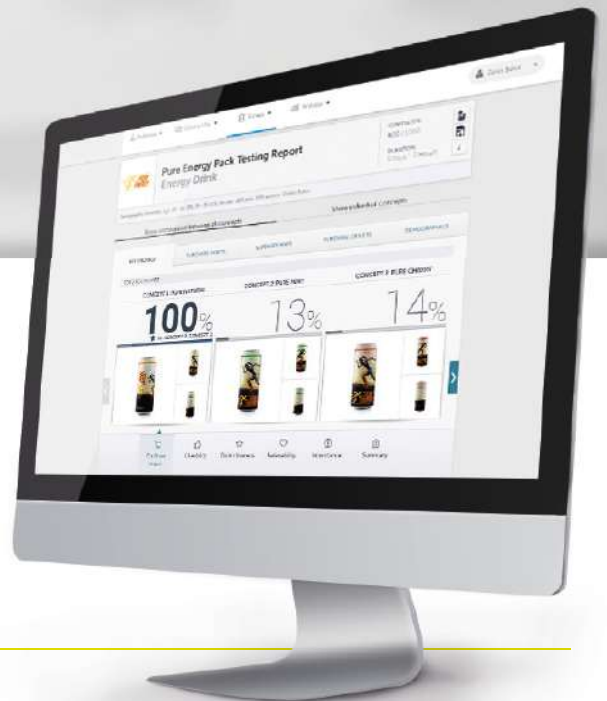
Ranked one of the *top 20* most innovative suppliers

More than just a survey platform – insights on demand.

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EASY-TO-USE ADVANCED ANALYTICS AND VISUALIZATION



When thinking about other buyers there was a focus on methods/uses such as social listening, data science, and usage of new approaches (general innovation). Suppliers on the other hand seemed to appreciate the openness of these companies to try new things and be creative



Interestingly, in an inversion of how buyers evaluated suppliers, when thinking about other buyers there was a focus on methods/uses such as social listening, data science, and usage of new approaches (general innovation). Suppliers on the other hand seemed to appreciate the openness of these companies to try new things and be creative.

This aligns well with our overall take: the buyers listed here are consistently public about what they are doing at events and via case studies, they often are actively engaged in piloting with new partners (many have a defined function with identifying new partners), and in some cases actively investing in start-ups that are bringing new methods, technology, or thinking to the market. This visibility allows buyers to be inspired on the “how to”, and suppliers to appreciate them “walking the talk” on supporting innovation in general.

THE BIG PICTURE

For buyers that consider insights and analytics a competitive advantage and are leading the charge in making both data and human understanding a core driver of the business, being open about it pays dividends. They are being paid attention to and setting the stage for the future, while also establishing “centers of gravity” within their markets to attract innovative new partners to help them achieve their goals. The consistency shown in the upper echelon of the GRIT 25 Client list indicates that this strategy is both long term and impactful; if it wasn't delivering value for these brands, they would simply stop doing it.

The real challenge now is for other buyers to not just be inspired, but to drive this model to the next level. We envision an increasing symbiosis between buyers who support innovation and a rising tide of suppliers entering the market to meet the challenge. This may well be more than the traditional vendor relationship as more companies emulate the leading buyers on this list and actually invest and nurture new partners to scale to meet the challenges they face.



For buyers that consider insights and analytics a competitive advantage and are leading the charge in making both data and human understanding a core driver of the business, being open about it pays dividends



HOW DO YOU BECOME THE MOST INNOVATIVE CLIENT INSIGHT ORGANIZATION? FIRST, ADOPT AN INNOVATIVE MINDSET

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Innovation is defined by the Merriam Webster as “the introduction of something new; a new idea, method, or device; a novelty”. Novelty is great; we see it as consumers at every CES show, and as professionals at every IIX, but I respectfully disagree with the Merriam Webster - novelty is not the same as innovation. Or, at least, not in the GRIT report measure of the top 25 most innovative clients. In this context, it means consistent and sustained innovation - the antonym of novelty.

The stability at the top of this year’s list is evidence that, for big brands, innovation in consumer insights can’t happen overnight. It takes a long-term approach, driven by visionary insights professionals, and supported by the C-suite (or the other way around), and it is not without risk. CPG and beverage, as well as cloud-based brands, top the list because competition is particularly tough in these sectors; nimble start-up brands can come from nowhere to disrupt the market. Most of the top 25 have either been disrupted, or have been a disruptor and want to avoid the same fate. Ultimately, market leaders can’t afford not to take risks to drive innovation and growth.

Another takeaway is that generosity is required to be recognized as an innovator. We all remember inspiring presentations from Marie Wolf (Unilever), Stephan Gans (PepsiCo), Michelle Gansle (Mars) or Marian Anderson (Microsoft). Is it risky for them to get on stage in front of the entire market, (including competitors)? You bet it is, but they are sharing the love for the benefit of the industry. The risk they take is rewarded, not only with a top spot in the list but, more importantly, with attracting more innovative talent for their teams - a virtuous cycle of risk and reward.

So how do you become an innovative client-side organization? I would say that it starts with a mindset. I have the good fortune to work with over half of the brands on the list, and can say that they all share an agile approach to innovation and marketing, using research to test and learn, rather than to validate decisions that have already been taken. They also share a vision that data is a renewable asset that must be continually harvested, not just used once. They structure their organizations to break down silos, and share insights with non-researchers. And, critically, they see the insights department as a driving force for organizational change, and not a backroom, quasi-academic function – they are there to solve business problems, not answer research briefs.

In practical terms, they are standardizing their approaches, from tools, to audiences, even down to rating scales and question wordings. Doing so means they can cross-analyze data from multiple projects, and build up relevant benchmarks and norms, to speed understanding. Standardization then makes it possible for them to involve their internal stakeholders more closely, handing over simple test-and-learn projects directly to the marketing, R&D and product teams that will benefit from fast, informed decisions. They are developing insight platforms so everyone in the company can access curated data. They also support the culture change needed to make the organization customer-centric, by using innovative and engaging ways to disseminate learnings, such as pop-up events, insight newsletters, or roadshows.

So, could we all be in the top 25 most innovative clients? Perhaps not, as we can’t all be PepsiCo, Unilever, or Mars. But we can certainly all strive to adopt an innovation mindset, commit to an agile approach and be brave enough to share our insights, our successes and our failures with our colleagues, partners and competitors in the industry.

MARKET RESEARCH INDUSTRY LUMASCAPE

Overall, this effort is tied to our vision of not just understanding the industry at an unparalleled level, but to eventually develop models that we will make available to the industry to create a series of tools that function as a roadmap for success



After cleaning all data, we ended up with 884 client organizations and 2,036 suppliers answering the question, although only 763 buyer responses and 1,510 supplier responses were usable in classifying themselves



In 2018 we began an effort to create some structure for better understanding of the market research landscape, resulting in the first ever industry Lumascape: a visual document that places companies within a particular industry into categories and places the categories in sensible relation to one another. Contrary to the usual expert-led Lumascape, we used our general experience in developing a taxonomic structure of the industry at GreenBook to generate basic categories, and then via the GRIT questionnaire respondents were asked to place their company, either supplier or client, into one of several categories. For the supplier side, the categories covered different types of companies, based on their primary focus – research, analytics, technology, research process, etc. On the client side, the focus was more on the nature of interaction with internal clients.

This year we repeated that effort, while also including scaled down versions of the major groupings in “big bucket” categories that were also included in the most innovative supplier and client sections, although there we asked respondents to categorize the companies they listed as innovative, not necessarily their own companies. The purpose of this expansion is to look at differences between how companies position themselves vs. how they are perceived by the industry as a whole.

Overall, this effort is tied to our vision of not just understanding the industry at an unparalleled level, but to eventually develop models that we will make available to the industry to create a series of tools that function as a roadmap for success. We’re still a bit away from that today, but the pieces are largely in place and this segmentation schema is a big part of driving the next steps.

So, what did we find in this year’s Lumascape? After cleaning all data, we ended up with 884 client organizations and 2,036 suppliers answering the

question, although only 763 buyer responses and 1,510 supplier responses were usable in classifying themselves. The primary reason for the difference in usable responses was due to non-response (it was an optional question) or “other” responses, none of which were of significant volume to warrant changing our categories. As noted in the most innovative section, although firms are working to create niche categories for themselves, in general most of them still fit within the classifiers we created.

In some cases, we had individual respondents from the same organization classify their companies in different categories, so to develop this lumascape we opted to use the most common category for each company as the final positioning segment.

Next, we looked at adding a dimension based on where the categories fit on a spectrum of strategic vs. tactical for clients, or service vs. technology for suppliers (with some gradations in between).

Finally, we used a combination of response density for each company and our expert judgment to come up with a broadly representative list of multiple examples of companies in each category. We did not focus on company size per se but rather tried to get a sense of the types of companies that classified themselves in each category.

Like in 2018 we wanted to do something visually interesting and even fun. We opted last year to create a “fantasy world map”, and the response was so positive that we have opted to do the same again. However, this year we are also including some more traditional visualizations to help give a high-level overview of the findings and insights that they have generated.

We call our version of the Lumascape the GRITSCAPE, and it directly follows this introduction, with more traditional descriptive data and insights gained from the data afterwards.



IS THERE AN OPTIMAL CLIENT RESEARCH ORGANIZATION? THE DATA DOESN'T TELL US.

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What do the most effective client research organizations look like? Are they strategy partners to the C-suite? Are they simply vendor managers? Or are they the champion of the customer's voice to the rest of the organization? For now, a definitive answer eludes us. This initial version of the GRIT Buyer Lumascope provides no clear answers as to the right structure or self-identity for corporate researchers.

Background

47 client organizations across 14+ industries are represented on the Buyer Lumascope. Individual respondents were asked to describe the role their function plays within their organization; ranging from the "voice of the customer within the organization" to "in-house research providers", among six additional options. Of these, 16 client organizations had three or more respondents participate (including Unilever, N=146 and Pepsico, N=67).

Complete Heterogeneity

Among the 16 client research organizations with three or more respondents participate, not a single organization had unanimity as to how they describe themselves. Perhaps even more surprisingly, only three organizations had a majority of respondents agree what their role is!

Several industries have multiple organizations appear in the Buyer Lumascope. Here, too, we see no standards or conformity. For instance, among 13 CPG companies, 46% fit into the GRIT definition of Cxia, and 31% are in Strategia. 50% of media organizations fit into Strategia.

Self-identification and Financial Performance

Ultimately, regardless of how research buyers describe themselves, it is the role of the insights function to contribute to financial performance of their organizations (as it is every department, of course). Which leads us to the question: is there an optimal insights organization self-identification for financial performance? Is it better

to be a strategist than a hybrid insights organization?

To evaluate, we ran multiple linear regressions (and multiple linear regression) on the relationship between the proportion of researchers that self-identify with a description of their organization and their company's stock gain/loss between December 30, 2016 and May 31, 2019, a period of about 1.5 years. A second analysis to look at financial performance over a 5-year time horizon (June 1, 2014 – May 31, 2019) was also completed. Privately held companies were not included, and subsidiary companies were rolled up into their parent organization (e.g. HomeAway was rolled up to Expedia). There are multiple additional variables we could have explored, but stock performance seems the most parsimonious for this scope of analysis.

In short, there is no significant relationship whatsoever between how a client describes themselves and their company's stock price performance during this period. No torturing of data could find anything meaningful in this analysis. At least for now, a client's position on the Lumascope and their company's financial performance appears random.

Practice fundamentals to prepare for the future

The fact that most companies included in the Lumascope have improved stock prices, makes meaningful separation all but impossible. The United States' decade-long economic boom has enabled many companies to flourish despite rapid changes in consumer preferences.

Perhaps the real connection between research strategy and financial performance will become apparent at the next financial crisis. It would be arrogant for us to predict a looming financial crisis. However, when it does happen, client organizations who prepare now will be the best off. Whether it's strategic consultants or the voice of the customer, adopting fast, efficient research solutions and consistently demonstrating ROI to stakeholders will ensure insights departments are well-suited to impact financial performance in the future.



About GRITscape

We launched the GRITscape in 2018 as a fun way to visualize the topography of the insights landscape by showing how both buyers and suppliers categorize themselves, and how those categories relate to one another.

In 2019 we're continuing the process with a lumascape that is changing as the industry changes, using the metaphor of a map with shifting borders and populations. And because we think it's cool, we doubled-down on the use of a "Game of Thrones" type fantasy world map as the context for the visualization.

Organizations are clustered based on which category most respondents from each company self-selected as the best fit. Supplier categories are laid out along the service-technology dimension (vertical). Client categories represent the different roles internal insights departments can play within organizations on a strategic-tactical continuum.

Relative placement and size of logos have no defined meaning and are only driven by design considerations.



WHAT DOES THIS TELL US ABOUT RESEARCH SUPPLIERS?

Last year we said “The first thing that we learned in this analysis is something we have been observing for many years – researchers don’t make good marketers. The premise of positioning is knowing what you do and what you don’t do. In this survey, there was a lot of inconsistency from the respondents within a company as to what that company does”. And, that still holds true, although perhaps there has been some improvement.

When we count unique companies, we have 366 distinct buyer companies and 715 distinct supplier companies. In looking at suppliers, 25 companies had 10 or more responses across multiple categories, and 88 had 2-9 across multiple categories. Now, bearing in mind that these responses are from respondents from the same company, it is telling that sometimes as many as 10 categories were selected.

As we posited in the most innovative section, for large companies that offer a variety of different services/solutions this may simply be a bit of myopia: respondents are answering based on their role or focus. However, considering the confusion we saw in the most innovative list categorization question for companies with fairly focused offerings combined with a similar challenge here, we think a significant issue is a decided lack of clarity both internally and externally on brand positioning. Of course, while we do not believe this had meaningful impact on the results, we must also consider that the company categories themselves might not have been as clear to all the respondents as they were to the survey authors, adding some potential noise to these data.

All things considered though, our key takeaway is that the employees of many supplier companies aren’t really sure what the company does, or don’t know how to talk about it consistently. This inconsistency was more pronounced within some firms than others, but it was evident to some degree in almost every supplier that had two or more respondents. This means that leaders of supplier companies need to clarify their market positioning and communicate that definition effectively throughout their organizations.

Also, and somewhat curiously, in this exercise we saw multiple employees of Unilever CMI position themselves as a supplier and use the supplier categories to describe themselves. We thought this could perhaps be a programming error, but it only applied to sixteen Unilever respondents whom also made it clear in verbatim comments from other questions that they view themselves as a full-fledged agency within Unilever, but with external clients as well (we assume Unilever partners). Although we are certainly aware of other buyers with internal research agencies, some of which also server external clients too, and many technology companies also have research offerings (Google, Microsoft, Facebook, etc.) it was a surprise to see so many Unilever employees identifying themselves this way. Is this a trend or a niche? We’re not sure, but we’ll certainly be paying attention to whether we see more non-tech buyers creating internal research agencies in the future.

We have 366 distinct buyer companies and 715 distinct supplier companies



Our key takeaway is that the employees of many supplier companies aren’t really sure what the company does, or don’t know how to talk about it consistently





THE BEST OF BOTH WORLDS: HUMAN EXPERIENCE & AUTOMATION FUSE TO CREATE THE NEXT EVOLUTION IN RESEARCH

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Researchers today must contend with a consumer ecosystem, changing at an unprecedented rate. Between connected consumers armed with endless options and aggressive challenger brands stealing market share, Consumer Insights and Market Research teams must embrace technology to win the game.

Due to this research teams are under constant pressure to monitor the pulse of the consumer and provide quality insights that successfully impact product lines, communications, advertising, promotions and more — for a fraction of the cost.

Manually collecting data that expires long before it's applied is no longer a viable option to keep pace with consumer buying behaviors, so researchers look to automation tools to gain efficiency without sacrificing insight quality. However, even with innovations in automation technology, consumer research still only moves as fast as the humans driving it.

Researchers spend countless hours becoming experts on their target audience and that knowledge is often applied to their research approach. How a research study is conducted – the format of question types, the context used to ask the questions, the methodologies selected, and the process for analysis is often the secret sauce and main point of differentiation for a consumer brand.

Suppliers react to the demand by offering new technological solutions along two competing evolutionary branches. On one side, complex research software is becoming more powerful with every release, providing researchers with a great level of customization

while taking care of the heavy lifting of statistical analysis. Unfortunately, it's often time-consuming to learn and less than intuitive in use, which leads to a longer learning curve and a high level of expert knowledge requirements.

On the other side, off-the-shelf automation solutions offer consistent and repeatable research tests that don't require time or expertise to set up. The tradeoff here is that such solutions typically operate as "black boxes", keeping their techniques hidden from researchers. They also more often than not lack the flexibility needed to accommodate unique research needs and practices.

To empower researchers to create automation that reflects the unique requirements of their research organization, research tools must evolve to be the best of both worlds – the ease of off-the-shelf automation based on industry best practices combined with the flexibility of platforms that allow user-friendly customization.

In this new approach, flexible guided automation uses pre-built tests fully programmed with all of the logic and optimal question types, using benchmarks and best practices established by experts but allows for the greatest expert of all, the researcher, to truly make it their own. In doing so this allows market researchers to unlock the combined value of technology while leveraging their human insights and professional expertise.

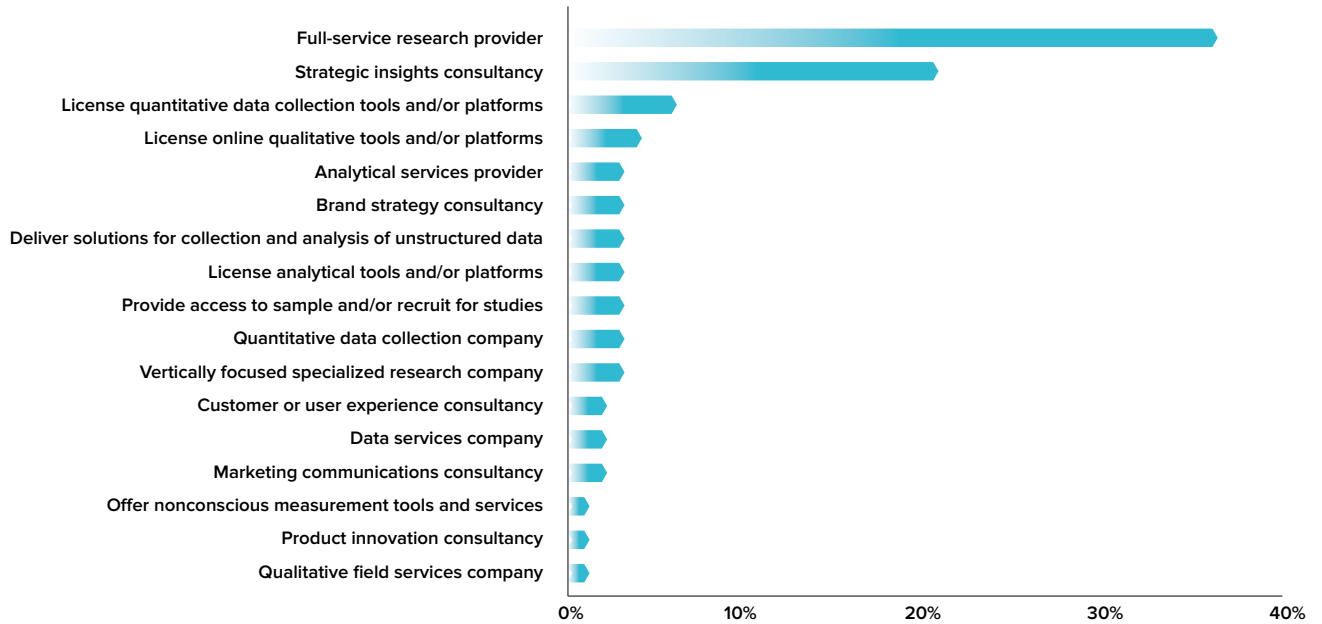
The era of **researcher driven custom automation** is an essential next step in the evolution of research as a strategic advantage. Allowing brands to meet the needs of an ever-evolving, demanding consumer and overcome the growing competitive landscape.

SUPPLIERS WITH MOST MULTIPLE CATEGORY RESPONSES

	Analytical services provider	Brand strategy consultancy	Customer or user experience consultancy	Data services company	Deliver solutions for collection and analysis of unstructured data	Full-service research provider	License analytical tools and/or platforms	License online qualitative tools and/or platforms	License quantitative data collection tools and/or platforms
LRW	0	1	0	0	1	53	1	0	1
Ipsos	0	0	0	0	0	32	0	0	0
System1 Research	0	1	0	0	0	20	1	0	0
Hotspex	1	4	0	0	0	12	0	0	0
PRS IN VIVO – BVA	0	1	1	0	1	16	0	0	0
Insites Consulting	0	0	0	0	0	18	0	1	0
SKIM	4	0	0	0	0	17	0	0	0
Shapiro+Raj	0	0	0	0	0	12	0	0	0
Zappi	1	0	0	0	1	1	2	1	9
Focus Vision	0	0	0	0	0	0	0	2	4
iTracks	0	0	0	0	1	2	0	9	2
Toluna	0	0	0	1	2	0	1	4	3
Unilever CMI	1	0	1	0	1	2	0	0	1
Kantar	0	0	0	0	1	9	0	0	0
Discuss.io	0	0	0	0	1	1	0	7	0
Fuel Cycle	0	0	0	0	1	0	2	5	1
Lucid	0	0	0	3	0	1	0	0	4
DIG	0	1	0	0	0	6	0	0	0
LivingLens	1	0	0	1	3	0	5	0	0
Remesh	0	0	0	0	2	0	1	6	1
AYTM	0	0	0	0	0	0	1	1	5
Insites Consulting	0	0	0	0	0	4	0	1	0
Dynata	0	0	0	2	0	0	0	0	1
GfK	1	0	0	1	0	4	0	0	0
Gongos	0	0	0	0	0	2	0	0	0
Join the Dots	0	0	0	0	0	7	0	1	0

	Marketing communications consultancy	not decision maker	Offer nonconscious measurement tools and services	Other	Product innovation consultancy	Provide access to sample and/or recruit for studies	Qualitative field services company	Quantitative data collection company	Strategic insights consultancy	Vertically focused specialized research company	Supplier Sum
	3	20	0	1	0	0	0	0	36	2	119
	0	9	0	0	1	0	0	0	1	1	44
	4	3	0	0	0	0	0	0	8	0	37
	0	5	1	0	0	1	0	1	10	1	36
	0	4	1	0	0	0	0	0	5	4	33
	0	6	0	0	1	0	0	0	6	0	32
	0	3	0	0	0	0	0	0	5	1	30
	0	2	0	0	0	0	0	0	11	0	25
	0	3	0	3	0	0	0	0	0	0	21
	0	6	0	4	0	0	1	0	0	0	17
	0	2	0	0	0	0	0	0	0	0	16
	0	4	0	0	0	1	0	0	0	0	16
	0	3	0	5	0	0	0	1	1	0	16
	0	2	0	0	0	0	0	0	3	0	15
	0	3	0	0	0	0	1	1	0	0	14
	0	3	0	1	0	0	0	0	0	1	14
	0	0	0	0	0	4	0	2	0	0	14
	0	0	0	0	0	0	0	1	5	0	13
	0	2	0	1	0	0	0	0	0	0	13
	0	1	1	0	0	0	1	0	0	0	13
	0	3	0	0	0	1	0	1	0	0	12
	0	4	1	0	0	0	0	0	2	0	12
	0	4	0	0	0	1	0	3	0	0	11
	0	1	0	0	0	0	0	1	3	0	11
	0	0	0	0	0	0	0	0	8	0	10
	0	0	0	0	1	0	0	0	1	0	10

SUPPLIER SEGMENTATION DESCRIPTION



One of the most notable findings concerns the reversal of the shift from “research” to “insights”



One of the most notable findings concerns the reversal of the shift from “research” to “insights”. The categories to choose from included both Full-Service Research Provider and Strategic Insights Consultancy. When looking at the actual firms that were listed in each one of these, there was a lot of overlap – both from our perspective and the respondent’s perspective. However, last year positioning your company as a Strategic Insights Consultancy was much more popular (42% respondents categorized their company that way) compared to positioning as a Full-Service Research

Provider (6% categorized that way). This year there was a massive shift, with 37% of respondents identifying their firms as Full-Service Research Providers while only 21% self-identified as Strategic Insights Consultancies. Perhaps the “insights consultancy” re-branding craze has run its course and suppliers are embracing a more traditional description of their offerings, albeit with different tools available?

Those two categories were the largest by far, with all other categories being under 6%. The chart above shows the breakdown.

SUPPLIER CATEGORIES AND GROWTH EXPECTATIONS

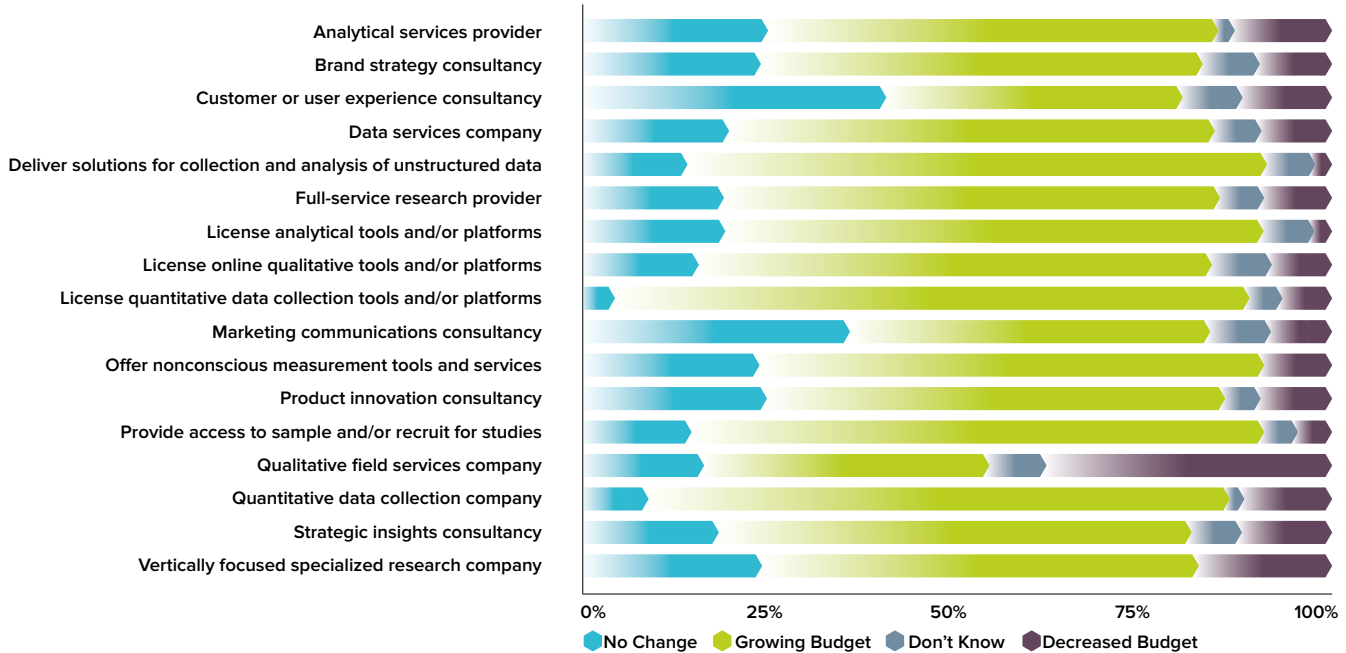
Technology-centric segments report significantly higher growth



If we look at growth expectations across all suppliers, the average we are working from is 64%, up from 57% in 2018. That is the percentage of supplier respondents that expect some growth (slight or significant) from last year to this year. Again, in a shift from last year, this optimism applies to all segments except Qualitative Field Services,

where respondents were equal in reporting both a decline and growth. However, keeping with our previous analysis in 2018 and empirical evidence via industry observation, technology-centric segments report significantly higher growth. Here is the detailed breakdown by category.

SUPPLIER CATEGORIES BY GROWTH



Technology providers of tools that make the research process happen are expecting growth that is above the average; firms that license analytical tools and/or platforms (73%), those that provide access to sample and/or recruit for studies (77%), those that deliver solutions for collection and analysis of unstructured data (78%), Quantitative data collection companies (78%), and companies that license quantitative data collection tools and/or platforms (86%). That final category could also likely be described as DIY or Automation platforms, a trend we have seen growing for several years now.

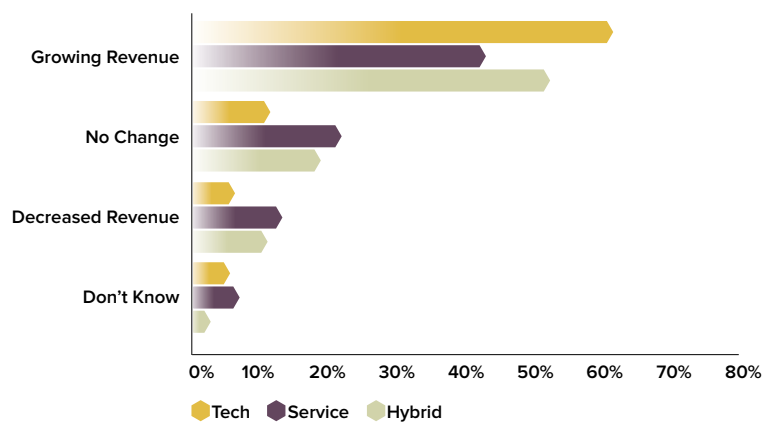
There are three categories that are meaningfully below the average growth expectation. All three are being impacted by automation and new tools and methodologies. Qualitative field services company (38%), Customer or user experience consultancies (40%) and Marketing communications consultancies (49%) are all expecting less than average growth in their companies.

However, if we simplify this by rolling up all the categories into three large groups and averaging their growth expectations, the story becomes crystal clear:

Technology companies on average expect 10% more growth than Service businesses and by over 20% for Hybrid organizations that offer a mix of technology and service. Bearing in mind other findings in this report about buzz topics, opportunities and challenges, and the GRIT Top 50 the story continues to be that while the industry as a whole seems to be growing nicely, technology companies are growing more.

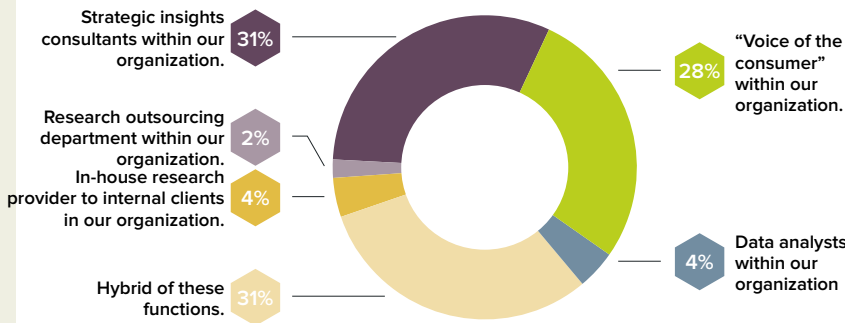
Technology companies on average expect 10% more growth than Service businesses and by over 20% for Hybrid organizations that offer a mix of technology and service

ROLLUP CATEGORY GROWTH EXPECTATIONS



CLIENT ORGANIZATIONS LUMASCAPE

BUYER SEGMENTATION DESCRIPTION



We asked research clients to undertake a similar task, although with far less granularity, in an attempt to understand how these organizations view themselves by role and impact within their organizations. Here is what we learned, again followed by a more nuanced analysis.

WHAT DOES THIS TELL US ABOUT CLIENT ORGANIZATIONS?

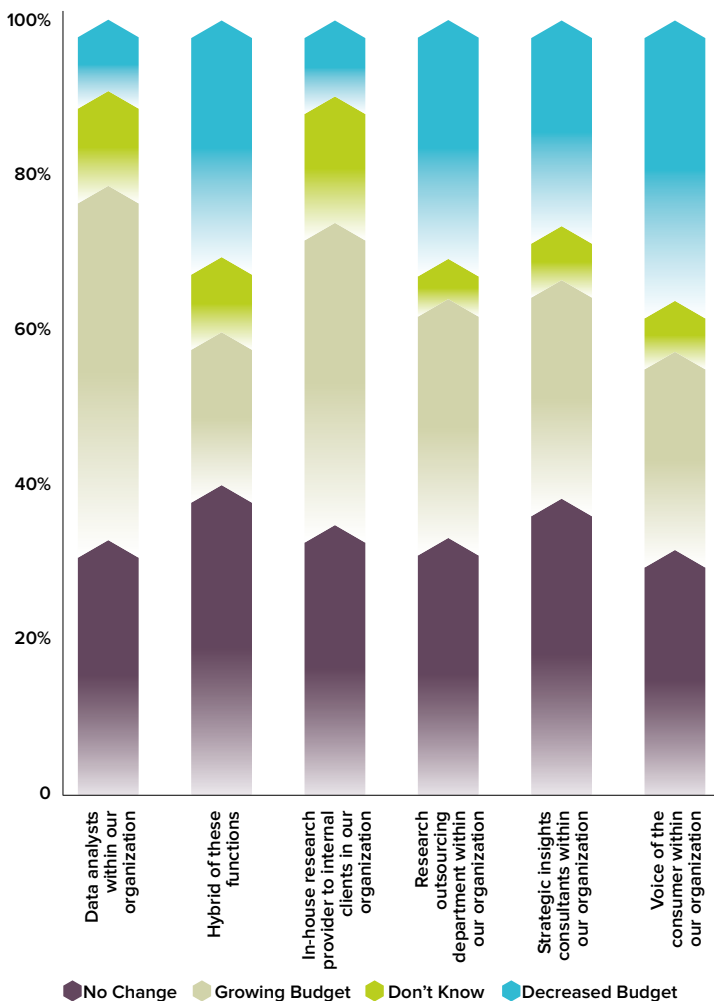
Three functions dominate client-side research organizations: strategic insights consultants (31%), voice of the customer for the organization (28%), or a hybrid of these and other research/analytic functions (31%). These are the same leaders we quantified in 2018, again evidencing the stability within the buyer segment.

Interestingly, despite their ubiquity as a structure for buyer organizations, it is the smaller categories of Data Analysts-focused organizations and In-house research providers that reported significant budget growth at 47% and 40% respectively, far in excess of the rest that were only in the 20 – 30% range. Those two categories also were radically lower in the percentages of respondents reporting budget decreases, with both being under 10%. Conversely, Voice of the Consumer centric organizations reported the highest level of budget decrease at 37%.

We suspect both findings are continued evidence of how technology is impacting buyer organizations, with growth in acquiring and analyzing data being worthy of investment while easily automated CX-based organizations are leveraging those tools to reduce costs and budgets.

The issue of positioning also occurs in client organizations, but the problem is not nearly as pronounced. 18 companies had more than 3 respondents who chose two or more categories, with Unilever and Pepsico respondents both selecting more than five categories to define their organization's positioning.

BUYER SEGMENT BUDGET CHANGES



Company	"Voice of the consumer" within our organization.	Data analysts within our organization.	Hybrid of these functions.	In-house research provider to internal clients in our organization.	not decision maker	Research outsourcing department within our organization.	Strategic insights consultants within our organization.	Buyer Sum	Other
Unilever	45	4	38	1	7	1	50	146	0
PepsiCo	27	2	14	0	3	0	20	67	1
Merck	1	0	4	1	0	1	7	14	0
P&G	8	0	3	0	1	0	2	14	0
Mondelez	0	0	2	0	0	0	3	5	0
Nestle Canada	1	0	2	0	0	0	2	5	0
Bank of Montreal	2	0	0	0	0	0	2	4	0
The Coca-Cola Company	1	0	2	0	0	0	1	4	0
General Motors	1	0	1	0	1	0	1	4	0
Kimberly-Clark	1	0	1	0	0	0	2	4	0
McDonald's	1	0	0	0	1	0	2	4	0
Pfizer	0	0	3	0	0	0	0	4	1
The Clorox Company	1	0	0	0	0	0	2	3	0
Colgate-Palmolive	1	0	1	0	0	0	1	3	0
Ferrero	1	0	1	0	0	0	1	3	0
HomeAway	0	0	0	1	0	0	2	3	0
Hulu	0	0	1	0	0	0	2	3	0
Johnson & Johnson	1	0	1	0	0	0	1	3	0

There could be a couple of explanations: The first is that client organizations are often more focused in their scope and therefore, know both what they do and what they don't do. Secondly, there are fewer possibilities of categories, and therefore more consistency. Finally, there is the issue of tunnel vision; in large organizations it is more likely that respondents who work within specific subsets of

the insights organization tend to think in terms of their roles, vs. the broader position of the insights organization. However, the fact that this does exist means, once again, that as researchers, we need to become better marketers. Not just for our benefit, but also for the benefit of our clients – internal or external.

It is the smaller categories of Data Analysts-focused organizations and In-house research providers that reported significant budget growth at 47% and 40% respectively



THE BIG PICTURE

The research industry is a very segmented marketplace, to no one's surprise. Understanding where you play, especially as a supplier, is important for positioning and marketplace success. And, based on the data from this edition of the GRIT study, this understanding of where a supplier fits is often not clear or is not communicated effectively within organizations.

Based on the changing nature of the industry due to automation and other technologies, methodology changes, and resource constraints (including time), we would expect to see significant shifts in the number and size of the companies in the categories that we defined in the lumascape exercise. The shift in how research is done will continue to impact processes, within both supplier and client organizations. Our understanding of what we do (and what we don't) will have to constantly evolve.

Understanding of where a supplier fits is often not clear or is not communicated effectively within organizations





CONCLUSIONS & FINAL THOUGHTS

In every edition of the GRIT report, we see positive news and we see challenges. This report is no exception to that history. Two themes keep coming to mind, while reading this report: the first is that value means different things to different people, and second is that there is a LOT going on in our industry and it simply gets confusing.

First, the value question. In my early days of research, I ran the customer satisfaction research program for a division of a large (the largest at the time . . . now, not so much) telecom company. We defined value as “what you get for what you pay”. When companies operationalize this definition it works quite well if all the customers want the same “what you get”. However, if almost everyone has a different definition of “what you get”, it becomes very hard to operationalize it. The “What You Get” part for our industry is quite diverse. As a buyer, you can “get” any of the following and much more.

- Faster – the value is that my organization can quickly get to a decision.
- Buy-in - means that I go through a process to include all the stakeholder and have fewer hurdles when the time come to operationalize insights.
- Data synthesis – the value is that the story looks at a variety of perspectives and gets me ‘closer to truth’.
- Real time - the value is that I can understand the consumer closer to the moment of truth or support my client in their time of need.

I can go on and on with this – frameworks, data sources, stories, visualization, etc... But we need to beware that sometimes we lose the bigger story in all the detail. *The core lesson is that all these things work together for one end goal – provide impact for*

our clients. The easiest example of this is reviewing the main reasons for organizations’ budget or revenue growth – they provided value (either internally or externally).

As previously noted, value doesn’t necessarily mean the same thing to everyone. So, the real question for all our clients is “what is valuable to you”? And that leads us into the next theme.

There is a proliferation of tools, platforms, methodologies, data sources, sample providers, and approaches in our industry. It is quite difficult to keep up with all the options. If we tried to keep up with all the changes and priorities, we would be left with no other job to do except ‘keep up’. And every organization is going through at least some change because of this proliferation. *The key to success is not just knowing what you do as an organization, but more importantly – what you don’t do.* While there are signs of improvement this year in the GRIT data, there is a lot of inconsistency on both the supplier and buyer sides about what the real role of the organization is. Are we the voice of the consumer? Are we strategists? Are we something else?

Until this question is answered in your organization, it will be almost impossible to focus on the right set of tools and skills to do your job to the best of your ability. And that focus comes from the question mentioned earlier. . . what is valuable to you?

GREGG ARCHIBALD
Managing Partner,
Gen2 Advisors



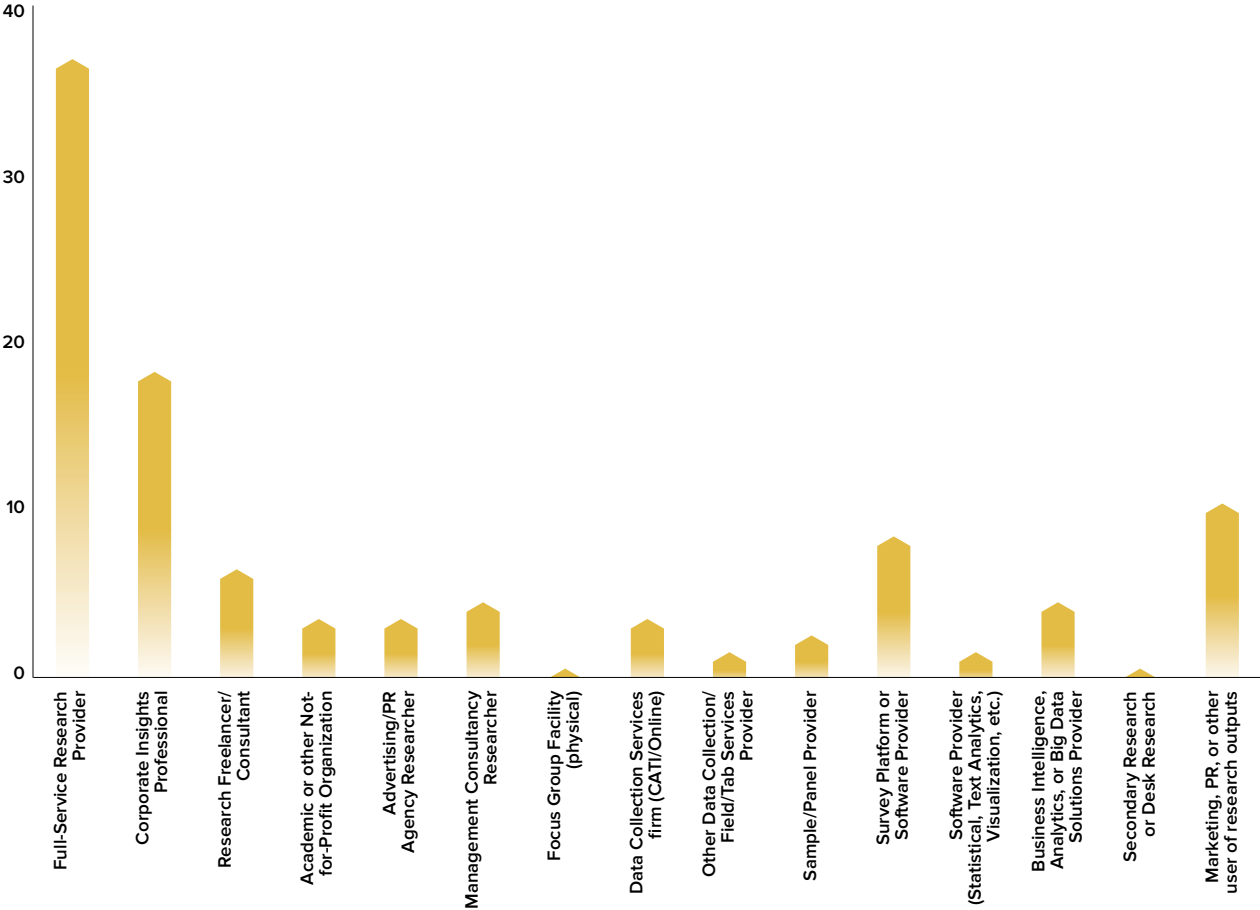
APPENDIX METHODOLOGY AND SAMPLE

ORGANIZATIONAL AFFILIATION

On the supplier side, we have achieved a good cross-section of the various sectors of the industry, even if over a third of respondents describe themselves as working within full-service agencies. Proportionally, representation from all industry sectors has remained relatively constant across each wave of the study. Interestingly, participants who identify themselves as “Freelancers/Consultants” are the

third largest segment of respondents at 6%, while the combination of more “tech-centric” suppliers such as sample providers, technology providers, etc. collectively make up 23% of the sample population, which is larger than in previous waves and evidence of the increasing growth of technology providers in the industry.

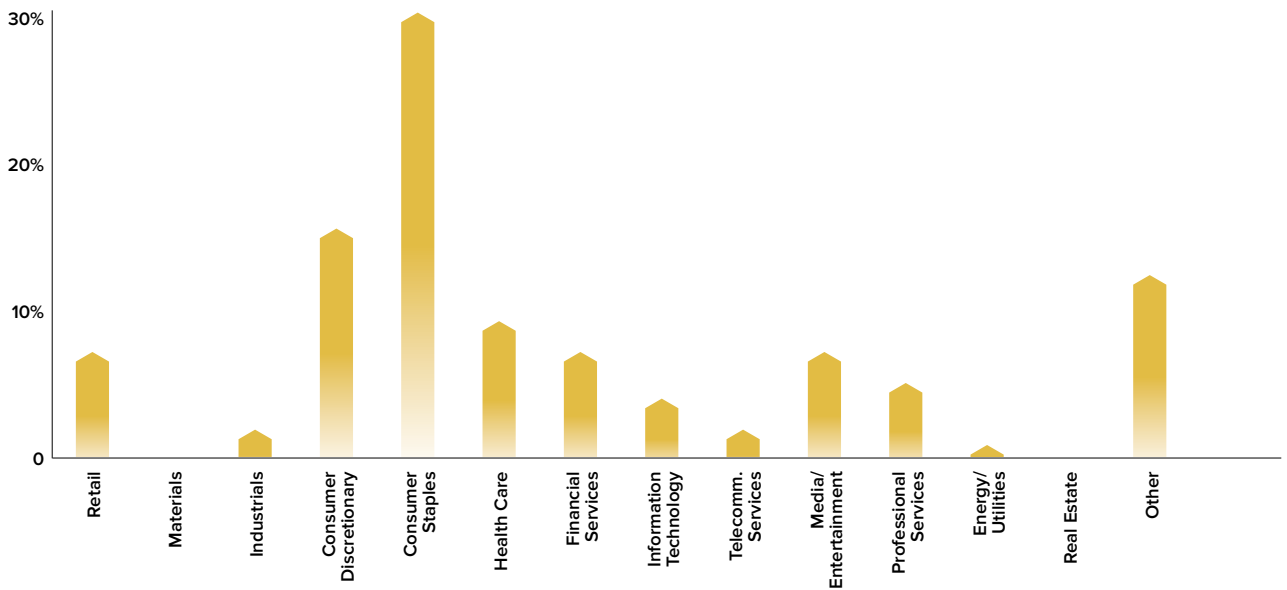
RESPONDENTS BY ORGANIZATIONAL AFFILIATION



In looking only at self-identified Buyers of research, we have a well-rounded sample of respondents from many sectors, ensuring a wide breadth of experience and views are represented from our client-side colleagues. The proportion is also roughly analogous

to the categories of largest buyers identified in other industry reports with Consumer Staples, Healthcare, Financial Services and Media making up well over half of the sample.

GRIT CLIENT RESPONDENTS BY VERTICAL



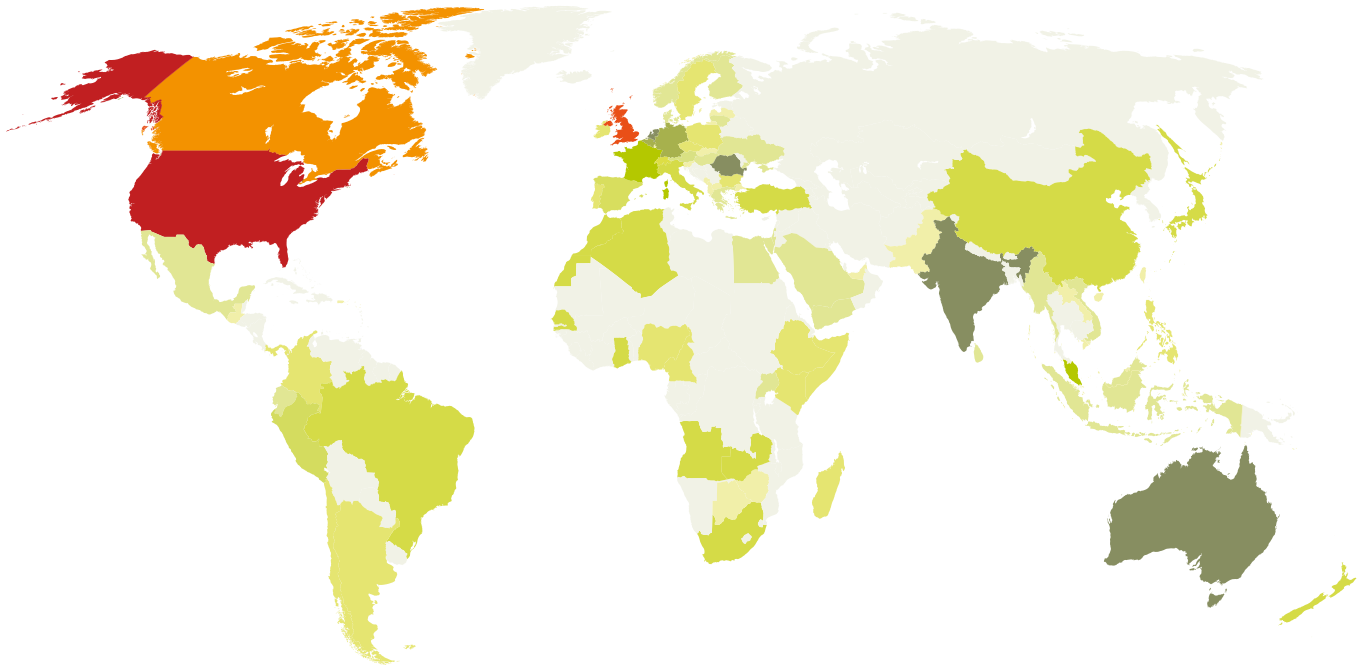
Regional sample sizes remained relatively consistent, with minor variances within each region. As previously noted, North American respondents comprised 67% of the sample, with Europe at 20%

and Asia at 7% and the rest of the world making up the balance. These percentages are in-line with previous waves with some +/- differences.

GRIT PARTICIPATION BY REGION



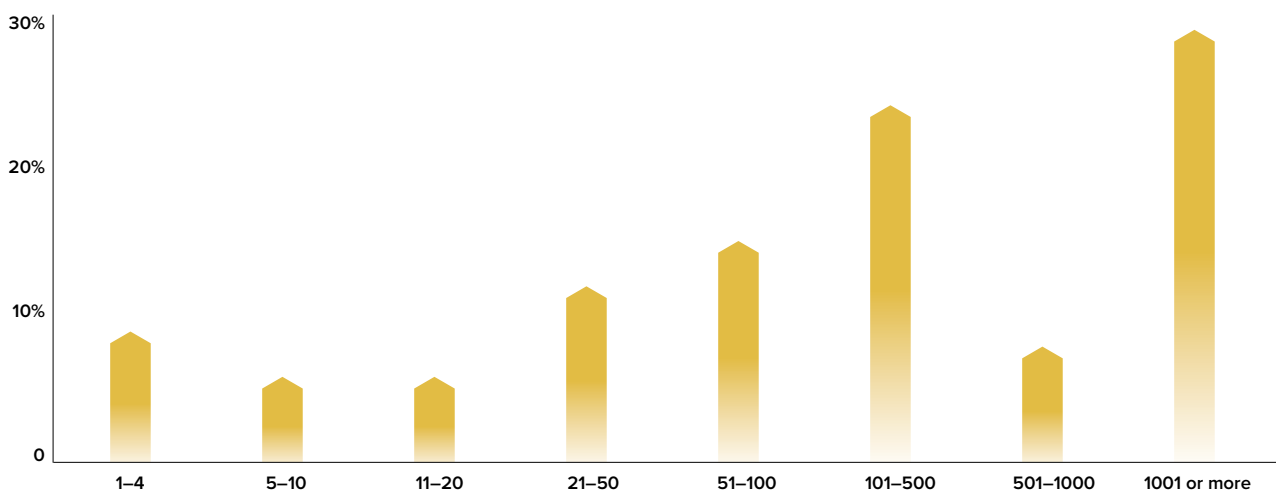
In exploring the physical location of GRIT participants via IP matching, we find that 125 different countries are represented within the sample, with respondent density shown in the map below.



GRIT SAMPLE BY SIZE OF ORGANIZATION

GRIT respondents generally fall into 3 camps, with each representing roughly one third of the sample: small organizations (under 50 people), mid-sized organizations (51 to 500 people), and large organizations with over 501 employees. This wave

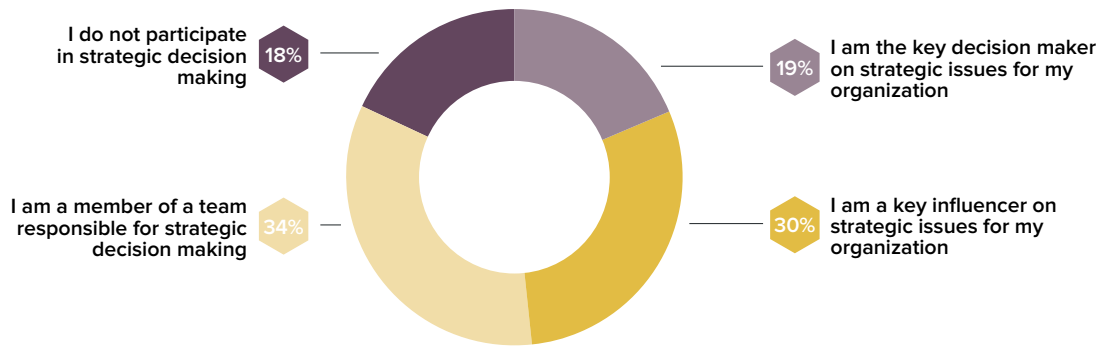
of GRIT did see an increase in large organization affiliated respondents, which we believe was significantly driven by an increase in Buyer-side participation. This wave is particularly well represented by large organizations overall.



GRIT RESPONDENT SENIORITY

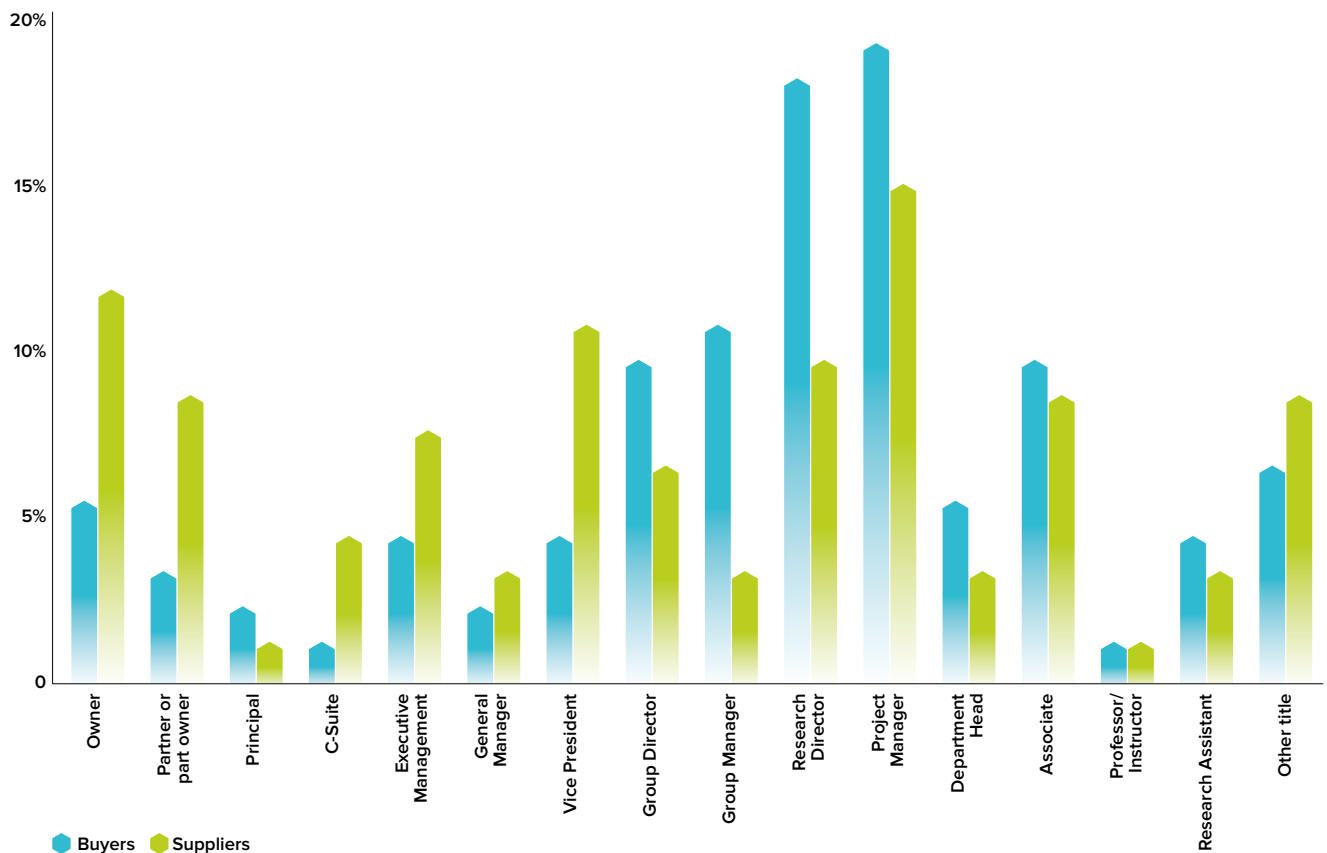
In analyzing other firmographic questions, the GRIT sample is comprised of largely senior level research professionals. 64% of GRIT respondents identify

themselves as key decision makers/influencers on strategic issues within their organizations.



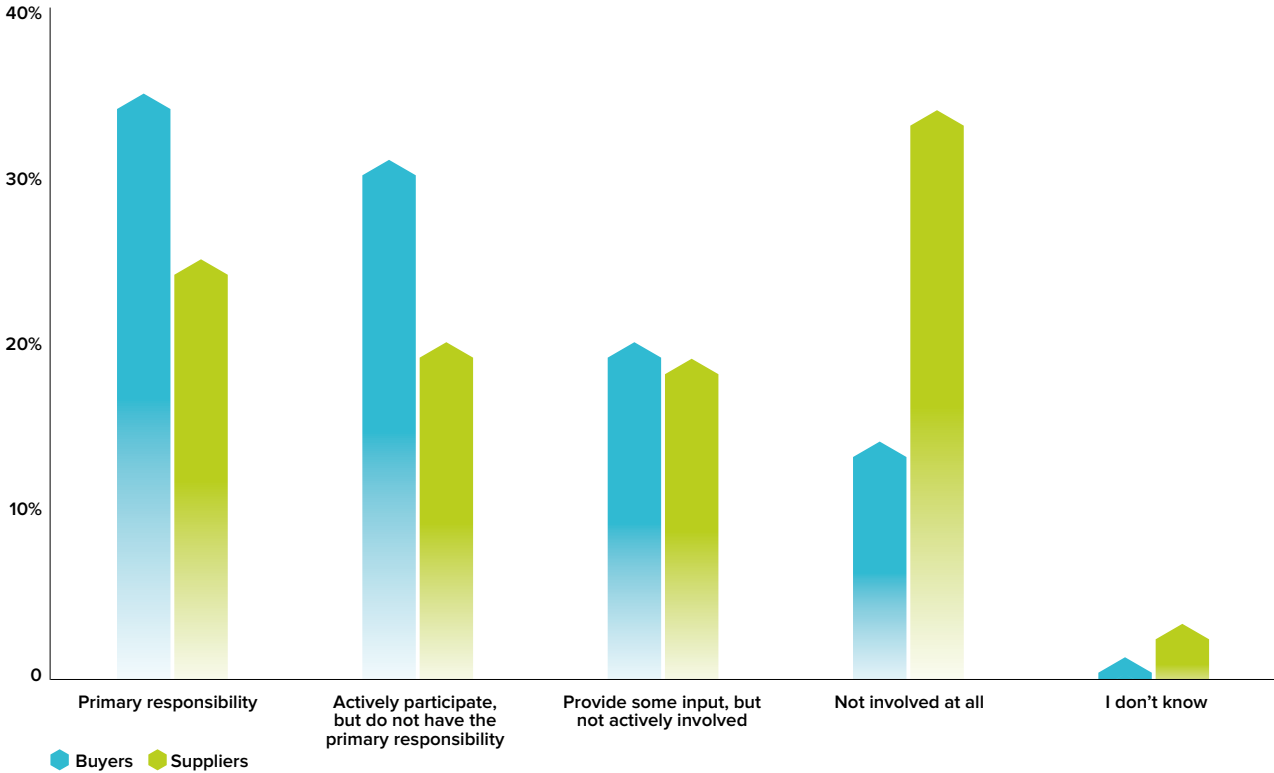
GRIT RESPONDENT TITLES

Concomitantly, the majority of GRIT respondents are in senior-level roles within their organizations.



BUDGET DECISION MAKERS

Unsurprisingly based on the tenure and seniority of many GRIT respondents, a majority have primary responsibility for or actively participate in their research group's annual budget within both buyers and suppliers.



APPENDIX

BUSINESS OUTLOOK

DEEP DIVE: SPENDING AND REVENUE TREND DRIVERS

REASONS WHY RESEARCH BUDGET/REVENUE GREW

Overwhelmingly for buyers, budgets increased due to the high value sponsors placed on data and customer insights, coupled with an increased need for research. Internal champions appreciated that insights, communicated effectively, helped the business to grow, and growth increased the need for new insights and the demand for them throughout the organization, while also providing the means to fund them.

The awareness of and demand for insights was met by suppliers who focused on communicating value to clients via proactive marketing and sales and who enabled the positive impact of research by focusing on client-centricity, service delivery, and product offerings which aligned with client needs.

REASONS WHY RESEARCH BUDGET/REVENUE GREW

	Buyer	Supplier
Sponsors/Clients Valued Research, Business Needs Increased	41%	11%
Focused on Client Service/Value Delivery	15%	26%
Market Presence Increased/Company Grew	12%	17%
Processes/Execution Improved	10%	13%
Marketing & Business Development Improved	9%	25%
Strong, Positive Corporate Focus	9%	11%
Innovation Focus	8%	19%
Strong Portfolio of Offerings	6%	23%
Other	11%	5%

Sponsors/Clients Valued Research, Business Needs Increased

Sponsor enthusiasm for the value of research-driven insights is the foundation of budget growth. Where research budgets increased, enthusiasm was driven by some combination of leadership's commitment to being data- and customer-driven and the company's trust in its insights professionals to deliver business value. Under these circumstances, the insights teams' successes and company's improved financial performance tended to reinforce

each other. The need for more insights, the belief that the insights team could provide them, and the company's financial performance were the necessary ingredients for increasing research budgets.

Sponsor enthusiasm was driven by faith in customer-centricity, belief that data is necessary to minimize risks, and momentum from the insights team's impact, in proportions that vary company to company.

In your opinion, what do think drove budget growth?

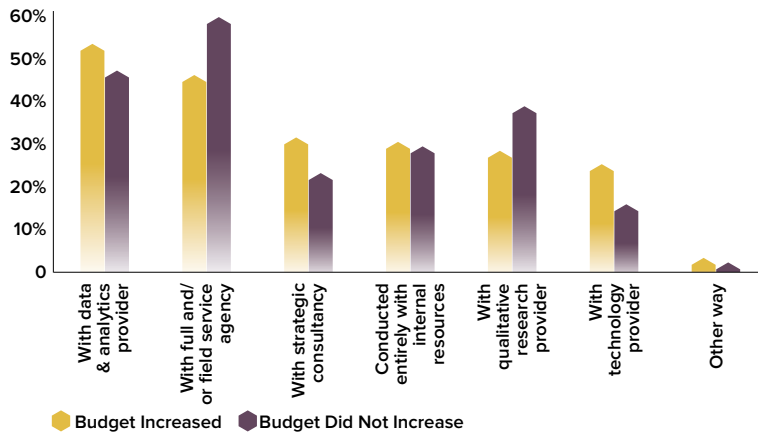
- Realization of how important customer feedback is
- Change in leadership and new leaders coming in that value research
- Executives better understanding the importance of data
- Reluctance to make business decisions without consumer validation first
- Interest in the conclusions; faith in the data and analysis
- Greater weight put on what we deliver to the business by senior management
- The need for more data to inform decisions and to show [how] ROI drove growth in our research ops
- Greater focus on insights as a result of key projects demonstrating impact
- People understood how insights helped them to make hard business decisions
- Increased familiarity and understanding internally of the value research and insights can provide teams to accomplish and successfully champion their projects
- Demand within the organization, executive sponsorship and insights organization maturation
- Internal stakeholders perceiving value in research and insights, and telling their marketing colleagues about it

Those with increased budgets were more likely to prioritize use of strategic consultancies and technology providers than other buyers, and less likely to prioritize the more traditional suppliers, full service agencies and qualitative research providers. While strategic consultancies and technology providers by no means dominate usage of other supplier types, executive sponsors at some companies may favor them over (or in addition to) traditional research suppliers, which would likely require a budget increase.

When asked with which types of suppliers they most frequently conduct projects, 18% of those with budget increases named strategic consultancies

compared to 10% for those who did not see an increase. Only 23% named full service agencies as their most frequent partner, compared to 36% of those with stagnant or decreasing budgets. More differences emerged among the top two partners: technology providers joined strategic consultancies as differentially used by those with increased budgets while qualitative research providers joined full service agencies as appearing less frequently. When the top three partners are considered, all differences disappear except for the more differential use of technology partners, and there are no significant differences among the top four or bottom three supplier types.

TOP TWO PROJECT PARTNERS BY RESEARCH SPENDING TREND (BUYER)



News of the insights success spread across different areas of the company, leading to more demand for similar and new types of insights. Company growth sparked the need for a greater breadth of insights – e.g., to understand potential new markets, new ways of reaching the market, or how to adjust the product portfolio – as well as deeper insights, e.g., a more granular understanding of customer segments, channel segments, or brand management.

In your opinion, what do think drove budget growth?

- Supporting more teams than in the past
- A greater understanding of our market and the trigger points for change
- The need to provide solutions to deliver the strategic 5yr vision
- The need for more strategic insights for more integrated business management and alignment for the business in terms of product development, marketing, sales and customer retention
- Topical growth – putting more dollars towards pressing topics like eCommerce
- The need for deeper insights covering a range of dimensions
- Need for deeper understanding of specific segments
- More retailer-specific needs in order to sell in new ideas; can't just blanket with national insights and expect strong sell in
- Expanding to global territories as well as making more content, which requires more research
- Brand expansion (categories/retailers), increased competitive activity, increased company size.
- New pressures (unaccounted for needs)

On the supplier side, those who experienced revenue increases took note of the uptick in demand for insights-related services, sometimes explained as flukes or crests of traditional cycles, but sometimes attributed to a return to normal or an emerging new normal.

In your opinion, what do think drove revenue growth?

- Client business demand and referrals
- Key clients spending more money on research
- Clients whose research budgets were larger than expected
- Clients dumping budget at the end of the year
- Clients seemed to spend more time planning at the beginning of the year and are now executing on initiatives
- Major client completed a reorg and is again engaged in research
- Greater product launches from our customers
- Customers are becoming more active
- C-suite finally connecting research spend with revenue growth
- Broadening of insight requirements – need for organizations to re-organize their insights to drive change
- Leadership understanding the value and need for research projects across the organization. Our research manager does a great [job] communicat[ing] value throughout the company.

Full service suppliers and freelance consultants were much less likely to name increased needs as a driver of growth compared to providers of more specialized services, such as software and analytics suppliers; survey platform providers; researchers from ad agencies, PR firms, management consultants; and niche players. The more specialized suppliers often

attributed their revenue gains, at least in part, to a “coming of age” for their field and sometimes for their unique offering. Some mention acceptance of the disciplines that generate insights, but more often the observation is about how technology, automation, and/or DIY tools meet client needs for cost-effectiveness and control.

In your opinion, what do think drove revenue growth?

- Interest in topics in which we have a competitive advantage
- Adoption and increasing awareness of the need for behavioral insights
- Permeation of integrated neuroscience
- Brands are responding to chat surveys and the ability to messaging platforms
- Clients’ needs for more cost-effective solutions
- An understanding within the market of the value of better, faster and more cost efficient research
- Shift in spend from consultancy to technology
- More and more insights professionals are being hired by enterprise organizations – which makes the enterprise the new consumer of insights technology solutions
- The industry shift in full-service to self-service and the wider adoption of online market research platforms
- The wider adoption by researchers to move to self-service
- Customer’s willingness to engage with platforms that have become a hybrid of full service and DIY has been our key driver to growth. More of our clients want to have the flexibility of utilizing our platform and only reaching out to us when additional help is needed.
- More companies buying automation
- More clients adopting a digital approach and being interested in new innovative methodologies.

Focused on Customer or Client Service/Value Delivery

For some companies whose budgets increased, the focus on the customer was a prominent driver due to its centrality to their corporate strategy or ethos.

In your opinion, what do think drove budget growth?

- Desire by senior leaders to be more customer centric in all aspects of the business
- We need to tap more into our customer’s mindset and understand their ever-changing needs better
- The focus on having the voice of the customer present in strategic decisions being made across the organization
- The need for consumer voice to play a larger role in product strategy and marketing The need to remain innovative and drive more value with every client interaction
- Need for closer contact to the customers, until now we only thought what the customers need
- Rebrand project is rooted in research to understand our members, potential members, and develop a segmentation
- A clear need for a better understanding of our clients, reflected in lower sales

For suppliers whose revenue increased, emphasizing client engagement, aligning offerings with needs, and delivering impactful insights were key revenue drivers, and the strategic foundation for another customer-focused key driver, their marketing and sales efforts. By delivering and clearly communicating value, these suppliers took advantage of the top driver of spending: the belief in the value of insights research and the increased need for it.

Suppliers frequently cited their organization's commitment to client-centricity and relationship-building as the foundation for these efforts. Great client relationships were viewed as instrumental to establishing a steady stream of recurring business, and delivering clear business value as instrumental in establishing those relationships.

In your opinion, what do think drove revenue growth?

- Client centric approach, built on reputation and trust over many years
- Strong client focus, we are totally client-centric
- Better business model in working with end-clients
- Focus on account management process rather than project-focused and increased focus on marketing
- Communication with clients to understand how to best meet their needs and working to become a strategic partner for all future needs.
- Delivering high quality insights and outputs, building collaborative relationships with clients
- Our impact-first approach to client engagements ensures we have deep client relationships
- Addressing objectives clearly, cost effectively and good quality resulted in repeat business.
- Actionable recommendations with our research helps build client relationships. When you have strong client relationships you can continue to grow
- Impacting positively and effectively in the business of the end clients drives our growth
- Fully satisfying clients with out-of-the-box insights and clear recommendations, including looking beyond the data toward general market trends and providing needed context for understanding the insights

For some suppliers, acting in a more consultative capacity was also important to the business value formula.

- Great consultative value
- Expanding our research technology implementation consultancy practice
- Our changed strategy to move towards solutions and consulting services taking advantage of advanced analytic skills
- Solid deliverables, delivering information the client did not even know they needed to know. Establishing good relationships and not being afraid of expressing to clients ways in which their ideas benefit/don't benefit the work

To ensure that value is delivered, the engagement must be aligned with the client's solution and project management needs and wrapped within a great experience.

In your opinion, what do think drove growth?

- Listening to clients, being fast and ruthlessly championing high quality
- Better product market fit
- Better suite of services for clients; responsiveness
- Dedication to delivering very developed insightful report/story of the research results
- The same methods and techniques can't be used when consumers and B2B professionals are making decisions differently today. Clients need to adapt their insights strategies and we've been able to help them in this journey
- Exceptional customer relations
- Better client service in terms of pre-sales, sales, post-sales support Personal touch
- Outstanding client delivery and relationships
- Commitment to great (a) client service and (b) innovation
- Good service, fast turnaround time, good accuracy
- Customer service and efficient/friendly technology
- Meeting targets, delivering on time and making sure our work is of high value. Creating and maintaining good client relationships as well.

Critical to creating great customer experiences is the ability to understand each client's needs and to adapt the solution to their realities and preferences. Listening skills, attention to detail, adaptable

solutions, and the flexibility to customize when necessary contribute to the client experience and deepening of relationships.

In your opinion, what do think drove growth?

- Better understanding of the client + better product innovation that puts the client needs first
- Responding and reacting to end-user/industry needs and requests Innovating the approach and scaling the research to meet the objectives outlined by the team
- Solid research aligned with client needs throughout the process
- Creating new routes to meet client needs. Gaining efficiencies by streamlining processes. Understanding client needs and providing more while being flexible when collaborating with clients
- Having dedicated teams to focus on client needs and then support with teams who are world class researchers to meet these needs
- Ability to exceed our clients expectations and customize new offerings that meet the evolving market and industry
- Customizations
- Technology adaptability

Generally among suppliers who increased revenue, client-focus to deliver great experiences and value are mentioned as a key revenue drivers. However, it was even more frequently mentioned by suppliers who also said their organization significantly

exceeded its goals. This suggests a hypothesis that greater client-focus (or perhaps external focus in general) can be instrumental in helping an organization to grow and increase its capabilities.

Market Presence Increased/Company Grew

Some buyers saw a direct relationship between the budget increase and their company's growth plus the stronger market presence that supported it.

- Company grew to the point where it could and wanted to invest in insights, hiring two dedicated research and data staff (me and one other) and giving us budget to grow department
- Leader in our area; consistent referral and social media presence

For suppliers, especially smaller ones (20 employees or fewer), revenue growth was linked to increased visibility and a burgeoning reputation for excellent or unique work. Visibility is often traced to word-of-

mouth, but is also a result of promotional efforts and the company's own growth and positioning. Some suggest that as particular market trends take hold, their brand resonates with more potential clients.

- A new method takes time to scale within agency and brand departments, and we are reaching scale with legacy customers and adding new. The industry is finally starting to embrace the 'Better' part of 'Better, faster, cheaper.'
- Word-of-mouth, excellent marketing and being best in category
- Overall company growth, compelling company value proposition

Processes/Execution Improved

Some buyers highlighted that changes to how they executed their work fostered results that led to budget increases. In some cases, increasing efficiency and taking work in-house resulted in more research investment rather than reductions ("Doing projects with higher impact. Leverage analytics through new ways of working. Faster, more agile tools."). Technology was often an enabler of process changes and widening the reach of research ("Adopting new tech", "Automated studies.")

Among suppliers, specialists, especially survey platform/software providers, were more likely to cite improved process and execution as a revenue driver; full service research suppliers were least likely. It can be argued that specialists are more dependent on technology than generalists, and that their window to respond to real-time issues is much shorter (consider sample providers and survey platform providers.) These successful suppliers, however, frequently mentioned the roles played by humans, often in tandem with technology, to improve the way insights are generated, solutions

are delivered, and work is conducted. Non-technical contributions included flexibility and adaptability, teamwork and collaboration, mindsets and intelligence, and hard work and dedication

- The right people with the right tools
- We do need latest technologies to be competitive, but growth only comes from people experience and skills. Without growing people there will be no growth in long term
- Agility, thinking differently, doing things faster and cost effectively but without reducing quality, listening to clients, coordinated approach with everyone behind the strategy
- Innovation and continuous improvement mind-set
- The people commitment to deliver impeccably

Among revenue drivers related to changing how things are done, several mentioned technology or concepts without specifically mentioning staff.

- Research Automation
- New data sources
- We have updated ourselves in new tools and technology

Marketing & Business Development Improved

Improvements to marketing and business development were key in driving supplier revenue; without these efforts, client-focused service delivery and offerings would encounter very few clients

to engage. While some increased investments in marketing, many had benefited from an increased presence due to their growth and reputation.

In your opinion, what do think drove revenue growth?

- We finally put some money into marketing and hiring key sales contributors
- Sales & marketing outreach, customer success, strong product
- Evangelizing (by sales and marketing)
- Fidelity of satisfied customers, presence in specialized forums and sponsorship of events.
- Improved marketing and improved capture of inbound leads
- We are working more closely with both PR counselors and direct clients to communicate our capabilities as well as the value of MR
- Better messaging about why we're unique and how our technology can seamlessly connect digital insights to digital ad measurement

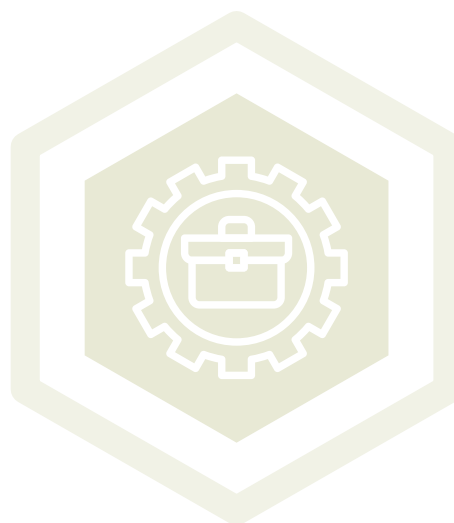
Many suppliers attributed revenue growth to improved business development strategy and how new markets and client targets were prioritized while maintaining current relationships.

- Expanding in other countries, buying new companies, client list growing
- Going after certain clients, industries, and types of work
- Building off of key relationships already in place. New large clients.

In addition to strategy, improvements to the business development process and staff were cited as drivers.

- We have transformed our strategies from traditional ways of getting business to more well thought of Digital Marketing ideas along with Social Media. This has resulted in more customer interest and growth.
- Better internal structure and sales activity
- Expanding our offerings and sales team.

Among supplier types, marketing & business development were mentioned most frequently by smaller full service research suppliers (20 employees or fewer) – more than twice as often as by larger full service suppliers. With respect to client-focus, the reverse is true: larger full service suppliers were twice as likely to mention it as smaller ones. This suggests that, for the smaller suppliers, getting business from new clients is a burning issue, whereas larger ones are more concerned with how to retain clients.



Strong Portfolio of Offerings

Another key ingredient for supplier revenue growth was a strong portfolio of offerings that aligned with customer needs. The strength is a function of the quality and uniqueness of their line of offerings, the fit with current market needs and adaptability to future needs, and specific functional capabilities provided. The driver was particularly

strong for specialists, who mentioned it about twice as frequently as full service research providers. Suppliers with 20 employees or fewer mentioned it much less frequently than larger ones.

The backbone of a supplier's strong portfolio may be the belief in its excellent quality and superiority over competitive solutions.

In your opinion, what do think drove revenue growth?

- Best product
- The quality of the product and how innovative it is compared with other companies in a similar field
- Because our quality is so high we are regularly recommended. So our quality and innovation drives our growth
- We focus on mobile MR solely...makes traditional methods look foolish, honestly
- Excellent community platform and partnerships with specialty research providers
- The quality and innovative nature of our work – we will not take on more work if we don't think we will do an excellent job.
- Quality and delivery timeline of data.
- Quality product bolstered by the drive of the sales team

Breadth and diversity of offerings were also credited with driving revenue. ("Diversification of our services", "Launch of new services and superiority on core competency.")

Offerings that meet critical client needs today, have the flexibility to be customized or adapted,

and the commitment to keeping up with or ahead of industry changes ensure that offerings are relevant and suitable to objectives. Accompanying services also help to ensure relevance. Enabling clients to do more is another strong theme associated with the fit, customization, and evolution of offerings.

In your opinion, what do think drove revenue growth?

- Innovative solutions, which reduce the cost and time to do research (things always in vogue)
- Offering more agile research solutions and being more proactive in engaging our clients on their business needs
- Innovative technology solutions for faster data and findings delivery at high quality
- More innovative features and tools offered, therefore opportunities to help our clients get more out of their experience and work with us a wider variety of projects
- Innovation & custom research methodologies
- Always adding new offerings, always keeping up with technology trends or being ahead of them, evolving the company even if it changes the company completely
- Adapting our products based on our research insights
- Our technology is best in...providing clients easy to use tools and the respondents they are seeking.
- Our technology (primarily API integrations) create new opportunities for our clients to innovate their own platforms.
- Providing more DIY solutions for our clients

For some suppliers, revenue growth was attributed more to the type of capability or functionality offered than specifically to its quality, variety, or customizability (“Innovative technology including

MR data blending, analysis, and visualization”, “Innovation in the emotional measurement space”, “New social media-driven research solutions.”)

Innovation Focus

At the start of “The Most Innovative Suppliers” section of the GRIT survey, one respondent expressed disgust with idea that “innovation” is important enough to command that much attention. It’s a fair point because “innovation” has no value unless it produces something of value. One rebuttal might be that suppliers who enjoyed increased revenue frequently mentioned innovation as a direct driver of their growth, but usually in tandem other drivers, such as client-focus and offerings.

- Innovation and keen focus on answering business questions and offering solutions
- Innovation and the ability to adapt to changes
- Innovative, forward-looking products and technology
- Customer centricity and innovative products

Another rebuttal might be that suppliers who mentioned innovation as a direct driver of increased revenue not only gained revenue, but also were more likely working for organizations that significantly exceeded their goals and increased the size of their insights department. Maybe focusing on “innovation” isn’t so disgusting after all.

A few suppliers did mention innovation in a value vacuum (“Focus on excellence and innovation”, “What we’re doing is innovative and new”), but these were the exceptions.

Strong, Positive Corporate Focus

Finally, it’s worth noting that some suppliers who increased revenue cited their organization’s strong strategic focus or ethos as growth drivers. While on the surface it may appear to be like patting one’s self on the back, corporate focus was mentioned twice as often by respondents who were not key strategic decision-makers or influencers compared to those most directly responsible for strategic decisions.

Related to the strong strategic focus, suppliers mentioned more disciplined planning and forecasting, clear areas of focus, and specific

components of the strategy. They also mentioned strong leadership, a culture that adapts to challenges, and the staff and working environment.

- Diversifying and adapting, strong vision and execution
- Having a clear growth strategy. Emphasis on servicing and growing key accounts
- Strong leaders, strong client relationships, strong business development, acquisitions
- The company environment which accepts new challenges with the changing market conditions
- The company culture and quality of employees drove growth

Suppliers who cited strong, positive corporate focus tended to be larger, older, and generalist. This was mentioned twice as often by full service research suppliers than by specialists, and twice as often by larger full service suppliers (more than 20 employees) than smaller ones. Suppliers that had been operating for 20+ years were also twice as likely to mention it as younger supplier companies, and companies with 101-500 employees were twice as likely to mention it as companies with 21 to 100 employees.

These findings may not be surprising because one might assume that older companies would be larger, and larger companies would have a bigger and more visible strategy apparatus. However, suppliers who significantly exceeded their organization's goals were less likely to name strong, positive corporate focus as a driver of revenue. This may suggest that a visibly strong, positive corporate focus may be more characteristic of a struggling organization, but it also suggests that it is characteristic of an organization that is dealing with its struggles successfully.

REASONS WHY RESEARCH BUDGET/REVENUE DECLINED

For buyers, budget decreases were mostly related to corporate cost-cutting, often in response to poor corporate performance, and sometimes related to a shift away from traditional – or any – customer

research. Suppliers who lost revenue took the brunt of this shift, and poor market performance compounded itself with further losses.

REASONS WHY RESEARCH BUDGET/REVENUE DECLINED

	Buyer	Supplier
Corporate cost-cutting/management	37%	1%
Shift from research/traditional research	23%	35%
Budget decrease because costs decreased	22%	16%
Poor market performance	19%	28%
Corporate focus on profitability/efficiency	16%	1%
Economy/business cycles	7%	17%
Other	5%	14%

Corporate Cost-Cutting/Management

According to buyers, the key factor directly driving research budget decreases was corporate-driven cost-cutting and cost management.

In your opinion, why was there a budget decline?

- Budget cuts due to unmet financial goals
- Due to cost constraints and company performance
- Budget cuts related to acquisition
- Budget restrictions from the new CFO
- Company looking for constant cost-cutting opportunities, and research budget is an easy target
- We moved to zero base budgeting
- General trend for all company departments
- Shrinking budgets all around... being asked to do more with less
- Cost cutting, cheaper methodologies
- Budgets tightening, demand is still there which forces us to use more cost-effective methods to complete projects.
- Cost cutting and a re-focusing on harvesting value vs. creating new products and new value
- Cost cutting era ...Therefore the need for cheaper and more agile and intuitive tools rather than standard ways of doing research with large sample sizes and fieldwork

Shift from Research/Traditional Research

One of the main reasons cited by buyers for budget decline was changing priorities within the business which, directly or indirectly, forced a shift away from traditional research.

In your opinion, why was there a budget decline?

- New mgmt. and new philosophy towards marketing spending
- Change of focus – less innovations in pipe line
- Less emphasis on consumer, more emphasis on direct spend (research is seen as indirect spend)
- Fewer projects, more focused marketing effort
- Some new consumer-oriented areas are being created and the money has been relocated
- Use of cheaper solutions and not doing some studies
- We are encouraged to...research less on lower-risk projects, using existing sources and knowledge
- Reduction in large costly trackers and investment in more actionable, timely insights
- Getting smarter at prioritization of key projects – embracing digitization and standard approaches to reduce cost
- ...the shift from “traditional” media to digital ones make some believe that measurement can be done ONLY by cookies/digital identifications. Like research itself is separated from the rest and is too OLD to be able to measure new behaviors.

In part, the shift away from traditional research (or customer research in general) was attributed to its expense and the lack of value placed on it, with some expressing that it was not as useful as valuable or nimble as intuition.

- Business doesn't see as much value in it & is looking for ways to cut costs
- More intuitive decisions required. Less focus on consumer feedback
- Shifted focus to more agile approaches vs. traditional, expensive and slow validation testing

These suppliers see the shift away from traditional research, including the move to DIY solutions.

In your opinion, why was there a revenue decline?

- Clients moving away from primary market research
- Client migration to more reduced methodologies. Reduced in involvement and reduced in scope
- Diminishing emphasis on research value in corporate business, increasing access to DIY research tools
- Client's want speed and agility. Clients are moving to in-house and client-side researchers
- Quick concept test going to DIY
- Client organizations are asking to do more work for less money, increasing reliance on automated tools and price competition
- Industry shifting to automated providers;
- CPG budgets are constricted; clients are experimenting with alternative methods, using big data, or going more on gut
- Marketers taking more functions in-house and taking siloed approach to innovation/NPD (some \$ is allocated to "insights", other budget amounts to "ideation") Many client-side budgets have shrunk and some budget has been transferred into newer solutions which we were not active in
- It's company policy to: 1) reduce cost or projects that don't impact the business 2) Use digital surveys instead 3) use insight from other sources i.e. data analytics, social monitoring report 4) direct feedback from customer through channel "Call center, shop, website"

Budget Decrease Because Costs Decreased

Another key reason for the lowered budget is that costs decreased. Consequently, some insights functions can provide the same value for less money by bringing work in-house or by getting good value without getting more data.

In your opinion, why was there a budget decline?

- We are / need to get smarter about where we spend and what we in-house
- Movement from full service vendors to DIY
- Moving NPS tracking from full service provider to DIY solution
- Several factors – 1) choosing to use internal resources and increase individual skillsets, 2) choosing to be more selective on research projects instead of fielding every request to do research.
- Optimization of the data sources we are using
- Striving to get more value out of existing tools and internal resources.
- Some internal tools have enabled us to get answers at no additional cost when hiring agencies

Increased competition, coupled with poor financial performance by buyer companies, increased pressure to lower fees, and the growth of low cost competition drove them down further or forced the supplier to lose business. While some acknowledged that competitors have a true cost advantage, suppliers who are losing revenue also doubt that cheaper competitors are delivering true value.

- Declines can be attributed to: heightened competitive pressure on pricing, a continued procurement buying practice (lowest price versus value skill set/expertise), competitive research brokers, DIY and disappointing strategic partnerships/ collaborations
- Clients have turned to conducting research on their own and/or have more limited budgets (because someone in charge of the budget knows they can do it online for \$5,000, so that should be the maximum they should spend)

Poor Market Performance

Some buyers directly attribute their budget decline to poor performance by their company, and either the inability to invest in insights or the lack faith that investing in insights can turn things around.

- Sales declines led to severe reduction of marketing research spending to help improve divisional profitability
- Poor management in general

- The competitive environment of research providers is growing with low-cost providers stealing share in the short term.
- Expertise has lost its value. Age and Experience are a handicap. Clients are junior and unexperienced. They know nothing about 'true qualitative.'
- Creative advertising agencies have been...selling themselves as able to provide strategic guidance and insights-based strategies for new products and branding...their decks are much prettier and have exciting language, and focus on the end results (the ad, what the consumer will see, and the finished product). We hear that clients didn't realize at the time that...they were actually skipping or short-changing strategy...

- Because our business is declining in volume and revenue, so all groups are trimming year over year. This just means I need to get a new job in the next 18 months. :)

Some suppliers also cited their poor decisions, execution, and performance.

In your opinion, why was there a revenue decline?

- Poor senior management decisions has led to significant reduction in thought leadership via buyouts and layoffs, leaving a soft middle of non-specialists needed to complete projects on time and engage with clients to meet their immediate (to say nothing of future) needs.
- Lack of innovation and merger that was not fully implemented
- Moving away from reliance on quantitative analysis to qualitative interviews
- Change of management resulted in a new proposal and pricing procedure. Have not had as good a hit rate since the change.
- Pricing adjustments brought sales down
- Wrong strategy
- Lack of clear product strategy. Current analytics trends are largely ignored
- Too much internal focus, changing client environment

Corporate Focus on Profitability/Efficiency

In some cases, buyers' reduced budgets were the result of a corporate focus on profitability and/or on productivity and efficiency.

- Margin pressures, more cost efficient solutions available
- Increased pressure for efficiency coupled with the adoption of more agile and effective methods. Also, reduction in large costly trackers and investment in more actionable, timely insights
- Change of directive in the area that focuses more on exploiting internal resources

Economy/Business Cycles

For some suppliers, revenue decreases and revenue increases are cyclical.

- Natural feast or famine nature of a small consultancy firm
- Hoping it's just a slow start
- Our sales are closely related to electoral cycles

WHAT, IF ANYTHING, WILL BE DONE TO ADDRESS DECLINE

Some buyers accept the budget decline, either as a logical or desired benefit of advances in technology or as unavoidable outcome of company performance or strategy. Others feel a call to action, either to publicize the value of their work to regain budget or

to revise their strategies so that they can maintain value with reduced resources. Suppliers plan to address revenue loss through proactive marketing and sales activity and improving alignment and engagement with clients.

What, if anything, will be done to address decline	Buyer	Supplier
Continue Business As Usual	22%	12%
Improve Insights Operations	22%	14%
Promote and/or Improve Value Delivered	20%	11%
Reduce Costs/Projects/Project Size	19%	4%
Strengthen Strategic Focus	16%	17%
Increase Internal Capabilities	11%	0%
Partner strategies	8%	3%
Improve Client Alignment/Engagement	8%	22%
Improve Marketing & Sales	4%	29%
Improve Offerings Portfolio	0%	17%
Other	7%	3%

Continue Business As Usual

When buyers' budgets are reduced, that may be a negative development for the insights and analytics industry overall, but it is not necessarily a situation that needs to be addressed by the buyer. Several buyers explained that increases in efficiency mean that they can do the same work for less money, and a few claimed to do better work. Among those whose budgets increased, however, there were also claims of increasing efficiency, but with the goal of doing more work rather than the same work.

- No need to address. Increasing efficiency is a good thing
- Nothing, we create better impact with less cost!
- It's appropriate to be reducing spend in an era where machines should be speeding up and simplifying our work

Other buyers were less positive or proactive about why they intended to continue business as usual. Some indicated that they would simply wait for things to improve, and a few others who waited had already seen improvement. Others said they would look for ways to do more with less, whereas others expressed powerlessness, particularly those who were not key budget decision-makers or influencers. Perhaps it is to be expected that less influential staff would have less to say about strategy, but the opposite seemed to be true in companies with increased budgets: they knew the strategy and praised the leaders.

- This may change in the next years
- Nothing can be done, except for looking for alternative solution
- Will continually look for the right research plan at the right cost.
- It is a global direction, nothing I could do to change the process

For suppliers with declining revenue, continuing business as usual is a risky approach, yet that is the approach some are taking.

- Wait patiently; these kinds of cycles occur regularly
- Nothing needed or planned at this time
- Not much we can do as client holds the purse strings
- Enjoy the time off!
- Nothing. Happy to downsize and focus on children
- Assassinate the government?? Seriously, British politics are wrecking small businesses here. We feel pretty hung out to dry.



Improve Insights Operations

A key focus for buyers whose budgets declined will be improving their insights operations, either by increasing the impact they have, streamlining or changing what they already do, bringing more activities in-house, or taking a harder look at how they spend their budget.

What, if anything, will you do to address this budget decline?

- Focus on quality projects that can unlock growth (value for the business)
- Add even more value through consumer insights
- Use insights to fuel growth opportunities
- I will accelerate use of tech enabled tools. Budgets will keep coming down but not impact.
- Look for innovative tools to more effectively utilize the budget
- Automated research to replace researchers
- I believe research costs should go down as technology enables less overhead costs
- Data sources should be synchronized to deliver more impact per used unit
- Opt for more free tools developed internally, go for smaller scale of research, work with internal team and use insights from social media/digital more often
- DIY
- Manage more projects myself vs. managing suppliers managing the projects
- We are bringing more in house to reduce costs while retaining the ability to generate insight
- More in-house and same number of projects but rethinking scope and budget needed. Ensure tools are agile to meet needs
- Find better, faster, cheaper methods of research, bring more of the analysis and work in-house instead of hiring full-service providers
- We are doing more with less; finding lower cost alternatives, using more in house resources. Staying local, to avoid travel expenses related to research
- Streamline. Scrutinize every dollar spent. Less is more approach.
- We actively seek new approaches to reduce the expense profile while increasing our impact and agility.
- Looking to train team. Conduct audit on all research programs

Some suppliers also link improved operations to reversing the decline, adding value or changing their processes.

- Bring in more value to the services provided and showcase them to client.
- Adding value to our services without increasing cost
- We have become more agile, shortening the time it takes us to complete projects and deliver insights.
- Organizationally, we are transforming our data systems and automating reporting to gain efficiency

Promote and/or Improve Value Delivered

Similar to buyers who linked budget increases to awareness of the value they provide, buyers with reduced budgets see promoting their value as a way to regain budget.

What, if anything, will you do to address this budget decline?

- Explain that the research mix is the only way to measure, understand and reduce business risks
- Generating internal projects, seeking to show the shortcomings that exist when having a reduced budget and the benefits that could occur
- Monetize the Value of Insights
- Try to show the power of insights with resources we have in order to develop an appetite for more.
- We are meeting with the new teams to explain our scope and encourage them to sponsor research projects.
- Continue to prove the value of research and insight, while also acknowledging that we need to use lower cost methods where it makes sense to do so
- Continue to emphasize the ROI of projects, drive more efficiency out of projects being delivered in order to maintain impact.

Some suppliers also see promoting the value of good research, in general, as a way to reverse their fortunes.

- Continue to educate...There is a place for online, but it isn't the ONLY answer for all objectives.
- Continue to push for importance of quantitative research to provide broader view of marketplace and customers.
- Gauging if we should compete with such strategies directly or reinforce the notion that they are only a complement of a well-rounded project

Reduce Costs/Projects/Project Size

In response to the budget decline, some buyers will reduce the number of projects they conduct or the resources that are put into them.

- No "nice to have" research will be commissioned, constantly looking at ways to save
- Prioritize the most important projects
- Prioritize and say no to things. Try to be more cost efficient in what we do to enable more activity.
- Be more resourceful (make more with less), in house approach more strategic projects... focus in game changer innovations
- Less "big" research, more "in-house" low/no direct budget projects, more analyses in house
- Continue to drive efficiencies, spot synergies within the org

Strengthen Strategic Focus

Some buyers emphasized that they will need to focus more on doing things differently or managing differently.

- Continue to push the innovation to get to insights faster
- To look for internal and creative ways to make research
- Moving to agile suppliers allows us to cut down on costs and money as well as utilizing suppliers like Knowledgehound to do more with what we have already
- Change in focus
- Management will address and hopefully get us back on track
- Changing business model and adding in new services
- Develop products that are more repeatable (as opposed to custom every time), more “package-able”
- We are focusing on our core expertise, productizing some of our specialties, and we’ve replaced our entire business development team.
- Continue to monitor and tweak pricing
- Reduce our company size, and be more proactive in business development

Suppliers also felt that more focus on strategy could help them reverse the tide, echoing the thoughts of suppliers whose revenue increased.

Increase Internal Capabilities

Some buyers felt that increasing capabilities, rather than streamlining or migrating them inhouse, would help their situation (“Will drive more efficiency going forward incl. in-sourcing some capabilities.”)

Improve Client Alignment/Engagement

One of the keys for suppliers to stem the revenue decline is to increase their focus on the customer and customer engagement with them, or in some cases, reducing engagement with unprofitable clients.

What, if anything, will you do to address this revenue decline?

- Deepen relationships with current clients.
- Training of junior associates to develop relationships with the next generation of client-side insights buyers
- Cross sell, present new solutions to existing clients.
- Re-think our engagement process
- We get on the road, visit clients and remind them what we do.
- Get everyone to spend more time with clients
- Look for more opportunities that fit neatly into automated solutions.
- Refine our goals to better meet client needs
- We are moving to keep our sound methodology and research but on a faster timeline to meet client needs.
- Offer cheaper solutions to match budget needs.
- Ensure different options available for each project to try and meet client’s budgets. Prove how our solutions can impact business results.
- Scale back on certain projects that require more elaborate resources
- Try and steer clear of projects for clients who do not understand or acknowledge the challenge involved.

Improve Marketing & Sales

Some ways that suppliers will address the decline focus directly on marketing and sales; some will emphasize expanding the client base, and some will look to increase business from existing clients.

- Increasing marketing activity, including improving website, greater outreach, using LinkedIn and writing articles
- We are in the process of re-organizing our business development function and amplifying our marketing
- We are building more leads databases and trying to find ways to increase the leads we get so that we have a broader pool of clients
- We have diversified the verticals we serve. Continue to invest in new business efforts to ensure we have a healthy pipeline of new clients.
- Get more business from within current client companies, as well as looking at other industries to pursue
- Promoting core specialties to develop a baseline business, continued to explore strategic collaborations, discerning implementation of new tech, trade-marking and starting a research coaching practice for DIYers, and more active digital advertising.

Improve Offerings Portfolio

Similar to buyers who linked budget increases to awareness of the value they provide, buyers with reduced budgets see promoting their value as a way to regain budget.

What, if anything, will you do to address this revenue decline?

- Working to diversify our portfolio and the verticals in which we operate
- Try to suggest more “outside” the box projects
- Increase our product suite and boost marketing and sales
- Add new products and services and technologies
- Launch new and innovative techniques, methodologies and forms of technology
- Diversify sources of income, get into consulting and data analytics.
- Refocus services portfolio
- Try to add research expertise
- Look for new capabilities whose help client budget and increase our revenue

APPENDIX LUMASCAPE INDEX

The following tables can serve as your index for the GRITSCAPE. Note they only include the small subset of companies we selected to be representative of each category. Our selection was based on attempting to show diversity of companies based on

number of respondents answering, size, geography, and in the case of buyers, business sector. The Supplier list is far larger because of the granularity of categories and depth of responses to choose from.

GRITSCAPE INDEX TABLE 1: SUPPLIERS

Company Name	Lumascape Categories	Kingdom
Metamatrix	Analytical services provider	Analyserv
The NPD Group	Analytical services provider	Analyserv
NAILBITER	Analytical services provider	Analyserv
Pathmatics	Analytical services provider	Analyserv
dunnhumby	Analytical services provider	Analyserv
SKIM	Analytical services provider	Analyserv
Interbrand	Brand strategy consultancy	Brandstrategia
Hall & Partners	Brand strategy consultancy	Brandstrategia
Compass Marketing Innovation LLC	Brand strategy consultancy	Brandstrategia
THE PLANNING SHOP	Brand strategy consultancy	Brandstrategia
Concentrix Corp	Customer or user experience consultancy	Cxiaconsult
Potentiate	Customer or user experience consultancy	Cxiaconsult
CX Workout	Customer or user experience consultancy	Cxiaconsult
Heart+Mind Strategies	Customer or user experience consultancy	Cxiaconsult
AskingCanadians	Data services company	Datania
RIWI Corp.	Data services company	Datania
Embee Mobile	Data services company	Datania
Karna AI	Deliver solutions for collection and analysis of unstructured data	Unstructured Territories
LivingLens	Deliver solutions for collection and analysis of unstructured data	Unstructured Territories
IBM	Deliver solutions for collection and analysis of unstructured data	Unstructured Territories
Remesh	Deliver solutions for collection and analysis of unstructured data	Unstructured Territories
Acupoll Precision Research, inc.	Full-service research provider	Fullservicia
Phoenix Marketing International	Full-service research provider	Fullservicia
Directions Research	Full-service research provider	Fullservicia
AMC Global	Full-service research provider	Fullservicia
MMR Research Associates	Full-service research provider	Fullservicia
Join the Dots	Full-service research provider	Fullservicia

Company Name	Lumascape Categories	Kingdom
Maru group	Full-service research provider	Fullservicia
Catalyx	Full-service research provider	Fullservicia
Kantar	Full-service research provider	Fullservicia
Dig	Full-service research provider	Fullservicia
Hotspex	Full-service research provider	Fullservicia
InSites Consulting	Full-service research provider	Fullservicia
GfK	Full-service research provider	Fullservicia
MetrixLab	Full-service research provider	Fullservicia
Relevant Insights	Full-service research provider	Fullservicia
Rockbridge Associates	Full-service research provider	Fullservicia
Azure Knowledge Corporation	Full-service research provider	Fullservicia
Ipsos	Full-service research provider	Fullservicia
BuzzBack	Full-service research provider	Fullservicia
Nielsen	Full-service research provider	Fullservicia
DE LA RIVA GROUP	Full-service research provider	Fullservicia
Hanover Research	Full-service research provider	Fullservicia
Infotools	License analytical tools and/or platforms	Analytool
Gavagai	License analytical tools and/or platforms	Analytool
mTAB	License analytical tools and/or platforms	Analytool
Market Logic Software	License analytical tools and/or platforms	Analytool
Dapresy	License analytical tools and/or platforms	Analytool
Currrnt	License online qualitative tools and/or platforms	Qualitoolia
Fuel Cycle	License online qualitative tools and/or platforms	Qualitoolia
Discuss.io	License online qualitative tools and/or platforms	Qualitoolia
FocusVision	License online qualitative tools and/or platforms	Qualitoolia
Vision Critical	License online qualitative tools and/or platforms	Qualitoolia
itracks	License online qualitative tools and/or platforms	Qualitoolia
AYTM	License quantitative data collection tools and/or platforms	Quantitoolia
Qualtrics	License quantitative data collection tools and/or platforms	Quantitoolia

Company Name	Lumascope Categories	Kingdom
response:AI	License quantitative data collection tools and/or platforms	Quantitoolia
Zappi	License quantitative data collection tools and/or platforms	Quantitoolia
Toluna	License quantitative data collection tools and/or platforms	Quantitoolia
Methodify	License quantitative data collection tools and/or platforms	Quantitoolia
SurveyMonkey	License quantitative data collection tools and/or platforms	Quantitoolia
Survata	License quantitative data collection tools and/or platforms	Quantitoolia
1Q	License quantitative data collection tools and/or platforms	Quantitoolia
Wunderman Thompson	Marketing communications consultancy	Marcomia
Think Shift	Marketing communications consultancy	Marcomia
System1 Group	Marketing communications consultancy	Marcomia
Keen as Mustard Marketing	Marketing communications consultancy	Marcomia
Big Chalk Analytics	Marketing communications consultancy	Marcomia
Ark Advisors	Marketing communications consultancy	Marcomia
Protobrand	Offer nonconscious measurement tools and services	Neuroland
Irrational Agency	Offer nonconscious measurement tools and services	Neuroland
TapestryWorks	Offer nonconscious measurement tools and services	Neuroland
CoolTool	Offer nonconscious measurement tools and services	Neuroland
NeuroSpot Limited	Offer nonconscious measurement tools and services	Neuroland
Sentient Decision Science	Offer nonconscious measurement tools and services	Neuroland
Polynom	Other	The Free Cities of Niche Protectorates
Ugam Solutions	Other	The Free Cities of Niche Protectorates
Informa	Other	The Free Cities of Niche Protectorates

Company Name	Lumascope Categories	Kingdom
Rival Tech	Other	The Free Cities of Niche Protectorates
Spalding Goobey Associates	Other	The Free Cities of Niche Protectorates
Veylinx	Product innovation consultancy	Innovatia
Consensus Point	Product innovation consultancy	Innovatia
EMI Research Solutions	Provide access to sample and/or recruit for studies	Samplania
Netquest	Provide access to sample and/or recruit for studies	Samplania
L&E Research	Provide access to sample and/or recruit for studies	Samplania
Internet Research Bureau	Provide access to sample and/or recruit for studies	Samplania
Precision Sample	Provide access to sample and/or recruit for studies	Samplania
Qualitative Intelligence	Qualitative field services company	Fieldservicia
Focus Pointe Global	Qualitative field services company	Fieldservicia
Happy Thinking People	Strategic insights consultancy	Strategiaconsult
The Engine Group	Strategic insights consultancy	Strategiaconsult
Sklar Wilton & Associates	Strategic insights consultancy	Strategiaconsult
TriggerPoint	Strategic insights consultancy	Strategiaconsult
Gongos	Strategic insights consultancy	Strategiaconsult
Shapiro+Raj	Strategic insights consultancy	Strategiaconsult
Isobar	Strategic insights consultancy	Strategiaconsult
M/A/R/C Research	Strategic insights consultancy	Strategiaconsult
LRW	Strategic insights consultancy	Strategiaconsult
Mizzouri LLC	Strategic insights consultancy	Strategiaconsult
Kelton Global	Strategic insights consultancy	Strategiaconsult
segmedica	Vertically focused specialized research company	Specios
Cascade Insights	Vertically focused specialized research company	Specios
Esalent	Vertically focused specialized research company	Specios
Proteus BI	Vertically focused specialized research company	Specios
Infomine Healthcare Research	Vertically focused specialized research company	Specios
PRS IN VIVO	Vertically focused specialized research company	Specios

GRITSCAPE INDEX TABLE 2: BUYERS

Company Name	Lumascap Categories	Kingdom	Company Name	Lumascap Categories	Kingdom
Away	"Voice of the consumer" within our organization.	Cxia	Air Canada	In-house research provider to internal clients in our organization.	Internalia
Mars	"Voice of the consumer" within our organization.	Cxia	Thermo Fisher Scientific	In-house research provider to internal clients in our organization.	Internalia
PepsiCo	"Voice of the consumer" within our organization.	Cxia	Moove	In-house research provider to internal clients in our organization.	Internalia
Kellogg	"Voice of the consumer" within our organization.	Cxia	Swedish Match	Other	The Free Cities of Niche
Disney	"Voice of the consumer" within our organization.	Cxia	Visa	Other	The Free Cities of Niche
SC Johnson	"Voice of the consumer" within our organization.	Cxia	Reckitt Benckiser	Research outsourcing department within our organization.	Outsourciana
The Coca-Cola Company	"Voice of the consumer" within our organization.	Cxia	Volkswagen	Research outsourcing department within our organization.	Outsourciana
Aflac	"Voice of the consumer" within our organization.	Cxia	Lowe's	Research outsourcing department within our organization.	Outsourciana
procter & gamble	"Voice of the consumer" within our organization.	Cxia	NBCUniversal	Strategic insights consultants within our organization.	Strategia
UPS	"Voice of the consumer" within our organization.	Cxia	McDonald's	Strategic insights consultants within our organization.	Strategia
Pernod Ricard	"Voice of the consumer" within our organization.	Cxia	Netflix	Strategic insights consultants within our organization.	Strategia
Expedia	Data analysts within our organization.	Analytica	Clorox	Strategic insights consultants within our organization.	Strategia
Takasago Intl. Corp. USA	Hybrid of these functions.	Hybridorea	HomeAway Inc.	Strategic insights consultants within our organization.	Strategia
AkzoNobel	Hybrid of these functions.	Hybridorea	Hulu	Strategic insights consultants within our organization.	Strategia
YouTube – Ads Marketing/ Video Solutions	Hybrid of these functions.	Hybridorea	Toyota	Strategic insights consultants within our organization.	Strategia
J&J	Hybrid of these functions.	Hybridorea	Home Depot	Strategic insights consultants within our organization.	Strategia
Pfizer	Hybrid of these functions.	Hybridorea	unilever	Strategic insights consultants within our organization.	Strategia
dyson – GB	Hybrid of these functions.	Hybridorea	Mondelez	Strategic insights consultants within our organization.	Strategia
Electronic Arts	Hybrid of these functions.	Hybridorea	Twitter	Strategic insights consultants within our organization.	Strategia
Heineken	Hybrid of these functions.	Hybridorea	Wendy's	Strategic insights consultants within our organization.	Strategia
Citibank	Hybrid of these functions.	Hybridorea	Nestle	Strategic insights consultants within our organization.	Strategia
Kimberly-Clark corporation	Hybrid of these functions.	Hybridorea	GM	Strategic insights consultants within our organization.	Strategia
Goldman Sachs	In-house research provider to internal clients in our organization.	Internalia	PRS IN VIVO	Vertically focused specialized research company	Specios
CBSi	In-house research provider to internal clients in our organization.	Internalia			



APPENDIX DATA CLEANING

To ensure the quality of the GRIT data overall and the fairness of the GRIT Top 50 and GRIT Top 25, a set of flags were developed and applied. These varied in severity from “instant death” to “mild symptoms”, and respondents were considered case-by-case according to their set of flags. The following issues were considered when evaluating whether each survey was legitimate, unique, and taken in good faith:

- Responses that indicated they were not members of the target Insights & Analytics industry
- Incomplete survey and degree of completion
- Questionable open-end responses (consistently blank or value-free, patently ridiculous, etc.)
- Number of times IP address appears in sample
- Context in which they mentioned their own company
- Repetitive answers
- Position in organization relative to their answers
- Extremely short or long survey duration
- Overall pattern of responses compared to others
- Other contradictory entries

Although some of these are “mild symptoms” of disingenuousness, each respondent was evaluated in terms of the kind of syndrome, if any, their symptoms indicated, and a decision was made as to whether including them would infect the sample. In addition to the respondent level, action was taken at the response level. To ensure the legitimacy of the GRIT Top 50 section, duplicate responses from the same individual were removed, uninterpretable or ambiguous names were removed, and so on. To ensure accurate counting, company names were standardized, coded as independent brands as well as rolled up to parent organization, and duplicate counting of the same entities from individual respondents was eliminated. Finally, of course, if an entire survey was evaluated as “too sick”, those votes were removed entirely.

All told we removed close to 1,000 cases that we felt did not meet our quality standards.



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As the established expert in digital market research data, Dynata optimizes market research through its data assets, innovative solutions, and consultative services to drive better business decisions and results for companies and agencies around the world. Founded in 1999, we were pioneers in originating online data sampling and created the first B2B panel, and continue to provide robust research data through rigorous first-party consumer and B2B data collection for more than 3,000 clients worldwide through our 11+ million panelists in more than 40 countries. As a trusted provider of comprehensive research services and data solutions – such as survey programming and optimizing sampling, and feature-rich automated research, integrated data, and advertising measurement – we enable powerful insights for competitive advantage.



Gen2 Advisory Services, LLC

www.gen2advisors.com

Gen2 Advisors is consulting and advisory firm supporting the insights industry. We support corporate researchers by identifying new suppliers, tools, technologies, and methodologies to support the changing nature of marketing, budgets, and new information opportunities. Suppliers can look to us for guidance on the impact of industry trends and market opportunities.



Idea Highway

www.id-highway.com

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



Infotools

www.infotools.com

Infotools is an award-winning software and services provider, with particular expertise in processing, analyzing, visualizing and sharing market research data. We have almost three decades of experience working with both in-house corporate insights teams as well as market research agencies. Our powerful cloud-based software platform, Infotools Harmoni, is purpose-built for market research data. From data processing through to analysis, reporting, visualization, dashboards, distribution, and data alerts – Harmoni is a true 'data-to-decision-making' solution. We also offer data experts who can help with things like research design and management, data design and organization, and insights discovery, analysis, visualization and reporting.



Keen As Mustard

www.mustardmarketing.com

Keen as Mustard is a full service London, UK based marketing agency that specialises in marketing for data, research & insight. They have in house capabilities for PR, branding, websites, content marketing and design.

KnowledgeHound

KnowledgeHound

www.knowledgehound.com

KnowledgeHound features the first search Driven Analytics platform designed specifically for customer insights so you can instantly find the exact answers you need when it matters most. Turn your customer data into a source of information that can continually adapt to help solve ongoing business challenges. KnowledgeHound's intuitive visualization engine allows anyone to create charts and tables on the fly so your customer data can be used to influence more decisions.

LIGHTSPEED

Lightspeed

www.lightspeedresearch.com

Quality-seeking researchers, marketers and brands choose Lightspeed as their trusted global partner for digital data collection. Our innovative technology, proven sampling methodologies and operational excellence facilitate a deep understanding of consumer opinions and behavior. With 700 employees working in 14 countries, we maximize online research capabilities. We empower clients by revealing information that is beneficial, providing clarity and research data that illuminates. Headquartered in Warren, New Jersey, Lightspeed is part of Kantar, one of the world's leading data, insight and consultancy companies. For more information, visit www.lightspeedresearch.com.

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Master of Science in Marketing Research
Broad College of Business

Michigan State University

www.marketing.broad.msu.edu/msmr

The Broad Master of Science in Marketing Research is a specialized graduate-level degree for people who want to build or accelerate their careers in marketing research. There are two program formats: a one-year, full-time program that starts in January, and a part-time, 21-month hybrid program that is mostly online, with several on-campus sessions.

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www.newmr.org

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OdinAnswers

www.odinanswers.com/about

OdinAnswers is a customer experience analytics platform for digital-first companies to better understand their customers. By finding the hidden relationships between customers' thoughts and feelings and business performance data, OdinAnswers uses natural language processing, advanced statistical modeling and machine learning to help its customers win the insights arms race. To learn more, visit <http://www.odinanswers.com>.



OfficeReports

www.officereports.com

OfficeReports is a powerful analytical reporting platform fully integrated in Microsoft Office that automates the process from data to final reports and presentations: • OfficeReports Analytics automates cross-tab and stat-test processes in Excel • OfficeReports Link populates data from Excel into Infographics in PowerPoint



Potentiate

www.potentiate.com

We're an award-winning data intelligence company, bringing to light what your customers, employees and the marketplace see in you and your others. Our priority is working with you to accelerate your business to the next level. Our consultative approach means you can rely on us to be focussed on outcomes. When working with Potentiate, you can expect worldclass technology, coupled with smart research design and consultancy. We're dedicated to understanding your business and your challenges and we'll tap into our full suite of services to ensure you get the answers you need.



Stakeholder Advisory Services

www.stakeholderadvisory.com

Stakeholder Advisory Services partners with its clients to incorporate insights of key stakeholders within two critical areas for business success – ensuring alignment of the organization's strategy and services with market needs and the management of reputational risk. To achieve its mission, Stakeholder Advisory Services provides a range of consulting services in reputation assessment, key customer relationship management, development of customer advisory boards and business transformation for the market insights industry.



Market Research Institute International

blog.mrii.org/about-us

Our mission is to offer global, market-leading continuing education programs for the practice of market research and insights. We pursue that mission by developing and delivering online courses designed to fulfill the core market research educational needs of individuals and companies worldwide. Our courses are written and continually updated by subject matter experts from across the research industry, and they are designed to meet the certification requirements of major national and international professional and industry associations.

COMMENTARY PROVIDERS



AYTM

www.aytm.com

AYTM is a market intelligence solution that is so advanced, it's easy. Our team of research experts offers a full range of quantitative and qualitative services, providing as much or as little assistance as you need. AYTM's proprietary panels provide best-in-class levels of trust, quality, speed, and feasibility, with access to over 25 million consumers in 26 countries, along with real-time pricing, guaranteed delivery time, and blazingly fast turnaround. Try our Personality Radar for quickly creating powerful customer personas, advanced Max Diff, and Competitive Topography for animated 3D mapping of customers' brand perceptions.



Bloomfire

bloomfire.com

Bloomfire's Insights Platform helps teams curate and share their research and knowledge with the stakeholders who need it to make business decisions. The platform's AI-powered search and multiple levels of categorization make it easy for users to find exactly what they're looking for: even words spoken in a video. And thanks to the software's mobile-friendly design, all platform users can access the information they need, whenever they need it.



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www.civi.com

Civicom® is the global leader in facilitating web IDIs and focus groups worldwide. Our suite of services include an online bulletin board solution, a mobile insights app for mobile qualitative research, mobile ethnography, and mobile or website usability testing; we also provide respondent recruitment, translation and transcription services, CCam focus™ 360 in-location video streaming services and an intuitive online platform for audio and



Delvinia-Methodify

www.methodify.it

Methodify is an automated market research platform that's changing the way business decisions are being made. It enables marketers and researchers to automate their research process and gain consumer insights in 24 hours or less.



Discuss.io

www.discuss.io

Discuss.io enables live video conversations with on-demand, global recruitment, and end-to-end service. Unearth and share consumer insights with your team and across your company, quickly and easily. Make better business decisions and drive innovation by engaging with consumers through real-time conversations. Today, Discuss.io is powering consumer closeness through Consumer Connection at many of the world's leading brands. The company is headquartered in Seattle, WA, USA. Please visit www.discuss.io for more details.



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Fuel Cycle

www.fuelcycle.com

Fuel Cycle is a mobile-first market research and community intelligence platform for supercharging the relationship between brands and customers. From discussion boards and live chats to gamification and rewards management, Fuel Cycle offers an easily customizable and robust solution for brands and businesses to build high-impact online experiences for their customers.



Gutcheck

www.gutcheckit.com

At GutCheck, we pioneered agile market research to provide our clients with actionable answers and insights, globally, at the speed of their business. Our team of full-service agile research experts—experienced in multiple tried-and-true methodologies, not just agile ones—uses our online qualitative and quantitative platform to help clients make more confident business decisions by connecting them with their target consumers more often and earlier on in development.



Insight Platforms & What Next Strategy

insightplatforms.com

Insight Platforms is the specialist directory and learning hub for insight tech, spanning market research, UX, CX, social and digital analytics. It covers more than 750 software and data tools for the modern researcher, and publishes articles, ebooks and videos from thought leaders on topics from artificial intelligence to the transformation of insight teams. Sister company What Next Strategy & Planning provides consultancy to brands, agencies and tech providers.



LivingLens

livinglens.tv

LivingLens is the friendly tech that enables richer insight and greater business impact. Working with the world's best brands, insight specialists and technology businesses we turn video (and other multimedia) into valuable insight. Our leading video intelligence platform enables the capture of content, the extraction of meaningful data within that content, clever ways to analyze that data using AI and machine learning, and easy ways to build powerful stories that inspire decisions. LivingLens is the biggest climber in this year's GRIT Top 50 Most Innovative companies, climbing a huge 35 positions to #13.



Lucid

luc.id

Lucid is a market research platform that provides access to authentic, first-party data in over 90 countries. Its products and services enable anyone, in any industry, to ask questions of targeted audiences and find the answers they need – fast. These human answers can be used to uncover consumer motivations, increase revenue, and measure the impact of digital advertising. Founded in 2010, Lucid is headquartered in New Orleans, LA with offices throughout the US, EMEA, and APAC.



PRs IN VIVO

www.prs-invivo.com

At PRs IN VIVO, we help global marketers to improve shopper and product experiences by offering insight & consultancy, grounded in the behavioral sciences, to accurately understand, predict & influence consumer choice. We help clients achieve better business outcomes, and improved in-market successes, through the passion & engagement of our teams, our constant pursuit of best-in-class expertise & our trusted, proven, innovative & agile research solutions.



Pureprofile

business.pureprofile.com

Pureprofile is a data and insights business, underpinned by technology. We help brands and media owners identify, connect and engage with more of the people that matter. By capturing declared, first-party data and the formation of deep consumer profiles, businesses gain the ability to segment, target and engage with their audiences for the purpose of research, marketing and advertising. In exchange, consumers receive value for their data, both as an immediate reward and through the delivery of preferred content and personalized experiences.



Survata

www.survata.com

Our mission is to let brands understand their customers after every touchpoint. We leverage honest, online interviews on a massive scale through our Publisher Network to draw out actionable insights for our clients, so every business decision is backed by sound data. Gathering consumer data should respect both the consumer and the brand, something we practice at Survata with our publisher model. By shifting the incentive structure and interview environment, consumers give candid answers and the brand receives quality responses to the questions they care about. Our dedicated team approaches each project with the full-force of our naturally-curious minds, working hard to constantly improve how companies can effectively reach their audiences.



Toluna

www.toluna-group.com

Toluna connects businesses and consumers to deliver real-time insights to companies of all sizes. Powered by the perfect fusion of technology, expertise, and the largest global community of influencers at the ready, we deliver rich, reliable, real-time insights. Our automated consumer insights platform, TolunaInsights™ underpins everything we do and clients can access the platform directly, leverage Toluna's managed services, or create fully-customized digital consumer insights programs via our engineered services. The company operates 24 offices globally.



Zappi

www.zappi.io/web/

By automating manual processes behind market research, Zappi enables clients and agencies to capitalize on the cost and time efficiencies technology unlocks and empower consumer insight by bringing it in the business decision process early and often.

REPORT AND QUESTIONNAIRE CONTRIBUTORS



Tom Anderson – OdinAnswers

Tom H. C. Anderson is founder of OdinAnswers, a Voice of Customer Analytics platform for digital-first companies. By finding the hidden relationships between customers' thoughts and feelings and

business performance data, OdinAnswers uses natural language processing, advanced statistical modeling and machine learning to help its customers win the insights arms race.



Gregg Archibald – Gen2 Advisors

Gregg Archibald is a marketing researcher and strategist dedicated to helping the research industry benefit from the consumer and technology changes that are making the field both more challenging

and more exciting. He is the Managing Partner for Gen2 Advisors – a strategy and consulting firm for the marketing research industry. Gen2 Advisors works with both client side organizations and supplier organizations to capitalize on the changes for business transformation and success. Working with several Fortune 100 organizations has framed the vision of the future in client needs and opportunities.



Melanie Courtright – Dynata

Melanie serves as Executive Vice President of Global Client Services at Dynata. Since joining the company in 2011, Melanie has played an integral role shaping a team that is passionate about research sampling,

quality, and world class client service. She has also played a key role in guiding the product development and thought leadership advances made at the company.



Jeffrey Henning – MRII

Jeffrey Henning, PRC has personally conducted over 1,000 survey research projects. Before founding Researchscape in 2012, Jeffrey co-founded Perseus Development Corporation, which introduced the first websurvey

software, and Vovici, which pioneered the enterprise feedback management category. He also coined the #MRX hashtag on Twitter. Jeffrey is currently volunteering as the president of the Market Research Institute International, a nonprofit providing continuing education to the research industry.



Nelson Whipple – GreenBook

Currently the Senior Research Director for GreenBook, Nelson has more than 30 years' supplier-side experience managing market research teams while directing internal Modeling and Analytics groups focused on

advancing methodologies and processes. Diverse project work has centered around preference analysis and simulations for Fortune 500 companies and foreign equivalents in B2C and B2B markets such as mobile devices, personal financial services, CPG, industrial equipment, telecom services, and retail. His teams have been recognized for work such as developing advanced preference-based simulators and R-based tools for Hierarchical Bayesian estimation.



Ray Poynter – NewMR

Ray is a co-author of The Handbook of Mobile Market Research and The Handbook of Online and Social Media Research, co-founder of NewMR.org,

coeditor of the ESOMAR book Answers to

Contemporary Market Research Questions, a content author for the University of Georgia's Principles of Market Research course and is the Managing Director of The Future Place, a UKbased consultancy, specialising in training.



Jon Puleston – Lightspeed

Jon Puleston is VP of Innovation of Lightspeed a Kantar business, where he heads an international team called QuestionArts specialising in the copy writing and design of surveys and the

development of specialist tools and technology for conducting research in the online and mobile arena.



Sue York – NewMR

Sue is the Chief Curator of NewMR, curating and organising the Festival of NewMR, Radio NewMR and other NewMR online learning events and a Market Research Consultant. Sue has a keen

interest in new methods and techniques and has co-authored a multi-country project that explored respondents.



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.



Christopher Robson – Deckchair Data

Chris is a Partner and Co-Founder of Deckchair Data. He is an acknowledged expert in research methodology and data science, and a frequent speaker on advanced

methods at industry conferences. He strongly believes in the importance of solid methodology combined with a laser focus on the business problem.



Jeffrey Resnick – Stakeholder Advisory Services

Jeff Resnick is founder of Stakeholder Advisory Services (www.stakeholderadvisory.com). Stakeholder Advisory Services partners with its

clients to incorporate insights of key stakeholders within two critical areas for business success – ensuring alignment of the organization’s strategy and services with market needs and the management of reputational risk. Prior to founding Stakeholder Advisory Services, Jeff held a variety of executive roles at ORC International including President of its U.S. Group. Jeff is a political junkie by nature and initiated and managed the CNN|ORC Poll for more than six years. He had the honor of serving as Board Chair for CASRO (now the Insights Association) in 2012.



Larry Friedman, Ph.D. – GreenBook

Larry Friedman, Ph.D. is former Chief Research Officer, TNS North America.

Larry has over nearly 40 years of experience in research and has worked on both the client and research company sides

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



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