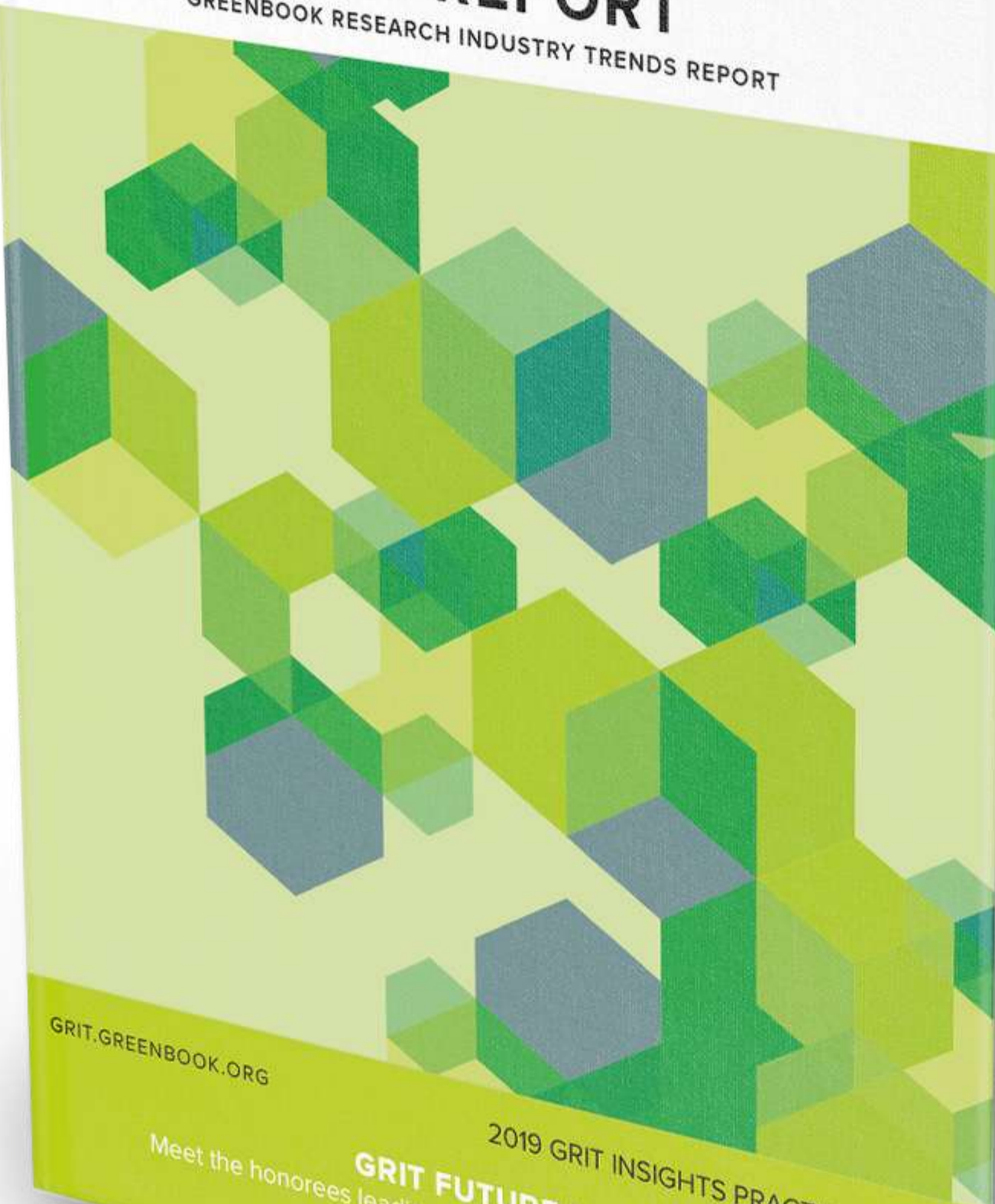




GRIT REPORT

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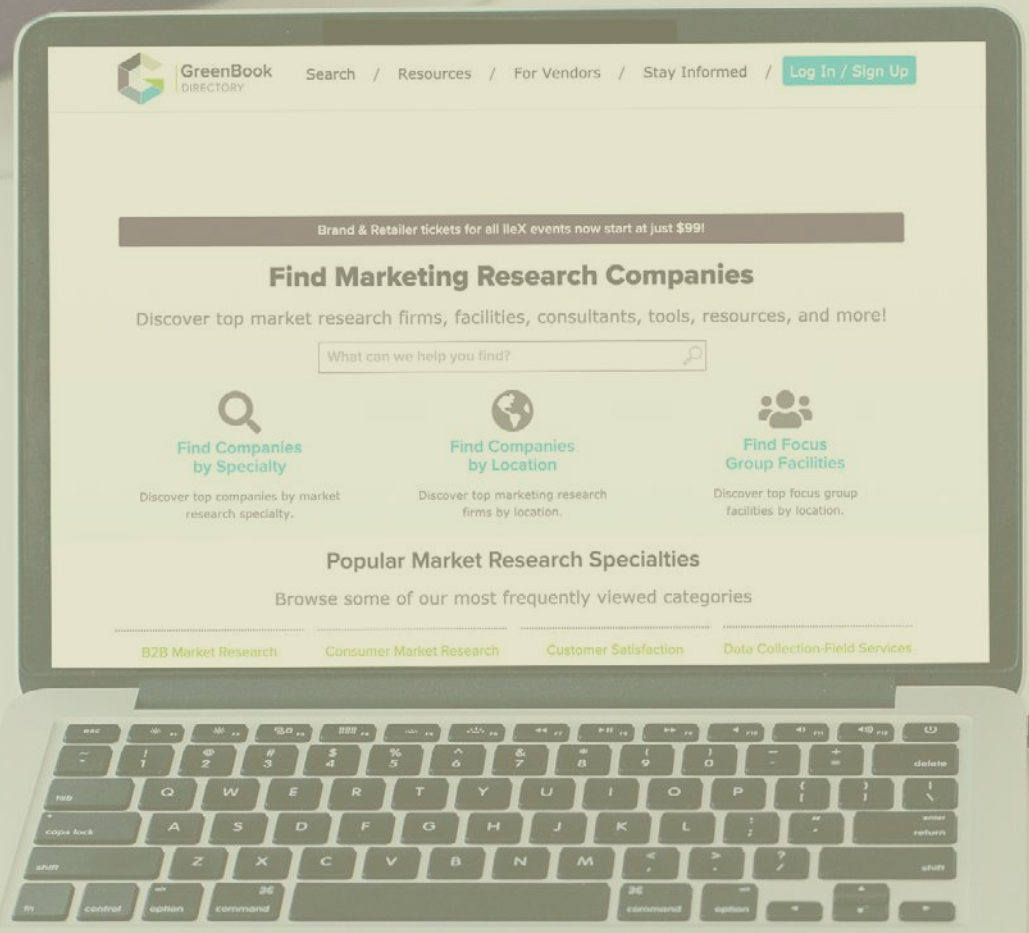


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2019 GRIT INSIGHTS PRACTICE REPORT

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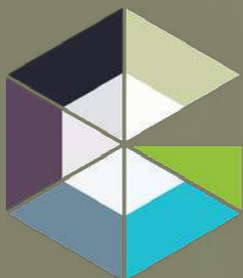
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CONTACTS:

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

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

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

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FOREWORD

Welcome to the 26th edition of the GreenBook Research Industry Trends Report, using data collected in Q4 of 2019. Starting with the previous report, each edition is now focused on particular aspects of our industry. This is the inaugural edition of the GRIT Insights Practice Report. It follows on the GRIT Business & Innovation Report that explored issues of business dynamics and the role of innovation.

In this report we tackle the nuts and bolts of the industry, focusing on fundamental themes related to the practice of research. We explore adoption of emerging methods, use of traditional methods, satisfaction levels with suppliers, drivers of supplier selection, investment priorities, projected spending, evolving role & activities of researchers, in-demand skill sets, buzz topics such as automation or AI, and more.

This edition also features the highly-anticipated GRIT Future List, a crowdsourced and expert-curated honor roll of researchers making a real impact. These are the professionals who should be watched as future industry leaders.

One of the changes we made to this version of GRIT is that we use our industry segmentation model to analyse all results. Although often in the report itself we break down findings based on Buyer vs. Supplier or by region, application of this model will allow for far more consistency across all waves of GRIT and deeper analyses that we plan to make available via other channels later this year.

Perhaps more than ever before, GRIT is emblematic of the value and the challenges of the market research industry. Both the survey as an instrument and the report have to evolve to more effectively meet the needs of its users - professionals like you. We are developing new ways to derive insight from the data and as we respond to changing needs like everyone else, expect to see new features and formats in the near future.

GRIT is a community effort and our authors, commentary contributors, 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, Braingroup Global, Gen2 Advisors, Infotools, Inguo, Insights Association, Knowledgehound, Lightspeed, MRII, NewMR, OfficeReports, and Potentiate. We couldn't pull this off without their generous commitment of time, energy, and expertise.

Enjoy!

LEONARD F. MURPHY

Executive Editor & Producer, GreenBook
lmurphy@greenbook.org (770) 985-4904

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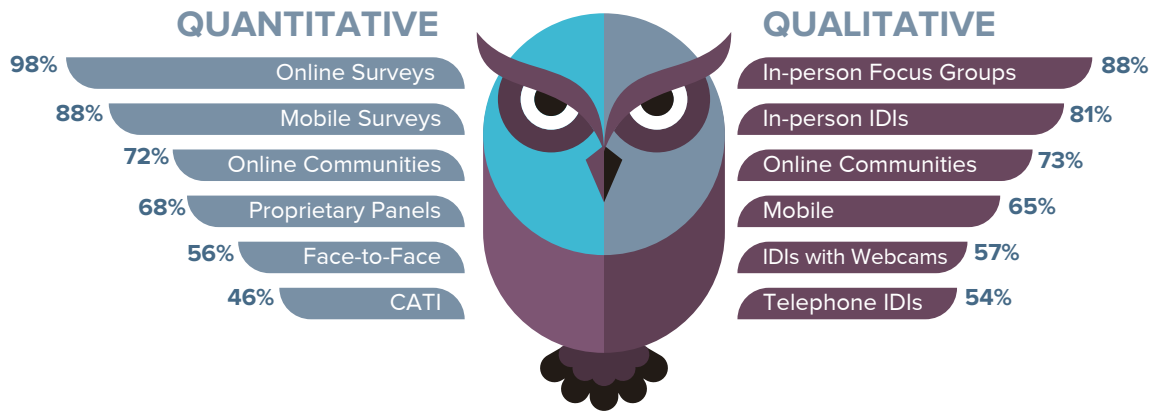
EXECUTIVE SUMMARY



BUYER USE OF QUANT & QUAL METHODOLOGIES

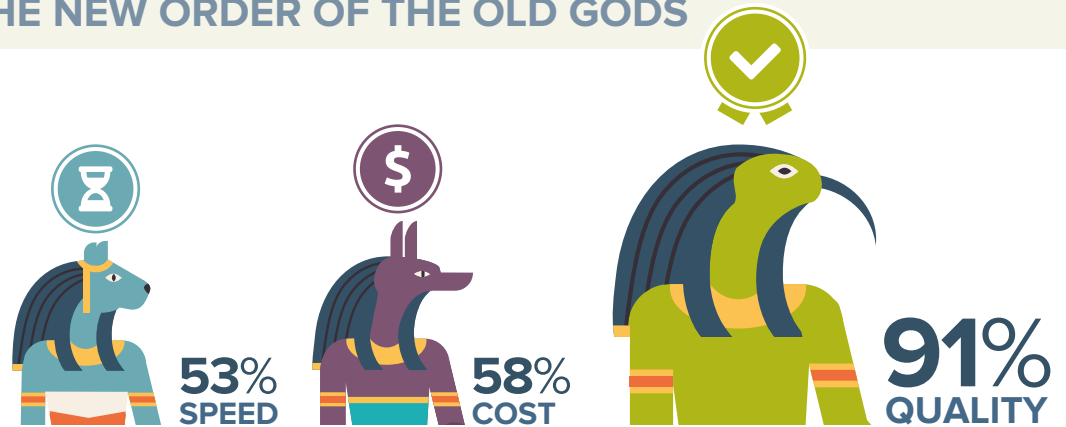
Quantitative:
When it comes to Buyers' choice, online surveys remain by far the most used quant methodology, followed by mobile surveys, communities, and proprietary panels. The overwhelming conclusion: Buyers opt for digital solutions most often.

Qualitative:
Buyers use In-Person Focus Groups or IDIs most regularly, but online communities are catching up. Despite the hype, AI-Agent based qual (bots) is still very much in its adoption infancy.



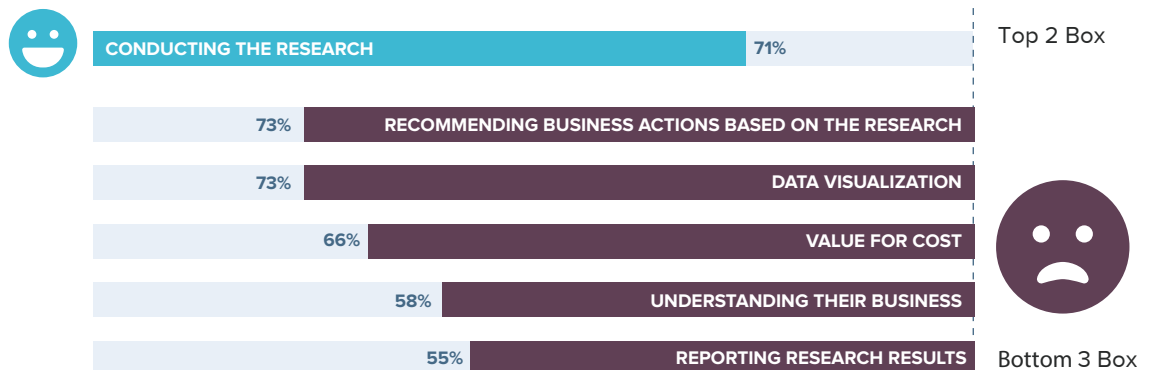
THE NEW ORDER OF THE OLD GODS

The old saw of Cheaper, Faster, Better is the key driver of method selection with a slightly revised order of Insight Quality, Cost, and Speed being the key priorities for a majority of both buyers and suppliers.

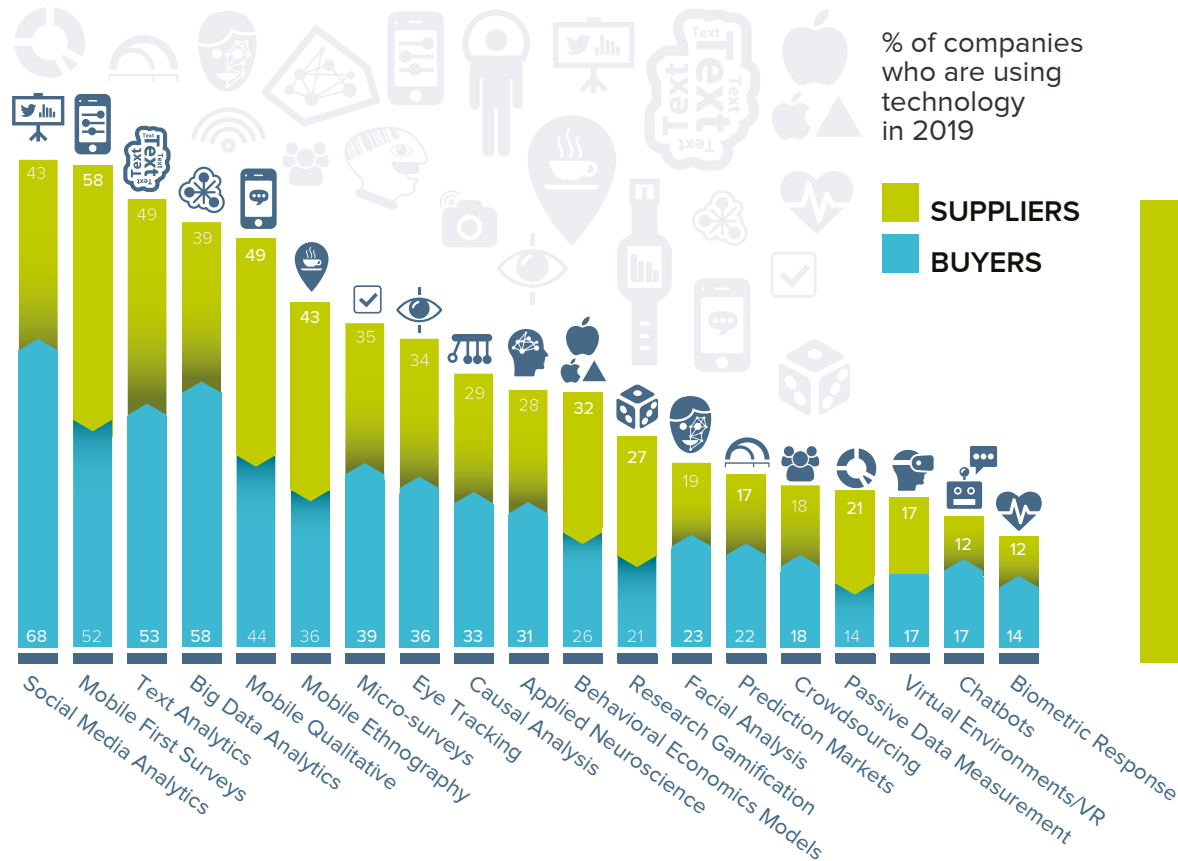


Buyers remain less than ecstatic with suppliers on ALL fronts; at least suppliers score highest on conducting the research, the most basic aspect. The lowest scoring include universal service aspects and those that may not apply to all suppliers. Suppliers need to understand how they fit into a client's portfolio and how to meet or exceed their expectations.

BUYER SATISFACTION WITH SUPPLIERS



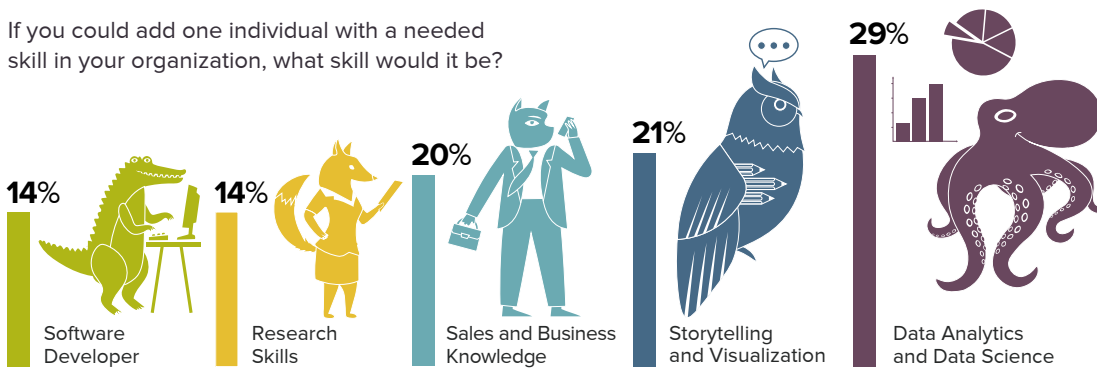
EMERGING METHODS IN USE BY BUYERS VS. SUPPLIER



Most buyers use Mobile First Surveys, Social Media Analytics, Text Analytics, and Big Data Analytics. Chatbots, Biometric Response and Passive Measurement are still very much niche, but with plenty of room for growth. Supplier trends reflect the diversity of company sizes and areas of specialty.

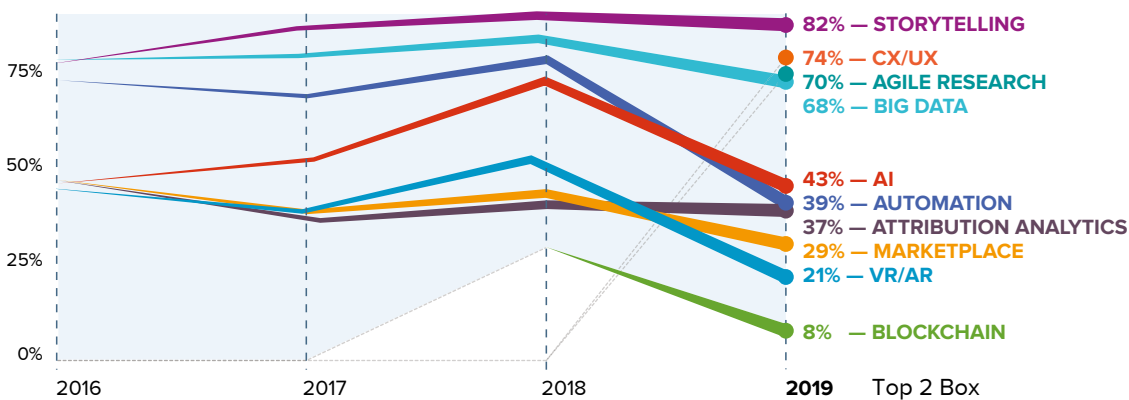
IN-DEMAND SKILLS

If you could add one individual with a needed skill in your organization, what skill would it be?



To future-proof their careers, a focus on Data Analytics and Data Science is by far the most important skill companies are looking for. The "general researcher" of the past will have a hard time staying relevant in the near future.

BUZZ TOPICS: HYPE OR GAME CHANGERS?



We compiled the verbatim buzztopics reported in previous waves into a new question to gauge where they are in the adoption cycle. Storytelling & Data Visualization now has mainstream adoption, followed closely by CX & UX programs and Big Data analytics. Blockchain has little adoption so far, but has the highest level of predicted adoption.

METHODOLOGY AND SAMPLE

For this report, the analysis is based on 1,117 completed interviews



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



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. More of the respondents come directly through GreenBook email invitations than all other sources combined, and respondents from the United States comprise the majority of all responses.

For this report, the analysis is based on 1,117 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 report is in line with the pattern we have seen for several waves. The GRIT survey that includes the GRIT 50 (last year's Business & Innovation Report) tends to have a sample size that is about double of this edition which focuses more on how research is conducted.

Some differences in countries and regions exist as well, so variances should be expected in certain findings based on sample artifacts. For instance, in this edition we see a larger proportion of Buyers employed by large organizations than in previous waves. However, we strive to call out relevant differences in our analysis when that appears to be a significant factor in results. Overall, we see the composition of the sample remaining relatively stable.

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

Because of the unique sampling approach we use, once field research 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.

The mix of respondents has varied slightly for this study, but within narrow bands. For this edition, 73% of respondents identified themselves as being Suppliers (n=790) and 27% identified themselves as Buyers (n=298). There is little difference regionally in this mix.

For the current survey and going forward, we have added a third category, Other Services. After reviewing previous surveys and verbatim responses (particularly for questions with Other: specify), we realized that a small number of respondents taking the survey were not Buyers or Suppliers in the traditional sense, but participate in the insights and analytics industry in other ways, such as recruiting or publishing. As such, they have relevant opinions on many subjects, so we have recognized them, but also adjusted the survey and analysis to be more relevant to their perspective. At the same time, we have made the results in the Supplier and Buyer analyses a little bit crisper.

BUYERS VS SUPPLIERS TREND

Buyer/Supplier	Wave										
	2014	15W1	15W2	16W1	16W2	17W1	17W2	18W1	18W2	19W1	19W2
Insights Buyer or Client	26%	20%	22%	22%	20%	25%	22%	25%	26%	29%	27%
Insights Provider or Supplier	74%	80%	78%	78%	80%	75%	78%	75%	74%	71%	73%



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In GRIT reports, some data are reported as aggregations of Buyer and Supplier responses, and some are split out. Ideally, Buyers and Suppliers would always be reported separately, but the toll in space and clutter argue against systematically reporting data with no statistically significant differences or, in many cases, little real-world significance.

Finally, a note on naming conventions for all trending data is warranted. GRIT editions have historically been described by the time period each study was fielded and published. Historically this report has been known as the Q3-Q4 2019 edition because data collection occurred in November and December of 2019 and it is being published in

Q1 2020. However, going forward we will also be interchangeably using the **GRIT Insights Practice Report** designation. Over time we'll likely do away with date-related designations entirely, but we continue to allow for a transition period in our descriptions as the new conventions take hold.

Within the report, we have simplified the labeling to refer to only the year and the wave; for example, 2015 Feb is now 15W1, 2018 Oct is now 18W2, and so on (however, 2014 Aug is simply 2014 because only a single wave was conducted.) We believe the simplified labels will be more scannable and also prevent readers from reading too much into details such as the month.

THE BIG PICTURE

GRIT continues to attract a broad cross-section of key stakeholders in the insights & analytics industry that allows for a deeper exploration of trends and more reliable analysis of the key areas we focus on than any other report in the industry.

We don't say that to brag, but simply to make clear to readers that we stand by the insights, learning, and predictions contained herein based on the wealth of data available to us and the specific lens we view these data through.

And when we refer to the industry, we completely understand what a difficult concept that is to define and quantify, and our everyday interactions and every GRIT report reinforce that what we just learned today is on its way to becoming something else tomorrow. The GRIT sample universe is driven

less by a narrow, pre-conceived notion of what the industry is or should be than by the relationships among the people who ultimately complete the survey (and the relevance of the topics to them).

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.**



EMERGING METHODS: FEW SIGNS OF CHANGE, BUT PLENTY OF POTENTIAL

Jackie Lorch

Vice President, Global Knowledge Management, Dynata

Email: Jackie.Lorch@dynata.com | Twitter: @jackielorch | Website: www.dynata.com

LinkedIn: <https://www.linkedin.com/in/jackie-lorch-5a96624/>

This new edition of the GRIT report finds little evidence of dramatic change in technique usage over the past five years and while there is interest in some new techniques, there are few signs of new methods set to explode onto the scene.

Mobile adoption still not widespread

It's astounding, for example, that 20% of researchers say they have mobile-first research "under consideration." Across the millions of monthly survey-starts we see at Dynata, people are choosing mobile access two-thirds of the time – and when it comes to the desirable 18-24 age group, fully three-quarters opt for mobile. While Dynata still provides non-mobile samples of 18-24 year olds (i.e., a group of 18-24s who prefer to read email on a laptop, and haven't joined an app panel), we feel obliged to offer a caveat that these people are unlikely to be a good representation of their cohort.

Another barrier to mobile access for global studies is falling with the rollout of 5G wireless technology across many countries, promising vastly improved speed and wireless capacity, allowing smartphones to handle data-heavy tasks faster and with more consistency and improving streaming.

The switch to mobile is long overdue.

The next communication revolution

It's possible that we may not make the switch to mobile before the next communication revolution hits our industry: audio. Until now people have interacted with technology primarily by touch, reading and typing, but many signs, including findings from Dynata's 2020 Global Trends Report, predict the rise of audio. How long before research participants expect to be able to talk to a questionnaire—and have the questionnaire talk back?

AI/Machine Learning: One to watch

A single new technique in use or under consideration that stood out strongly in this GRIT Report's open ends is AI/Machine Learning. This capability offers vast potential for our industry, including:

- Better participant experience by teaching us preferences and way to act on them
- Improved quality via new verification techniques using matching and learning
- More accurate feasibility and field time estimates
- Quota filling that's more efficient, accurate and methodologically sound
- Leveraging new data sources to enrich survey findings with new perspectives

Blockchain as one solution to industry threats?

Other techniques are emerging which may solve core industry challenges. Our research has found that 80% of people across major research markets believe consumers have lost control over how companies collect and use PII. We see people starting to act by increasingly abandoning sites and deleting or avoiding apps. These are clear threats to our business. Blockchain technology brings promise in restoring faith in the security of personal data. According to recent data from Dynata's Global Trends Report the technology is little understood by consumers today, but our industry may have an opportunity to move uncharacteristically fast to tackle this growing challenge, taking a leadership role in restoring consumer trust and faith in the protection of their personal information.

ADOPTION OF EMERGING METHODS

In looking at what research approaches and methods are in use or under consideration, it is important to remember that the GRIT sample is not a representative sample of the market research population. The GRIT sample tends to be drawn from those more engaged with the future of research, so the 'in use' figures will tend to be higher than for the wider market research population. The

GRIT report's key usefulness lies in the relativities between the approaches, the trends over time, and the differences between key groups (such as the Buyers and Suppliers of research and insights).

The 2019 questionnaire has been updated and the changes are outlined in the longitudinal analysis section.

ADOPTION TRACTION

EMERGING METHODS, TABLE 1

Rank	Emerging Method	In Use	Under Consideration	Interest
1	Mobile First Surveys	56%	20%	77%
2	Text Analytics	50%	31%	81%
3	Social Media Analytics	50%	25%	75%
4	Mobile Qualitative	48%	24%	71%
5	Big Data Analysis	44%	29%	74%
6	Mobile Ethnography	41%	24%	65%
7	Micro Surveys	36%	27%	63%
8	Eye Tracking	35%	20%	55%
9	Behavioral Economics Models	30%	27%	57%
10	Causal Analysis	30%	15%	45%
11	Applied Neuroscience	29%	22%	50%
12	Research Gamification	25%	29%	55%
13	Facial Analysis	20%	21%	41%
14	Passive Data Measurement	19%	26%	46%
15	Prediction Markets	19%	24%	42%
16	Crowdsourcing	18%	22%	40%
17	Virtual Environments/ Virtual Reality	17%	25%	42%
18	Chatbots	14%	31%	44%
19	Biometric Response	12%	16%	28%

(Buyers and Suppliers, n = 1,088)

Table 1 shows the 19 approaches included in the 2019 GRIT study ranked in terms of how many people said they were already using these techniques. Remember, 'using a technique' does not necessarily mean using it heavily; it may mean it is sometimes used, and sometimes not. The table is ranked from highest to lowest in terms of 'In Use'.

At the top of the list is Mobile First Surveys, with 56% saying they use them. However, in 2019 it is worrying that 20% of people only list Mobile First Surveys as being under consideration. For some time, it has been necessary to accommodate mobile devices for most projects, and it is widely recognized that Mobile First is the best way of doing that. The 23% who are not in the In Use or Under Consideration groups include 15% who are not sure (perhaps they are not involved in the detail of surveys) and 6% who are not interested (perhaps their company does not use surveys – e.g., pure qual, pure big data, or pure social media). But the 20% who are 'considering' Mobile First should probably get a move on.

In addition to Mobile First surveys, five other methods are in use by at least 40%, and these divide neatly into two extremes. Text Analytics (50% using), Social Media Analytics (50%), and Big Data Analysis (44%) are all about quant, computer programs, and analytics. On the other hand, Mobile Qualitative (48%) and Mobile Ethnography (41%) are all about using new tools to enable qualitative insights. This suggests that both analytics and qual are strong.

The next group of approaches are perhaps best thought of as established niches. This group ranges from Research Gamification (25% using and 29% considering) to Micro Surveys (36% using and 27% considering). This group covers a range of techniques, methods, and philosophies.

The bottom group of seven approaches, ranging from Biometric Response (12% using and 16% considering) to Passive Data Measurement (19% using and 26% considering) are a mixture of small niches, future trends, and perhaps ideas already on the way down.

The two techniques with the highest 'Under Consideration' (and not using) figures are Text Analytics (31%) and Chatbots (31%). Text Analytics has been growing its 'In Use' figure over the last five years and seems set to grow further. Chatbots were added to the GRIT questionnaire for the first time this year, and they also appear to be growing.

We also read the open-ended suggestions for emerging techniques that were not part of the existing survey. There was only one technique that stood out for inclusion and that was AI/Machine Learning, which is covered in the investigation into which techniques are real and which are just buzz. A word cloud of the suggestions is shown below.

The two techniques with the highest 'Under Consideration' (and not using) figures are Text Analytics (31%) and Chatbots (31%)



SHORT-TERM STABILITY, LONG-TERM WINNERS

Table 2 shows the 'In Use' data from 2014 to 19W2, a period of five years. This longitudinal view of the data highlights some of the changes to the GRIT survey, showing items that are no longer asked, and the three new items asked in 2019 (Passive Data Measurement, Causal Analysis, and Chatbots).

The changes over the last 12 months column shows that very little has changed in the last year, and this is normally the case in our industry. The one big change over the last 12 months has been the increase in people reporting they are using Applied Neuroscience, up from 20% a year ago to 29%, and it is up 16 percentage points since 2014.

However, behind the short-term stability there are some interesting long-term trends. Text Analytics, Mobile Qualitative, Big Data Analytics, Mobile Ethnography, Micro Surveys, and Applied Neuroscience are all up 10 percentage points or more over the last five years. These are the real winners, and most of the items near the top of the table are there because they have grown in usage over the last few years (unlike Social Media Analytics, which was already in widespread use in 2014 and has only grown modestly since.)

By contrast, there are a number of techniques that were only used by fewer than 20% of companies in 2014 and have not increased their footprint since, such as Biometrics (13% in 2014, and 12% in 2019). This

does not mean these techniques are not providing value to some people with specific applications, but it does suggest that they are not going to be mainstream any time soon.

EMERGING METHODS, TABLE 2

Emerging Methods In Use	2014	15W2	16W2	17W2	18W2	19W2	12-month Change	5-year Change
Mobile First Surveys	–	–	–	50%	54%	56%	3%	6%
Text Analytics	40%	38%	46%	46%	51%	50%	-1%	10%
Social Media Analytics	46%	43%	52%	43%	49%	50%	1%	4%
Mobile Qualitative	37%	34%	42%	44%	43%	48%	4%	11%
Big Data Analytics	32%	34%	38%	38%	45%	44%	-1%	12%
Mobile Ethnography	30%	31%	33%	35%	38%	41%	2%	11%
Micro Surveys	25%	25%	35%	34%	33%	36%	3%	11%
Eye Tracking	34%	28%	35%	34%	38%	35%	-4%	1%
Behavioral Economics Models	25%	21%	29%	29%	32%	30%	-1%	5%
Causal Analysis	–	–	–	–	–	30%	–	–
Applied Neuroscience	13%	15%	16%	21%	20%	29%	9%	16%
Research Gamification	23%	20%	25%	25%	26%	25%	0%	2%
Passive Data Measurement	–	–	–	–	–	19%	–	–
Facial Analysis	18%	18%	24%	20%	24%	20%	-4%	2%
Prediction Markets	19%	17%	24%	19%	21%	19%	-3%	0%
Crowdsourcing	17%	12%	16%	15%	18%	18%	1%	2%
Virtual Environments/VR	17%	10%	14%	11%	17%	17%	0%	0%
Chatbots	–	–	–	–	–	14%	–	–
Biometric Response	13%	10%	12%	12%	16%	12%	-4%	-1%
Mobile Surveys	64%	68%	75%	–	–	–	–	–
Online Communities	56%	50%	59%	60%	59%	–	–	–
Webcam-Based Interviews	34%	33%	43%	47%	51%	–	–	–
Internet of Things	12%	9%	14%	12%	15%	–	–	–
Sensor/Usage/Telemetry Data	–	7%	11%	11%	13%	–	–	–
Wearables-Based Research	7%	8%	10%	9%	9%	–	–	–
Buyers & Suppliers, n=	455	1,022	1,580	1,533	1,260	1,088		

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



BUYERS AND SUPPLIERS

One key split in the insights industry is between those whose main role is producing and selling insights, such as market research agencies, and those commissioning, buying, and using the insights, such as client-side insight teams.

Table 3 shows those techniques 'In Use' for both groups. The methods are sorted by the gap between Buyer use and Supplier use, with the methods that Buyers use more at the top and methods that Suppliers use more at the bottom.

EMERGING METHODS, TABLE 3

Emerging Methods	Buyers	Suppliers	Buyers - Suppliers	Buyers/Suppliers Combined
Social Media Analytics	68%	43%	25%	50%
Big Data Analytics	58%	39%	19%	44%
Chatbots	17%	12%	5%	14%
Micro Surveys	39%	35%	4%	36%
Prediction Markets	22%	17%	5%	19%
Facial Analysis	23%	19%	4%	20%
Text Analytics	53%	49%	4%	50%
Causal Analysis	33%	29%	4%	30%
Applied Neuroscience	31%	28%	3%	29%
Biometric Response	14%	12%	2%	12%
Eye Tracking	36%	34%	2%	35%
Virtual Environments/Virtual Reality	17%	17%	0%	17%
Crowdsourcing	18%	18%	0%	18%
Mobile Qualitative	44%	49%	-5%	48%
Behavioral Economics Models	26%	32%	-6%	30%
Research Gamification	21%	27%	-6%	25%
Mobile First Surveys	52%	58%	-6%	56%
Mobile Ethnography	36%	43%	-7%	41%
Passive Data Measurement	14%	21%	-7%	19%
n=	298	790		1,088

If the sample were a random probability sample the differences between Supplier and Buyer would need to be 7% or larger to be significant at the 95% level, so differences smaller than 7% should probably be ignored.

The main story in this table is Social Media Analytics and Big Data Analysis. In both cases, more clients are using the techniques than agencies providing these services. This gap has existed for several years, but it has grown larger. In 2018, the gap in the use of Social Media Analytics was 18 percentage points; now it is 24. The gap last year in Big Data Analysis was 14 percentage points; now it is 19. The data suggest that many clients are buying their social media and big

data analysis from non-market research suppliers and/or they are conducting the analyses internally.

The data suggest that many clients are buying their social media and big data analysis from non-market research suppliers and/or they are conducting the analyses internally



DIFFERENCES AMONG THE SUPPLIERS

The term 'Suppliers' covers a wide range of organizations, with different areas of focus. To enable a more detailed analysis, we have divided Suppliers into four categories: Technology Providers,

Full/Field Service, Data and Analytics, and Strategic Consultancy. Table 4 shows the use of emerging technologies by these four groups.

EMERGING METHODS, TABLE 4

	Technology Providers	Full/Field Service	Data and Analytics Providers	Strategic Consultancies
Mobile First Surveys	63%	61%	60%	53%
Text Analytics	46%	46%	62%	50%
Social Media Analytics	23%	42%	49%	52%
Mobile Qualitative	44%	54%	35%	52%
Big Data Analytics	39%	32%	58%	41%
Mobile Ethnography	37%	45%	31%	47%
Micro Surveys	36%	32%	38%	37%
Eye Tracking	15%	41%	26%	37%
Behavioral Economics Models	14%	33%	32%	39%
Causal Analysis	23%	28%	36%	32%
Applied Neuroscience	24%	34%	19%	26%
Research Gamification	31%	30%	18%	25%
Passive Data Measurement	18%	26%	25%	16%
Facial Analysis	12%	23%	15%	18%
Prediction Markets	15%	17%	21%	18%
Crowdsourcing	13%	13%	21%	27%
Virtual Environments/Virtual Reality	6%	21%	11%	18%
Chatbots	14%	12%	21%	8%
Biometric Response	5%	16%	10%	9%
Average number used	4.78	6.06	5.88	6.05
n=	97	332	108	240

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

The technology providers tend to be less likely to use emerging technologies, compared with the other three groups. The two high points for technology providers, Mobile First Surveys and Research Gamification, are not appreciably higher than most of the others.

The Full/Field Service companies do not have any high standouts, but there are a wide range of technologies where these companies lead; for example, 23% for Facial Analysis, 21% for Virtual

Environments, and 16% for Biometrics are not high, but they are higher than the other three categories. The highest standout for Full/Field Service is Mobile Qualitative at 54%, but this is matched by Strategic Consultancies with 52%.

The key standouts for the Data Analytics companies are Text Analytics and Big Data Analytics, each of which are used by at least 58% and lead the next highest group by 12% or more.

The Strategic Consultancies have the smallest number of standouts (both high and low). They are high for Social Media, Mobile Ethnography, and Behavioral Economics.

Across the four groups, none of the niche techniques are major players, reinforcing the niche nature of these technologies. At the high end of

usage, the key differences are the low scores for Social Media Analytics for Technology Providers, Mobile First Surveys for Strategic Consultancies, Mobile Qualitative and Mobile Ethnography for Data/Analytics, and Big Data Analytics for the Full/Field Service companies.

DIFFERENCES BY REGION

There are a few interesting differences by region. However, the main message is that the advanced market research world (i.e. the world that can be reached via GRIT surveys) is essentially a homogeneous one.

Table 5 shows the data for the North America, Europe, and APAC regions.

In 2018, Europe was ahead of North America in Applied Neuroscience (26% versus 17%); that gap has now widened to 42% in Europe and 25% in North America



EMERGING METHODS, TABLE 5

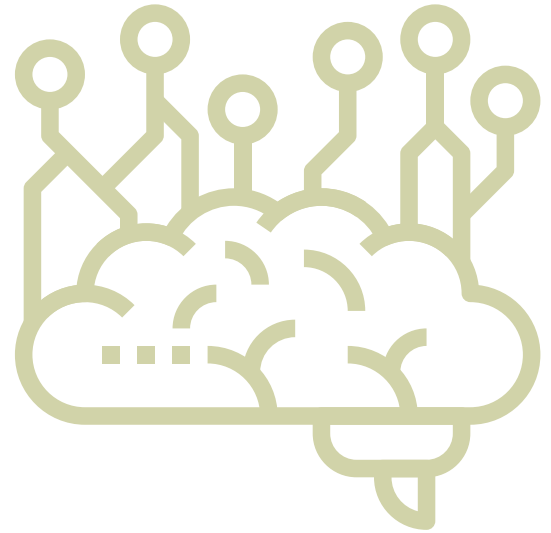
	North America	Europe	APAC	Total
Mobile First Surveys	55%	63%	57%	56%
Text Analytics	51%	47%	57%	50%
Social Media Analytics	49%	51%	51%	50%
Mobile Qualitative	47%	53%	45%	47%
Big Data Analytics	45%	42%	46%	44%
Mobile Ethnography	40%	45%	40%	41%
Micro Surveys	32%	41%	42%	35%
Eye Tracking	32%	41%	36%	35%
Causal Analysis	31%	26%	37%	30%
Behavioral Economics Models	29%	30%	41%	30%
Applied Neuroscience	25%	42%	29%	29%
Research Gamification	22%	36%	27%	25%
Facial Analysis	17%	24%	23%	20%
Passive Data Measurement	16%	27%	20%	20%
Prediction Markets	18%	21%	21%	19%
Crowdsourcing	18%	19%	19%	19%
Virtual Environments/Virtual Reality	16%	20%	20%	17%
Chatbots	13%	15%	18%	14%
Biometric Response	9%	16%	18%	12%
n =	662	236	142	1,087

If the sample were a random probability sample, the differences between North America and Europe would need to be 9% to be significant at the 95% confidence level and the gaps between APAC and the USA would need to be 11%, therefore differences below those levels should be treated with extra caution. The cells highlighted in yellow are ones where the gap between Europe and North America is 9 percentage points or more.

In general, the claimed usage from Europe seems higher than from North America, but this may be partly due to sample differences. For example, it may be the case that in North America the GRIT survey reaches more deeply into the industry while in Europe (and APAC) it may be collecting responses from those most engaged with the English-speaking world of advanced market research.

Two interesting differences are Applied Neuroscience and Eye Tracking. In 2018, Europe was ahead of North America in Applied Neuroscience (26% versus 17%); that gap has now widened to 42% in Europe and 25% in North America. The method has expanded in both regions, but by even more in Europe.

In 2018, the standout difference in the regional comparisons was Eye Tracking: in North America, 35% of companies said it was in use, but in Europe that figure was 51%. This year the gap has narrowed. In North America, the figure is 32%, and in Europe the figure has dropped to 41%, reminding us not to read too much into a single year's data.



THE BIG PICTURE

If you are running a middle-sized organization, then the data suggest that unless you are an outlier, you should be using Mobile First Surveys, Text Analytics, Social Media Analysis, and Mobile Qualitative research



The three main messages are 1) over the last five years things have been relatively stable; 2) the advanced research world is pretty similar globally (yes, you can find differences, but the overall pattern is one of similarity); and 3) clients' use of Social Media and Big Data Analysis is increasingly not coming from market research suppliers.

The stability message is of particular interest to those championing the exciting approaches that have yet to take off, such as Biometrics. When and if we see these techniques become more mainstream, we will see them moving up the GRIT league table, but there is no sign of that yet.

If you are running a mid-sized organization, then the data suggest that unless you are an outlier, you should be using Mobile First Surveys, Text Analytics, Social Media Analysis and Mobile Qualitative Research – plus some of the other items.

The main worry for market research providers is the suggestion from the data that many research buyers are turning to non-market research sources for their Big Data and Social Media Analytics, something the GRIT report has been showing for some time now.



APPLIED NEUROSCIENCE OUTPACES THE GROWTH RATE OF THE INDUSTRY BY 3X

Aaron Reid, Ph.D.

Founder and CEO, Sentient Decision Science, Inc.

Twitter: @aaronashleyreid | Website: www.sentientdecisionscience.com

LinkedIn: <https://www.linkedin.com/in/aaron-reid-0961694/>

The most staggering number in the nonconscious measurement chapter is the 11-point growth among Buyers in use of Applied Neuroscience (implicit and timed response). This rate of growth is over 3X the historical annual growth rate of our industry. Building off the Greenbook analysis of the data, we see at least four more factors influencing nonconscious measurement adoption.

First, the numbers represent the percentage of respondents who claim each technique is “in use”, not the percentage of Insights budget captured by these methods. It is quite likely that the use of nonconscious methods is expanding within organizations that have experienced success. This explanation would be more consistent with the growth rates that we, and some of our friendly competitors, have experienced over the past five years. In fact, we usually see clients who try Applied Neuroscience in one application (e.g. Ad testing), turn around and use it in other applications (e.g. package testing, claims testing, concept testing). Nonconscious providers who are outpacing even these 3X growth rates, are likely capturing a greater proportion of Insights budgets.

Second, Applied Neuroscience is extremely practical to incorporate within existing research paradigms. An Insights VP can significantly upgrade a brand tracker or A&U study by incorporating a 2-minute nonconscious exercise. Since this is quantitative data collected at the individual level, those implicit variables can be used to cut all of the other data in a study, providing immediate insights value.

Third, quick conscious response time techniques are actually much more differentiating than Likert scale questions and are easy for Insights pros to understand and explain to internal stakeholders. This highly important reality is likely driving increased adoption. Respondents enjoy these exercises a lot more than batteries of agree/disagree questions (>80% satisfaction) – especially on mobile devices. If I had my druthers, the industry would take a first step and replace all brand attribute assessment Likert scales with these superior conscious response time based methods.

Fourth, the 2-point decline in Facial Analysis usage among market research buyers is curious. One factor that is likely playing a role is the outside investment being made in Facial Analysis. After attracting investment, a trend has been to redirect resources to larger opportunities outside of the \$46B research industry (e.g. the automotive industry). While this shift in priority makes sense for investors, it is leaving a hole in sales and service to market research. Early experiences with Facial Analysis, left a lot of questions on why consumers were reacting emotionally. However, the latest advances in Facial Analysis, which combine change in implicit perceptions with expressions of emotions, provide much more useful explanations of the “why” behind the expressions. We expect that, as market researchers experience the practicality and power of these integrated techniques, adoption of Facial Analysis will increase.

In summary, we see this staggering growth of Applied Neuroscience to be consistent, if not understated, with our experience of the full penetration of these methods.



THE NET ON NONCONSCIOUS MEASUREMENT

For the past 15 years, Neuromarketing methods, such as EEG, Biometrics and Facial Coding, designed to measure nonconscious consumer response, have been the new up-and-coming measures disrupting the research industry, causing both debate and attention, experimentation and now acceptance. There is hardly a Fortune 500 consumer goods manufacturer or service provider that does not currently use some form of nonconscious measurement in their standard market research evaluations.

In fact, for the past four years that the GRIT report has tracked neuro and other nonconscious measures, the net incidence of interest (Usage plus Under Consideration) among research buyers has hovered around 80%, a vast majority. Ranging from a low of 76% in 2016 to a high last year of 84%, interest has settled back to 78% in 2019.

Over half of Buyers (54%) are using some form of nonconscious measures, although net usage of neuro measures declined slightly (-2%) from the previous GRIT wave



THE NET ON NONCONSCIOUS MEASUREMENT, TABLE 1

	16W2	17W2	18W2	19W2	4 Year Average
Net: Usage/Interest Any Nonconscious	76%	79%	84%	78%	79%
n=	322	343	329	298	

NONCONSCIOUS MEASUREMENT USAGE IS NOW A STAPLE

Over half of Buyers (54%) are using some form of nonconscious measures, although net usage of neuro measures declined slightly (-2%) from the previous GRIT wave. Given the road's steep incline from essentially 0% in 2005, this is quite a shift in the market research industry. The key drivers have been recognized value (consumer perceptions, decisions, and behavior are heavily influenced, if not driven by,

nonconscious response), accessibility (established full-service agencies created expertise and offers, and service providers grew), and affordability. It is these conditions that have enabled nonconscious measurements to grow from special occasion methodologies to everyday practice with neuro measures baked into standard measures.

THE NET ON NONCONSCIOUS MEASUREMENT, TABLE 2

	Use of Nonconscious Measures (Buyers)		
	18W2	19W2	Delta %
Net Nonconscious Measures	57%	54%	-2%*
Eye Tracking	39%	36%	-2%*
Applied Neuroscience (such as implicit or timed response)	20%	31%	+11%
Behavioral Economics Models	31%	26%	-5%
Facial Analysis	25%	23%	-2%
Biometrics (such as EEG or fMRI)	15%	14%	-1%
n=	329	298	

*Numbers in table are rounded to nearest whole; difference in percentages based on unrounded percentages.

WHAT ABOUT SPECIFIC MEASURES?

A deep dive into the various methods and their usage in 2019 spotlights the diversity and complexity of classification that has besieged Neuromarketing from the beginning. The method descriptions tested in GRIT include clearly distinct, non-ambiguous ones such as Eye Tracking and Facial Analysis, but also categories of methods that may appear to be clear to a novice audience, but ambiguous to a more experienced one. The general term, Applied Neuroscience, for example, encompasses a variety of more specific methods, but the label used in the survey, Applied Neuroscience (such as implicit or timed response), only calls out two. So, when we see Eye Tracking and Facial Analysis changing by only 2% from last year, but Applied Neuroscience increasing by a whopping 11%, we have to consider whether the survey has introduced an artefact.

From 2017 to 2018, Facial Analysis usage jumped by 8% and the net use of nonconscious measures also increased by 7%, as every other method tested (save one) increased by at least 4% during that period. Applied Neuroscience was immune to this effect, declining slightly from 22% to 20% usage, but leaping ahead this year from 20% to 31% while the other methods lost traction, at least as far as usage is concerned.

The last time Applied Neuroscience increased substantially, from 16% to 22% between 2016 and 2017, the net score also dropped, from 52% to 50%, as it's done this year. The prior year, biometric

response, facial analysis, and eye tracking each increased by at least 3%, similar to last year.

So we have two instances where Applied Neuroscience usage increased substantially while net nonconscious (or neuro, if you prefer) measurement usage declined. Each time it followed a year in which most or all other methods increased usage.

So, is the current surge in usage an artefact due to the wording change or a real increase? First, the wording change might plausibly explain a change in reported usage if usage *decreased*; adding two examples to the label runs the risk of limiting what people think about, so it seems strange that a change from the very general Applied Neuroscience Methods to the potentially more restrictive Applied Neuroscience (such as implicit or timed response) would spark a 50% increase in reported use.

On the other side of the ledger, we've seen this pattern before from 2015 to 2017. Could it be that the terminology is fine, and a spike in use of applied neuroscience follows the adoption of other methods? If Applied Neuroscience is a vague term that doesn't mean much to people, would we have seen a more or less steady increase in reported usage over the past 5 years? Similarly, if Behavioral Economics Models is a vague term that no one understands, does it make sense that the reported use would fluctuate as much as it has over the past 5 years? If people did not understand it, would we expect the responses to be more or less flat over time?

A deep dive into the various methods and their usage in 2019 spotlights the diversity and complexity of classification that has besieged Neuromarketing from the beginning



THE BIG PICTURE

Neuro measures are no longer “the new kids on the block.” This means that most clients are already using them, and many vendors (over half) have added them, in one form or another, to their repertoires



Neuro and Nonconscious Measurement have hit critical mass and become a mainstay in the market research industry



There appears to be a slight softening for Total Interest (usage + interest) among most neuro measures across the board this year (ranging from +2% to -6%) suggesting that the class of measures is slowing in growth. As noted earlier, interest has been hovering in the same range for 5 years. Several factors may contribute to this.

First, neuro measures are no longer the new kids on the block. This means that most clients are already using them, and many vendors (over half) have added them, in one form or another, to their repertoires. What drove the class of measures to grow initially was in large part the flurry of experimental R&D research dollars to create proof of concept and value assessment within client organizations. Now we observe that R&D budgets are softening and also that there are several new developments which are capturing those R&D dollars.

In the GRIT Report section on EMERGING TRENDS, Big Data, Social Media and Text Analytics all rise to the top as having total interest in the 80% or above range among research Buyers. Moreover, while Artificial Intelligence/Machine Learning is not part of the Emerging Methods battery it was frequently mentioned for Other. Among Buyers, 22% use it already and 21% plan to use it, bringing Total Interest in AI/ML to 43%.

Relatively speaking, data for big data, social media, and text analytics can be collected in large quantities without ever interacting directly with the people from whom it comes; it is relatively easy and

cheap to come by. Nonconscious (or neuro) methods, generally speaking, have the opposite properties: typically you need to engage with a cooperative data-giver on a personal basis to get what you need. While net interest in nonconscious (or neuro) measurement is down 7% among Buyers, it is relatively flat among Suppliers, a change of only 2%. Further, interest in Applied Neuroscience is up only 2% among Buyers, but up 10% among Suppliers.

Suppliers continue to innovate ways to make collection of nonconscious (or neuro) data more affordable, and as the word gets out, perhaps use and interest will rise again. If that happens, it would not be the first time that availability of affordable options overcame existing barriers to adoption.

As we look ahead from anecdotal evidence and empirical data (meaning, we talk to a lot of industry leaders), there are two immediate growth drivers that we expect to make a possible impact on Neuro method expansion in the years ahead:

- AI/ML will increasingly begin to use nonconscious measures as a means to improve algorithms and predictive validity.
- Neuro methods are beginning to be adapted to qualitative research which will expand usage and applications.

Neuro and Nonconscious Measurement have hit critical mass and become a mainstay in the market research industry. It will be exciting to watch for new applications and combining with other emerging methods in the year to come for greater understanding of human response.

THE NET ON NONCONSCIOUS MEASUREMENT, TABLE 3

	Interest in Nonconscious Measures (Buyers)		
	18W2	19W2	Delta %
Net Nonconscious Measures	84%	78%	-7%*
Eye Tracking	59%	53%	-6%
Applied Neuroscience (such as implicit or timed response)	47%	49%	+2%
Behavioral Economics Models	63%	57%	-6%
Facial Analysis	45%	39%	-6%*
Biometrics (such as EEG or fMRI)	33%	30%	-3%
n=	329	298	

*Numbers in table are rounded to nearest whole; difference in percentages based on unrounded percentages.



INTERVIEW WITH THE CEO

Frederic-Charles Petit

CEO and founder, Toluna

Website: www.toluna.com | LinkedIn: <https://www.linkedin.com/in/frederic-charles-petit-6ab967/>

Q1. The industry is changing fast; between emerging technologies and start-ups and consolidation among the top companies there is a lot of disruption occurring to the whole category. How is Toluna reacting to that, and what does it mean for the future?

A1. 2019 had more twists and turns than a Netflix blockbuster. New players invested in the industry: private investment firm Bain Capital acquiring a 60 percent share of Kantar and SAP buying Qualtrics for \$8 billion.

There was also a changing of the old guard: GfK sold a chunk of its business to Ipsos and some former rivals joined forces with the merger and integration of Research Now and SSI.

Toluna celebrates its 20th anniversary next year and we've learned a few things. We doubled down on technology more than two years ago. We saw that the real vet of companies that succeed would be those who claim to be and those who truly are technology-based.

The way forward for market research is speed, quality and agility combined with automation, for maximum efficiency, enabling users to focus on interpreting results and the business implications.

Q2. What do you see as the most exciting trend happening in the industry right now?

A2. The market research industry is late to adopt Artificial Intelligence, but it is now a staple.

Retail has benefitted from its capabilities for customer FAQs and reviews for years as peer appraisals of product color, fit and quality drive a majority of buying decision.

The technology that empowers personalization, identifying positive or negative customer experiences; text analysis, the words that frequently appear online in connection with products; and trend identification, price fluctuation based on popularity, will soon be embedded in research near you.

AI and machine learning will also provide opportunities to mine data more effectively from both primary and secondary sources.

Q3. What is scariest, or what trend do you think we as an industry need to be very cautious about?

A3. Market research industry consolidation means customers may have less choice – with fewer, bigger research platforms. By default, consumer package goods, financial, telecommunications and media & entertainment corporations may soon do all their testing – from ideation to business analysis to commercialization – with a single research partner, leading to bigger brand and firm partnerships.

Industry consolidation offers well-known challenges. Consolidated industry sectors can have relatively high barriers

to entry, lack of differentiated products, and potentially few, well-established brands with high profit margins.

It can also mean that larger firms end up with more business, potentially stunting creativity and competition. In the market research sector, single partner testing without the checks and balances of diverse inputs could result in worse and not better decision making.

Q4. What are you investing in to future-proof the business and maintain the leadership position of the company?

A4. People and partnerships.

People. Toluna always looks to hire the best and the brightest. And then we encourage them to stay. We always want fresh energy from people with non-traditional backgrounds. Our value of meritocracy gives them the chance to build real careers. Partnerships. We are always open to non-traditional partnerships. For example, first- and third-party data are on a collision course. Privacy and compliance regulations could encourage third-party data aggregators to seek new alliances.

First-party data companies will benefit from the hundreds of extra data points that third-party data brings to research results.

The consolidation both data types could power companies to make even better and more nuanced business decisions.

Q5. Thinking five years ahead, what do you envision Toluna looking like as a company?

A5. Technology will continue to advance. Industry basics are not going to change:

Speed remains a constant. What was fast last year will not be in 2025 but research has to offer the flexibility to fit with iterative innovation processes.

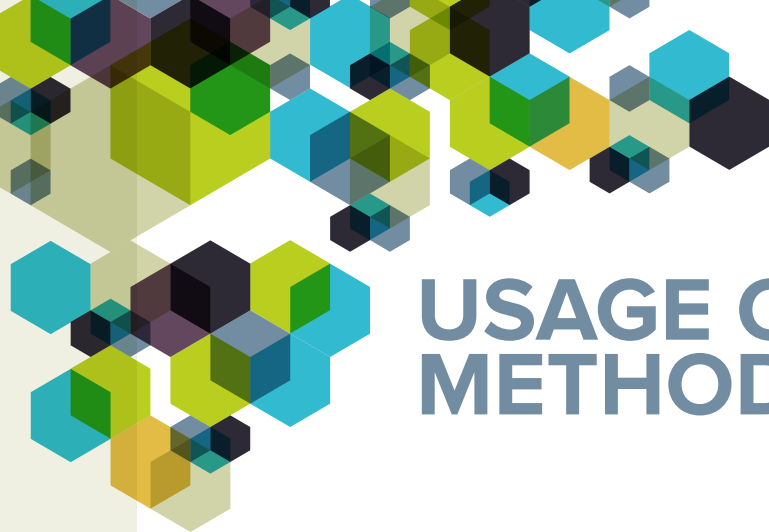
Agility means using tools and techniques which factor speed and rigour into the process simultaneously, so work of a high quality can be delivered at a faster pace.

As technology continues to evolve and standardise, a benefit of industry consolidation should be that the end data will be more actionable, faster and better quality.

Q6. You have a long and distinguished career growing and leading companies. Any advice you can offer to the next generation of business leaders?

A6. Be a person who makes bold moves. People who take calculated risks will do better than those who are too safe.

Be with your clients with laser focus discipline on their needs. Know what they are thinking and what they need just as they realize it themselves. When you are with clients in the action, you can never lose.



USAGE OF TRADITIONAL METHODOLOGIES

GRIT data shows that just 46% of projects are quantitative only



This section looks at a range of techniques which might be called traditional and investigates how widely they are used. The main findings are:

1. The usage of qualitative research is higher than reports based on total spending imply.
2. Online Communities are a major player in both qualitative and quantitative research.
3. There are relatively few differences in terms of regions and Buyer versus Supplier.
4. The most modern forms of qualitative and quantitative research (e.g. biometrics and Automated/AI qualitative) have not yet taken off.

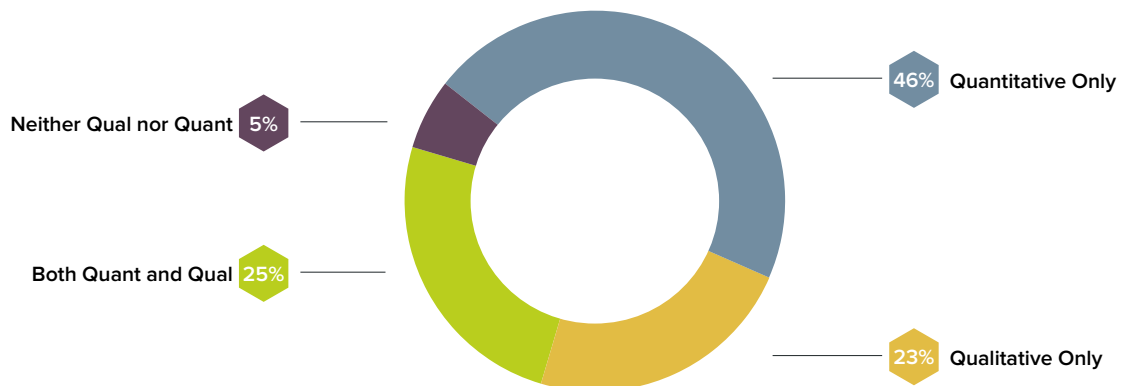
THE BALANCE BETWEEN QUALITATIVE AND QUANTITATIVE TECHNIQUES

Across Buyers and Suppliers, the vast majority of organizations (80%) use both qualitative and quantitative research; 85% are using qualitative research, 93% are using quantitative, and just 1% using neither qualitative nor quantitative.

From other sources (e.g. ESOMAR and from the turnover of large research agencies), we know that quantitative research accounts for a much

larger amount of money than qualitative research. However, talking to key research buyers makes it clear that qualitative research is seen as vital. The chart below brings that perspective to life: GRIT data shows that just 46% of projects are quantitative only. The remaining projects use both quantitative and qualitative (25%), use qualitative only (23%), or (according to Buyers and Suppliers) neither (5%).

HOW PROJECTS ALLOCATE ACROSS QUANT AND QUAL (BUYERS AND SUPPLIERS)



DIFFERENCES BETWEEN GROUPS

This dual usage pattern in terms of whether quantitative and/or qualitative research is used is consistent across all of the regions, i.e. there are no significant differences between the regions. The pattern of usage between Buyers and Suppliers is also consistent with just one significant difference: 92% of Buyers say they use Qualitative Research compared with 83% of Suppliers, but it is still the vast majority of each.

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

The key difference is that the Technology Providers and Data/Analytics Providers tend to use less qualitative research. However, even in these groups, more than 50% used qualitative approaches in the last twelve months.


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

USAGE OF TRADITIONAL METHODOLOGIES, TABLE 1

Used in last 12 months	Technology Providers	Full/Field Service	Data and Analytics Providers	Strategic Consultancies	All Suppliers
Any Quant	93%	94%	98%	90%	93%
Any Qual	56%	89%	68%	93%	83%
n=	97	332	108	240	790

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

This dual usage pattern in terms of whether quantitative and/or qualitative research is used is consistent across all of the regions



The message from the earlier table is amplified here. The Data Analytics and Technology Providers are more likely to do Quantitative Only projects, and the Strategic Consultancies and Buyers are more likely to be including qualitative in the mix.

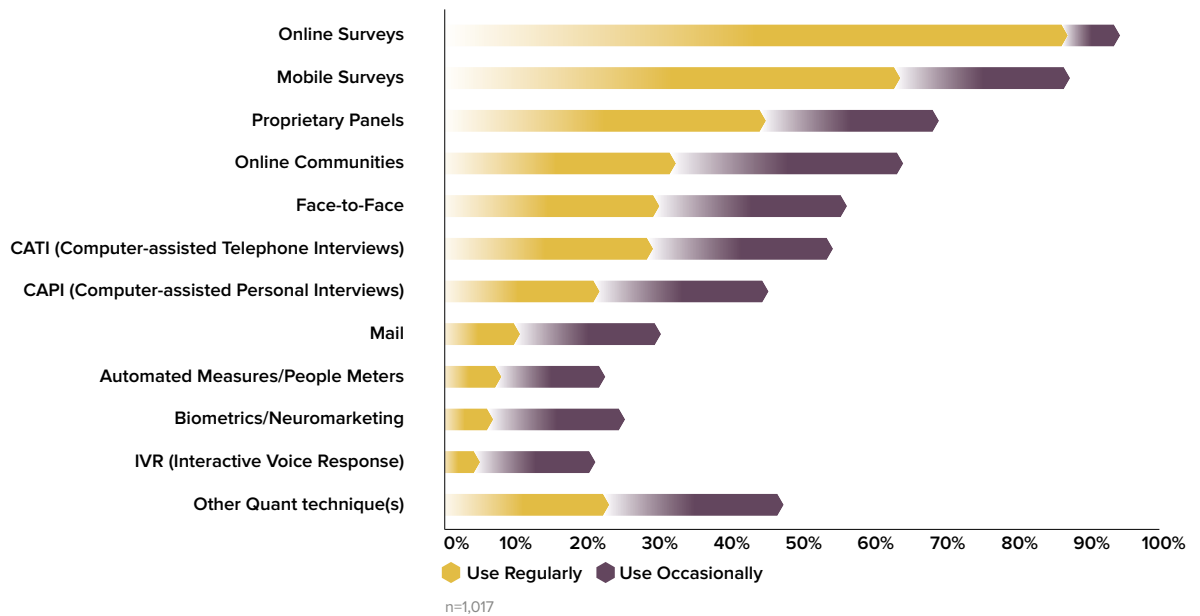
USAGE OF TRADITIONAL METHODOLOGIES, TABLE 2

Category	Base	% of Base	Group	Group %
Quantitative only	Suppliers	47%	Data & Analytics	60%
			Technology Provider	56%
			Full/Field Service	50%
			Strategic Consultancy	36%
	Buyers and Suppliers	46%	Asia	34%
			Suppliers	47%
Qualitative only	Suppliers	24%	Buyers	43%
			Strategic Consultancy	30%
			Full/Field Service	24%
			Technology Provider	15%
Both Quantitative and Qualitative	Buyers and Suppliers	25%	Data & Analytics	12%
			Buyers	30%
	Suppliers	24%	Strategic Consultancy	28%

QUANTITATIVE DATA COLLECTION OPTIONS

Everybody who said they used quantitative methods were asked to indicate which they used regularly and which occasionally. The chart below shows the usage patterns.

QUANTITATIVE METHODS USED REGULARLY OR OCCASIONALLY (BUYERS AND SUPPLIERS WHO USE QUANT METHODS)



Not surprisingly, Online Surveys are the dominant data collection method, with 89% saying they use these regularly, and a further 7% using these at least occasionally. Second (also not surprisingly) are Mobile Surveys, with 65% saying they use Mobile Surveys regularly and a further 24% using these occasionally.

The data make it clear that Mail, Automated Measures/People Meters, and Biometrics/Neuromarketing are used by a relatively small proportion of organizations, although significant niches exist. For example, if we aggregate

government, not-for-profit, transportation, education, retail, telecommunications, and financial services, we discover a segment in which 46% use mail at least occasionally, with 21% using it regularly. Among all other verticals, less than half of that (22%) use it at least occasionally and only 7% regularly.

Online communities are a technique that was previously in the Emerging Technologies section of the GRIT study; for 2019, it has moved to the mainstream section. This move seems fully justified as one-third report using them regularly and one-third report using them at least occasionally – placing Online communities fourth overall.

Online Surveys are the dominant data collection method, with 89% saying they use these regularly, and a further 7% using these at least occasionally



REGIONAL DIFFERENCES – QUANTITATIVE METHODS

There are a few differences by region. The table below shows all of the cases where there are significant differences between a region and the other regions in terms of approaches Used Regularly.

USAGE OF TRADITIONAL METHODOLOGIES, TABLE 3

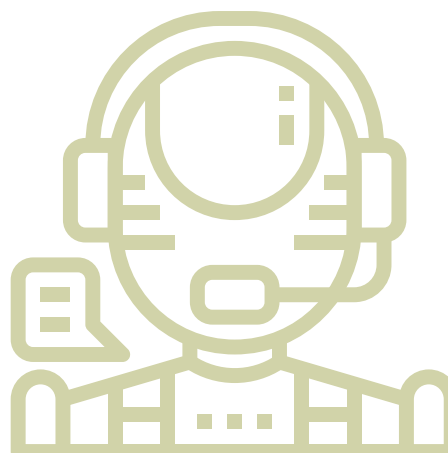
Method	% Use Regularly (Buyers and Suppliers; All Regions)	Region	% Use Regularly (Buyers and Suppliers; Single Region)
Online surveys	89%	Asia	75%
Face-to-Face	31%	Central & South America	71%
		Asia	68%
		North America	23%
CATI	30%	Central & South America	68%
		Asia	45%
		North America	25%
CAPI	23%	Central & South America	61%
		Asia	59%
		Europe	30%
		North America	14%
Mail	11%	Central & South America	32%
		Europe	16%
		North America	8%

In general, North America uses fewer of the offline methods; conversely Asia, Central & South America and to a lesser extent Europe use more of the more traditional ones.

BUYERS VERSUS SUPPLIERS – QUANTITATIVE METHODS

There are few significant differences between the Quantitative techniques regularly used by Buyers and Suppliers of research. They are:

- Online surveys (more Buyers use regularly, 93% to 87%)
- CATI (more Suppliers use regularly, 33% to 23%)
- CAPI (more Suppliers use regularly, 24% to 18%)
- Other techniques not listed (more Suppliers use regularly, 26% to 19%)



DIFFERENCES BY TYPE OF SUPPLIER

There are a few significant differences between the four types of Suppliers, in terms of the quant approaches they use regularly, as shown in the table below.

USAGE OF TRADITIONAL METHODOLOGIES, TABLE 4

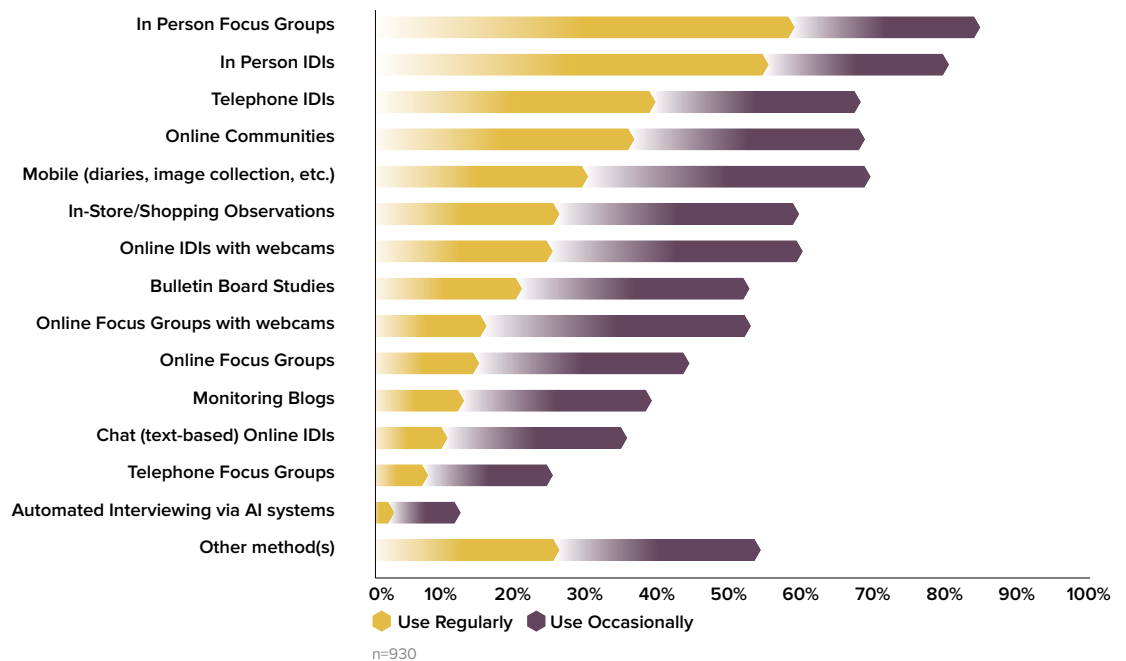
Method	% Use Regularly (All Suppliers)	Supplier Type	% Use Regularly (Specific Supplier Type)
Proprietary Panels	48%	Strategic Consultancy	39%
Face-to-Face	33%	Full/Field Service Agency	41%
		Technology Provider	11%
CATI	33%	Full/Field Service Agency	39%
		Full/Field Service Agency	34%
CAPI	24%	Strategic Consultancy	18%
		Technology Provider	13%

Generally speaking, the Technology Providers are less likely to use the non-online data collection options, and the Full/Field Service Agencies are more likely.

QUALITATIVE DATA COLLECTION OPTIONS

The survey asked all of those who used qualitative methods to indicate which they used regularly and which occasionally. Chart below shows the usage patterns.

QUALITATIVE METHODS USED REGULARLY OR OCCASIONALLY (BUYERS AND SUPPLIERS WHO USE QUAL METHODS)





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The data illustrate that qualitative researchers have adopted a wide range of tech-enabled options while also highlighting the enormous importance of face-to-face qualitative research, especially In Person Focus Groups (60% using regularly, 27% occasionally) and In Person IDIs (56% using regularly, 26% using occasionally).

As with quantitative methods, the importance of online communities also stands out among qualitative. In a qualitative context, 38% are using communities regularly and a further 33% using them occasionally, making online communities the 4th most used medium for both qualitative and quantitative research. Of Buyers and Suppliers who use online communities at least occasionally for

both types of research, nearly half could be considered heavy users:

- 48% use it *regularly* for qual **and** regularly for quant
- 37% use it *occasionally* for qual **and** occasionally for quant
- The remaining are split evenly between those who use it regularly for one and occasionally for the other

In terms of online qualitative research, it is clear that asynchronous techniques (e.g. online communities, online diaries, and bulletin board studies) are in much wider use than synchronous techniques (e.g. online focus groups with webcams, chat online focus groups, and chat online IDIs).

Automated AI systems have, at present, low usage rates.

REGIONAL DIFFERENCES – QUALITATIVE METHODS

There are a few regional differences, and the table below highlights significant differences between a region and the rest of the world with respect to the percentage regularly using a qualitative method.

USAGE OF TRADITIONAL METHODOLOGIES, TABLE 5

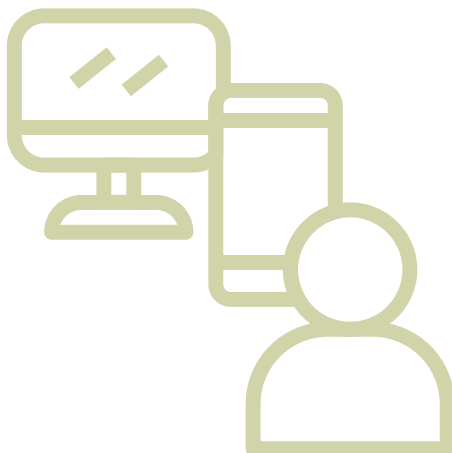
Method	% Use Regularly (Buyers and Suppliers; All Regions)	Region	% Use Regularly (Buyers and Suppliers; Single Region)
In-Person Focus Groups	60%	Central & South America	90%
		Asia	75%
		North America	53%
In-Person IDIs	56%	Asia	84%
		North America	50%
Online IDIs with webcams	26%	North America	31%
Bulletin Board Studies	22%	North America	25%
		Asia	7%
Online Focus Groups with webcams	17%	North America	20%
Monitoring Blogs	13%	Europe	20%

North America is a little less likely to regularly use in-person focus groups and IDIs



The key difference is that North America is a little less likely to regularly use face-to-face focus groups and IDIs, whereas Asia and Central and South America are more likely to use these in-person techniques.

BUYERS VERSUS SUPPLIERS – QUALITATIVE METHODS



The difference between Buyers and Suppliers in terms of the numbers using various qualitative techniques is summarized in Table 6. Lower proportions of Buyers report using In-Person IDIs, Telephone IDIs, Bulletin Boards, Instore Observation and Mobile Diaries regularly.

USAGE OF TRADITIONAL METHODOLOGIES, TABLE 6

Method	% Use Regularly (Buyers and Suppliers)	Group	% Use Regularly (Specific Group)
In-Person IDIs	56%	Buyers	49%
Telephone IDIs	40%	Buyers	31%
Mobile (diaries, image collection, etc.)	31%	Buyers	20%
In-Store/Shopping Observations	27%	Buyers	16%
Bulletin Board Studies	22%	Buyers	10%

DIFFERENCES BY TYPE OF SUPPLIER

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

USAGE OF TRADITIONAL METHODOLOGIES, TABLE 7

Method	% Use Regularly (All Suppliers)	Supplier Type	% Use Regularly (Specific Supplier Type)
In-Person Focus Groups	62%	Full/Field Service Agency	72%
		Data and Analytics Provider	49%
		Technology Provider	24%
In-Person IDIs	59%	Full/Field Service Agency	67%
		Data and Analytics Provider	45%
		Technology Provider	22%
Telephone IDIs	44%	Full/Field Service Agency	50%
		Technology Provider	15%
Online Communities	38%	Technology Provider	65%
Mobile (diaries, image collection, etc.)	36%	Technology Provider	56%
		Data and Analytics Provider	19%
Bulletin Board Studies	26%	Technology Provider	52%
		Data and Analytics Provider	12%
Chat (text-based) Online Focus Groups	18%	Technology Provider	37%
Online Focus Groups with webcams	18%	Technology Provider	30%
Monitoring Blogs	13%	Technology Provider	26%
Chat (text-based) Online IDIs	12%	Technology Provider	28%

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

COMPARISON WITH EARLIER WAVES

The GRIT questionnaire in 2019 has been modified (improved) in several ways compared with earlier years, which makes direct comparisons difficult. However, it is possible to make broad assessments of the differences.

Previous waves asked for the proportion of research projects that are quantitative, qualitative, or neither, but did not specify how a project that employed both types should be counted. The current wave accounts for this, and we still find that the ratio of quantitative projects to qualitative remains at about 2:1, as it has for the last three years. But the current, richer data shows that the ratio of Quantitative Only to Qualitative Only to Both Qualitative and Quantitative is 2:1:1.

In the previous waves of GRIT, people selected three techniques that are *among their most frequently used* (not necessarily the three *most frequently used*), as opposed to stating regularly, occasionally, rarely for all of the approaches. In the previous waves, Online Surveys were #1, followed by Mobile Surveys – as are in the current wave. Proprietary panels, new to this wave, is third most regularly used. The fourth most used quantitative approach is Online Communities, which was in the emerging technologies section in previous waves.

In terms of Qualitative Research, the most popular methods in the previous wave were In Person Focus Groups, In Person IDIs, and Telephone IDIs, followed by using Online Communities for discussions. In the current wave the values are different because of the improved approach, but the order is the same.

THE BIG PICTURE

Most Suppliers and most Buyers use both qualitative and quantitative, with less than 50% of projects being quantitative only. The main qualitative methods are online surveys and mobile surveys, with many of the studies being carried out via proprietary panels and online communities.

In terms of qualitative research, traditional methods, for example, In-Person Focus Groups and IDIs are the most used approaches, with Online Communities and Mobile Diaries being the most used newer approaches.

There are some differences between regions, between Buyers and Suppliers, and between different types of Suppliers. However, these differences are relatively few, and tend to follow common sense patterns, such as Technology Providers doing more online qualitative and less face-to-face qualitative.

In-Person Focus Groups and IDIs are the most used approaches, with Online Communities and Mobile Diaries being the most used newer approaches





ONLINE TOOLS DEMOCRATIZE QUALITATIVE RESEARCH, BOOST CUSTOMER CLOSENESS AND PARTICIPATION

Jim Longo

CoFounder and SVP Research Solutions, Discuss.io

Email: mailto:jim@discuss.io | Website: www.discuss.io

LinkedIn: <https://www.linkedin.com/in/longomr/>

Central to the success of any new product is how well it addresses a customer need. That's why it's critical that brand stakeholders and customer-facing employees develop empathy for their customers. But brands cannot accomplish this without building genuine connections with customers — and customers can increasingly tell when a brand isn't being genuine.

Fortunately, today's customers want to do more than simply buy. They want to participate in a brand experience. Consumers increasingly see brands as means to a broader culture of participation. Modern qualitative research methods make this journey possible for customers.

Graduating from Traditional Research Methods to Democratized Systems

Qualitative research and innovations in the industry are transforming the way we connect with consumers. Traditional research processes are notoriously rigid and expensive. They exclude less-prominent members of marketing teams from participating. They limit or add rigidity to customers' experiences with these methods as well.

These barriers keep whole teams at arm's length from their customers. Marketers need access to more equitable qualitative research tools. They need to remove the friction from qualitative research to support a more cooperative, everyday relationship with customers as well.

When multiple team members conduct rich and open conversations with customers and then share detailed insights from those interactions across the organization, they can foster a culture of empathy. In this way, brands achieve a rapid and deep-seated understanding of customer perspectives. The "agile empathy" those teams cultivate enables brands to make better real-time decisions, reduce time-to-market, apply more effective marketing, and even create more successful products.

Both Brands and Customers Are Embracing Digital Qualitative Tools

Naturally, the digital tools that facilitate these processes must be online. As technologies become more robust, brands are shifting

typically offline practices — such as in-person interviews and focus groups — online, connecting to customers quickly and at lower cost. These new digital environments are more accessible and automated, and they provide greater access to tools to help marketers disseminate their findings across their organizations.

By automating processes and leveraging ubiquitous technologies like webcams, web browsers, WebRTC, VoIP, social media, natural language processing (NLP), and others, qualitative methods become less restrictive to team members and more natural to customers. What's more, the process can be carried out both asynchronously (with solutions like text-based communities) and synchronously (with video conferencing). Brands are able to connect with consumers contextually, who also interact from their own home and work environments. This opens doors to near endless possibilities and use cases.

In this way, brands can dramatically amplify the research process. The high usability of modern tools reduces the learning curve and boosts adoption within the organization. This gives brands more opportunities to connect with consumers, at greater frequencies.

Best of all, digital tools increase the sophistication of data capture and analysis. Even as marketers engage customers naturally — and in ideal contexts — automated features make qualitative data sets easy to review, share, and analyze, both broadly and individually.

The Future of Qualitative Research is Customer Centricity and Context

Both B2B and B2C brands are already working to create this natural relationship-forming process with their customers. They are developing a deeper understanding of their customers' perspectives, aspirations, and motivations, and they are disseminating their findings across their organizations. It's by adapting research methods to customer contexts and broadening access within the organization that companies will yield the best investigative results.



BUZZ TOPICS: HYPE VS. ADOPTION

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



Measuring sentiment around new concepts and topics as they enter the insights and analytics industry has continued to be an effective tool in predicting their traction and adoption. We have seen early stage buzz topics move from interesting ideas to growing parts of the industry toolkit and whole companies developing based on them (automation, analytics, and data visualization come to mind), while others remain interesting but with little widespread adoption (talent marketplaces, blockchain, and VR/AR for example).

Previously we tracked these as both verbatim comments and using a scale based on an overall perception of usefulness and of buzz. Beginning with this wave, we decided to use a similar model as we do in emerging methods and look at actual adoption stages.

This shift made it a bit tricky to make a straight comparison from previous waves because we changed the answer choices from opinions about what other people think (game changer, interesting trend, etc.) to one that better captures adoption - in use, plan to use, probably will use, will be adopted by others (not us) and will not be significantly adopted. However, it focuses the question on something the respondent knows about - their attitude and intention toward the topic - and the aggregation of those results will determine what is a buzzy topic. If a lot of people plan to use it, think they'll probably use it, or think others will adopt it, it's buzzy. If a lot of people are using it, it will eventually migrate to our emerging or traditional methods battery.


A few notes on some of the tradeoffs for this change.

We did not remove any topics, but we added two: CX/UX and Agile. These came from our analysis of verbatims in the last wave. This may make it harder to compare ranks because we have two more in this year's list, and they both rank fairly high. Additionally, we added research automation to automation and machine learning to AI, again based on input from the last wave.

For our comparisons to previous waves, we consider the top two box scores from each – game changer/interesting trend versus in use/plan to use. You'll notice large drop-offs in top 2 box percentages for several topics, such as automation: in 2018, 76% said it was a game changer or interesting trend; now only 51% use it or plan to use it. However, if you add the third box, probably will use it, the score comes up to 75%, only one percent off last year. This seems to argue in favor of a top three box score from previous waves for comparisons.

The top 2 box, however, seems to work for topics such as Storytelling & Data Visualization: in 2018, 84% said it was a game changer or interesting trend, and this year 81% say they use it or plan to use it. Therefore, in order to look at an apples-to-apples comparison from previous waves, rather than compare top 2 box scores directly, it is instructive to compare the ranks based on those scores, which we see in Table 1, the wave-on-wave trend table.

Storytelling and Data Visualization, CX/UX, Agile, Big Data and Automation are the topics that are most followed and experiencing significant practical implementation





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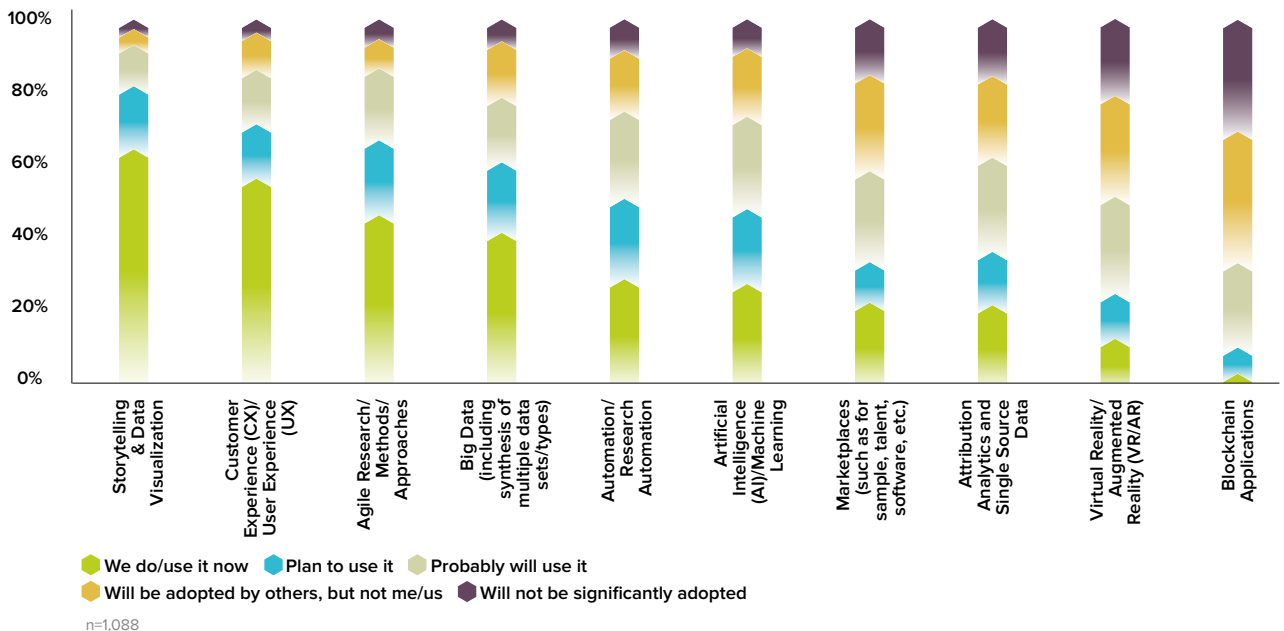
BUZZ TOPICS: HYPE VS. ADOPTION, TABLE 1

All Respondents	Top 2 Box Score				Rank			
	Y16W2	Y17W2	Y18W2	Y19W2	Y16W2	Y17W2	Y18W2	Y19W2
Storytelling & Data Visualization	78%	83%	84%	81%	2	1	1	1
Customer Experience (CX)/User Experience (UX)	–	–	–	71%	–	–	–	2
Agile Research/Methods/Approaches	–	–	–	67%	–	–	–	3
Big Data (including synthesis of multiple data sets/types)	80%	77%	82%	61%	1	2	2	4
Automation/Research Automation	74%	66%	76%	51%	3	3	3	5
Artificial Intelligence (AI)/Machine Learning	47%	51%	72%	48%	6	4	4	6
Marketplaces (such as for sample, talent, software, etc.)	49%	37%	42%	34%	5	5	6	8
Attribution Analytics and Single Source Data	52%	36%	41%	36%	4	7	7	7
Virtual Reality/Augmented Reality	45%	37%	49%	25%	7	5	5	9
Blockchain Applications	–	–	29%	10%	–	–	8	10
n=	1,560	1,533	1,260	1,117	1,560	1,533	1,260	1,117

Clearly Storytelling and Data Visualization, CX/UX, Agile, Big Data and Automation are the topics that are most followed and experiencing significant practical implementation among GRIT respondents. AI, Attribution, and Marketplaces have sizable interest but still have much room to grow, while AR/VR and Blockchain have the lowest comparative rankings. Again, as a reminder, we have normalized scales as best we could here, so apparent drop off should be taken with a grain of salt. Going forward this ranking will be a far more reliable measure of

adoption for these topics for trending purposes. To better illustrate the new metric, it's useful to look at results by response option. If we only look at the response of We do/use it now, as previously noted it may be time to move Agile, Big Data, CX/UX and Storytelling/Data Visualization into another question set next year; they clearly have reached mainstream adoption. All others are niche at best in terms of actual adoption, although blockchain remains at the beginning of its adoption curve as of the end of 2019.

INTENTION/ATTITUDE TOWARD BUZZ TOPICS (BUYERS AND SUPPLIERS)





BUZZWORDS

Rick Kelly

SVP, Products & Research, Fuel Cycle

Email: <mailto:rickelly@fuelcycle.com> | Twitter: [@_rickkelly](https://twitter.com/_rickkelly) | Website: www.fuelcycle.com

LinkedIn: <https://www.linkedin.com/in/rhkelly/>

Buzzwords are underrated. While acknowledging the risk of overgeneralization, it seems to be perennially in vogue to complain about the use of buzzwords. A simple search for “why people hate buzzwords” reveals thousands of articles and posts bemoaning buzzwords. TrustRadius’ list of the 119 most-hated buzzwords include facepalm-inducing words like “low-hanging fruit,” “agile,” and “synergy.” Perhaps the reason why people dislike buzzwords is because they are commonly associated with BS. Too often, buzzwords are used to impress rather than inform.

But buzzwords represent important topics of change in any industry. They shouldn’t be ignored and are likely underrated because of the high levels of BS that surround them. Buzzwords serve as an important signal of coming waves that will impact researchers soon, despite the noise that can accompany them. Five years ago, common research buzzwords were topics like “mobile research,” “disruption,” and “big data.” Now, these practices are commonplace.

As buzzwords move from potential future trend to practices, they migrate from buzzwords to just...words.

The Summer 2019 issue of the GRIT report identified the hottest industry buzzwords as “artificial intelligence” and “research automation.” I’m sure I’m not alone in having engaged in some eye rolling when I’ve seen these topics addressed. In fact, both terms were rated by GRIT respondents as topics they were both most optimistic and pessimistic about!

While both AI and automation certainly have their share of BS’ing prognosticators, there are many real applications for both I’ll highlight here.

Research Automation

If we define research automation as efforts to reduce or eliminate human effort with software, then automation is already exiting the buzzword stage and becoming incredibly commonplace. For instance, sampling powerhouse Lucid introduced programmatic (including automated) sampling several years ago, replacing the once complex network of phone calls and emails that connected sample providers to provide sample to research projects. Other companies are templating robust survey research methodologies and packaging them into complete solutions, automating laborious tasks with lines of code.

Artificial Intelligence & Machine Learning

While the ultimate promise of artificial intelligence is to automatically create insights based on collected data, meaningful application of AI exists today and is used by forward-thinking researchers. At Fuel Cycle, we utilize machine learning for several applications, including sentiment analysis and text analytics for analyzing text, computer vision to scan photos for logos, labels, and objects that accelerate qualitative data analysis. Partners of ours like Remesh use machine learning to crystalize meaning from large scale synchronous discussions. Qualtrics developed an industry-leading fraud detection solution utilizing artificial intelligence.

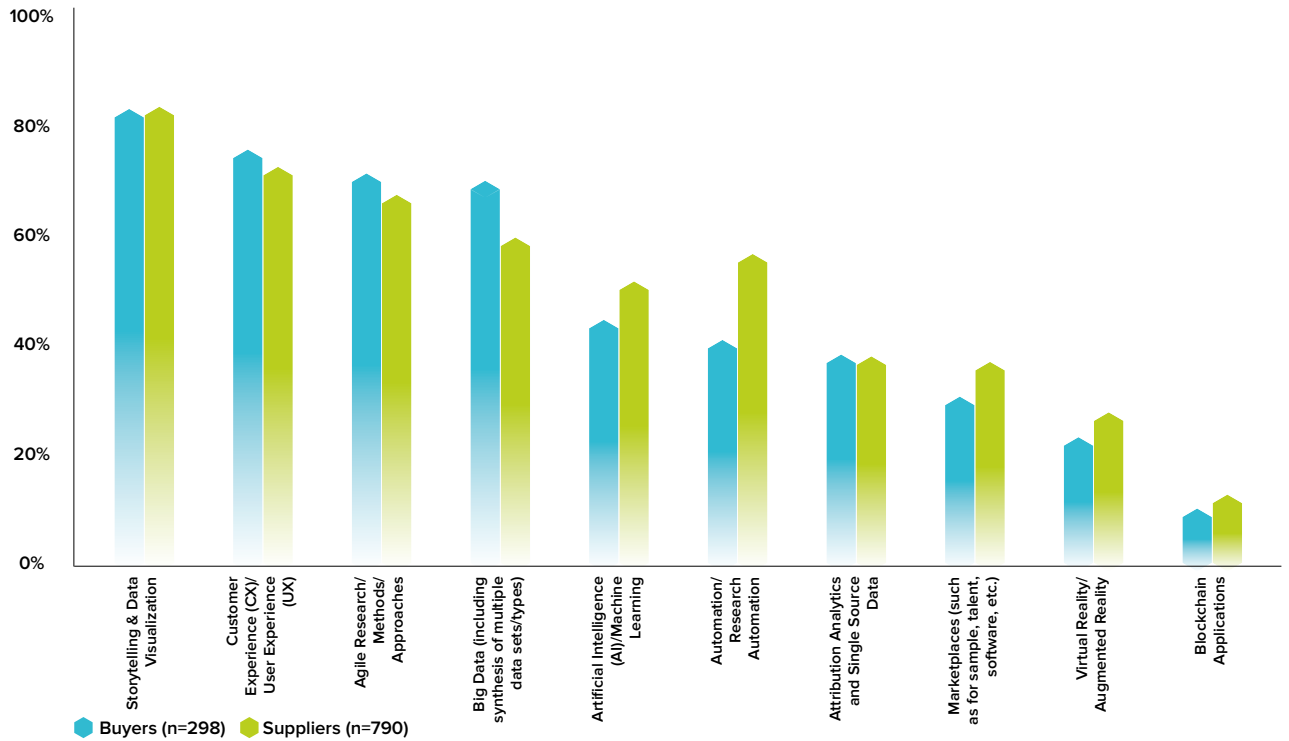
In Conclusion

Despite the fact that buzzwords can often reek of self-promotion more than insight, they’re often indicative of important topics that practitioners should consider for the future. Nearly every buzzy topic in recent memory has become a core part of researchers’ workflows. Mobile research, big data, and similar terms at peak zeitgeist a few years ago are now commonplace. So too, we should expect current buzzwords like research automation and artificial intelligence to soon lose the buzz and become just words.

When looking at differences between Buyers and Suppliers, we see consistency in top 2 box scores with a few exceptions that jibe very well with

previous observations: big data leads more with Buyers, while more process innovations such as AI, Automation and Marketplaces lead with Suppliers.

BUZZ TOPICS: BUYERS VS. SUPPLIERS (19W2, DO IT NOW/PLAN TO DO)



THE BIG PICTURE

Automation, AI, Big Data, and Storytelling & Visualization should be at the top of the list for consideration



As we observed last year, if these results are directional guidance for potential areas to focus on investing time and resources in the year ahead, clearly Automation, AI, Big Data, and Storytelling & Visualization should be at the top of the list for consideration. Multiple data points in this wave of GRIT reinforce this conclusion, so we are confident we will continue to see growth in these areas. More

importantly, understanding the interrelationship of these data to other insights we have captured, trends, especially in the areas aligned with Buyer needs and priorities, enables Suppliers to evolve their strategies and make more informed choices regarding new offerings, talent, skills, training, and technology investments. This section serves as a vital part of that set of directions.



THE NUMBERS ARE IN: 5 IMPORTANT ATTRIBUTES TO CONSIDER WHEN SELECTING A MARKET RESEARCH PARTNER

Lev Mazin

CEO & Co-Founder, AYTM

Email: <mailto:Lev@aytm.com> | Website: www.aytm.com

LinkedIn: <https://www.linkedin.com/in/levmazin/>

As a market research buyer, you want a platform built with empathy in mind. Your supplier should have a deep understanding of your objectives, as well as careful consideration of how best to help you meet them. Below, you'll find the top five attributes that influence purchasing decisions and can help guide you in what to look for in a market research partnership.

Data Quality

While every supplier in the industry recognizes that data quality is an issue, most fail to take any significant action because it's against their short-term business interests. Poor data quality leads to business decisions that can move the brand in the wrong direction and ultimately result in lower market share. It can also erode the trust built with stakeholders and negatively impact your company's ability to understand the consumer.

Choose a supplier that employs a carefully crafted quality control workflow, that includes the removal of bots and duplicates; verification of your target audience and the quality of their responses; as well as a deep commitment to providing an exceptional user experience.

Panels can promote data quality by implementing a system that rewards respondents for their honesty and candor. Aytm's TrustScoreSM – an automatic system of consistency verification scores panelists using an algorithm that looks for inconsistencies in answers. We show our appreciation for survey takers who provide consistent answers, while progressively reducing access to surveys to those that don't. This protects the interests of researchers. Respondents ranked PaidViewpoint—our proprietary panel—a [Top 5 Survey Site](#) by SurveyPolice for five years in a row.

Service Level

Having a supplier that customizes their technology and service to your needs means you can get the research done right, within budgetary and time constraints, while leveraging technology to complete even the most advanced tests easily, for quick iteration and delivery of insights at the speed of the market.

This customization empowers you to build best-practice templates and processes, raising the standard and consistency of all

the research being conducted by your teams. Look for market research suppliers that offer a seamless combination of platform, panel, and reporting; along with a flexible service model, allowing you to “Do-It-Yourself,” “Do-it-Together,” or have them “Do-It-For-You.”

Relationship

As a buyer, you need a partner that will become an extension of your research team. Look for a supplier that demonstrates:

- Empathy - It's crucial that your supplier really listens and understands your unique challenges to help you achieve your desired outcomes.
- Responsiveness - Work with a supplier that responds quickly when you have questions, need help troubleshooting, creating surveys, or launching them to your audience.
- Expertise - Your supplier must bring its knowledge and best practices to the table to fill in any research experience gaps you may have.
- Training - Find a supplier that arms you with the information you need to become more self-sufficient, enabling successful digital transformation across your org.

Reputation + Thought leadership

Modern market research suppliers should strike a balance between reputation and thought leadership. A reputable supplier keeps its promises and delivers excellent results, consistently, over time. To date, aytm has powered millions of survey responses, offering insights from more than 60 million consumers across 33 countries and 16 languages.

Yet, to remain at the forefront of innovation, suppliers must anticipate the evolving needs of buyers, while also helping to lead meaningful change in the industry with cutting-edge ideas and solutions. For example, there is currently no recognized industry standard for data quality management. Aytm is actively working to develop a new standard that includes several vectors for establishing data quality.

Ensure that your supplier can not only serve your needs today but is envisioning new and better ways to evolve and meet your needs in the future.

SATISFACTION WITH SUPPLIERS

74% of those Buyers who work regularly with strategic consultants are very or completely satisfied, significantly higher than how satisfied they are with more tactical providers

Returning in this wave of GRIT is our exploration of Buyers' satisfaction levels with Suppliers, combined with how Suppliers see themselves. Although many individual companies on both sides have formalized programs for capturing satisfaction data, GRIT is the only study that looks at this across the industry in aggregate. New to this wave is an analysis of the types of Suppliers being used.

Prior to asking for overall satisfaction with providers, Buyers were prompted for how frequently they worked with different types of providers. The majority of research Buyers work with full service and qualitative providers regularly, while only about four in ten work with analytics and technology providers regularly, and fewer than one in four work with strategic consultants regularly.

SATISFACTION WITH SUPPLIERS, TABLE 1

Type of Provider	Buyers		
	Work with regularly	Work with occasionally	Rarely or never work with
Full and/or field service providers	62%	26%	12%
Qualitative research providers	54%	32%	15%
Data & analytics providers	40%	36%	23%
Technology providers	37%	37%	26%
Strategic consultants	23%	42%	34%

n=295

Consistent with prior waves, Buyers rated all the providers they work with overall rather than by type (to do so would either expand survey length dramatically, cripple sample per analysis, or both.) Crosstabbing overall satisfaction by those who regularly work with types (even though they may also work with other types) produces the following imperfect measure: 74% of those Buyers who work regularly with strategic consultants are very or completely satisfied, significantly higher than how satisfied they are with more tactical providers, especially technology and field service providers (60%). Strategy sells – and satisfies.

SATISFACTION WITH SUPPLIERS, TABLE 2

Type of Provider Regularly Worked With	Buyers Top 2 Box %
Strategic consultants	74%
Qualitative research providers	64%
Data & analytics providers	61%
Technology providers	60%
Full and/or field service providers	60%

n=298

Note that frequency of work may be a consequence of satisfaction with a type of provider. For instance, only 45% of those who work occasionally with full-service providers are very or completely satisfied with their providers, vs. 60% for those who work regularly with such providers.

HOW BUYERS RATE SUPPLIERS

Last year, in its GRIT debut, Buyers' overall satisfaction with Suppliers (across all types) was an underwhelming 49% (Top 2 Box, completely or very satisfied) but has risen 6 percentage points to 55% over 2019. The improvement is mainly due to higher satisfaction with strategic aspects, which, on average, improved by 5 percentage points, led by Reporting research results (9 points), Recommending business actions based on the research (7 points), and Interacting with senior management (6 points). No strategic aspect declined in satisfaction.

The aggregate score for tactical aspects declined 3 percentage points, despite a 4 point improvement in Data visualization. Most tactical aspects - Timeliness of deliverables, Value for the

cost, Project management/service, and Managing scope/changes – dropped 4 percentage points or more.

The top two most satisfying aspects from 2018, Conducting the research and Implementing the research plan are in the same position this year, with scores of 74% and 70%, respectively. This is consistent with common sense: these are the two aspects that perhaps apply most universally across supplier types, and doing well on them are likely table stakes to be considered for work. The third top aspect from last year, Project management/service, fell to 6th place with a score of 57%, an 8 point drop. The third position is now Understanding the issue to be researched, a strategic aspect, which improved 5 points to 63%.

Buyers' overall satisfaction with Suppliers (across all types) was an underwhelming 49% (Top 2 Box, completely or very satisfied) but has risen 6 percentage points to 55% over 2019



SATISFACTION WITH SUPPLIERS, TABLE 3

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

[Normalized to remove Not applicable/Not expected. As with other data in this GRIT wave, recut from past historical reporting to focus on Buyers.]

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

ARE CHANGES IN RATINGS ARTEFACTS OF SURVEY CHANGES?

Some of the movement from 2018 to 2019, but not all of it, may be explained by subtle changes to the strategic and tactical aspect questions. In past waves, the buyer could select a rating from 'completely satisfied' to 'not at all satisfied' or opt out by choosing 'Not applicable'. In this this wave, we tightened up the opt out option to make it more descriptive, decisive, and appropriate to the specific aspects: 'Do not expect this from them'.

While reviewing the data to date, some answer patterns suggested that some respondents may not know how to answer regarding an aspect that wasn't expected to be part of the service, but they didn't necessarily choose not applicable. For example, some Buyers love the Supplier to interact with senior management because, in some cases, they may bring an external credibility that cannot be realized via internal efforts, perhaps a particular area of expertise or the objectivity of an outsider. Other Buyers might loathe the prospect of a Supplier encroaching on territory they have carefully cultivated and positioned. If a Supplier does not interact with senior management, the first buyer may be less satisfied while the latter may be delighted. In each case, the behavior (or non-behavior) is the same, but the impact on satisfaction is completely opposite.

We saw evidence of this in the data last year, and hypothesized that some buyers would be more comfortable saying that they did not expect the Supplier to interact with senior management, rather than offer an opinion on something that hadn't happened (or hadn't happened yet.) From this perspective, 'not applicable' did not seem to be the right way to opt-out because, if a Supplier chose to make it an issue regardless of the Buyer's expectations, it would be extremely applicable. After considering these issues, we decided to change not applicable to not expected from them.

Going a step further, we removed the 'not applicable' choice from aspects that would seem to

be baked into any type of supplier service: project management/service, managing the scope and changes, timeliness, and value for the cost. The results are consistent and enlightening.

First, usage of the opt-out option increased for five aspects after it was changed to do not expect this: interacting with senior management (9.5 points), data analysis (3.5), designing the research plan (3.1), recommending business actions (3.0), and data visualization (2.4). Top 2 Box satisfaction scores increased for interacting with senior management, recommending business actions, and data visualization, suggesting that those who did not choose 'not applicable' but would have chosen 'do not expect' in the last wave gave a lower than average rating instead. It seems to have made no difference for data analysis and designing the research plan, perhaps because it is easier to give a more neutral rating for those because they are relatively more behind the scenes.

Second, where the opt-out option was taken away, top 2 box satisfaction declined, from 4 percentage points for timeliness of deliverables to 11 points for managing scope/changes. This suggests that people who opted out last wave would have provided ratings that were more negative than average for these aspects. Whether one believes the higher 2018 scores are truer than the 2019 scores or not depends on how willing you are to believe that a Supplier can provide a service which cannot be evaluated vis a vis timeliness, service quality, and value for the cost.

Lastly, some aspects did not change relative to the number of op-outs, and some of them did not change while one of them – reporting research results – spiked up. This reminds us that although we can find correlations between how a question is asked and how its measure response changes, sometimes the response is influenced by actual, real-world experiences. So, while the findings relative to the survey changes are consistent and

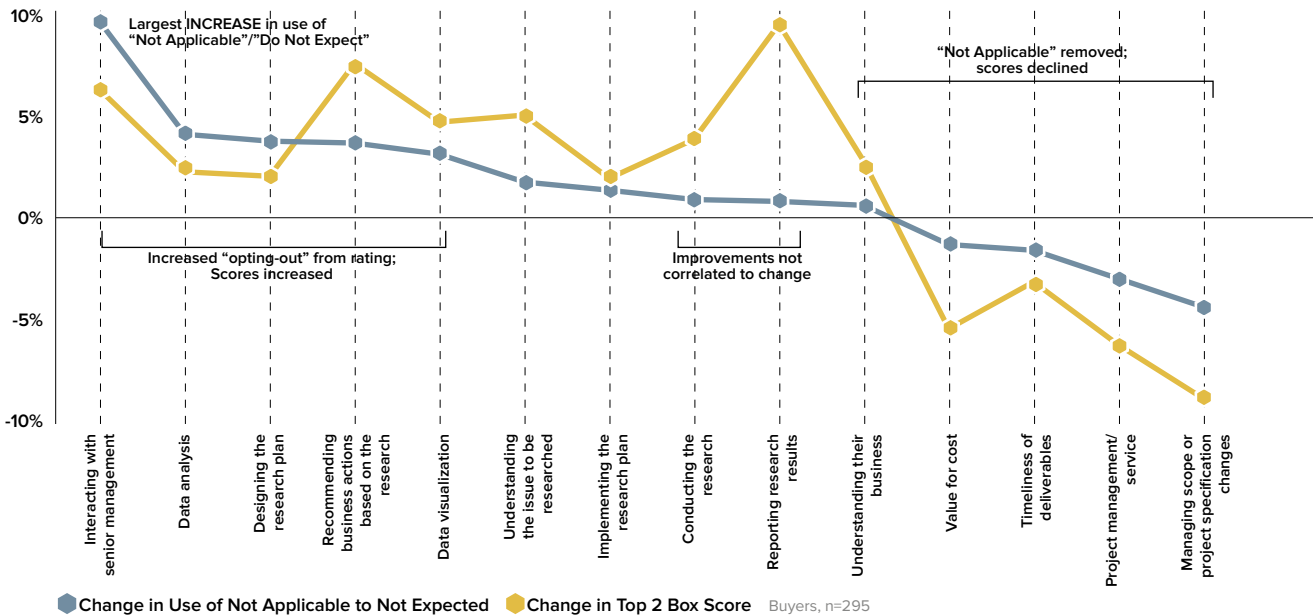
Some of the movement from 2018 to 2019, but not all of it, may be explained by subtle changes to the strategic and tactical aspect questions



suggestive, they seem to impact the magnitude of the differences, not the direction, and, it can be

argued, provide a more accurate accounting of Buyer perceptions of Supplier performance.

CHANGE FROM 2018 TO 2019 (BUYERS), CHART 1



DOES SATISFACTION VARY BY SUPPLIER TYPE?

Recognizing that the essence of the insights and analytics industry does not boil down to simple classifications like Buyer and Supplier, GRIT continues to pursue more granular understanding of our structure and players. In this spirit, we have attempted to drill down further into satisfaction with different types of Suppliers, but without the survey length or sample size luxury to ask separate sequences for each supplier type.

As a proxy, we asked GRIT Buyers which types of Suppliers they work with regularly, occasionally, and rarely or never. Our hypothesis is that if we profile satisfaction responses by the supplier types that are top of mind, we might identify some meaningful differences. Obviously, summary ratings across different types of Suppliers will not yield a detailed scorecard of satisfaction levels within a specific supplier type, but any differences we see when profiling Buyers ratings by the supplier types that they know best should provide clues about how different types of suppliers are performing.

Chart 2 shows the Buyer ratings of Suppliers for each of the seven strategic aspects broken out by Buyers who work regularly with each type of supplier. Of course, if a Buyer regularly works with more than one type of supplier, the response will count for multiple types, making it more difficult to find differences.

However, we do see some differences, mainly with respect to strategic consultancies, data and analytics providers, and technology providers. Working regularly with just 23% of Buyers, strategic consultancies drive the smallest, but most unique type in the analysis. Overall satisfaction with Suppliers in general is higher for Buyers if they work regularly with strategic consultancies. Satisfaction is particularly high with respect to interacting with senior management and higher for recommending business actions.

Overall satisfaction with Suppliers in general is higher for Buyers if they work regularly with strategic consultancies. Satisfaction is particularly high with respect to interacting with senior management and higher for recommending business actions

SATISFACTION WITH SUPPLIERS ON STRATEGIC ASPECTS BY TYPE WORK WITH REGULARLY (BUYERS), CHART 2

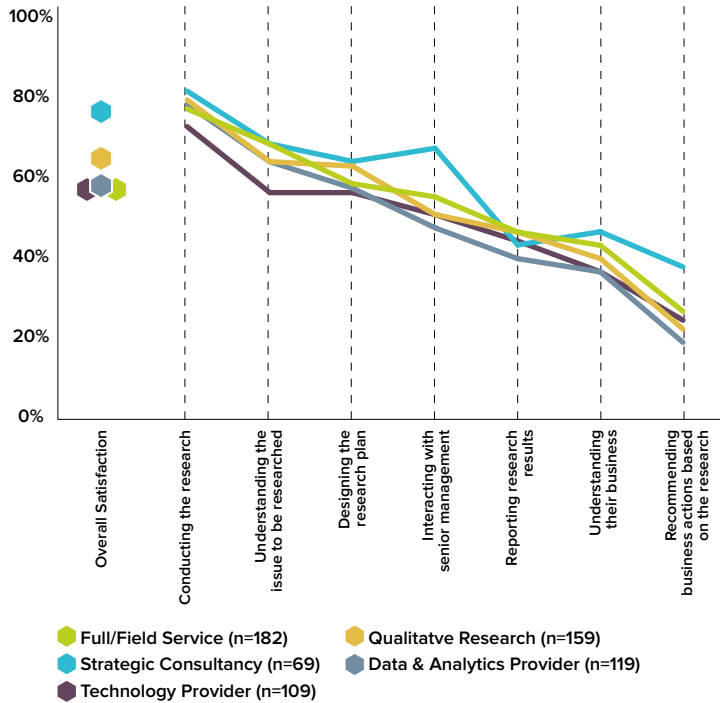
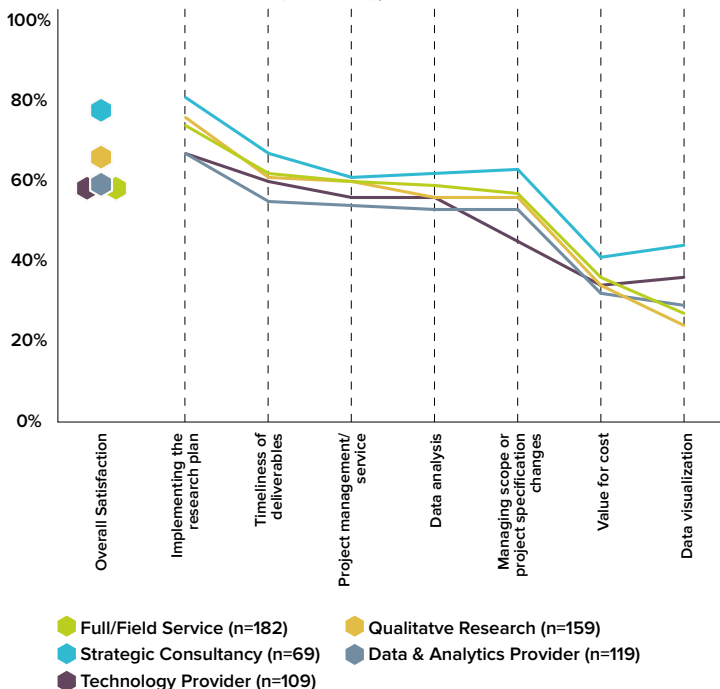


Chart 3 shows similar information for the tactical aspects. The Buyers that regularly work with strategic consultancies are more satisfied with implementing the research plan, timeliness of deliverables, managing project scope and changes, value for cost, and data visualization.

Buyers who regularly work with technology providers are less satisfied with Suppliers' understanding of their business, while those who regularly work with data and analytics providers are less satisfied with interaction with senior management and reporting research results, as well as timeliness of deliverables and project management/service.

Charts 4 and 5 show satisfaction with strategic and tactical aspects again, this time broken out by which supplies are used occasionally. Buyers who work with strategic consultancies only occasionally do not have a distinct profile such as the one that the regular group shows. Full/field service agencies, indistinguishably in the center of things for Buyers who work with them regularly, now stand out in a more negative way for those who use them only on occasion. Lower satisfaction is evident for most of the strategic aspects: understanding issue to be researched, interacting with senior management, reporting results, understanding the business, and making recommendations. On the tactical side, these Buyers are also less satisfied with suppliers on project management/service, managing project scope/changes, data analysis, and value for cost.

SATISFACTION WITH SUPPLIERS ON TACTICAL ASPECTS BY TYPE WORK WITH REGULARLY (BUYERS), CHART 3

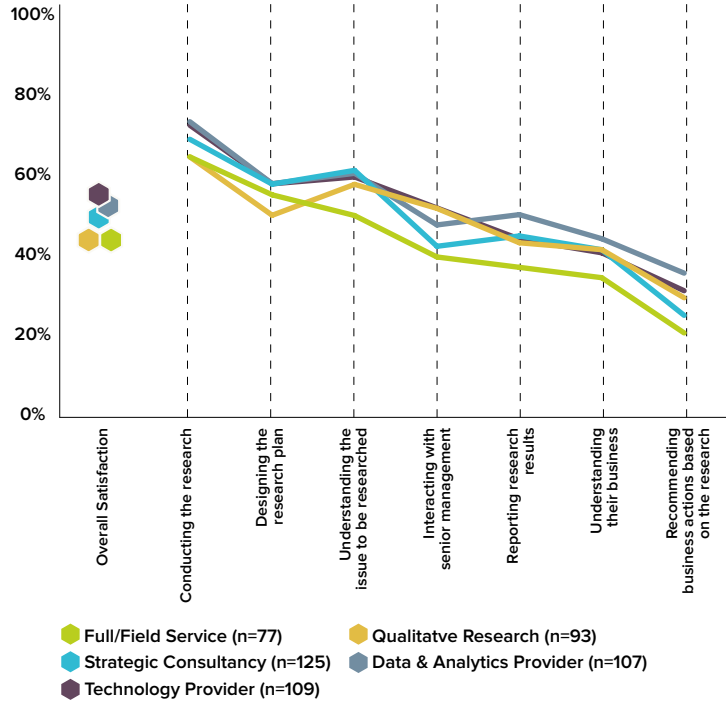


Clearly, there are different levels of satisfaction in different aspects of service driven by how a Buyer works with particular types of suppliers, and GRIT is just now scratching the surface of it. The analysis by regular use shows that when strategic consultants are a regular part of the mix, good (or, at least, better) things happen. However, only 23% of buyers work with them regularly, and GRIT analysis has not progressed far enough yet to understand the context in which this occurs. For example, do these Buyers work regularly with strategic consultants and only occasionally with other types, or does the regular use of strategic consultancies work for them because it is a good complement to their other regular partners?

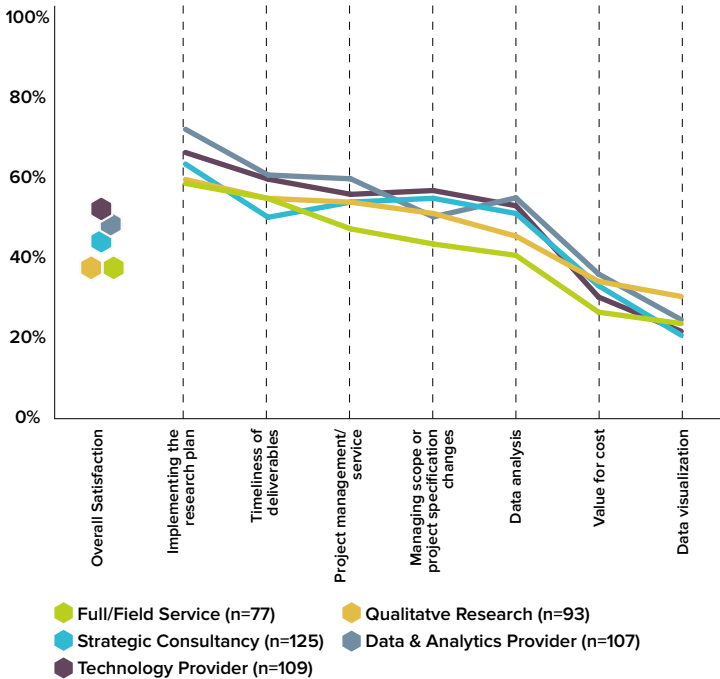
The 'occasional' analysis reveals that Buyers are less satisfied when full/field service agencies are used occasionally, yet we know, based on the data, that if they are not working with full/field service agencies occasionally, they are very likely working with them regularly. This suggests a hypothesis that Buyers are more satisfied with suppliers if they have a go to full/field service provider, perhaps complemented by a go to supplier from one or more of the other types.

At this point, GRIT can offer these few insights and some hypotheses which will have to be addressed via our ongoing analyses.

SATISFACTION WITH SUPPLIERS ON STRATEGIC ASPECTS BY TYPE WORK WITH OCCASIONALLY (BUYERS), CHART 4



SATISFACTION WITH SUPPLIERS ON TACTICAL ASPECTS BY TYPE WORK WITH OCCASIONALLY (BUYERS), CHART 5



There are different levels of satisfaction in different aspects of service driven by how a Buyer works with particular types of suppliers, and GRIT is just scratching the surface of it now

HOW SUPPLIERS RATE THEMSELVES

Suppliers were told we've asked research Buyers a series of questions about their satisfaction levels with research providers. Now we'd like to know how research Suppliers think the industry performs. Subsequently, they saw a similar series of questions as Buyers, asking them to rate how well Suppliers like them (e.g., of the same type – full/field service, technology providers, etc.) meet the needs of clients.

Suppliers were dramatically under confident at the top level: only 35% thought that providers did very well or met needs completely, compared to the 55% of Buyers who were very or completely satisfied. Suppliers were also under confident on Managing project scope/changes, which they rated 15 percentage points lower than Buyers, Understanding the issue to be researched (11 points lower), Interacting with senior management (10 points lower), Understanding their business (8 points lower), and Timeliness of deliverables (7 points lower). On the other hand, they were dramatically overconfident on Data analysis (8 points higher than Buyers), Reporting results (7 point higher), Value for cost (6 points higher), and Recommending business actions based on the research (5 points higher).

Given that Suppliers answered a somewhat different question, how comparable are Top 2 Box satisfaction and Top 2 Box meets needs? If we rank each aspect by Top 2 Box score, the same two aspects come out as 1-2: conducting the research and implementing the research plan. In fact, 8 more of the remaining 12 aspects are within 2 rank positions of each other. The most disagreement occurs regarding:

- Reporting research results (tied for #6 among Suppliers but 10th for Buyers)
- Data analysis (#3 for Suppliers but only #7 for Buyers)
- Managing scope or project specification changes (#8 for Buyers, #11 for Suppliers)
- Understanding the issue to be researched (#3 for Buyers but tied for 6th for Suppliers)















The key takeaway seems to be that Buyers and Suppliers have a good understanding of Supplier strengths and weaknesses, but Suppliers might need to spend more time understanding Buyer needs for data analysis and reporting. Considering the two topics together, it might be that Buyers don't question Suppliers' technical prowess, but may feel like the analysis misses the mark (leading to poor reporting).

It might seem odd that Suppliers could miss the mark with data analysis when Buyers rate them so much more highly on understanding the business issue to research, but both Suppliers and Buyers give them low marks for understanding the clients' business. Perhaps Suppliers are better at devising and marketing solutions to topical business problems than they are at customizing the solutions for individual clients.

Suppliers were dramatically under confident at the top level: only 35% thought that providers did "very well" or "met needs completely", compared to the 55% of Buyers who were very or completely satisfied



SATISFACTION WITH SUPPLIERS, TABLE 4

		Top 2 Box %					
		Scope	Buyers	Suppliers	Difference	Buyer Rank	Supplier Rank
	Overall satisfaction	Overall	55%	35%	-20%		
	Data analysis	Tactical	54%	62%	8%	7	3
	Reporting research results	Strategic	45%	52%	7%	10	6(t)
	Value for cost	Tactical	34%	40%	6	12	10
	Recommending business actions based on the research	Strategic	27%	32%	5%	13 (t)	13
	Data visualization	Tactical	27%	31%	4%	13 (t)	14
	Designing the research plan	Strategic	58%	61%	3%	5	4
	Project management/service	Tactical	57%	60%	3	6	5
	Conducting the research	Strategic	74%	75%	1%	1	1
	Implementing the research plan	Tactical	70%	67%	-3%	2	2
	Timeliness of deliverables	Tactical	59%	52%	-7%	4	6(t)
	Understanding their business	Strategic	42%	34%	-8%	11	12
	Interacting with senior management	Strategic	52%	42%	-10%	9	9
	Understanding the issue to be researched	Strategic	63%	52%	-11%	3	6(t)
	Managing scope or project specification changes	Tactical	53%	38%	-15%	8	11
	n= (maximum)		295	789			

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

Suppliers were asked to evaluate how well their reference group meets needs, and there were some differences across Supplier types.

Technology providers differed the most, rating their group lower for meeting needs with respect to strategic aspects including conducting the research, designing the research plan, and understating the issue to be researched, though they gave themselves the highest mark for reporting results. They also self-evaluated lower on tactical issues including implementing the research plan, project management/service, and data analysis. However, most technology providers said their primary business was licensing tools and platforms, so the lower ratings may reflect a lower involvement in traditional projects and relationships.

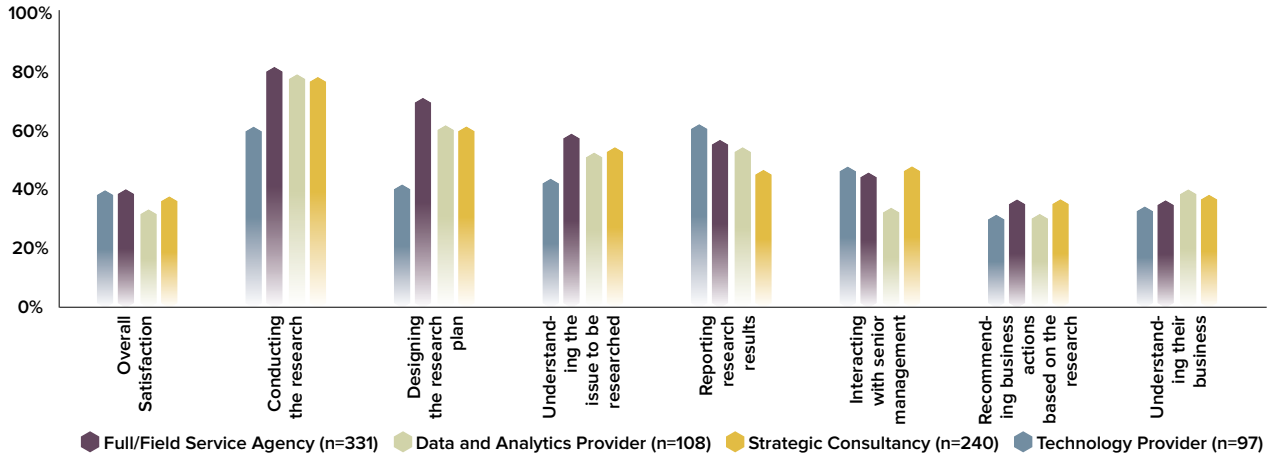
A few other differences stand out:

- Full/field service agencies rate themselves highly on designing the research plan and understanding the issue to be researched
- On tactical aspects, full/field service agencies indicated they were better at meeting needs for implementing the research plan, project management/service, data analysis, and managing the scope/changes

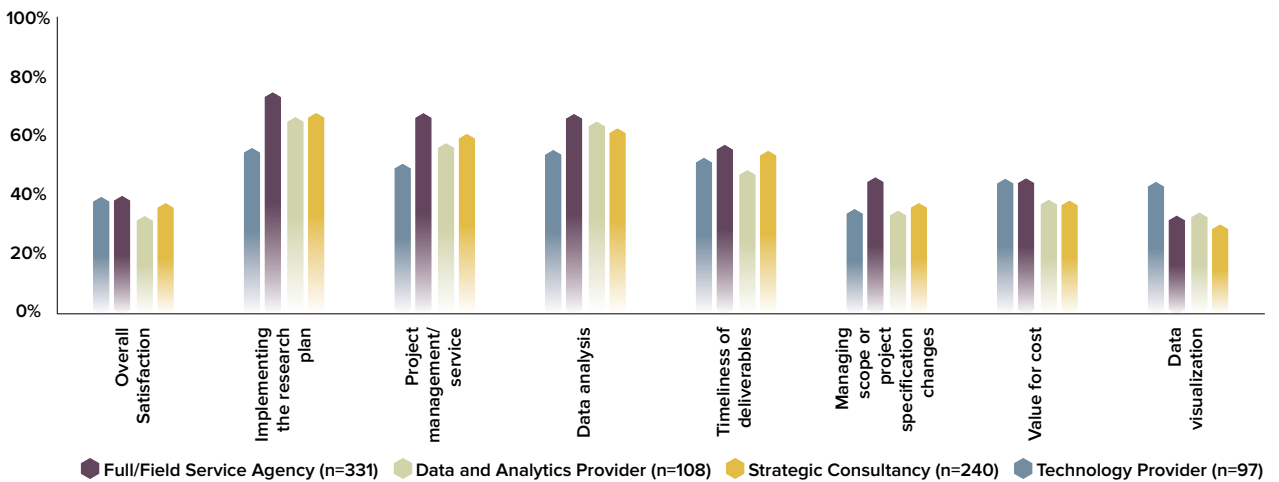
The key takeaway seems to be that Buyers and Suppliers have a good understanding of Supplier strengths and weaknesses, but Suppliers might need to spend more time understanding Buyer needs for data analysis and reporting



PERCEPTION OF SATISFACTION ON STRATEGIC ASPECTS WITH SUPPLIERS IN THEIR SEGMENT (SUPPLIERS), CHART 6



PERCEPTION OF SATISFACTION ON TACTICAL ASPECTS WITH SUPPLIERS IN THEIR SEGMENT (SUPPLIERS), CHART 7



THE BIG PICTURE

Traditional providers will continue to benefit from a focus on becoming more strategic, as strategic consultants, and excellence at strategic skills, drives overall satisfaction



Traditional providers will continue to benefit from a focus on becoming more strategic, as strategic consultants, and excellence at strategic skills, drives overall satisfaction. The drive to be more consultative is a worthy goal: generating insights that deliver real organizational impact can develop deep relationships. The more strategic the research, the greater the opportunity for partnership, while the more tactical the effort, the less opportunity.

For many providers, however, the relationship will continue to be far more transactional, driven by the rise of automation and DIY tools, the opportunity for most traditional Suppliers may be limited to

winning the business based on the cheaper, faster, better rubric on a client-by-client basis. If the future is in technology and analytics platforms, those vendors have significant work to do to become true strategic partners.

Especially in light of this last point, it is worth reflecting on the hypothesis that client satisfaction with suppliers may be at its highest when they have optimized a complementary portfolio of trusted partners with whom to work with on a regular basis. In that context, it is important to understand how a prospective (or current) client structures its portfolio and how your service would fit in and enhance it.



3 THINGS YOU SHOULD BE ASKING OF YOUR MARKET RESEARCH SUPPLIERS

Matt Warta

CEO and Co-Founder, GutCheck

Email: matt@gutcheckit.com | Twitter: @mwarta | Website: www.gutcheckit.com

LinkedIn: www.linkedin.com/in/matt-warta/

Only 27% of buyers are satisfied with the recommended business actions their market research suppliers provide. On the other end of the research process, and equally low in satisfaction, is how well a supplier understands a buyer's business to begin with. Can you relate?

With these numbers, it's no wonder that only 56% of market research suppliers were able to grow their revenue in the past year. Suppliers are falling short on two of the most important drivers for customer satisfaction. Yet when a supplier understands your business and can leverage those learnings into recommended actions, you win. When you win, you're more likely to work again with that supplier, and to tell your friends about them. This translates into a high Net Promoter Score (NPS) for the supplier. And a high NPS (>65) is empirically tied to well-above-average Net Retention.

Why does this matter? Because the more satisfied you are, the more work your supplier gets from you, and the better positioned they are to improve and optimize their research methodologies to ensure your continued success—and, by extension, to grow their own business. This is the key ingredient to long-term sustained growth for any business, whether you're a chocolate factory or a market research company.

So, how can you help your market research supplier optimize and grow? Ask these three things of them:

1: Make sure they understand your business. This requires investment from both you and your supplier. Your supplier needs to employ client services and research teams with intellectual curiosity, the commitment to understand your business, and the innate wiring to do great work. Their understanding needs to go beyond the current project at hand; they must become true students of your business. Likewise, you, as the buyer, don't have to treat your relationship with your supplier as only a transactional one. Rather, spending the time to educate your supplier on your key objectives and initiatives for the year, and what success looks like for you when your plans are achieved, is what helps create a real partnership with them.

2: Make sure they execute your project with greatness. Suppliers tend to be strong in this area already. Conducting the research and implementing the research plan earns top marks with buyers in terms of overall satisfaction. The market research industry has invested wisely in quality standards, automation to create efficiencies and reduce errors, and the implementation of tried-and-true methodologies, among other strategies. Combined with attracting people who are logical, show high attention to detail, and have great project management skills, the industry has created a recipe for success. Your job as the buyer is to hold your supplier to their own standards and demand quality at every turn.

3: Make sure they recommend business actions. For this third and arguably most valuable "ask" to be possible, the first two imperatives need to be executed well. But it's important to understand that this goes far beyond your supplier just reporting what the data says. It's about understanding the data and then how to activate on those insights. For example, presenting high-level statistics on non-category buyers and their purchase habits is just reporting on the data. Recommending specific attributes to communicate to non-brand users that would have the most impact on persuading them to try your brand, along with the best media channels to harness, is a recommended business action. While this capability is less commonplace in the market research industry today, it's nevertheless becoming more popular as hundreds of millions in private equity are now funding insights firms to buy activation agencies and vice versa. Your supplier should have the skills and tools available to give you actionable next steps that make the most sense for your business.

As outlined in this report, there are many trends, technological advances, and other innovations influencing the market research industry today, but at the end of the day, your supplier will succeed when they intimately understand your needs and objectives and make actionable recommendations that can significantly impact your business. You, as a buyer, will need to invest the time and resources in your supplier, just as your supplier will need to acquire and develop the right talent and tools. With this type of partnership, you not only increase your satisfaction with your supplier but the industry can truly flourish and grow.

CAUSALITY OF SATISFACTION DRIVERS

Causal models made their first appearance in the GRIT survey this year, and debuted with 33% usage among Buyers and 57% interest overall

In 2018, we reported satisfaction drivers based on simple regression analysis. For this wave, we apply causal modeling to the satisfaction data to analyze drivers. For the past few months, we have been testing out different causal models on data from prior waves, and now we share our findings based on the current data. Causal models made their first appearance in the GRIT survey this year, and debuted with 33% usage among Buyers and 57% interest overall, so it seems appropriate to apply it in this report.

We tested different causal models of satisfaction across buyers, and obtained the best result when we excluded aspects which did not apply universally to across supplier types. More than 10% of Buyers said they did not expect the following from their suppliers:

- Interacting with senior management (24%)
- Recommending business actions from research (12%)
- Visualizing data (12%)
- Implementing the research plan (11%)
- Analyzing data (10%)

These have been excluded because the missing responses muddy the results, and working out ways to accommodate them is beyond the scope of our immediate objectives. Chart 7 graphically represents the relationships between Buyers'

overall satisfaction with suppliers and the different strategic and tactical aspects measured. In this representation, graphic elements have the following meanings:

- Solid blue circles represent the different service aspects
- Arrows represent causal relationships, and:
 - Direction of an arrowhead indicates direction of causality
 - Thickness of an arrow represents relative magnitude of strength of the relationship
 - Absence of an arrow indicates lack of a significant direct relationship
- Target symbol represents the object of key factor identification
- Large solid orange circles represent key factors driving the target

The first two visuals that should stand out from this representation are 1) the absence of large orange circles and 2) all arrows point away from overall satisfaction. These two points imply that the level of overall satisfaction is driving satisfaction with the individual aspects. Considering that most buyers have "go to" suppliers that they use regularly, it may be that their overall experience with the Supplier over time drives their expectation of how each specific aspect will be delivered.

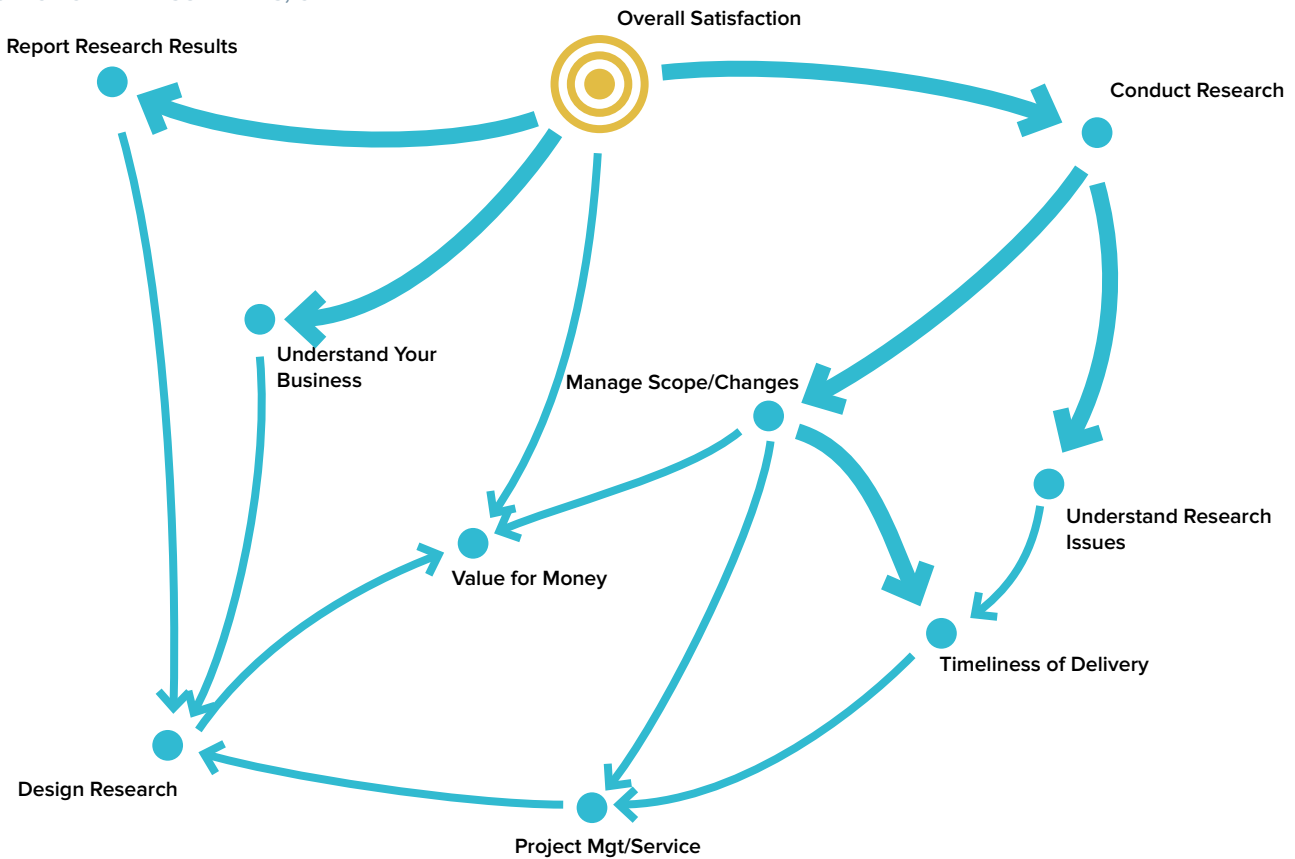
Because supplier satisfaction is asked regarding the Buyers' aggregate supplier experience, we cannot test this hypothesis by looking at specific relationships, and parsing the Buyer data further creates sample size issues and poor model fits. However, we can report that when we split the data by types of suppliers used more or less frequently, some models show the service aspects driving overall satisfaction.

When we split the data by types of suppliers used more or less frequently, some models show the service aspects driving overall satisfaction

For example, a model based on those who use full/field service providers regularly shows overall satisfaction driving the perception of satisfaction with the beginning and ending of a project: designing the research and reporting on it. Running the same model on those who use full/field service providers occasionally, on the other hand, shows

that satisfaction with conducting the research drives overall satisfaction. These models are not significant enough to present and do not focus on satisfaction with full/field service providers, but they also do not refute the hypothesis that regular use of suppliers reverses the expected causality between service aspects and overall satisfaction.

SATISFACTION WITH SUPPLIERS, CHART 7



The major drivers (thickest arrows) in the buyer model are shown in Table 5. Put differently, when Buyers reach a certain level of comfort with a supplier, they expect the Supplier to excel at understanding their business, reporting research results, and conducting the research.

CAUSALITY OF SATISFACTION DRIVERS, TABLE 5

Satisfaction with:	Drives satisfaction with:	With this strength:
Overall	Understanding your business	0.591
	Reporting research results	0.567
	Conducting research	0.521
Conducting research	Managing scope/changes	0.579
	Understanding research issues	0.543
Managing scope/changes	Timeliness of delivery	0.41

When Buyers reach a certain level of comfort with a Supplier, they expect the Supplier to excel at understanding their business, reporting research results, and conducting the research



From this graphic, we can also see key pathways where satisfaction is linked through multiple aspects. For example, once overall satisfaction influences the expectation of understanding the business, that aspect in turn influences the expectation of the research design which, in turn, impacts the expectation of value for the money. The expectation of value for the money is also directly influenced by managing scope and changes to the project, which often has cost implications, as well as by overall satisfaction, which may represent the “value” side of value for the money.

The causal analysis on the Supplier side has some interesting findings as well. As we review them, keep in mind that Suppliers were asked how well their segment meets the needs of clients and that aggregate supplier analysis includes strong representation from four distinct types: full/field service, strategic consultants, data and analytics

providers, and technology providers. We have applied the Buyer model specifications to suppliers as a group, meaning that we have excluded the same service aspects which Buyers indicated did not apply universally.

While it is beyond our scope to detail these models in this report, we did look at the models by supplier type. Our top-level finding is that the “Buyer model” fits full/field service agencies and, surprisingly, technology providers the best, strategic consultancies nearly as well, and data and analytics providers the least. (The lower fit for data and analytics providers may be driven by the exclusion of data analysis from the model based on the Buyer ratings. We suspect that if we continue to model within supplier types, we could find a set of service aspects that are more customized to each type.)

The main relationships identified in the analyses by supplier type are detailed in Table 6.

CAUSALITY OF SATISFACTION DRIVERS, TABLE 6

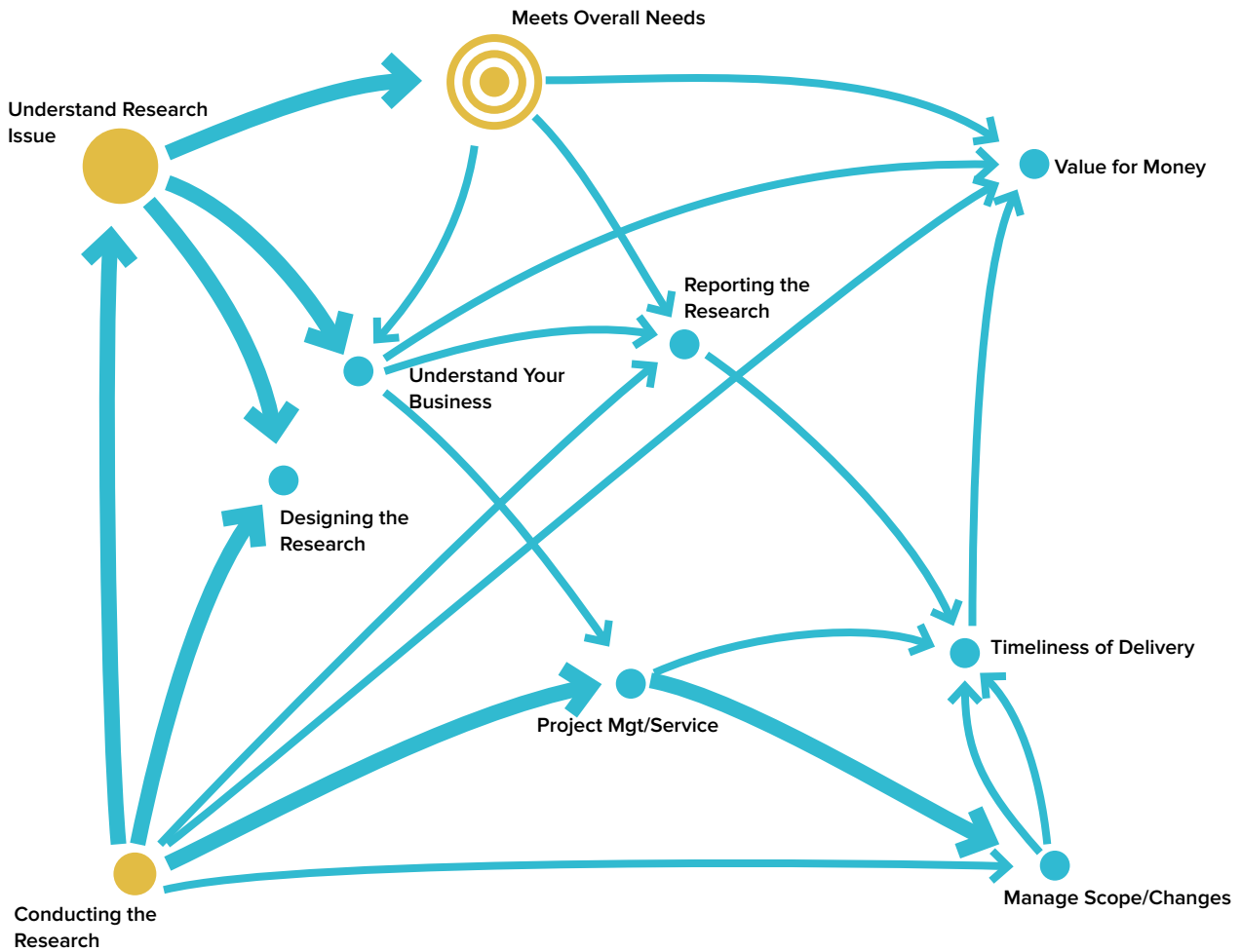
Supplier Type	Meeting needs:	Enables them to meet needs regarding:	With this strength:
Full/field service agencies	Understanding research issues	Designing the research	0.543
		Overall	0.461
		Understanding your business	0.41
	Designing the research	Conducting the research	0.408
	Project management/service	Managing scope/changes	0.446
Strategic consultancies	Designing the research	Timelines of delivery	0.41
		Reporting on the research	0.463
	Conducting the research	Value for the money	0.462
		Designing the research	0.443
	Understanding research issues	Understanding your business	0.6
Project management/service	Conducting the research	0.426	
Data & analytics providers	Reporting on the research	Managing scope/changes	0.417
		Overall	0.372
Technology providers	Conducting the research	Reporting on the research	0.667
	Timeliness of delivery	Value for the money	0.744
		Understanding research issues	0.511
	Understanding research issues	Designing the research	0.525

Strongest relationship for each supplier type in bold

Understanding that there is diversity across Supplier types, we can look at the aggregate model with some enhanced perspective (Chart 8). Despite the diversity

we know to exist, the statistics used to evaluate the models are similar to those for the individual supplier type models.

SATISFACTION WITH SUPPLIERS, CHART 8



Our top-level finding is that the “Buyer model” fit full/field service agencies and, surprisingly, technology providers the best, strategic consultancies nearly as well, and data and analytics providers the least

Across Supplier types, understanding research issues seems to be the key to meeting the overall needs



The main relationships between aspects are detailed in Table 7. Across Supplier types, understanding research issues seems to be the key to meeting the overall needs. This relationship was strongest among full/field service agencies, and they are the largest group in the sample; the other two aspects driven by understanding research issues also show up in aggregate.

Conducting the research drives expectations of other aspects, and this most reflects the findings from strategic consultancies, although imperfectly. The strong relationship between project management/service and managing scope/changes shows up here as well as among full/field service agencies and strategic consultancies.

SATISFACTION WITH SUPPLIERS, TABLE 7

Meeting needs:	Enables them to meet needs regarding:	With this strength:
Understanding research issues	Overall needs	0.464
	Understanding your business	0.46
	Designing the research	0.353
Conducting research	Understanding research issues	0.451
	Designing the research	0.394
	Project management/service	0.341
Project management/service	Managing scope/changes	0.384

THE BIG PICTURE

The Buyer causal model suggests that the pre-existing relationships drive expectations of performance on service aspects, the most important of which are understanding the client's business, conducting the research, and reporting the research. The key takeaway may be that the ideal client relationship is one in which the Buyer doesn't have to micromanage projects because they know the Supplier understands their business needs, and they trust the Supplier to competently execute the work and report meaningful results. It may also be that clients differ regarding how much they want to design the research versus having the supplier do it, and so that does not show up as a driver.

Suppliers seem to agree that they need to understand the research issue, execute the work well, and provide great service. Beyond that, the types of service are diverse, and several aspects do not emerge as strong drivers in aggregate. For example, reporting on the research shows up among strategic consultancies, data and analytics providers, and technology providers, but not among full/field service providers. The first three types have distinct specialty areas that a client likely lacks, so the client may be more dependent on them for a clear accounting of the project and its findings. Regarding full/field service agencies, some Buyers may value their reporting while others may prefer to report on the results themselves. What these agencies have in common is Buyers' strong expectation that they can design and execute the work independently enough that the Buyer does not have to think about it until the data comes back.

The key takeaway may be that the ideal client relationship is one in which the Buyer doesn't have to micromanage projects because they know the Supplier understands their business needs





THE CAUSALITY OF SATISFACTION

David Wolfe

CEO, Inguo

Email: david.wolfe@inguo.io | Twitter: @dmichaelwolfe | Website: inguo.io

LinkedIn: <https://www.linkedin.com/in/david-wolfe-ir/>

Until recently, the method of automated causal discovery, rather than traditional regression modeling has been met with wide skepticism due to the combinatorial explosion of potential patterns and the inherent computational challenges to get optimal models.

The recent Buyer Satisfaction study completed as part of this edition of the GRIT Report is a prime example. They identified the best-fit model from an overwhelming number of potential patterns. With this new breakthrough algorithm, researchers and analysts can now test various sets of factors through automation, rather than spending time validating models until finding the correct combinations of factors. From this, the data fit metrics will provide researchers confidence that the output is correct.

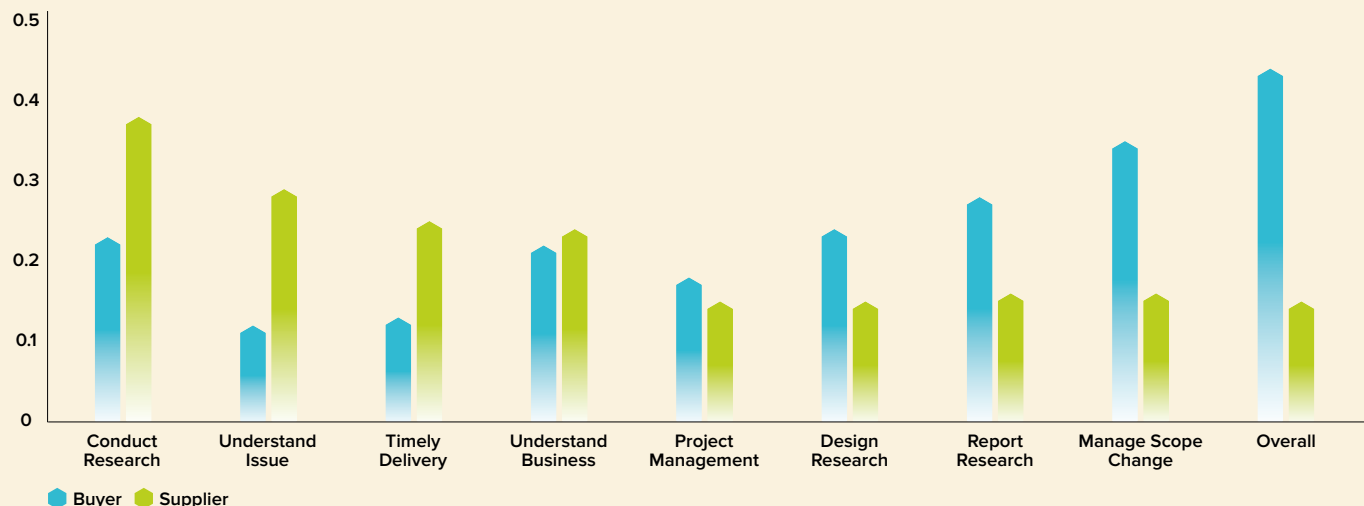
If we look at the study, we can see how mapping the key factors between suppliers and buyers can tell the truth and inspire Suppliers for a better understanding of their Buyers, and result in an improvement in factors that drive Buyers satisfaction.

Additionally, this study highlights the speed and accuracy that automated causal modeling will provide. Given the multiple graphs that this study produced in minutes, researchers and analysts have the ability to visualize multiple graphs with multiple sets of samples and factors. This is evidenced when looking at both Buyer and Supplier characteristics and their causal relationships.

Beyond the study, discovered graphs allow analysts to compare key factors towards different target factors. The following chart shows a comparison of total causal effect to "Value for Money" in Buyer satisfaction between recognition of Buyer and Supplier.

With this new technique, researchers will drastically improve efficiency and accuracy for the purposes of market research in a fraction of the time as other methods. Most importantly, this breakthrough is far less complicated and can give researchers more time to compare brands, products and customer segments, or to assess the best decision forward and with an eye toward ROI.

THE COMPARISON OF TOTAL CAUSAL EFFECT TO "VALUE FOR MONEY" IN BUYER SATISFACTION BETWEEN RECOGNITION OF BUYERS AND SUPPLIERS



BUSINESS OUTLOOK AND INVESTMENT PRIORITIES

As in most preceding waves of GRIT reports, budgets increase more frequently than decrease, more Suppliers enjoy increased revenue than suffer from losses, more insights organizations add FTEs than

eliminate them, and technology investment is brisk. Plus, everyone wants to select methodologies that will be better, cheaper *and* faster (in that order). Is there anything left to discuss? Let's see...

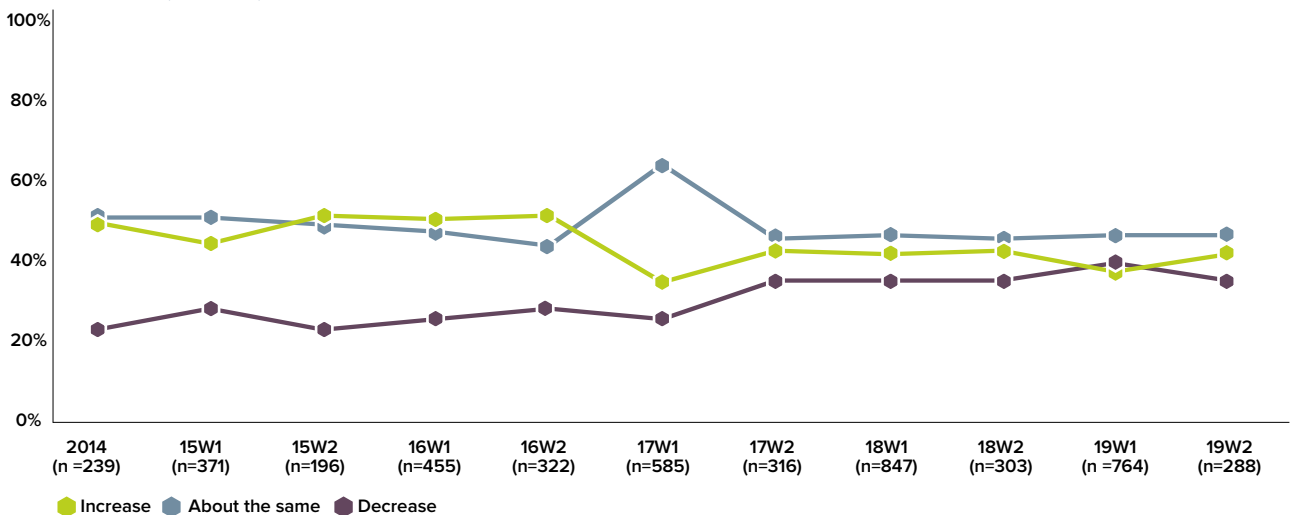
IS THE INSIGHTS & ANALYTICS INDUSTRY GROWING?

After a brief reversal in the last GRIT wave, client-based insights providers with research project budget increases once again outpace those with decreases

From a business outlook perspective, the insights and analytics industry is healthiest when the amount of money spent in it increases and employment rises. Although GRIT is not designed to size the industry, the research provides insights into whether more companies are increasing budgets and staff size, and this helps inform discussions of whether the industry as a whole, is growing, declining, or trading water.

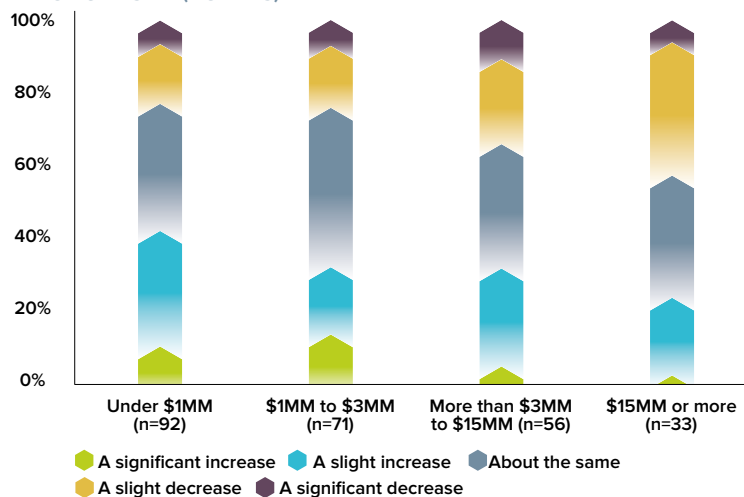
After a brief reversal in the last GRIT wave, client-based insights providers with research project budget increases once again outpace those with decreases, which is the norm historically. In fact, from the first GRIT measurement in 2014 through 2016, the number of budget increasers was always at least twice as large as decreasers. At the start of 2017, however, the gap narrowed, settling into a new normal where about one-third of client-side insights teams increase budgets, while around 7-8% fewer decrease budgets.

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



If all budget sizes were equal and increased or decreased by the same percentage, GRIT data would show economic growth in the industry. However, not all budgets are equal, and, unfortunately, budget increases are most likely to be reported among those with smaller budgets to begin with, and those with annual budgets of \$3MM or less are two to three times more likely to report significant increases than are those with larger budgets. Worse, those with the largest budgets are the most likely to report budget decreases.

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



GRIT data on size of annual budgets goes back to early 2017 and provides some insight into the recent trajectories of budget size categories. The following table breaks budget sizes into five categories and reports their smallest and largest proportions since 2017 (for consistency of comparisons, only the second GRIT wave of each year is considered). For example,

budgets of more than \$3MM to \$10MM peaked at 23% of all budgets and hit 18% at its nadir, a range of 4% (numbers in the table are rounded, so adding and subtracting based on the table may be sometimes be off by a percent.) Its net change, however, from 2017 to now is zero.

BUSINESS OUTLOOK AND INVESTMENT PRIORITIES, TABLE 1

Annual Research Project Budget Size Category	Category Size (% of Buyers, Fall GRIT Waves*)				
	Smallest	Largest	Range	Net Change since 17W2	
Under \$1MM	32%	37%	5%	-1%	-1%
\$1MM to \$3MM	22%	28%	6%	6%	6%
More than \$3MM to \$10MM	18%	23%	4%	-0%	No change
More than \$10MM to \$15MM	4%	6%	2%	-2%	-5%
More than \$15MM	13%	18%	2%	-2%	

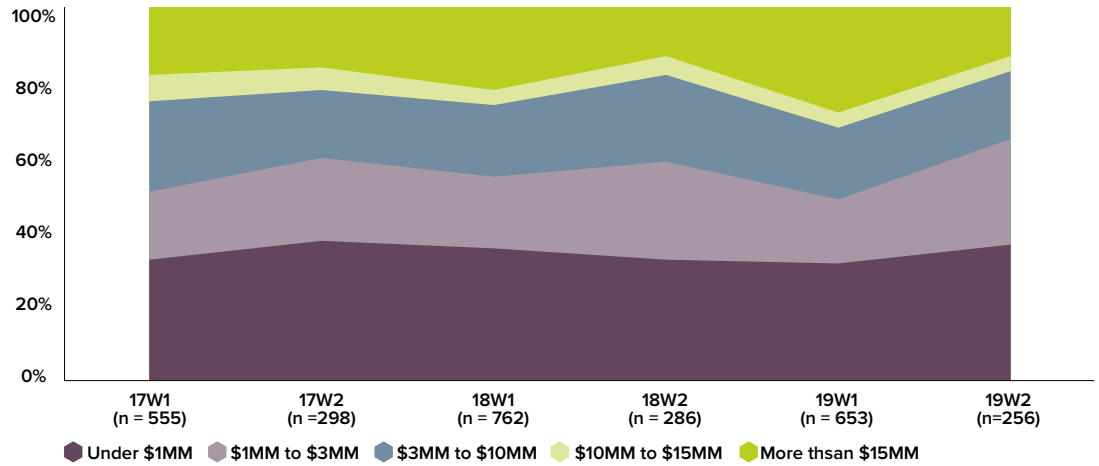
*This analysis leaves out the spring waves to enhance measurement consistency. Annual budgets can change throughout the year, and the fall assessment may end up being more accurate than the spring assessment.

This table and the more detailed chart reveals that budgets toward the lower end (\$1MM to \$3MM) increased each wave as a proportion of all budgets, while the largest budgets, over \$10MM declined.

Budgets toward the lower end (\$1MM to \$3MM) increased each wave as a proportion of all budgets, while the largest budgets, over \$10MM declined



ANNUAL RESEARCH PROJECT BUDGET SIZE BY GRIT WAVE (BUYERS)



Mathematically, the size of the largest category could decline even if the number of companies with large budgets stayed constant



Based on the decline of the \$10MM or more category, it's tempting to argue that overall spending is down; after all, the largest budgets have the most impact on industry spend, and there appears to be fewer of them. However, an overall spending decline can only be hypothesized, not proven, from this discussion.

For instance:

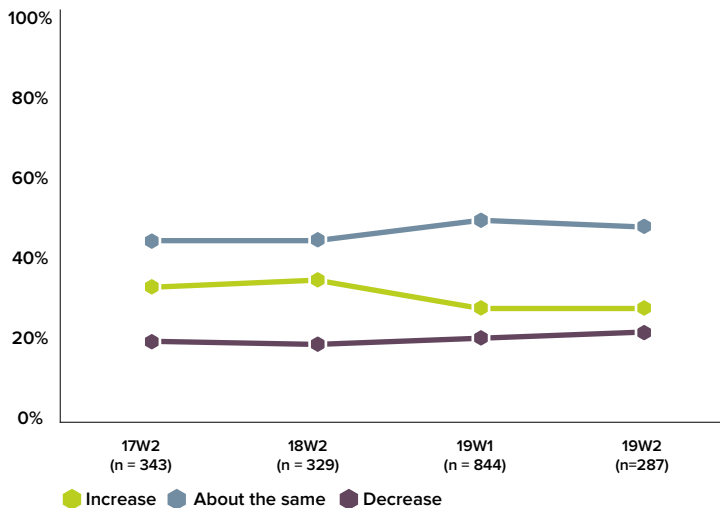
Although 42% of Buyers with budgets of \$15MM or more saw their budgets decrease, 24% experienced increases. It's beyond the scope of GRIT to determine if the net gains offset the net losses. (However, twice as many Buyers reported significant losses as reported significant gains.)

Mathematically, the size of the largest category could decline even if the number of companies with large budgets stayed constant. If enough smaller companies started up, the percentage of the insights world made up of large budget clients would decline, but overall spending would go up; spending from the new companies would add to the existing total.

Whether the reader concludes that overall spending is down or not will be influenced by prior knowledge and perhaps additional facts discussed later in this report.

In addition to research project budgets (which exclude staff in the GRIT questioning), hiring is another barometer of industry growth. Among client-side insights professionals, the budget pattern is almost repeated for department size trends; the number of companies who increased FTEs for 2019 is higher than the number that reduced staff, but the gap is narrowing vis a vis previous GRIT waves.

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

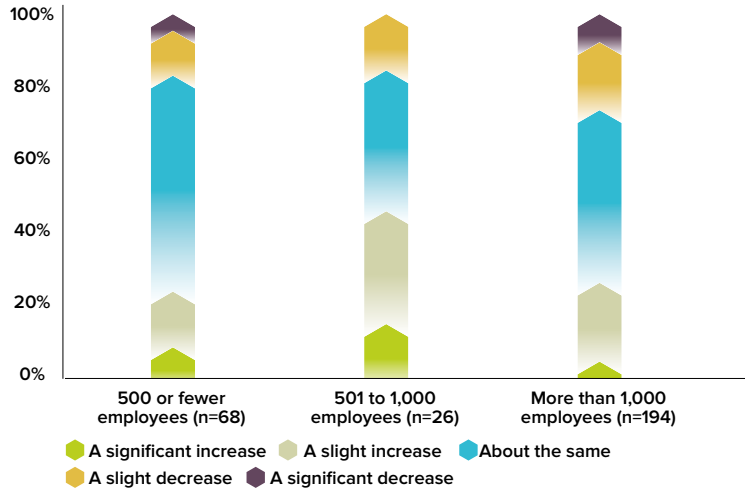


As companies with the largest budgets were the most likely to reduce budgets, companies with the most employees are most likely to reduce the FTEs performing insights work. Unlike the budget pattern, the larger companies are increasing FTEs at a faster rate than are smaller companies. Overall, there is more volatility among companies with 500 or more employees: nearly 60% of smaller companies said the number of insights FTEs did not change; more than half of larger companies declared that their insights FTEs either increased or decreased.

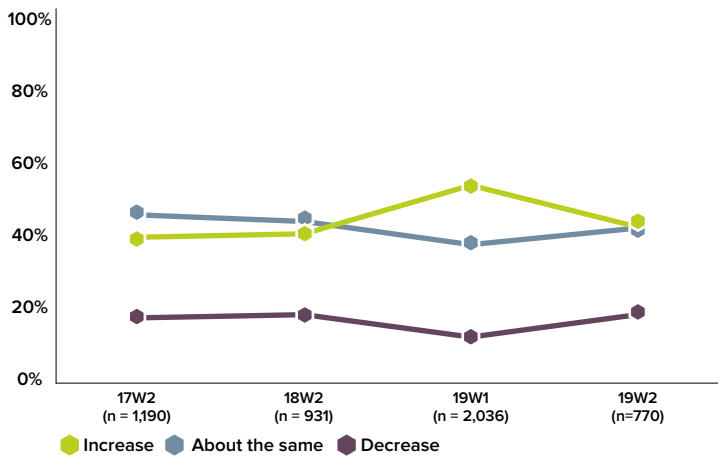
On the Supplier side, the number of organizations hiring more FTEs outpaced those decreasing by a margin of more than 2 to 1, as it has in every GRIT wave (starting in 2017). Aside a spike earlier this year, the percentage of Suppliers increasing their insights FTEs has remained steadily around 40%, while those reducing staff has consistently been just below 20%.

As with the client-side, the largest Supplier companies have the most staff reductions, but nearly half increased their staff in 2019, a comparable amount to every other category except the 10 employees-or-fewer category. Based on the GRIT numbers, hiring appears to be strong among Suppliers (especially large ones), although factors outside what the survey measures come into play as well.

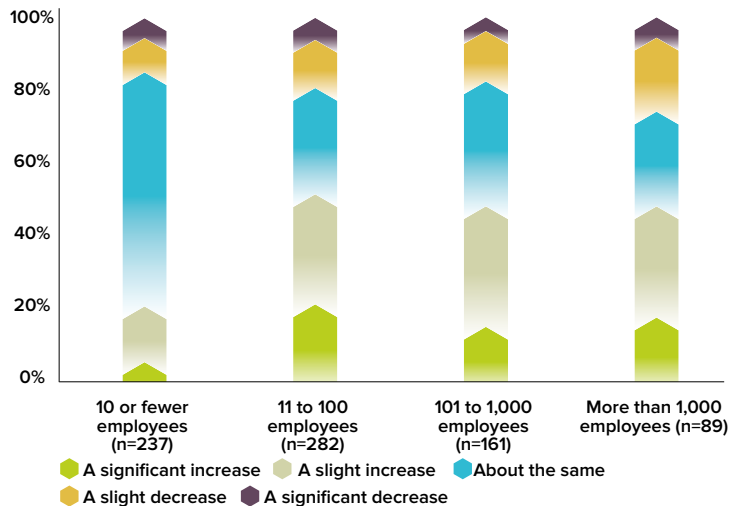
CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS BY EMPLOYEE SIZE (BUYERS)



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



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



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For Suppliers, meeting and exceeding goals are highly correlated with increasing or maintaining revenue: if they don't accomplish that goal, any other goals won't matter for long



A note on the relative stability of the 10 employees-or-fewer category: to some extent, there is stability built into this category. A small firm that significantly increases hiring is likely to move into the next category; one that significantly reduces staff runs a higher likelihood of no longer exiting in the insights industry. Therefore, we should expect to see less movement at a given point in time.

Presumably, the same would not be true for client-side researchers who are part of a larger, non-research revenue dependent enterprise. Reducing the size of a small group that has to generate its own funding is likely more precarious than reducing the size of a group in which a larger group invests.

ARE INSIGHTS ORGANIZATIONS SUCCEEDING?

In addition to research project investment and hiring, the success of an organization offers a perspective on the business outlook for the industry. If an organization meets or exceeds its goals, it thrives and portends good prospects for the industry, both financially and intrinsically for the insights professional. For Suppliers, meeting and exceeding goals are highly correlated with increasing or maintaining revenue: if they don't accomplish that goal, any other goals won't matter for long.

The situation for client-side insight professionals is somewhat different. Although the success of their department can lead to increased budget, there is not always a direct correlation between levels of success and levels of budget. As documented in previous GRIT reports and touched on later in the current one, budgets can change due to circumstances beyond the insights function's control. Poor business performance and the resulting need for company-wide budget cuts is frequently cited as a cause of losing budget.

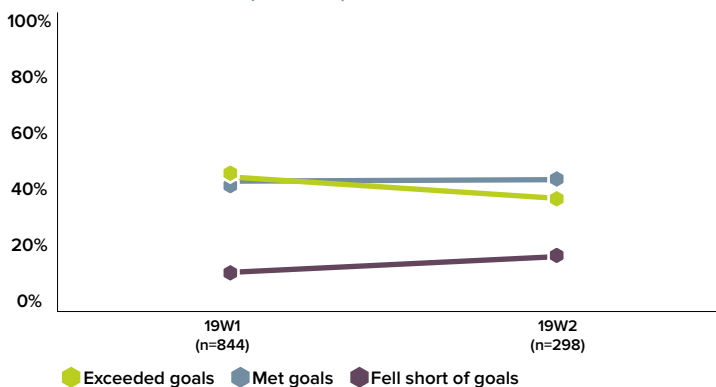
Some budget-reducing scenarios are more benign; for example, the company may have undertaken a large, one-off strategic project the previous year that would not be repeated, or the department planned to have a smaller budget because they realized they didn't have to spend as much money (e.g., streamlining processes or finding DIY solutions). So, while budget reductions do not directly improve the insights and analytics industry's business outlook, they may indicate a healthy business outlook for a given department in a particular situation.

To better understand whether individual companies are succeeding, GRIT recently began tracking performance against the organization's goals for the insights and analytics work. The metric is too new to fully interpret its meaning over time yet, but so far it is yielding some useful insights. For the current wave, 82% of client-side insights functions are meeting or exceeding their goals, 37% of which are exceeding, which is double those who are falling short. Note that the proportion exceeding goals is similar to the percentage that received budget increases, while 50% more experienced decreases than fell short of their goals (27% to 18%).

For the current wave, 82% of client-side insights functions are meeting or exceeding their goals, 37% of which are exceeding, which is double those who are falling short



PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS BY GRIT WAVE (BUYERS)



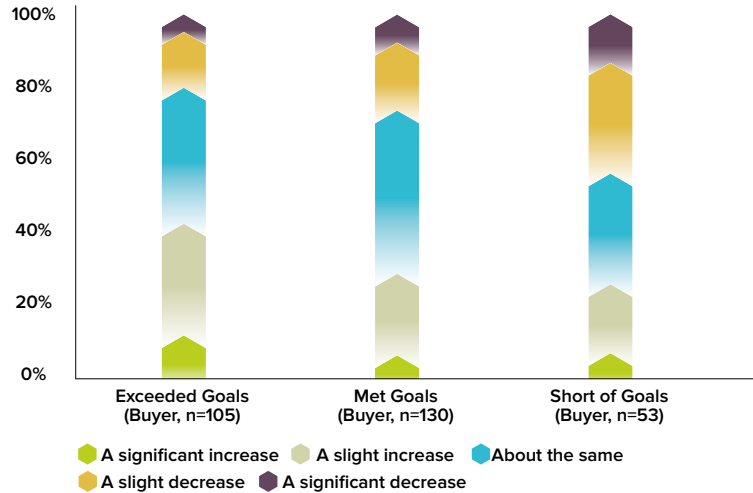
Looking at the budget trends by performance against goals, we see a clear relationship between better performance and more budget, but it's not absolute. Among those who met goals, about 29% had budget increases, but those who fell short got increases nearly as often (27%). The difference is that 43% of those who fell short had budget reduced, meeting goals was only associated with a 26% reduction, a difference of 17%.

The budget reduction gap between those who met and those who exceeded goals is much narrower, only about 6%. However, those who exceeded goals received budget increases about 42% of the time compared to only 29% for those who merely met goals, a gap of 13%. As mentioned previously, the gap between meeting and falling short is only 2% for those who fell short versus those who met goals. So, at a high level, because of the small gap in increases between met and exceeded and the small gap in decreases between met and fell short, it appears that the bonus for exceeding goals and the penalty for falling short are taken from those who would otherwise leave the budget alone. In other words, exceeding or falling short of goals may have increased focus on the budget, one way or the other.

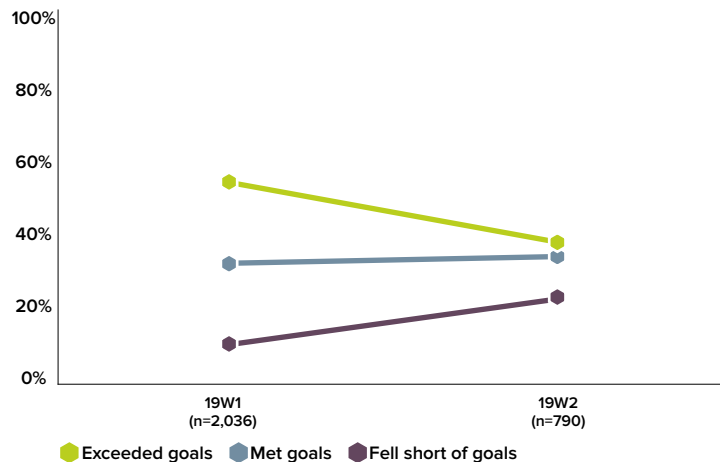
It must be noted that budgets were reduced 20% of the time among those who exceeded goals. Based on anecdotal comments, some of these result from poor company performance despite the insights function's efforts, and some result from having a goal to reduce the cost of the insights work. The bottom line is that while increases in budgets are vital to the business outlook for the industry, they are not necessarily an accurate report card on the client-side insights function.

On the Supplier side, those who exceeded goals also outpace those who fell short, but it looks like performance assessments were rosier earlier in the year as the percentage who exceeded goals dropped from 57% to 39%. Similarly, revenue increases dropped from 71% of Suppliers to 56%, demonstrating, once again, that goal performance and finances are related.

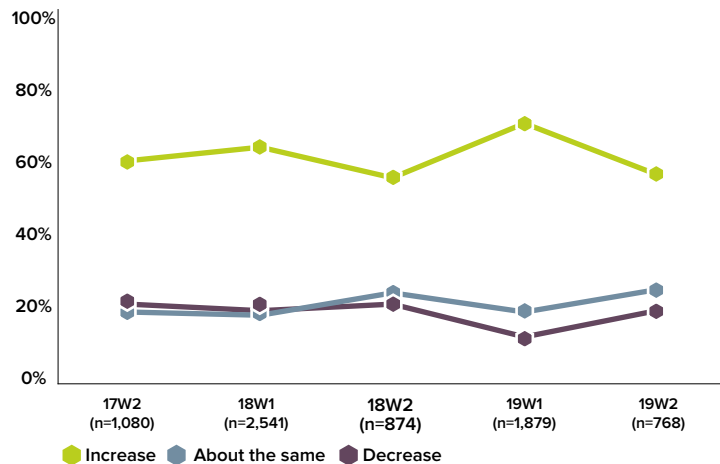
ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND BY PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS (BUYERS)



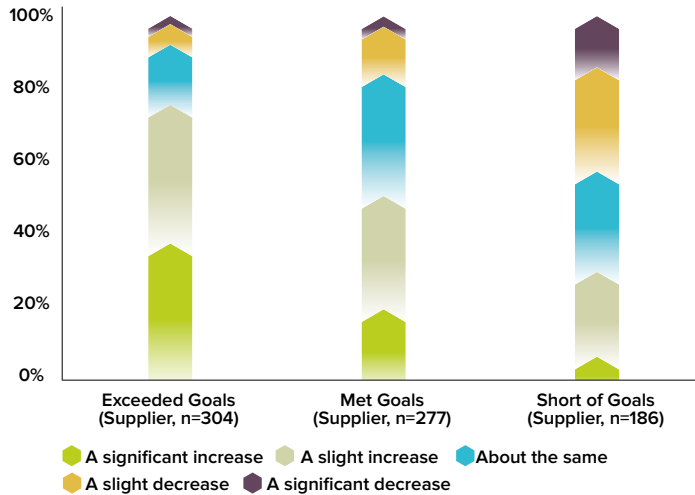
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS BY GRIT WAVE (SUPPLIERS)



REVENUE TREND BY GRIT WAVE (SUPPLIERS)



REVENUE TREND BY PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS (SUPPLIERS)



The relationship between goal performance and revenue is much stronger than among Buyers between performance and budget. The gaps between revenue increases are 25% between exceeded and met (76% to 51%) and 21% between met and fell short (51% to 30%). Going in the other directions, gaps in decreases are 26% between fell short and met (42% to 16%) and 8% between met and exceeded (16% to 8% - a small percentage in absolute terms, but still double.) It might not be much of stretch to say, for Suppliers, that there are no important goals that don't somehow show up in the revenue numbers.

Supplier revenue, client budget, and performance against goals, unsurprisingly, impact the insights professional's confidence in their position. Among client-side, those who are optimistic about the future of their company's insights role are statistically more likely to have experienced a budget increase and less likely to have a decrease. Those who are not optimistic were dramatically more likely to have experienced a decrease. Among Suppliers, the relationship between optimism and revenue is even more acute.

BUDGET TREND PROFILE

Budget Trend Profile	n	% Who Increased	% Who Decreased
Percent of Buyers	288	34%	27%
Performance/outcomes	n	% Who Increased	% Who Decreased
Performance relative to organization's goals			
Exceeded	105	43%	20%
Fell short	53	26%	43%
Attitude toward future of insights role at company			
Very optimistic/optimistic	92	37%	23%
Very pessimistic/pessimistic/neither	40	18%	43%

Note: in these profile tables, statistically significant differences are in bold.

REVENUE TREND PROFILE

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	767	56%	19%
Performance/outcomes	n	% Who Increased	% Who Decreased
Performance relative to organization's goals			
Exceeded	304	76%	8%
Fell short	186	30%	42%
Attitude toward future of company			
Very optimistic	100	74%	12%
Very pessimistic/pessimistic/neither	93	33%	40%

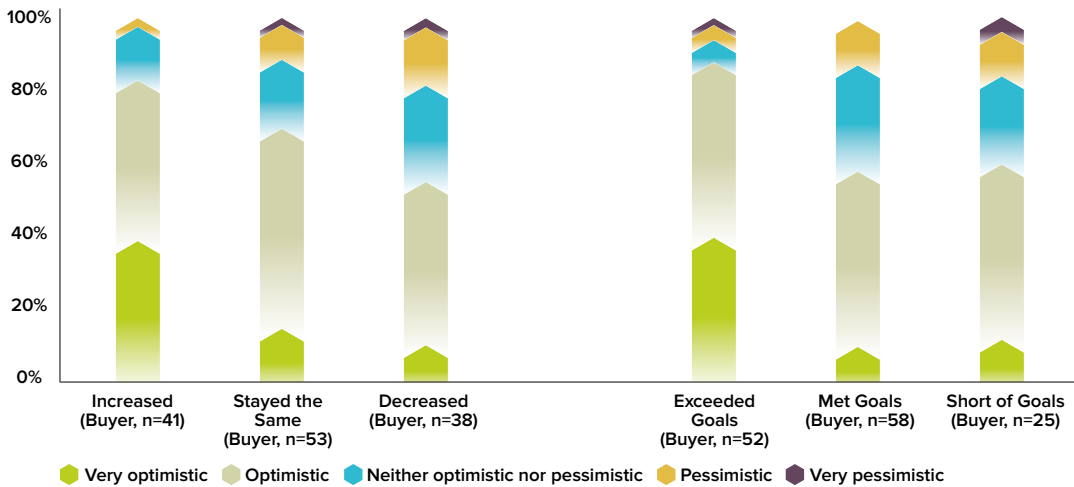
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Looking at optimism by budget trend and performance against goals among the client-side, the relationship to budget is much more direct than for performance against goals. This may be due that the fact that a budget change is a discrete, observable

event while performance against goals may be more subjective and therefore more difficult to correlate. For some, the budget change may represent the articulation of the performance against goals.

OPTIMISM ABOUT ROLE BY RESEARCH PROJECT BUDGET SIZE TREND AND PERFORMANCE AGAINST GOALS (BUYERS)



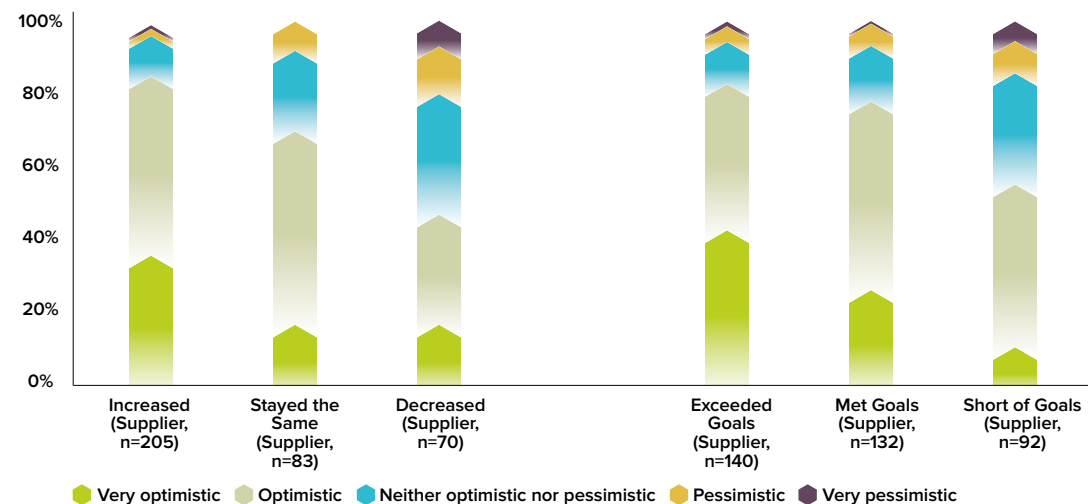
For Suppliers, there is a steeper drop off in optimism when revenue decreases or goals are not met than there is between increasing versus maintaining revenue and exceeding versus meeting goals



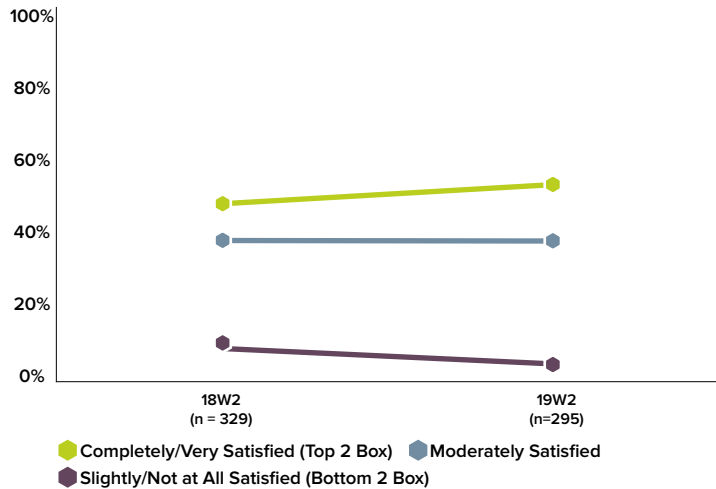
For Suppliers, there is a steeper drop off in optimism when revenue decreases or goals are not met than there is between increasing versus maintaining revenue and exceeding versus meeting goals. There

is likely a very high correlation between falling short of goals and losing revenue, and losing revenue raises the specter of staff cuts.

OPTIMISM ABOUT COMPANY BY REVENUE TREND AND PERFORMANCE AGAINST GOALS (SUPPLIERS)



OVERALL SATISFACTION WITH SUPPLIERS BY GRIT WAVE (BUYERS)



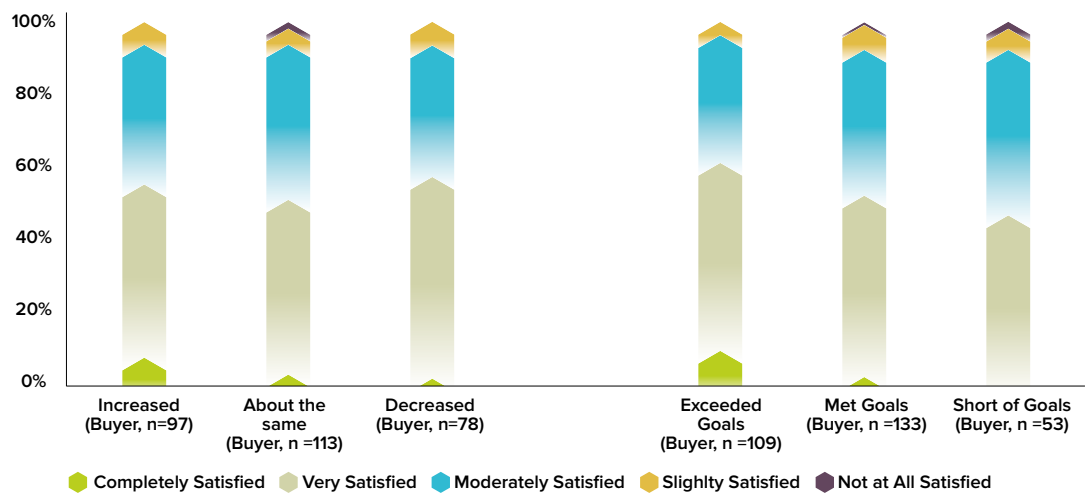
If clients aren't satisfied with Suppliers, how motivated are clients to offer them work versus taking more in-house or finding other ways to gather insights?



Satisfaction with Suppliers addresses the success question from a different perspective: are Suppliers successfully serving clients? Previously, top 2 box ratings of overall satisfaction with Suppliers in the GRIT survey have been notably low, and this wave continues the trend, despite a small uptick from 49% to 55%. Coupled with the hypothesis that spending might be declining, low satisfaction scores are concerning. If clients aren't satisfied with Suppliers, how motivated are clients to offer them work versus taking more in-house or finding other ways to gather insights?

Interestingly, overall satisfaction does not correlate with budget increases or decreases, but it also has a very moderate relationship to goal performance. When Buyers fall short of goals, satisfaction with Suppliers appears to be lower. Yet, when Buyers are exceeding expectation, top 2 box satisfaction only hits 61%. If Suppliers convinced Buyers that they played an important role in accomplishing or exceeding their goals, would satisfaction increase substantially? If satisfaction increased dramatically, would budgets be more likely to increase?

RESEARCH PROJECT BUDGET SIZE TREND AND PERFORMANCE AGAINST GOALS BY OVERALL SATISFACTION WITH SUPPLIERS (BUYERS)



If Suppliers convinced Buyers that they played an important role in accomplishing or exceeding their goals, would satisfaction increase substantially?



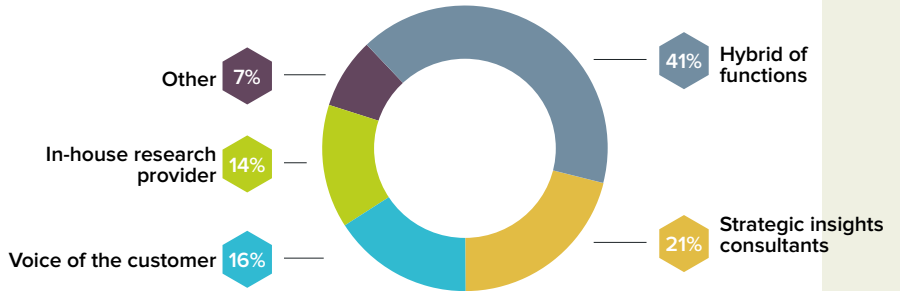
BUYER OUTLOOK DEEP DIVE

Using GRIT's new system for categorizing insights Buyers, over 40% self-classify as performing some hybrid of strategic consulting, Voice of the Customer, and/or in-house researcher. Most however, choose a single function that best describes their role: 21% choose strategic insights consultant; 16%, Voice of the Customer; 14%, in-house research provider; and 8% some other function (including data analysts and research outsourcing departments).

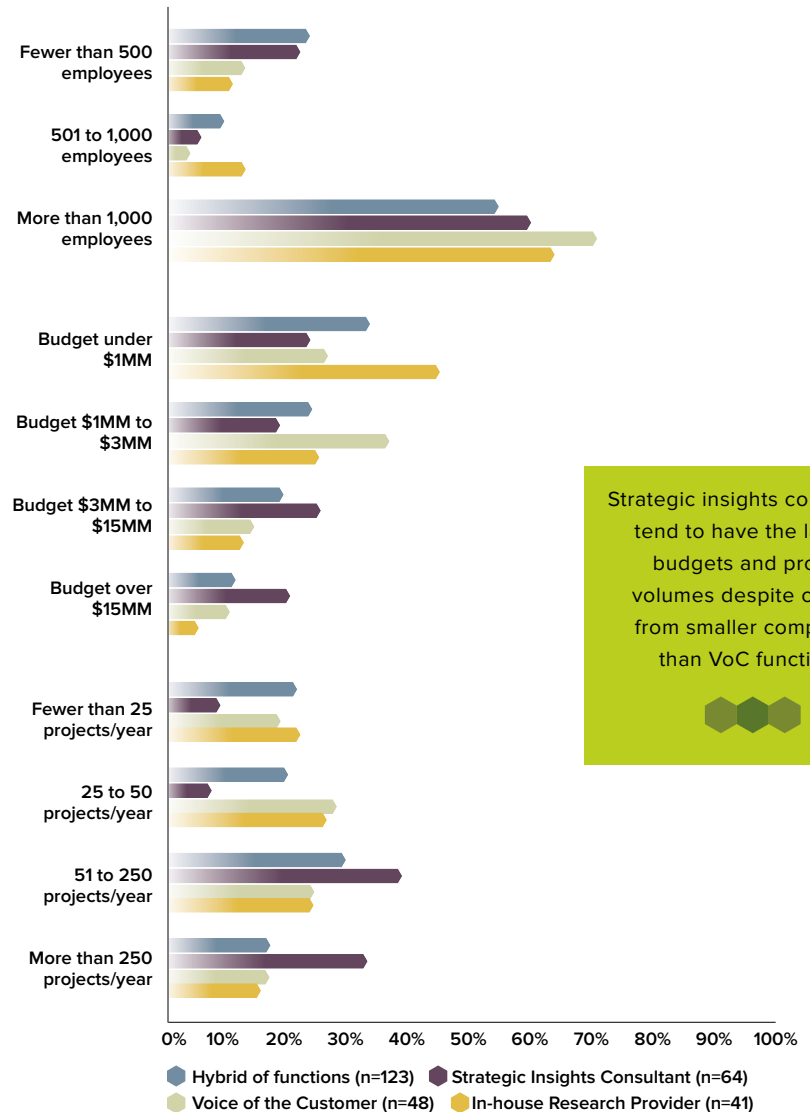
Although the majority among each category consists of companies with 2,500 or more employees, there are some nuances by company size and differences by size of annual research project budget and project volume. The highlighting in the Professional Focus Profile table for Buyers, on the following page, indicates the density of each classification across the ranges of employee size, budget and project size. The thick borders indicate the ranges that contain the largest two-thirds of each professional focus category.

This approach can be used to sketch the profiles of each type of Buyer. Strategic insights consultants tend to have the largest budgets and project volumes despite coming from smaller companies than VoC functions. Possibly, they function as a more strategic version of a research outsourcing department. VoC, while skewing largest with respect to company employee size, are likely second to strategic consultants in budget with project volume similar to in-house researchers and hybrids. In-house research providers come from companies smaller than VoC's and slightly larger than a strategic insights consultant, with the smallest project budgets and average project volume. It's likely that their budgets are smaller because they are doing their own research, and staff costs are not included in the budget question. Hybrids skew smallest with budgets between in-house researchers and VoC and average project volume. Similar to in-house researchers, it's likely some activities that strategic consultants and VoC pay for from their research project budgets are conducted by staff under a separate allocation.

PROFESSIONAL FOCUS (BUYERS)

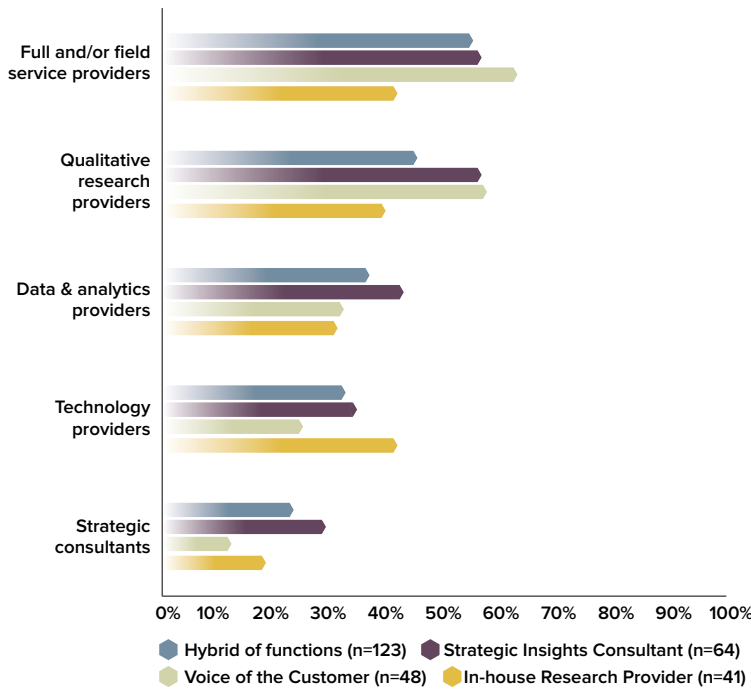


BUYER CATEGORY BY COMPANY SIZE AND SCOPE OF DEPARTMENT



Strategic insights consultants tend to have the largest budgets and project volumes despite coming from smaller companies than VoC functions

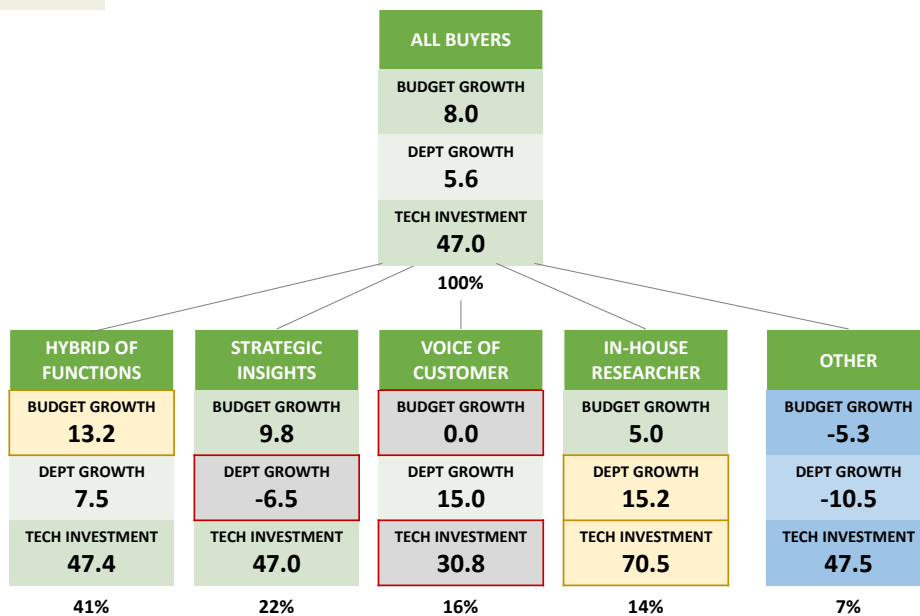
BUYER CATEGORY BY SUPPLIER TYPES WORK WITH REGULARLY



Among the four categories, in-house researchers, not surprisingly, are the least likely to use full and field service providers and qualitative researchers on a regular basis. They are, however the most likely to use technology providers. VoC, with likely the second largest budgets, are most likely to use these two types of Suppliers, while strategic consultants, with the likely largest budgets, use qualitative research providers as much as VoC, with slightly lower but still regular, use of full and field service providers. They also are the type most likely to use data and analytics providers and strategic consultants, supporting the hypothesis that they function as more value-added outsourcers for their companies. The group that provides a hybrid of functions, again not surprisingly, is not distinguished by its regular use of any type of Supplier compared to the other professional focus categories.

The outlook for each function differs by research budget, department size, and technology investment trends as illustrated in the tree diagram. Buyers were asked to rate each on a five-point scale, from significantly increased to significantly decreased, and these scale points have been weighted and turned into a relative score where the higher number indicates a more significant increase.

Those who perform a hybrid function experienced the strongest budget growth, while those in a VoC function experienced the least



Not compared: "Other" function (n=22)

Those who perform a hybrid function experienced the strongest budget growth, while those in a VoC function experienced the least (other function is shown for completeness but has a small sample size). VoC, however, has strong department size growth, which is not part of the budget total, just behind in-house researcher. In-house researcher has the strongest staff growth as well as the strongest technology investment. Strategic insights consultants have shrinking staff, on average, possibly by virtue of their outsourcing proficiency, and VoC has the weakest, though positive, technology investment.

As we've seen in past GRIT Reports, the largest research budgets are the most likely candidates for decreases. While 24% of budgets of \$15MM or more saw increases, nearly twice as many (42%) were trimmed or cut. For the smallest budgets (under \$1MM), the percentages are reversed (42% increasing, 23% declining). For those with budgets in between \$1MM and \$15MM, about one in three saw increases, but, as budget sizes become larger, budget decreases become more frequent.

As we've seen in past GRIT Reports, the largest research budgets are the most likely candidates for decreases



Insights functions with larger project volumes are also more likely to reduce budget than those with lower volumes. Budgets are most likely to increase among those with fewer than 25 projects per year, but does not vary much across the larger volume categories.

Insights functions with larger project volumes are also more likely to reduce budget than those with lower volumes

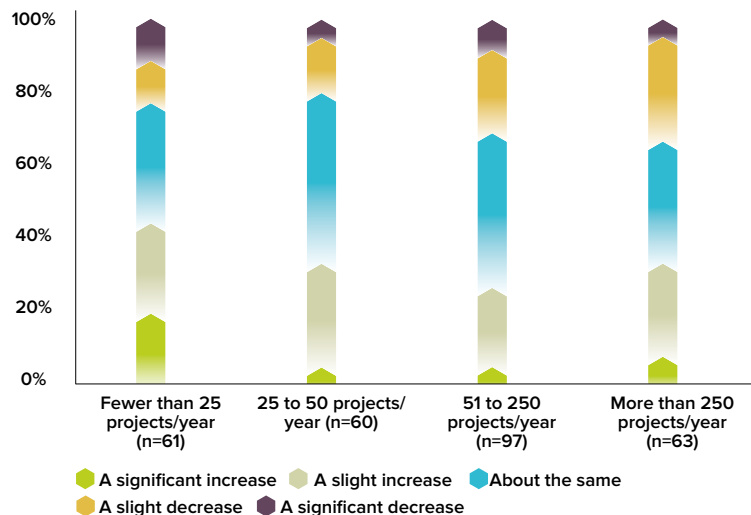


As the lowest project volume category has the most accelerated budget increases and the rate of budget increase is similar across the largest project volumes, perhaps it is not shocking that the smallest category has declined since 2017, while the largest has grown. In 2017 Q1-Q2 GRIT Report, only 13% of Buyers had annual project volumes in excess of 250, but that percentage has grown to 23% currently.

BUDGET TREND PROFILE HIGHLIGHTS

Budget Trend Profile Highlights	n	% Who Increased	% Who Decreased
Percent of Buyers	288	34%	27%
Scope of Department	n	% Who Increased	% Who Decreased
Annual Research Budget			
Under \$1MM	92	42%	23%
\$1MM to \$3MM	71	32%	24%
More than \$3MM to \$15MM	56	32%	34%
More than \$15MM	33	24%	42%
Number of Projects Annually			
Fewer than 25 projects per year	61	44%	23%
25 to 50 projects per year	60	33%	20%
51 to 250 projects per year	97	27%	31%
More than 250 projects per year	63	33%	33%

ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND BY PROJECT VOLUME (BUYERS)

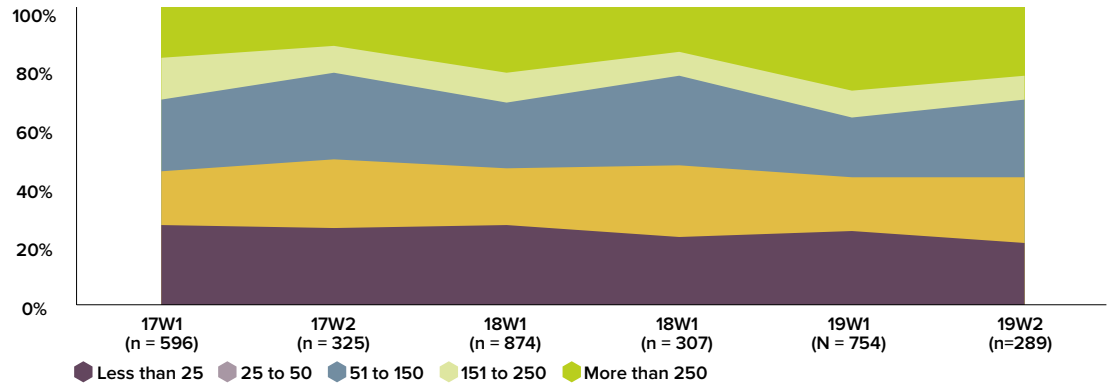


While trends such as bundling smaller projects into bigger projects to save money may suggest that project volume should be declining, perhaps the advent of automation and the adoption of DIY tools has made it more attractive to initiate smaller, faster turnaround projects that are driving the volume growth.

Perhaps the advent of automation and the adoption of DIY tools has made it more attractive to initiate smaller, faster turnaround projects that are driving the volume growth



ANNUAL RESEARCH PROJECT BUDGET SIZE BY GRIT WAVE (BUYERS)



Annual Project Volume Size Category	Category Size (% of Buyers, Fall GRIT Waves*)			
	Smallest	Largest	Range	Net Change since 17W2
Less than 25	21%	26%	5%	-5%
25 to 50	22%	24%	2%	-1%
51 to 150	26%	30%	4%	-3%
151 to 250	8%	9%	1%	-1%
More than 250	13%	23%	10%	10%

*This analysis leaves out the spring waves to enhance measurement consistency.

Certain types of organizations were more likely to experience budget increases or reductions than others. By industry, budget increases were most frequent among education/government/NFP/transportation, services (financial or professional) and what might be called consumer intangibles (retail, media/entertainment/sports, and hospitality and travel). Meanwhile, consumer non-durables (formerly called staples in this report) continued its decline. As noted previously, budget declines are skewed toward larger organizations, and, with respect to global regions, budgets in Europe decreased more frequently than in other parts of the world.

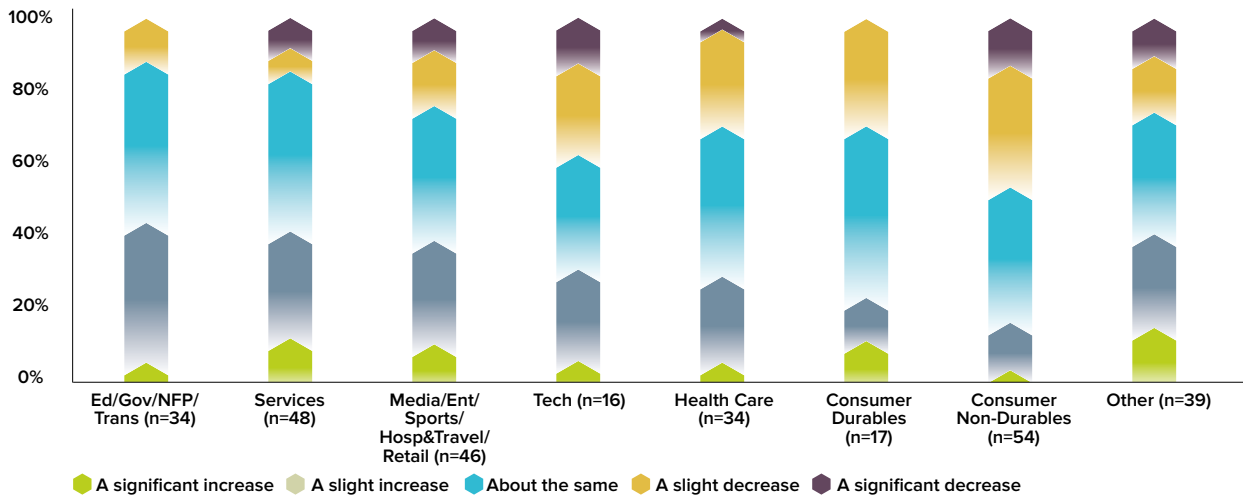
Budget Trend Profile Highlights	n	% Who Increased	% Who Decreased
Percent of Buyers	288	34%	27%
	n	% Who Increased	% Who Decreased
Industry			
Education/government/NFP/transportation	34	44%	12%
Financial or professional services	48	42%	15%
Retail/media/entertainment/sports/hospitality/travel	46	39%	24%
Consumer non-durables	54	17%	46%
Employee size			
500 employees or fewer	68	41%	21%
501 to 1,000 employees	26	46%	19%
More than 1,000 employees	194	29%	30%
Global Region			
North America	195	38%	24%
Europe	58	16%	43%
All other regions	35	40%	17%

Among industries, consumer non-durables ranks last in budget increases and first in decreases, while education/government/NFP/transportation had the most increases and fewest decreases. (Note: in the associated charts, industries with small sample sizes, such as tech, are included for completeness). We have come to expect decreases to be most frequent among those with the largest budgets, and comparing each industry's budget distribution with its budget trends confirms this. The accompanying chart sorts industries by the percentage of budgets in excess

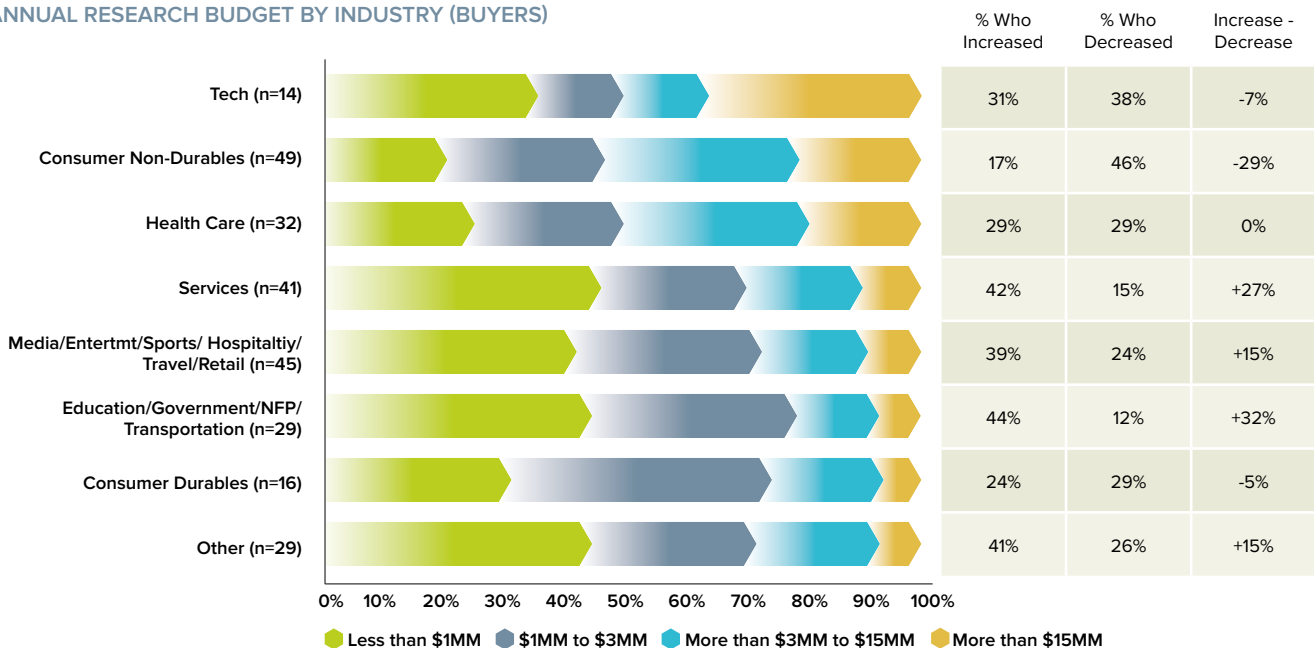
of \$15MM along with the budget trend. In general, the more large budgets within an industry, the more likely it is to skew toward budget decreases. The three industries with the greatest number of large budgets each have budget decreases that equal or exceed their increases. (Note that some industries have very small sample sizes, which may be the reason that tech does not show even more extreme decreases than consumer non-durables and why consumer durables shows overall decline despite fewer large budgets.)

Among industries, consumer non-durables ranks last in budget increases and first in decreases, while education/government/NFP/transportation had the most increases and fewest decreases

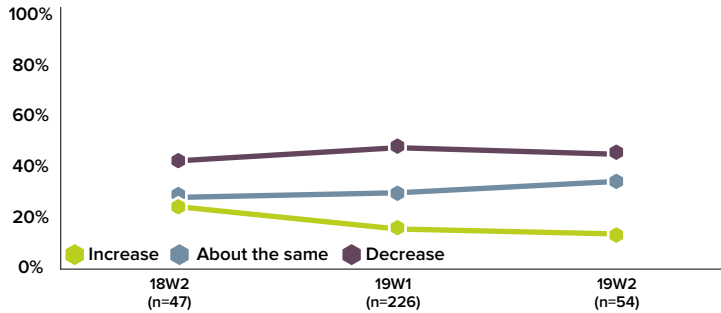
RESEARCH SPENDING TREND BY INDUSTRY (BUYERS)



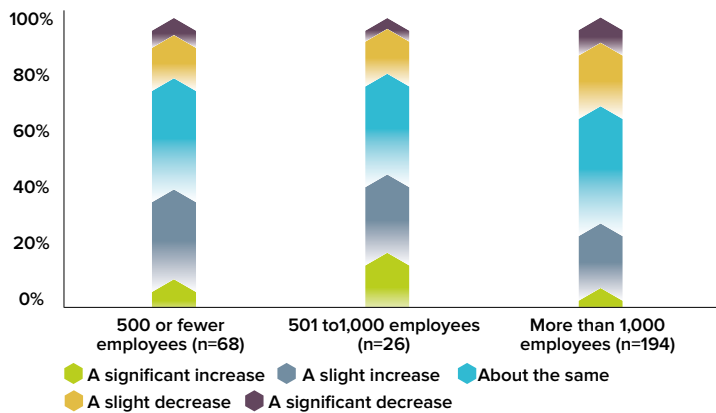
ANNUAL RESEARCH BUDGET BY INDUSTRY (BUYERS)



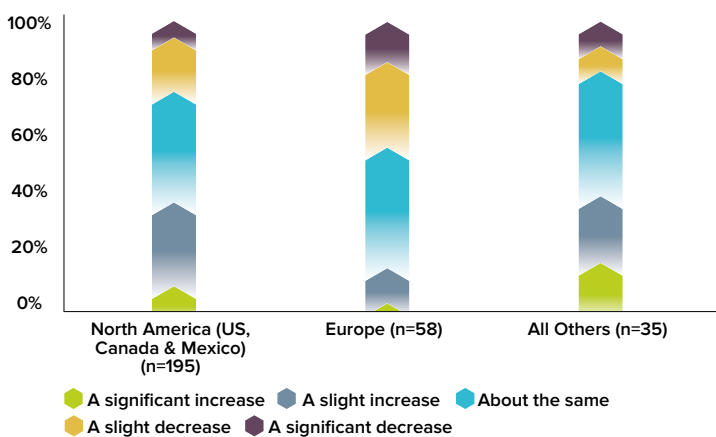
ANNUAL RESEARCH PROJECT BUDGET TREND BY GRIT WAVE (CONSUMER STAPLES/CONSUMER NON-DURABLES)



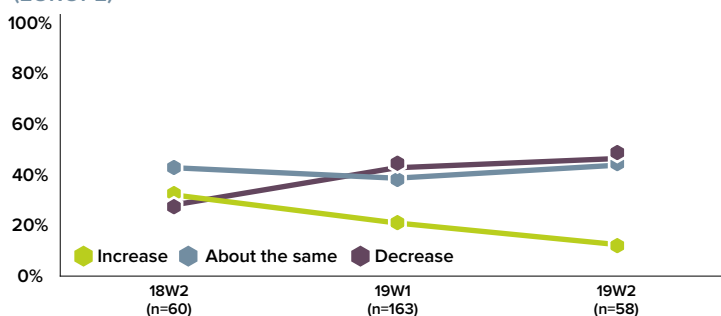
ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND BY EMPLOYEE SIZE (BUYERS)



RESEARCH SPENDING TREND BY GLOBAL REGION (BUYERS)



ANNUAL RESEARCH PROJECT BUDGET TREND BY GRIT WAVE (EUROPE)



Most notably, consumer non-durables continues the budgeting re-engineering reported in earlier GRIT waves. In addition to the wave-on-wave metrics, verbatim comments in the GRIT survey from Suppliers who depend on these large clients as well as some consumer non-durables staff have lamented this seismic change rippling through the insights and analytics industry.

With respect to global regions, budget increases in North America outpace decreases by 38% to 24%, but decreases outpace increases in Europe for the second straight GRIT wave, widening from 40% to 23% earlier this year to 43% to 16% currently.

Company factors external to the insights function are most often the drivers of budget decreases

Echoing previous GRIT Reports, company factors external to the insights function are most often the drivers of budget decreases. While many factors can influence budget decisions, when asked for the single most influential factor, more than two-thirds of Buyers facing reduced budgets cited company-wide pressure to cut costs due to poor company performance, stronger corporate focus on profits, or lack or perceived value by management. One in five mentioned a change in the perceived value of their insights work, attributed to insights work shifting away from traditional methods (8%) or from their department (4%) and management's lack of value for customer insights generally (5%) or their kind of insights work specifically (3%). One in ten suggested that reducing budget was part of their plan due to achieving greater efficiency (6%) or a return to normal workloads (4%).

DRIVERS OF BUYER BUDGET INCREASES & DECREASES

When asked how they would most likely respond to the decrease, most (59%) cited some version of doing more with less: 24% said they were going to continue to increase efficiency, 18% said they would start looking into it, and 17% said they would take more work in-house, often via DIY tools. Thirteen percent said they would reduce the amount of work they do, either downsizing projects (8%) or do fewer of them (5%). Nine percent will do more to establish the value of their work, either promoting it more (6%) or improving its value (3%).

The reasons for budget increases mirror the reasons for decreases. Whereas two-thirds of reducers cited corporate pressure to shrink their budget, a similar amount of budget increasers said that their corporate environment drove the change: 43% cited an increase in corporate needs for insights work; 31%, management championing it; and 8%, company growth. In addition to the 31% who said management value for the work was the key budget driver, 13% said they actively promoted the value to management.

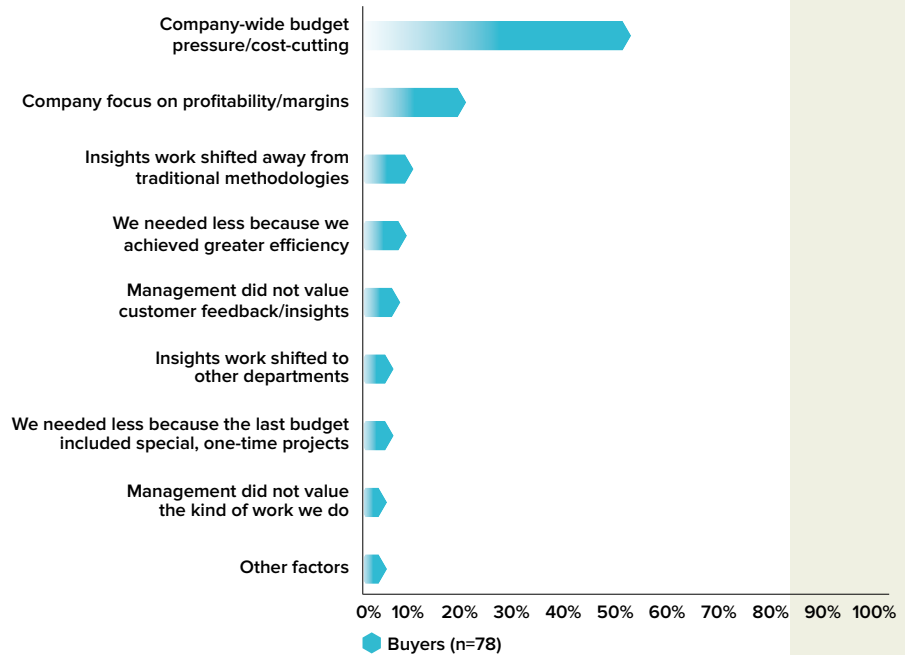
When asked how they would most likely respond to the decrease, most (59%) cited some version of “doing more with less:”



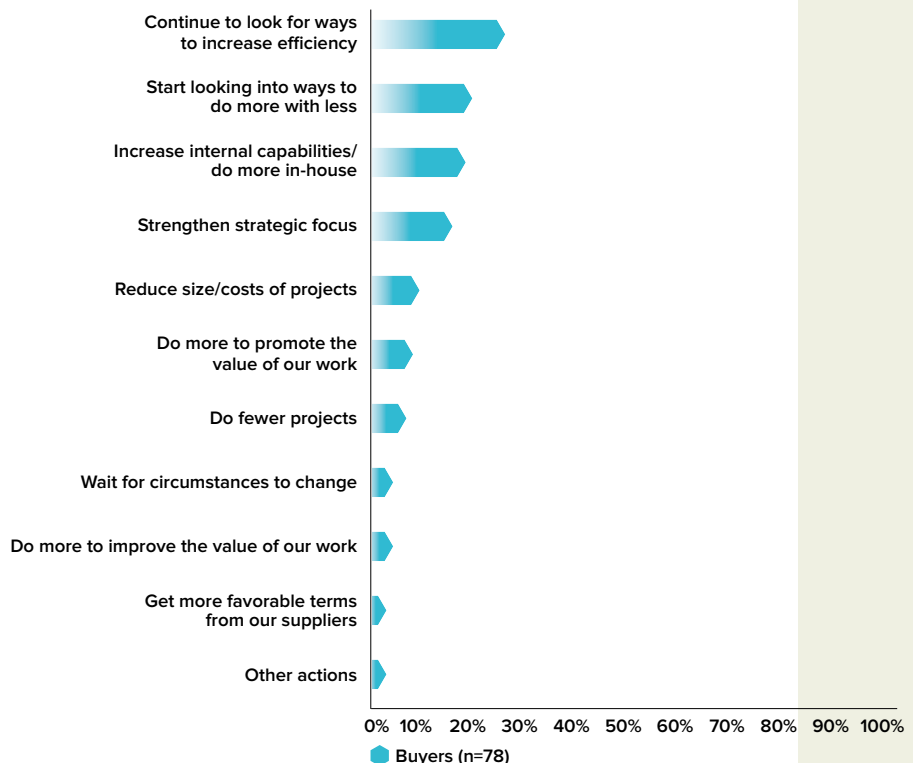
Most budgets – increasing or decreasing – are primarily influenced by the company’s overall success and management’s appreciation of the insights department’s role in that success



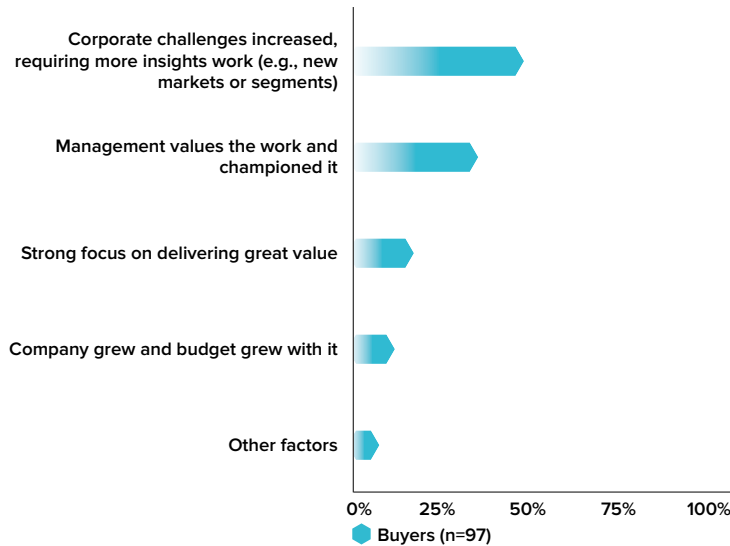
WHICH FACTOR MOST BEHIND BUDGET DECREASE? (BUYERS)



WHICH FACTOR MOST BEHIND BUDGET DECREASE? (BUYERS)



WHICH FACTOR DROVE THE BUDGET INCREASE? (BUYERS)



Budget Trend Profile	n	% Who Increased	% Who Decreased
Percent of Buyers	288	34%	27%
Practices	n	% Who Increased	% Who Decreased
Always or frequently:			
Benchmarks self against other organizations	58	36%	22%
Gives access to dashboards/ visualization tools to clients	52	33%	23%
Measures the ROI impact of the projects we conduct	24	29%	17%
Currently use:			
Customer experience (CX)/ user experience (UX)	173	38%	20%
Attribution analytics and single source data	65	38%	22%
Micro-surveys	112	36%	24%
Chatbots	49	35%	24%
Text analytics	153	33%	22%
Passive data measurement	41	27%	37%
Mobile ethnography	101	25%	38%
Crowdsourcing	53	23%	42%
Eye tracking	104	22%	43%

In summary, while some budgets are shrinking because of shifts away from traditional methods, increases in efficiency, and bringing more work in-house, most budgets – increasing or decreasing – are primarily influenced by the company’s overall success and management’s appreciation of the insights department’s role in that success. As discussed in detail in the previous Insights Practice GRIT Report, adoption of new methods, efficiency gains, and DIY trends can be associated with shrinking budgets, but they also increase the capacity for and value of work produced by insights departments, leading to greater demand for work from business stakeholders and budget increases.

Turning toward which practices might be related to increases or reductions, directionally, organizations that benchmark themselves, give clients access to dashboard and visualization tools, and measure the ROI impact of projects they conduct are less likely to have budget reductions. GRIT sample size gets thin for these questions, but these are mentioned because they are consistent with many of the verbatim comments made in recent surveys.

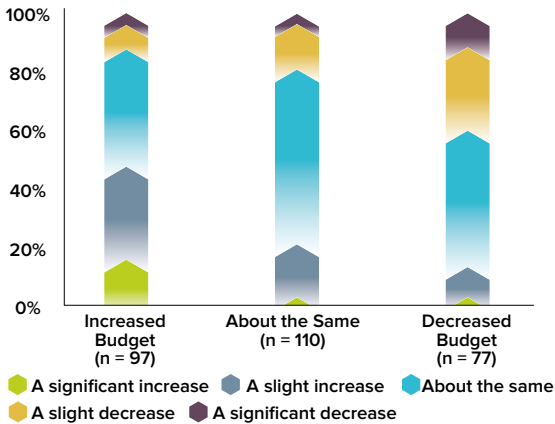
Adoption of some of what GRIT terms as emerging methods or buzz topics is also correlated to budget trends, although the causal relationship is unclear and some of the observations are directional, due to sample size (i.e., sample size is smaller for techniques with lower adoption). The relationship between adoption of customer experience (CX)/user experience (UX) approaches and reduced likelihood of budget decreases is statistically significant. However, it is unproven whether the relationship is due to the amount of investment committed to CX/UX programs or because of demonstrated ROI. Also, statistically significant are the relationships between reduced budgets and the adoption of mobile ethnography and eye tracking, although this probably indicates some unarticulated common variable across some users of these methods rather than the methods’ usefulness.

BUYER INVESTMENT PRIORITIES

The strong relationship between budget increases and hiring and technology investments is intuitive as well as previously documented. With respect to specific technology investments, those who made investment in data integration and analytics priorities also saw budget increases. Also, those who invested in sample quality had a statistically significant lower incidence of budget decreases.

Directionally, those who made innovation and scalability priorities in their selection of methodologies tended to be more likely to receive budget increases than those who did not.

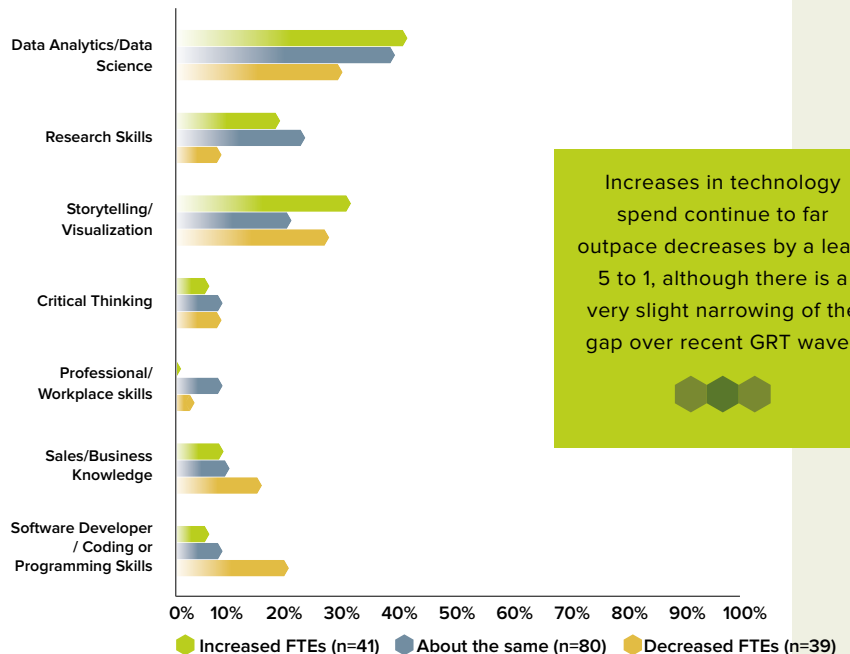
ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND BY CHANGE IN NUMBER OF FTE POSITIONS (BUYERS)



There are a few interesting statistical differences regarding which skills are needed in the near term for those who are increasing staff versus those who are decreasing. Those who are increasing staff are more likely to be looking for data analytics/data science and research skills; they have possibly established their capabilities and are looking to build scale. Those who have reduced staff are more likely in need of sales or business knowledge and software developers or programming/coding skill; it is likely the former would improve the value they deliver to stakeholders while the latter may enable them to do more with less.

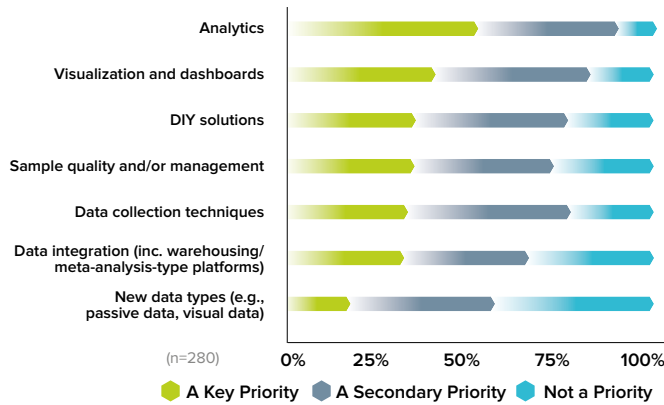
Budget Trend Profile	n	% Who Increased	% Who Decreased
Percent of Buyers	288	34%	27%
Priorities	n	% Who Increased	% Who Decreased
Changes to department's full-time staff			
Increased staff	79	58%	13%
Decreased staff	64	19%	48%
Investment in technology			
Increased spending	125	48%	22%
Decreased spending	23	13%	57%
Key/secondary priority:			
Data integration	187	39%	24%
Analytics	255	37%	26%
Sample quality	208	36%	23%
Methodology selection: key priority			
Innovative approach	82	40%	27%
Scalability	69	36%	17%

SKILLS NEEDED IN NEAR TERM BY CHANGE IN NUMBER OF FTE POSITIONS (BUYERS)

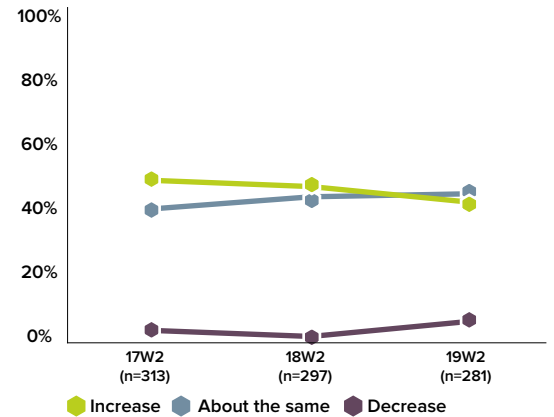


Increases in technology spend continue to far outpace decreases by a least 5 to 1, although there is a very slight narrowing of the gap over recent GRT waves

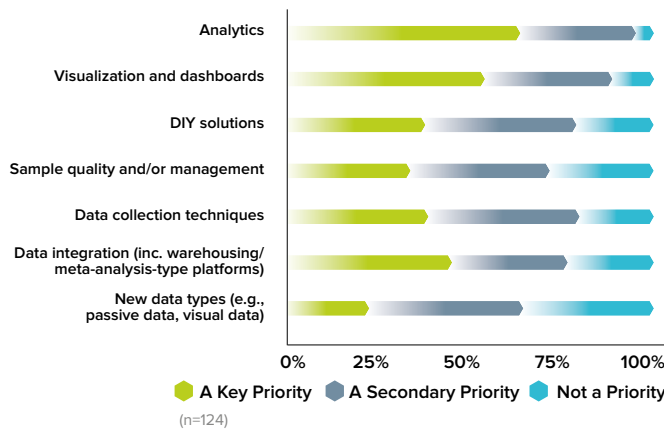
PRIORITIES FOR TECHNOLOGY SPENDING (BUYERS)



CHANGE IN TECHNOLOGY SPEND (BUYERS)

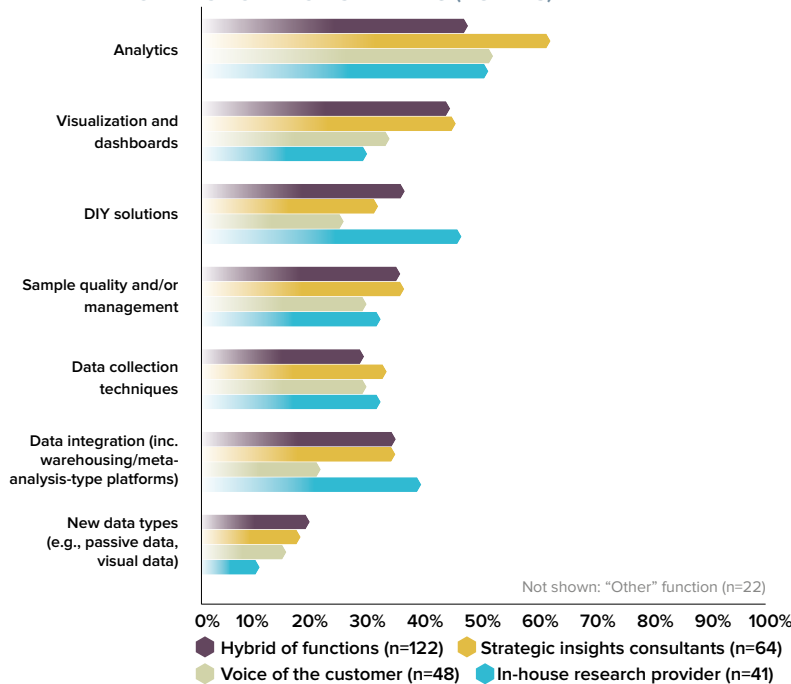


PRIORITIES FOR TECH SPENDING (BUYERS WHO INCREASED TECH SPENDING)



Increases in technology spend continue to far outpace decreases by a least 5 to 1, although there is a very slight narrowing of the gap over recent GRIT editions. The top priorities are analytics and visualization tools/dashboards, followed by DIY solutions, sample quality or management, data collection techniques, and data integration named as key priorities within a 3% band. New data types are only a key priority for about 18% of Buyers, just over half of which who named DIY, sample, data collection, and data integration.

KEY PRIORITIES FOR TECH SPENDING (BUYERS)



Looking only among Buyers who increased technology investments, we see a slightly different picture. While most types of investments see a lift in their key priority status, data integration moves into third place behind analytics and visualization tools and dashboards; 45% name it a key priority versus just 32% of all Buyers. The two leading investment types also increase by more than 10% points.

As might be expected, technology investment across the professional focus categories is most different among in-house researchers. They are much more likely to spend on DIY solutions, and directionally the type most likely to spend on data integration. The only other noteworthy difference is the enthusiasm for analytics among strategic insights consultants.

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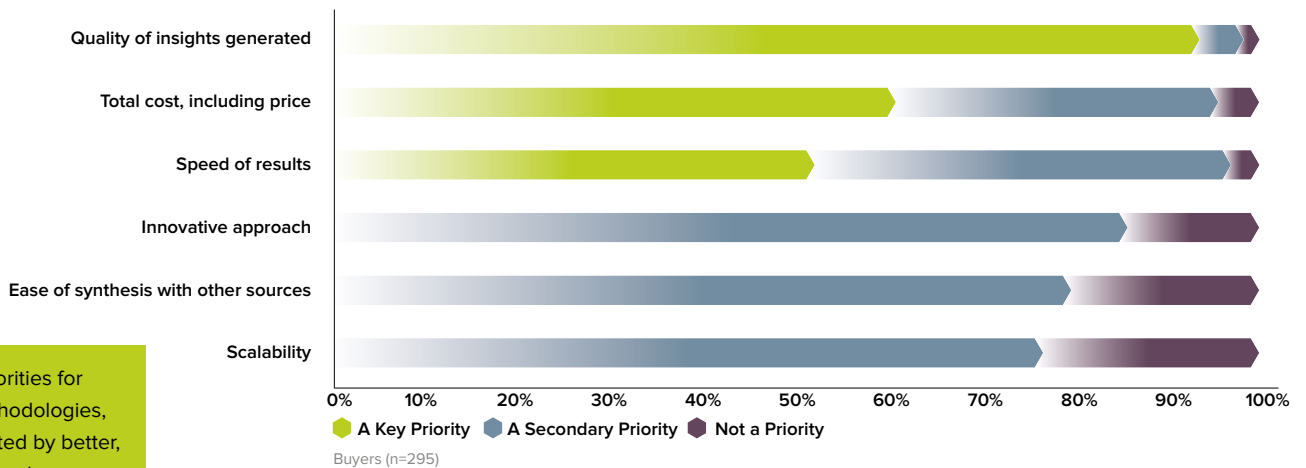
Subtext®

DRIVERS OF METHODOLOGY SELECTION

Turning to priorities for selection of methodologies, these are dominated better, cheaper, faster per chart, which are much more likely to be selected as

key priorities than are innovative approach, ease of synthesis, and scalability.

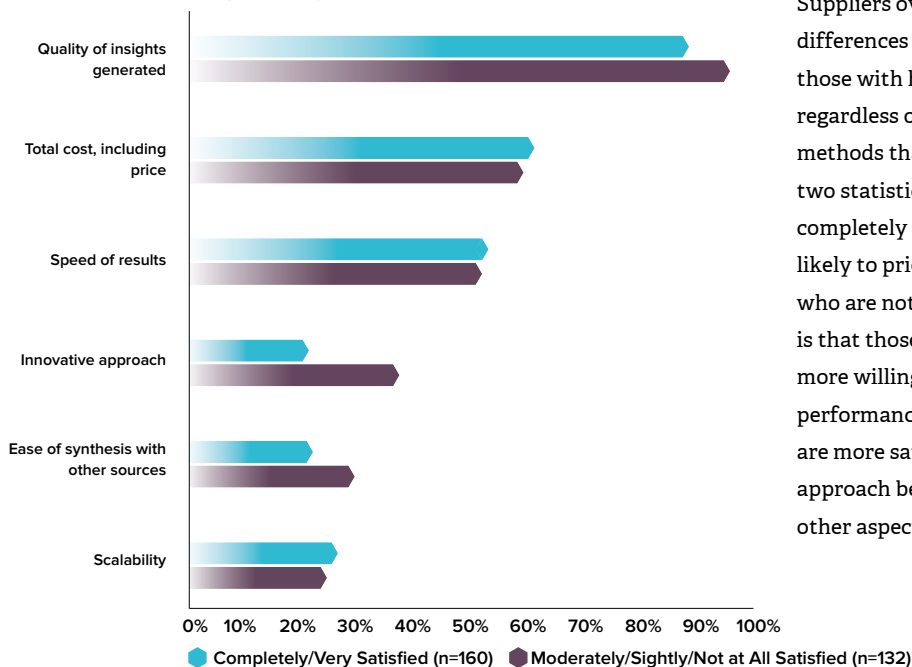
PRIORITIES FOR METHOD SELECTION (BUYERS)



Turning to priorities for selection of methodologies, these are dominated by better, then faster, then cheaper



PRIORITIES FOR METHOD SELECTION BY OVERALL SATISFACTION WITH SUPPLIERS (BUYERS)



Given the moderate levels of satisfaction with Suppliers overall, it may be useful to look for differences in selection criteria priorities across those with higher and lower satisfaction. Overall, regardless of satisfaction level, Buyers are looking for methods that are better, cheaper, and faster. However, two statistical differences emerge: those who are completely or very satisfied with Suppliers are more likely to prioritize quality and innovation than those who are not very satisfied. One possible explanation is that those who are less satisfied may be slightly more willing to risk quality in order to get better performance on some other criteria. Also, those who are more satisfied may take a chance on an innovative approach because they are more comfortable with other aspects of the service delivery.

SUPPLIER OUTLOOK: DEEP DIVE

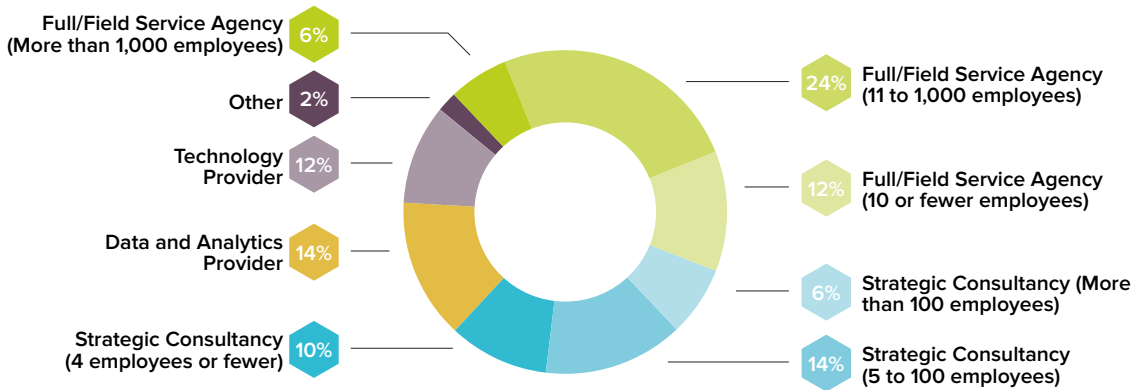
Applying GRIT's evolving professional focus categories, 42% of Suppliers self-classify as full or field service agencies, followed by 30% as strategic consultancies, 26% as specialists (14% as data and analytics, 12% as technology providers), with 2% as other. As we know that the largest organizations differ in important ways from the smallest ones, it is useful to further segment full and field service agencies and strategic consultancies by employee size (smaller, larger, and largest, applying different breakpoints across these two types).

At a more detailed level, the GRIT survey asks each supplier to further select a primary focus area from a list of nearly 20 descriptions. As the answer choices are not filtered by the response to the macro classification, the common and diverging selections across full and field service agencies, strategic consultancies, data and analytics providers, and technology providers may shed some light on how the industry is evolving.

42% of Suppliers self-classify as full or field service agencies, followed by 30% as strategic consultancies, 26% as specialists (14% as data and analytics, 12% as technology providers), with 2% as "other"

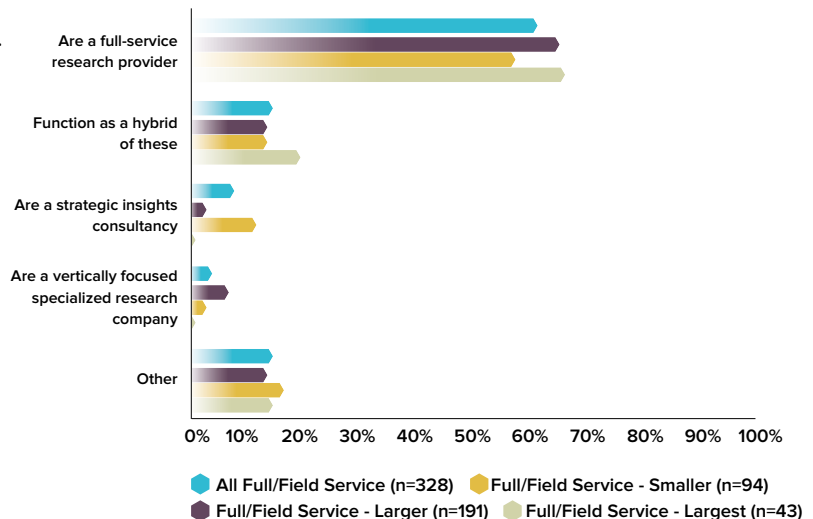


HOW PROJECTS ALLOCATE ACROSS QUANT AND QUAL (BUYERS AND SUPPLIERS)

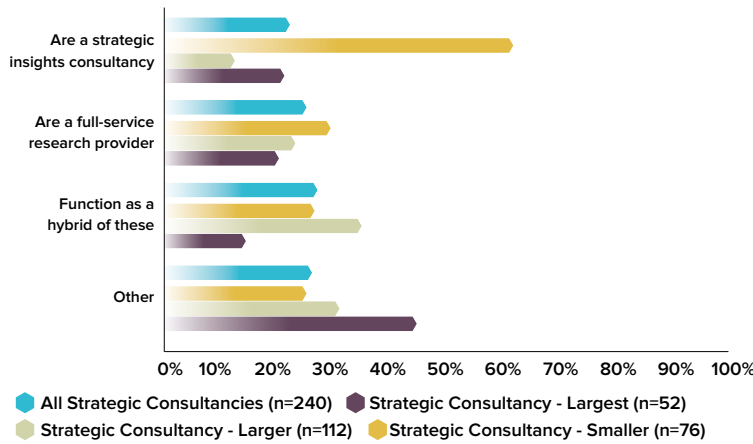


Those who self-classify as a full and field service agency mostly choose it again when offered the more detailed list: 76% chose it again or chose hybrid. For the largest agencies, the percentage jumps to 86% with the remaining 14% allocated to other. Smaller agencies are almost as committed to this classification, although a handful (6%) identify as a vertically-focused specialized research company. Among the middle group, larger agencies, there is slightly more diversity, as 11% identify as strategic consultancies. We do not know, however, how much of this 11% started as strategic consultancies and chose to build a more complete solution to grow their business and how much started as pure research companies before deciding to reposition as strategic consultancies.

WHICH OF THESE MOST CLOSELY MATCHES HOW YOU WOULD DESCRIBE YOUR ORGANIZATION? (FULL/FIELD SERVICE AGENCIES)



WHICH OF THESE MOST CLOSELY MATCHES HOW YOU WOULD DESCRIBE YOUR ORGANIZATION? (STRATEGIC CONSULTANCIES)



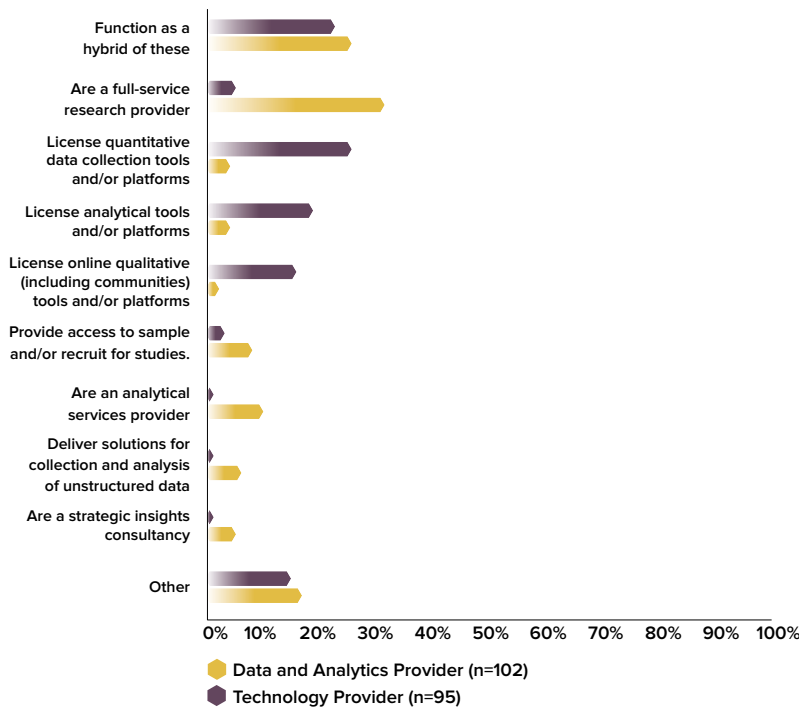
The pattern diverges for strategic consultancies, however: only 56% chose it a second time or chose hybrid. Full/field service was chosen by 25%, and another 20% chose other. The smallest strategic consultancies were the most likely to identify that way a second time, while the largest was most likely to choose full/field service agency. More of the largest firms selected full/field service than selected strategic consultancy again! This pattern of identification, to an even greater extent than for full/field service agencies, gives the impression that many firms are trying to shift their identities. Some full/field service agencies are re-positioning as strategic consultancies, while some strategic consultancies are expanding services to own more of the total solution.

Some full/field service agencies are re-positioning as strategic consultancies, while some strategic consultancies are expanding services to own more of the total solution



Data and analytics providers show traces of this sort of evolution: 56% identify as a full/field service agency or hybrid, plus 16% as other. Only 9% identify as an analytical services provider, although 19% identify with licensing tools or platforms, providing access to sample, or delivering solutions for unstructured data. Because so many identify as full/field service agencies and so few as strategic consultancies (4%), it leads to the question of how many are former full/field service agencies who chose to reposition as data and analytics providers instead of as strategic consultancies.

WHICH OF THESE MOST CLOSELY MATCHES HOW YOU WOULD DESCRIBE YOUR ORGANIZATION? (SPECIALIST SUPPLIERS)

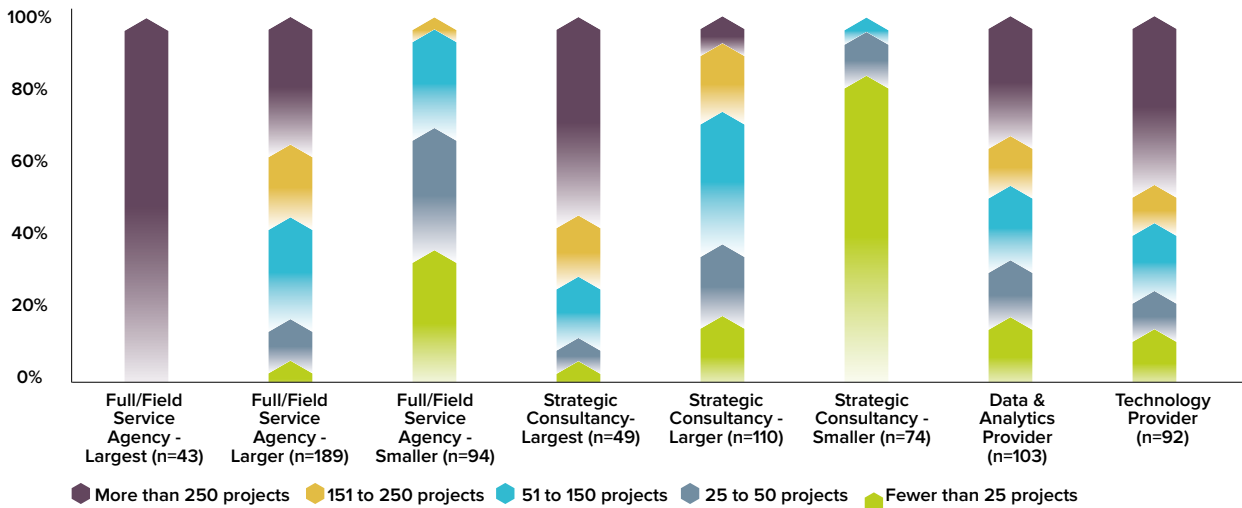


Whereas significant proportions of data and analytics providers and strategic consultancies seem likely to share a full/field service lineage, technology providers are a completely different breed: only 4%, in total, identify as a full/field service agency or strategic consultancy, 58% license tools or platforms, and another 25% function as a hybrid.

For the first time, the GRIT survey asked Suppliers about annual project volume and found it varies across professional focus categories, though much depends on company size. Full/field service agencies tend to handle the highest volume, followed by

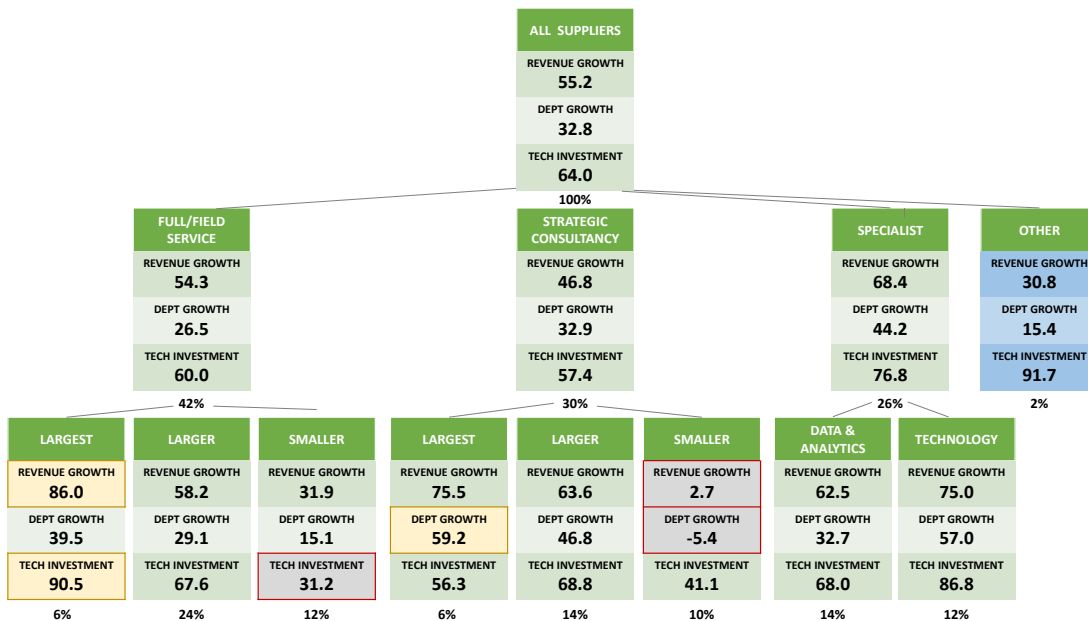
strategic consultancies. Technology providers handle a somewhat lower volume than strategic consultancies, but more than data and analytics providers.

ANNUAL PROJECT VOLUME BY SUPPLIER PROFESSIONAL FOCUS (SUPPLIERS)



Concerning revenue, staff size, and technology investment trends, the strongest revenue momentum occurs among the largest full/field service agencies, who also lead in technology spending. The largest strategic consulting firms lead

in insights department growth. Consistent with previous GRIT waves, the two specialist segments are strong across the metrics. Not doing as well are the smaller full/field service agencies and strategic consultancies, particularly the latter segment.



Looking more closely at revenue trends, the smallest strategic consultancies, Suppliers with 10 or fewer employees, and those with a small project volume are having the most trouble increasing revenue. Those with the largest project value are winning the revenue game, as project volume often translates directly into revenue (if the projects are priced

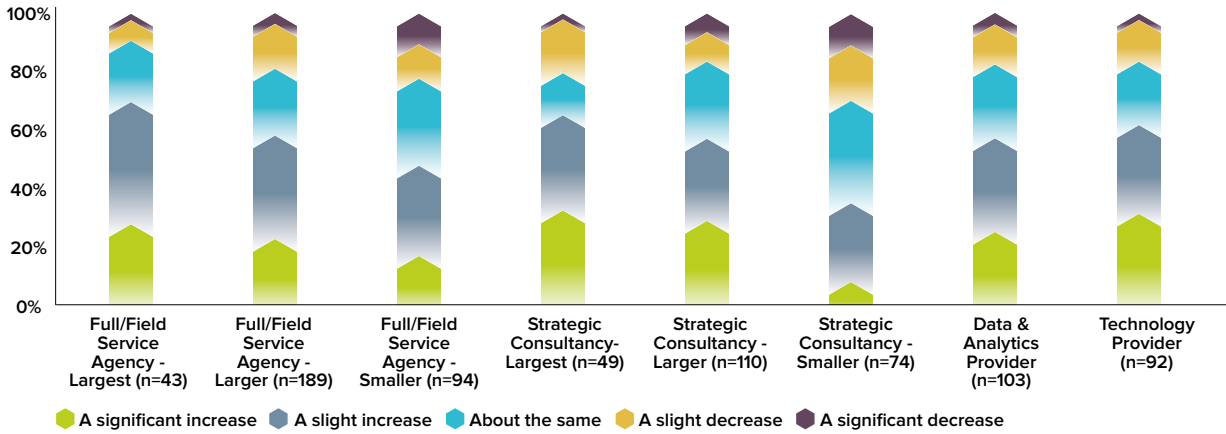
well). The accompanying table shows results for all professional focus categories, employee sizes, and project volume levels; while not all results are statistically significantly different, directionally there is additional confirmation of the general principles at work.

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	767	56%	19%
Company Characteristics	n	% Who Increased	% Who Decreased
Professional Focus			
Full/Field Service Agency - Largest	43	70%	9%
Full/Field Service Agency - Larger	189	58%	19%
Full/Field Service Agency - Smaller	94	48%	22%
Strategic Consultancy- Largest	49	65%	20%
Strategic Consultancy - Larger	110	57%	16%
Strategic Consultancy - Smaller	74	35%	30%
Data & Analytics Provider	103	57%	17%
Technology Provider	92	62%	16%
Employee Size			
10 or fewer employees	238	42%	27%
11 to 100 employees	280	61%	17%
101 to 1,000 employees	161	60%	17%
More than 1,000 employees	88	67%	9%
Scope of Business	n	% Who Increased	% Who Decreased
Annual Project Volume			
Fewer than 25 projects	162	40%	30%
25 to 50 projects	111	51%	21%
51 to 150 projects	162	59%	21%
151 to 250 projects	88	59%	17%
More than 250 projects	213	69%	10%

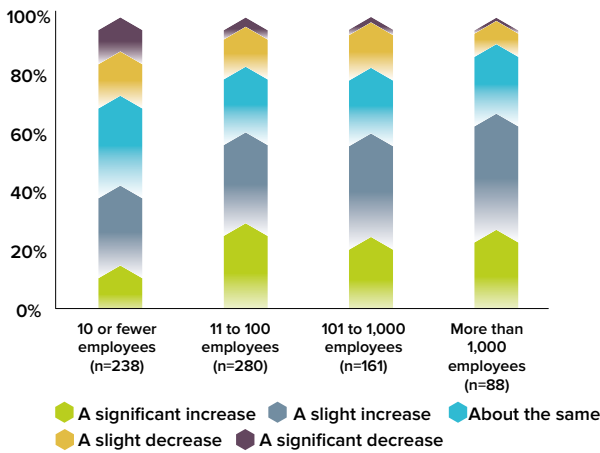


Despite the budget declines among European-based Buyers, revenue trends are as positive or even more positive for European Suppliers than for other global regions.

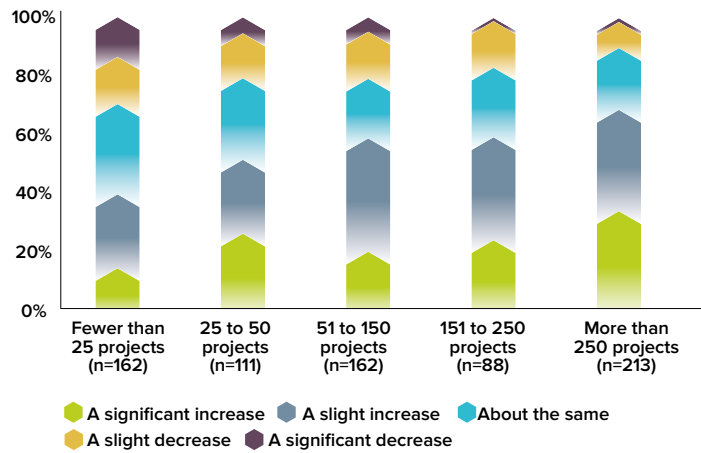
REVENUE TREND BY PROFESSIONAL FOCUS CATEGORY (SUPPLIERS)



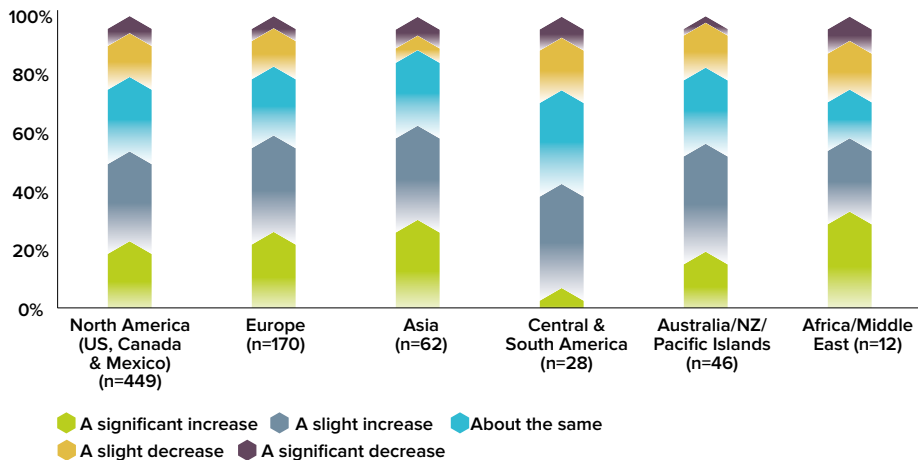
REVENUE TREND BY EMPLOYEE SIZE (SUPPLIERS)



REVENUE TREND BY ANNUAL PROJECT VOLUME (SUPPLIERS)

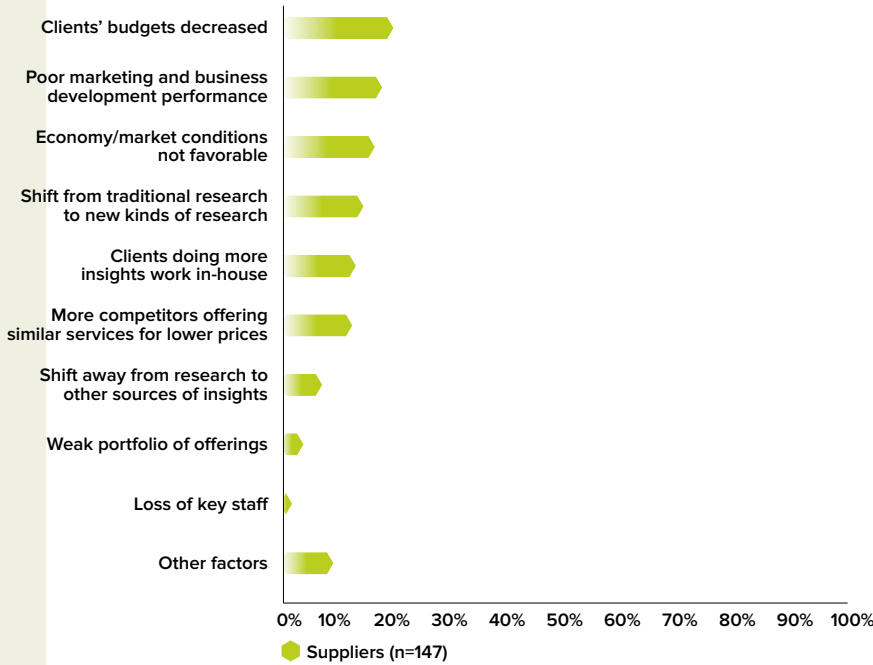


REVENUE TREND BY GLOBAL REGION (SUPPLIERS)



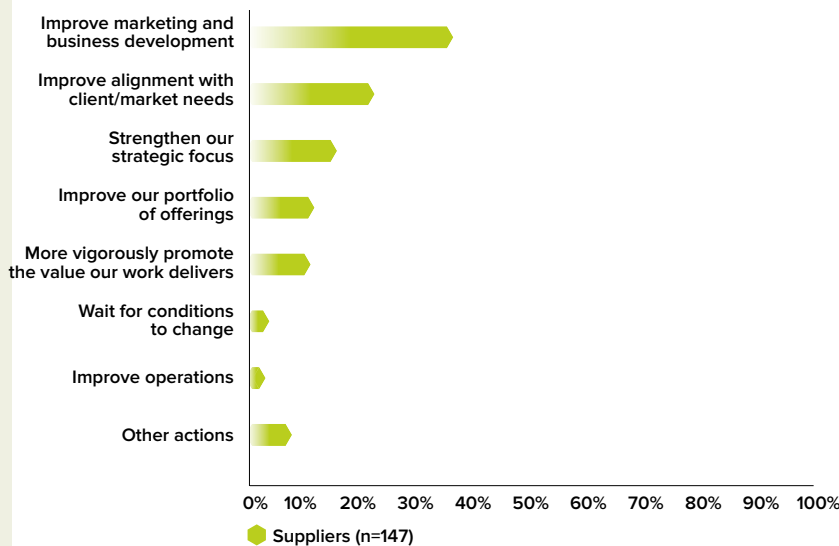
DRIVERS OF SUPPLIER REVENUE INCREASE & DECREASE

WHICH FACTOR IS MOST BEHIND REVENUE DECREASE? (SUPPLIERS)



When asked for one factor that most caused a decline in revenue, most Suppliers whose revenue decreased cited factors beyond their immediate control. Forty-one percent pointed to changes in the industry: a shift away from traditional research (13%), clients taking more work in-house (12%), availability of lower-cost alternatives (11%), and shift of insights work from research to alternative sources (5%). Thirty-three percent attributed the loss to external conditions: clients' decreased budgets (18%) or economic or market conditions (15%). Nearly three of every four mentioned cited external circumstances. Another 18%, however, cited issues for which they had direct control: marketing and business development (16%) and a weak portfolio of offerings (2%).

HOW WILL YOUR ORGANIZATION RESPOND TO THE REVENUE DECREASE? (SUPPLIERS)

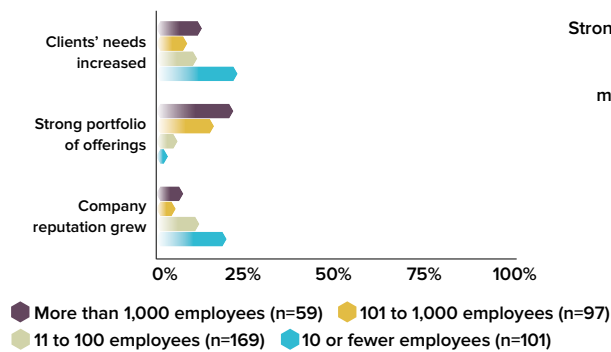


When asked how they would respond to the decrease, only 2% said wait for conditions to change. Nearly three of every four selected an action that in some way would better align them with the market: improve marketing and business development (35%), improve alignment with market needs (21%), improve the portfolio of offerings (10%), and more vigorously promote the value their work delivers (10%). Another 15% cited primarily internal activity: strengthen strategic focus (14%) and improve operations (1%).

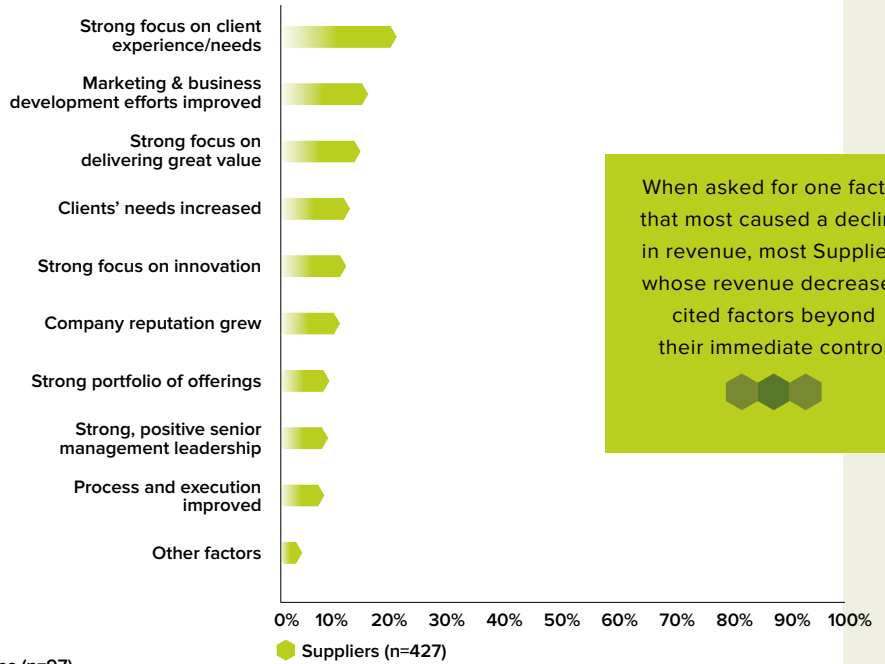
For those who increased revenue, they named drivers that mirror that echo the actions that those who lost revenue plan to take: a strong focus on the client (19%), improved marketing and business development (14%), and focus on delivering great value (13%). Whereas the leading reason for revenue decline was client's decreased budgets (18%), 11% of increasers mentioned that clients' needs grew.

Considering the reasons for the increase by employee size, a couple of insights emerge. For smaller Suppliers, revenue increase is more frequently the result of the Client's needs increasing and/or the Supplier's reputation grew. For the largest Suppliers, increasing the portfolio of offerings is a stronger growth driver than for smaller Suppliers.

WHICH FACTOR DROVE THE REVENUE INCREASE? BY EMPLOYEE SIZE (SUPPLIERS)



WHICH FACTOR DROVE THE REVENUE INCREASE? (SUPPLIERS)



When asked for one factor that most caused a decline in revenue, most Suppliers whose revenue decreased cited factors beyond their immediate control



Supplier revenue trends are related to a variety of practices executed with some frequency, especially externally focused ones. Suppliers tend to grow revenue more frequently if they are involved in

business unit-level strategic planning, benchmark themselves, actively promote their research, interact with senior stakeholders, explore new things, and focus on future growth strategies.

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	767	56%	19%
Practices	n	% Who Increased	% Who Decreased
Always or Frequently:			
Is involved in strategic planning sessions at the business unit level	141	67%	14%
Benchmark self against other organizations	125	66%	14%
Actively promote the research we conduct	170	64%	13%
Regularly interact with senior stakeholders	246	64%	15%
Explore new methods, technologies, business models, and partners	259	63%	14%
Is focused on future growth strategies	275	62%	16%

When asked how they would respond to the decrease, only 2% said "wait for conditions to change." Nearly three of every four selected an action that in some way would better align them with the market



For smaller Suppliers, revenue increase is more frequently the result of Client's needs increasing and/or the Supplier's reputation growing



Considering the relationship between adoption of emerging methods or buzz topics and revenue trends, many individual methods have a positive relationship with revenue growth. The biggest differentiator, however, between those who gain or lose revenue seems to be how actively the Supplier adopts new methods rather than any specific,

individual method. Suppliers who use 5 or more of the emerging methods were more likely to increase revenue than those who adopted fewer than five. Adopting one to four methods is better than not adopting any methods, but it only seems to prevent losses, not win more revenue.

Suppliers tend to grow revenue more frequently if they are involved in business unit-level strategic planning, benchmark themselves, actively promote their research, interact with senior stakeholders, and focus on future growth strategy



Suppliers who use five or more of the “emerging” methods were more likely to increase revenue than those who adopted fewer than five



Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	767	56%	19%
Practices	n	% Who Increased	% Who Decreased
Number of Emerging Methods in Use:			
None	71	41%	35%
1 to 4	257	48%	22%
5 or more	439	62%	15%
Currently Use:			
Facial Analysis	147	73%	6%
Biometric Response	90	73%	10%
Chatbots	94	71%	14%
Attribution Analytics and Single Source Data	162	70%	12%
Passive Data Measurement	165	69%	12%
Marketplaces (such as for sample, talent, software, etc.)	184	68%	14%
Research Gamification	207	67%	13%
Big Data (including synthesis of multiple data sets/types)	296	65%	12%
Automation/Research Automation	242	65%	12%
Causal Analysis	227	64%	12%
Applied Neuroscience	218	64%	12%
Behavioral Economics	246	64%	12%
Agile Research/Methods/Approaches	357	64%	14%
Prediction Markets	132	63%	9%
Artificial Intelligence (AI)/Machine Learning	227	63%	12%
Mobile First Surveys	449	63%	14%
Mobile Ethnography	327	62%	15%
Mobile Qualitative	377	62%	16%

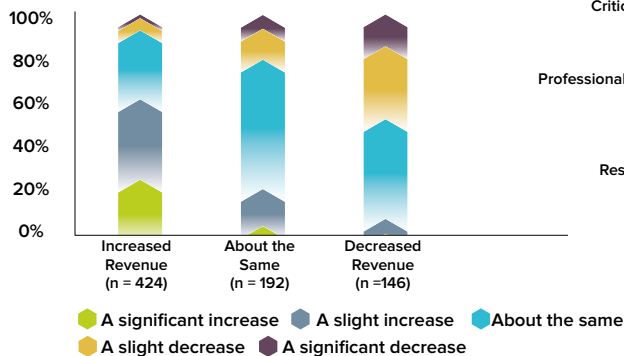
SUPPLIER INVESTMENT PRIORITIES

For Suppliers, it seems, there is very little that is not directly tied to revenue. Not surprisingly, the relationships across revenue, hiring, and technology spending trends are even stronger than for Buyers. Among Suppliers, for example, hiring increases were almost always associated with increased revenue and very rarely with a revenue decrease.

Regarding priorities for technology investments, revenue increases were strongly related to prioritizing new data types, data integration, data collection techniques, and visualization and dashboards. Also, when prioritizing criteria with which to select methods, Suppliers who emphasized innovation were more likely to increase revenue; those who prioritized total cost were less likely. These technology and method selection priorities tend to reinforce the importance of some drivers mentioned previously: actively exploring new methods and adopting some of them.

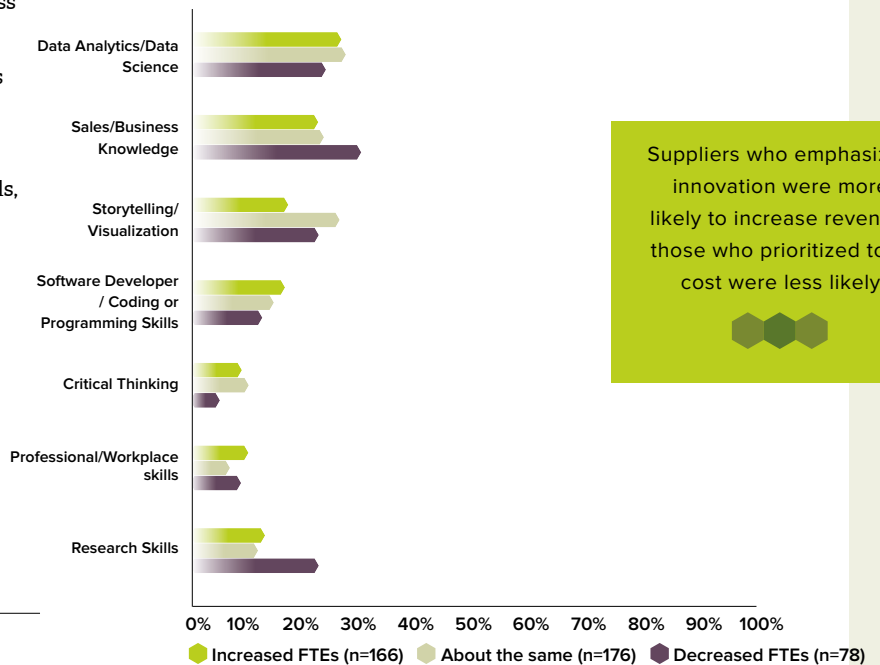
Suppliers who increased staff had similar needs for skills in the near term to those whose FTE count stayed about the same, but differed somewhat from those who reduced staff. Those with diminishing staff were somewhat more likely to need sales and business knowledge (similar to the buyer situation) and research skills. Needs for skills are also similar across professional focus segments, with minor exceptions. Data and analytics Suppliers are slightly more likely to need data analytics/data science and research skills, and technology providers are slightly more likely to need sales or business knowledge and software development or coding and programming skills.

REVENUE TREND BY CHANGE IN NUMBER OF FTE POSITIONS (SUPPLIERS)



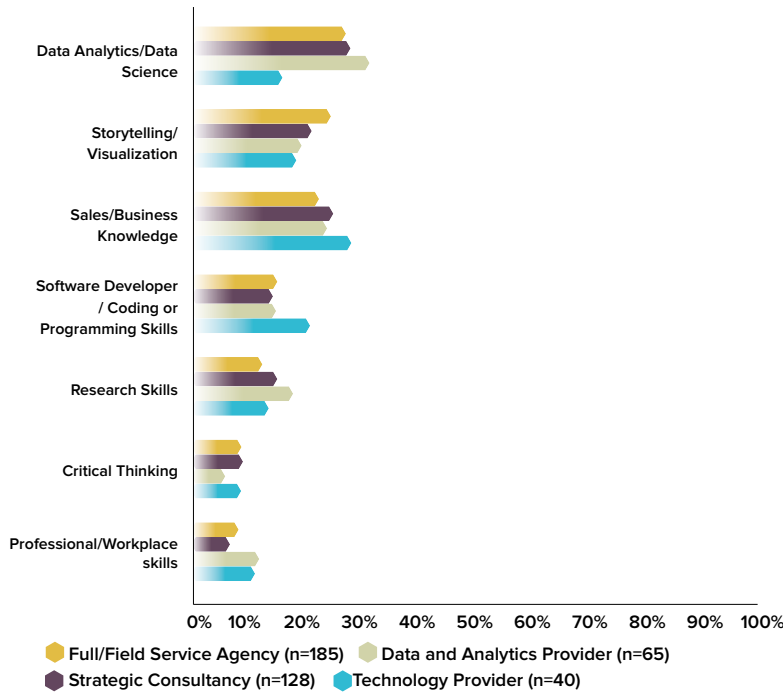
Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	767	56%	19%
Priorities	n	% Who Increased	% Who Decreased
Changes to Department's Full-Time Staff:			
Increased staff	313	84%	4%
Decreased staff	138	22%	58%
Investment in technology			
Increased spending	402	69%	12%
Decreased spending	55	29%	58%
Key/Secondary Priority:			
New data types	462	61%	15%
Data integration	401	61%	16%
Data collection techniques	600	59%	18%
Visualization and dashboards	654	57%	18%
Methodology/Selection Key Priority:			
Total cost, including price	429	54%	23%
Innovative approach	306	62%	14%

SKILLS NEEDED IN NEAR TERM BY CHANGE IN NUMBER OF FTE POSITIONS (SUPPLIERS)



Suppliers who emphasized innovation were more likely to increase revenue; those who prioritized total cost were less likely

SKILLS NEEDED IN NEAR TERM BY PROFESSIONAL FOCUS CATEGORY (SUPPLIERS)

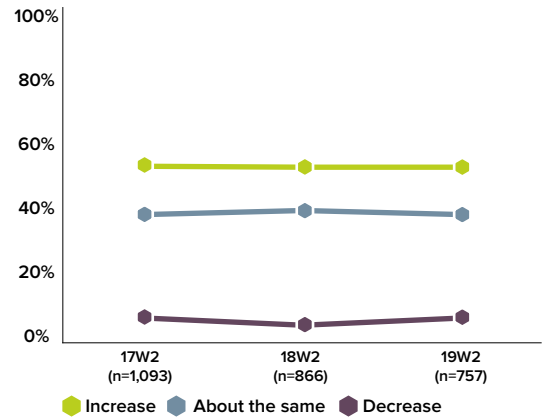


Those with diminishing staff were somewhat more likely to need sales and business knowledge (similar to the buyer situation) and research skills

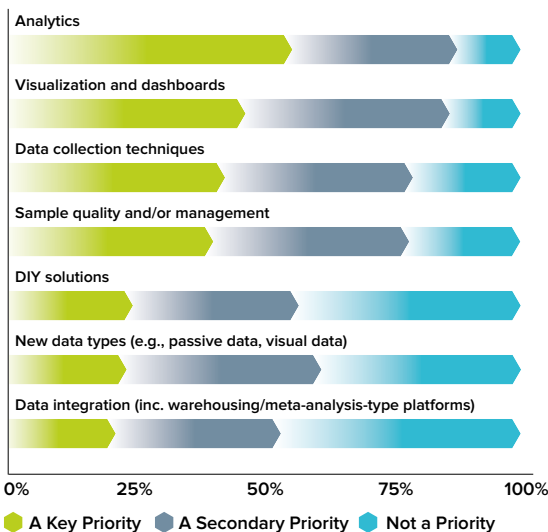


Technology spending among Suppliers has retained the same momentum since GRIT began measuring it in 2017. Analytics stands apart from the other areas as a key priority, but Suppliers are also prioritizing visualization and dashboards, data collection techniques, and sample quality and management ahead of DIY solutions, new data types and data integration. Focusing only on those who increased technology spending, we see the same order of priority, but with more activity for each investment type.

CHANGE IN TECHNOLOGY SPEND BY GRIT WAVE (SUPPLIERS)

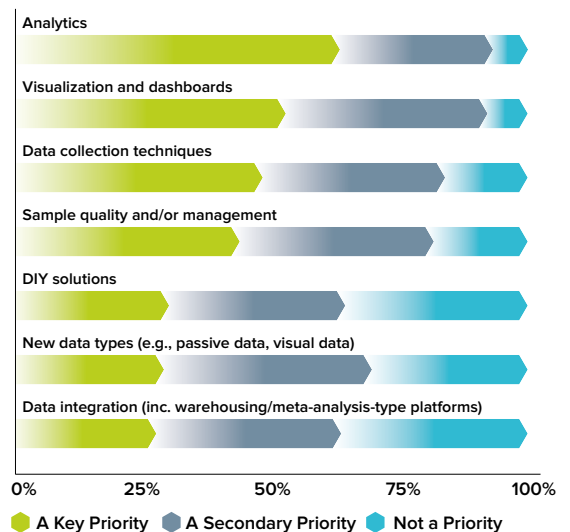


PRIORITIES FOR TECHNOLOGY SPENDING (SUPPLIERS)



Suppliers (n=748)

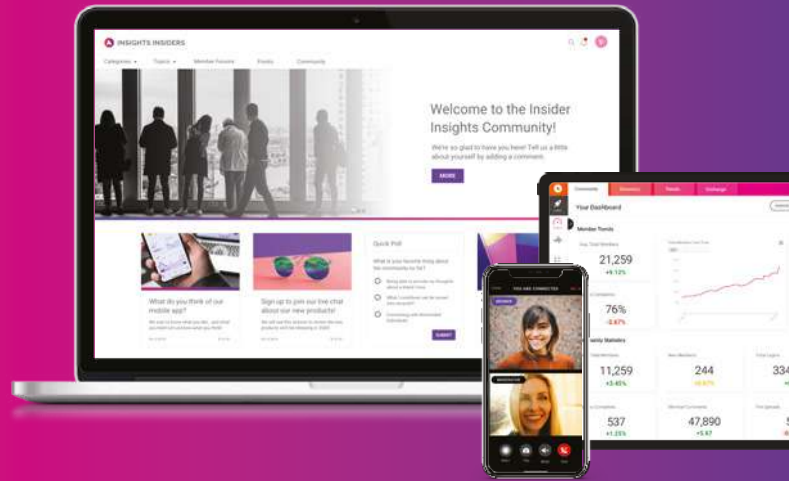
PRIORITIES FOR TECHNOLOGY SPENDING (SUPPLIERS WHO INCREASED TECHNOLOGY SPENDING)



Suppliers who increased technology spending (n=399)

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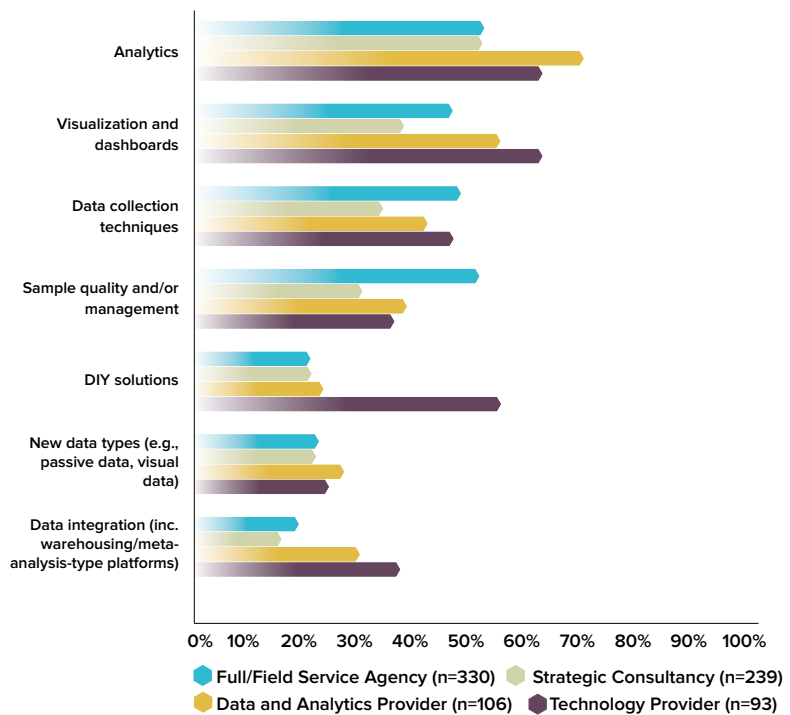
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Across professional focus areas, a few, somewhat predictable differences emerge for technology investment priorities. Technology providers name analytics, visualization and dashboards, DIY solution, and data integration as key priorities. Data and analytics providers have a similar enthusiasm for analytics and visualization and dashboards. Full/field service agencies prioritize sample quality and management more than the other Supplier types.

If we break out full/field service agencies by size, each category has a similar emphasis on analytics, but the largest agencies lead all other investment areas.

Concerning strategic consultancies, analytics is the leading priority across all segments, but much more strongly for the largest firms. The largest consultancies also are more likely to prioritize visualization and dashboards, new data types and data integration, while the middle group has a stronger focus on data collection techniques, sample, and DIY. Possibly, the larger firms are focused on a wider swath of business-related data while the middle group's strategy is more focused on primary research.

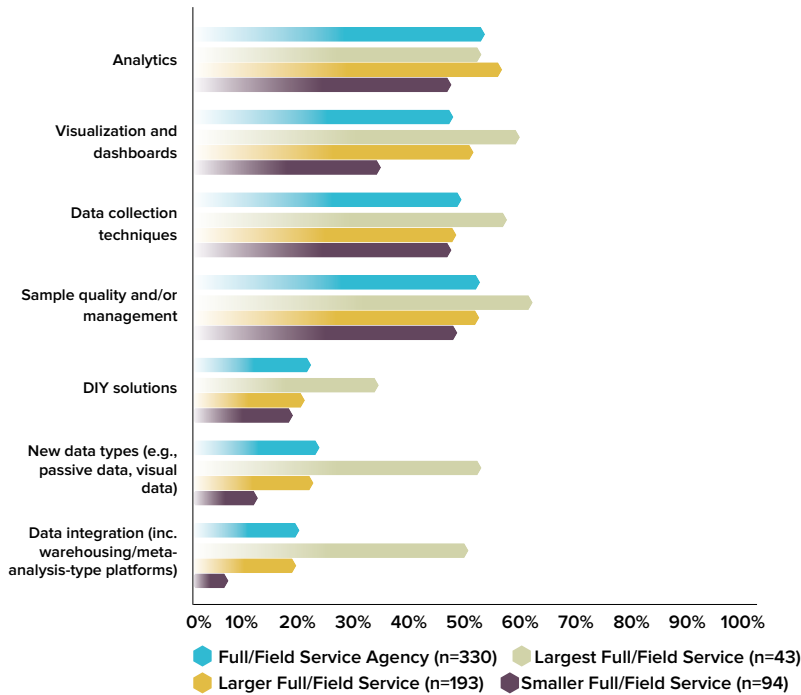
KEY PRIORITIES FOR TECHNOLOGY SPENDING (SUPPLIERS)



More technology providers name as key priorities analytics, visualization and dashboards, DIY solution, and data integration

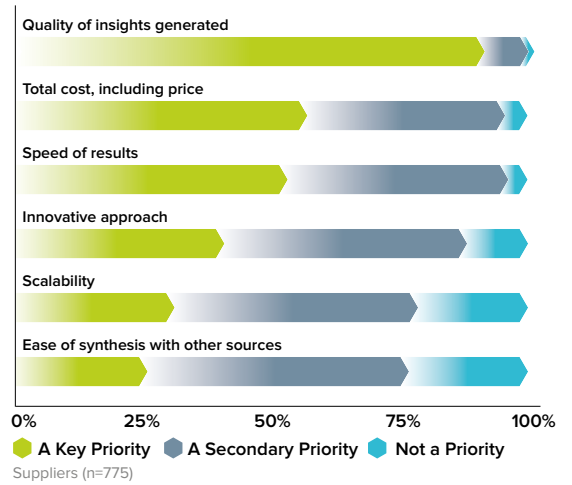


KEY PRIORITIES FOR TECHNOLOGY SPENDING (FULL/FIELD SERVICE)

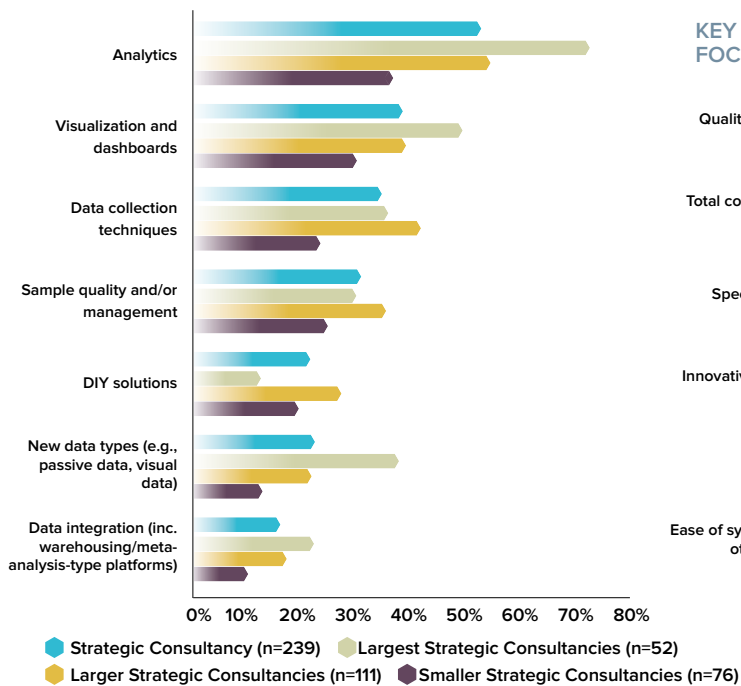


As with Buyers, Suppliers prioritize better, cheaper, and faster when selecting methodologies. Across the professional focus areas, full/field service are most likely to prioritize total cost; technology providers the least. Technology providers are more concerned with scalability than are other types of Suppliers.

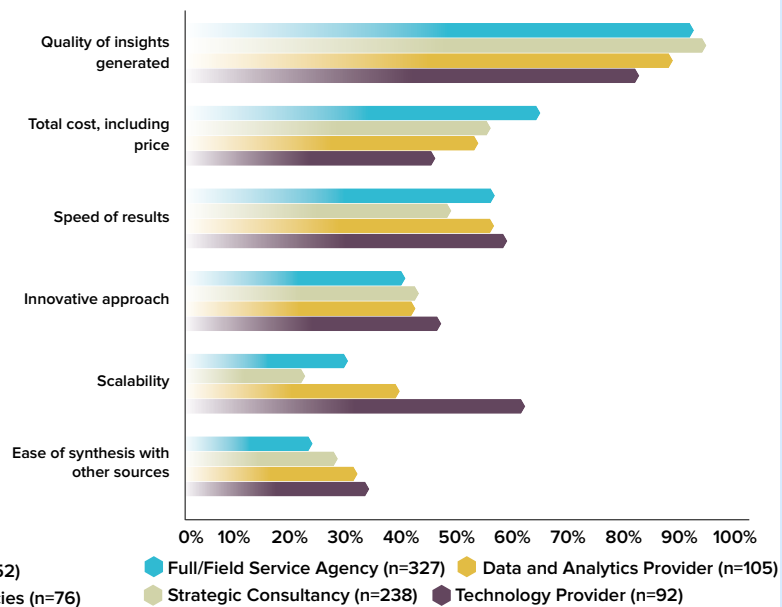
PRIORITIES FOR METHOD SELECTION (SUPPLIERS)



KEY PRIORITIES FOR TECHNOLOGY SPENDING (STRATEGIC CONSULTANCIES)



KEY PRIORITIES FOR METHOD SELECTION BY PROFESSIONAL FOCUS CATEGORY (SUPPLIERS)





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THE BIG PICTURE

The business outlook for the insights and analytics industry, as a whole, should revolve around the question “is the industry growing?”. This is a question we can explore via GRIT data, though, admittedly, we cannot answer definitively. The proportion of project research budgets that are increasing continue to exceed the proportion that are decreasing, but the gap has continued to narrow since 2017. Worse, among the largest budgets, those with more than \$15M, decreases occur nearly twice as frequently as increases, and the proportions of Buyers with larger budgets seem to be shrinking.

Similarly, the proportion of Buyers who increase FTEs continues to outpace the proportion that decrease, but that gap has also narrowed. Further, among the largest companies, as many increased as decreased. For all we know, each increase has created more FTE positions than each decrease eliminated, however, the opposite may be true. All we can say for sure is that there is a lot of change, particularly among businesses large enough to create significant ripples.

On the other hand, the trend for more Suppliers to increase hiring than to decrease has been solid since 2017. For Suppliers, hiring trends track very closely with revenue trends, and, in GRIT, revenue gains have always outpaced revenue losses, and usually at a 3 to 1 margin or greater.

Realistically, however, shouldn't this always be the case? A client-side insights department can experience budget reductions but continue to operate as long as it has senior management support. A Supplier that consistently loses revenue, however, faces a much different fate, such as closing or selling the business. The Buyer with a smaller budget has a better chance of contributing to a future GRIT survey than does a Supplier with negative revenue.

The Buyer perspective suggests serious challenges to industry growth because of negative trends among larger Buyers, while the Supplier perspective, all else equal, shows growth in revenue and FTEs. Among Suppliers, revenue is strongest among the largest firms, and, although the largest Suppliers are the most likely to reduce staff, they are also the most likely to increase FTEs. So, whereas large Buyers seem to pose industry challenges, large Suppliers seem to be flourishing more than smaller ones.

Despite the uncertainty, however, many organizations across the Buyer and Supplier sides are having individual success. Among client-side insights functions, over 80% report that they are meeting or exceeding their goals, and some of the findings based on their professional focus shed light on the different formulas for success. Among Suppliers, we see a restructuring across traditional research, analytics, and strategy consulting as Suppliers work on honing an identity that works for their particular skill sets. Perhaps we also see the burgeoning reassertion of bigness as more large Suppliers seem to be expanding capabilities and adding capacity to provide solutions that smaller generalists cannot offer.

For Buyers and Suppliers, technology investment focuses on analytics as well as visualization and dashboards, although, after those two, investment priorities can differ according to area of professional focus. In a case of the more things change the more they stay the same, Buyers and Suppliers still prioritize better, cheaper, faster (in that order) when selecting methodologies.

The Buyer perspective suggests serious challenges to industry growth due to negative trends among larger Buyers, while the Supplier perspective, shows growth in revenue and FTEs





BUILDING HUMAN CONTACT IN AN EVER ARTIFICIAL LANDSCAPE

Annie McDannald

Global Manager, Civicom Marketing Research Services

Email: <mailto:annie.mcdannald@civi.com> | Twitter: @CivicomMRS | Website: www.CivicomMRS.com

LinkedIn: <https://www.linkedin.com/in/annie-mcdannald-07837816/>

Somewhere amidst the deafening bells and whistles from a vigorous technology evolution, there is an audible and collective sigh of human fatigue. Bombarded with an ever increasing number of platforms, programs, apps, software, and solutions for every step of the research process, insights providers are ready to establish a new baseline for “back to basics.” We seem to find ourselves with fully loaded tool boxes and an eagerness to shift industry focus back to a more human touch.

The technical renaissance, raging strong, has already left a plethora of ‘tried and true’ and ‘tried but died’ solutions in its’ wake. Researchers, having learned from the latter, will glean more success from the tried and true solutions. This industry temperature will be a test for start-up and new-comer suppliers fighting to stand out among the technical white-noise, and long-standing suppliers that haven’t evolved to deliver greater agility or more diverse and effective solutions. Those suppliers who have established trust by delivering consistent quality, and visibly drive success of research objectives, will have an upper hand. These will be the tools in the box that stand the test of time. Despite the upper hand, though, these suppliers will also face expectations to become more agile and pursue innovations that continue to deliver faster results, higher quality experience in execution, and lower costs.

Many researchers are going to find themselves at this stage of the game with a strong comfort level with tech and a confidence to rely upon DIY solutions. Others will always find value in partnerships that allow them to focus on the research, and leave the tech to the experts. Use what works well and reliably for you in order to create the best opportunities to get to the heart of your respondents.

The need to stay connected to the more human side of research will benefit from growth and awareness in two key areas: one is protecting privacy, and the other is stabilizing expanded connectivity. First, there is a deeper grasp around what “data” in today’s world truly is, and what specific information can be captured about us as individuals. This is accompanied with an increase in data security standards and industry-wide accountability to maintain compliance. We will also see greater laws and regulations surrounding the protections of personal data, in line with standards exhibited in the CCPA and GDPR. Finally, we’ll all benefit from implementation of 5G networks. We’ll continue to see an increase in overall reach of online connectivity. Improvements in infrastructure world-wide will result in stronger bandwidth in areas previously considered unreliable or too remote. Expanded connection allows for not only expanded reach, but smoother research experiences for participants, researchers, and buyers alike.

Perhaps in 20 years from now we’ll be talking about a return to the simpler days of Artificial Intelligence, Blockchain, and Machine Learning. With such a constant surge of tech development in research over the last 20+ years, and still going strong, it’s natural to want some fresh air with the living and breathing, but I acknowledge it may not be long lived. Our insatiable determination to continue creating, improving, and exploring will soon have us back to in the shop to find what new tools we have room for in our boxes.

THE EVOLVING RESEARCHER ROLE & SKILLS

As researchers and students of market research, our field is constantly evolving as new technology is developed and methods improve and evolve. We have witnessed and documented this change in GRIT for several years, and the stark reality is that the in-demand skills of today are different than those of just a few years ago, and almost unrecognizable as core hiring criteria from the early part of this century. In order to ensure both experienced

practitioners and new hires are up to speed we must constantly keep a pulse on what employers and clients are looking for, and who and what they will find valuable long term.

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

IN-DEMAND SKILLS

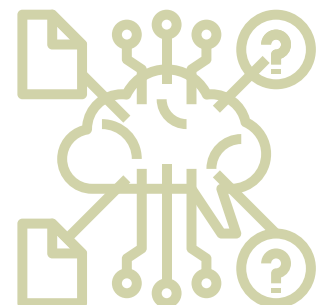
For the past few GRIT surveys, we have asked respondents to tell us (open-ended) which one skill they would add to their organization in their next hire, and also what skills would be most important five years from now. The results this year are very consistent with what we saw last year: for those researchers looking to future-proof their careers, demonstrating competence in Data Analytics and Data Science is far and away the most important skill companies are looking for both now and five years from now.

Remarkably, we see Data Analytics/Data Science as the most in-demand skill in all types of organizations, including both Client organizations and Suppliers of all sizes, in all types of business, and in all regions. There have been many degrees and certificate programs started in recent years in the Data Science and Analytics areas, and it is clear that researchers weak in these areas need to avail themselves. The general researcher of the past, whose main competency was in being able to read the significance notes in tabs will have a hard time staying relevant in the near future.

Beyond Data Analytics/Data Science, the softer areas skills related to Storytelling/Visualization and Sales/Business Knowledge are also seen as important for new hires, with the latter growing in importance this year. As we discovered in GRIT for the past few years, some companies are moving more in a Consulting direction, and these skills are critical to success in this area.

Behind these, we see a demand for more traditional Research Skills, as well as a need for Software Developers/Coders. Given the growth of technology-based platforms, the latter should not be a surprise.

For those researchers looking to future-proof their careers, demonstrating competence in Data Analytics and Data Science is the most important skill companies are looking for both now and five years from now



THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 1

IF YOU COULD ADD ONE PERSON WITH A NEEDED SKILL IN YOUR ORGANIZATION, WHAT WOULD IT BE?

	All Respondents	
	2018	2019
Data Analytics/Data Science	30%	29%
Storytelling/Visualization	22%	21%
Sales/Business Knowledge	14%	20%
Critical Thinking	7%	7%
Software Developer / Coding or Programming Skills	12%	14%
Professional/Workplace skills	6%	6%
Research Skills	14%	14%
Artificial Intelligence (AI)/ Machine Learning	3%	3%
Behavioral Economics	1%	1%
Neuroscience	1%	0%
Market / Product Pricing	0%	0%
Marketing / Digital Marketing	1%	3%
Digital	1%	0%
Social Media Related Skills (Inc. social listening)	1%	1%
Other Skills	4%	3%
n=	546	606

Note: the table above was developed by combining multiple coded responses into simpler broad categories. Coded responses included over 30 categories, so for simplicity's sake we opted to look at results in this big bucket classification way.

CONSISTENT DEMAND

We see relatively few differences in demand for any of these skills by type of organization. There are a few noteworthy exceptions worth pointing out:

- While Data Analytics/Data Science is the most in-demand skill across all organizations now and five years from now, the near-term demand is higher in Buyer organizations (37%) than in Suppliers (26%);
- On the other hand, and not surprisingly, Suppliers place a higher near-term need for Sales/Business knowledge (24%) than Buyers do (10%).
- In the longer-term, Buyers see a higher need for skills around Storytelling/Visualization than do Suppliers (30% vs. 19%).

This, with the finding above about Buyer-Supplier differences in Data Analytic/Data Science needs, perhaps reflects the direction discussed by Kirti Singh of P&G in his interview with Lenny Murphy in November of 2019, when he said the model moving forward was to depend on Technology platforms for data gathering, and then relying on P&G Insights teams to derive the business insights and communicate effectively with management.

While Data Analytics/Data Science is the most in-demand skill across all organizations now and five years from now, the near-term demand is higher in Client organizations (37%) than in Suppliers (26%)

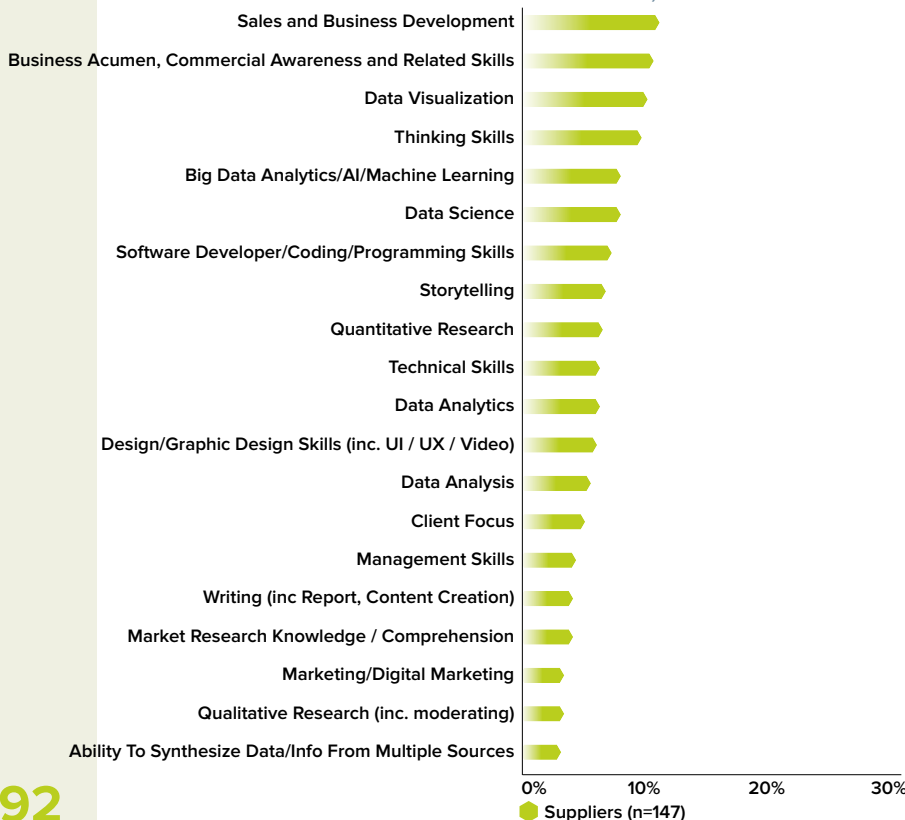


IN-DEMAND SKILLS: BUYERS AND SUPPLIERS

THE EVOLVING RESEARCHER ROLE & SKILLS, CHART 1



THE EVOLVING RESEARCHER ROLE & SKILLS, CHART 2



Looking at the skills issue in a more granular fashion is necessary, though it is challenging to do with great precision as we get into smaller sample sizes and issues of interpretation. The data we have discussed so far are roll-ups of codes of verbatim responses to the question “If you could add one individual with a needed skill in your organization, what skill would it be?” and now we will delve into the more than 30 codes that were developed to summarize the responses. Undoubtedly, questions will arise regarding precise meanings (“what are ‘technical skills?’”) and distinctions across skills (“are ‘data analysis,’ ‘data analytics,’ and ‘data science’ more similar than different?”). Honestly, any specific classification or interpretation can be easily challenged, but the value of this analysis lies in the entire gestalt that one takes away, not in the details.

Among Buyers, eighteen skills were coded as mentioned by at least 4 of the 164 who gave interpretable answers. Granted, this is a small number of responses, but we want to consider a large set of skills given the fluidity of the coding and interpretation; something mentioned by only a handful of respondents may appear more meaningful in the context other items that appear higher up in the list.

The top five skills for Buyers are storytelling, market research knowledge/comprehension, data visualization, data science, and business acumen and commercial awareness; together, these suggest an overall priority of turning market research data (broadly defined) into actionable, easily understandable business insights. Three of the top five for Suppliers (10 or more mentions) overlap: data visualization, data science, and business acumen and commercial awareness; storytelling is ranked 8th for Suppliers and market research knowledge/comprehension as distant 16th.

Instead, Suppliers mention sales and business development most frequently, while thinking skills ranks 4th for them, compared to just 10th among Buyers. We can conclude that sales and business development is critical to Suppliers in ways that do

not apply to internal insights groups; in the Business Outlook section, we saw Suppliers attribute revenue losses, in part, to inadequate marketing and sales, while those who increased revenue frequently credited their sales and marketing efforts. For the other differences in ranking, we need to be careful about leaping to conclusions before we look at potential drivers.

Foremost, we must remember the question that was posed: “If you could add one individual with a needed skill in your organization, what skill would it be?” A Buyer might answer “market research knowledge” if they have a new department, a staff composed mainly of people with more analytical experience than research experience, or if they simply

want to keep up with suppliers. A Supplier might not mention it, especially if their historical strength is in market research; for example, they may “need to add” business development skills, but simply “maintain” their research expertise.

Similarly, a Supplier might need to add “thinking skills” – such as critical thinking, strategic thinking, adaptability, innovative thinking – because they may feel pressure to innovate to survive or to be able to expand their consulting abilities to retain business. A Buyer, on the other hand, may not feel the same kind of pressure to innovate and may already have people on staff with adequate strategic thinking who simply need to gain more business experience.

THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 2

Skill Ranking: Buyers and Suppliers	Buyer Rank	Supplier Rank	Suppliers-Buyers
Other Analytics Skills	11	Not Ranked	N/A
Social Media Related Skills (inc. social listening)	16	Not ranked	N/A
Market Research Knowledge/Comprehension	1	16	15
Ability To Synthesize Data/Info From Multiple Sources	8	20	12
Data Analysis	6	13	7
Storytelling	1	8	7
Data Analytics	6	10	4
Writing (inc. Report, Content Creation)	14	17	3
Technical Skills	8	11	3
Data Science	3	5	2
Qualitative Research (inc. moderating)	17	18	1
Data Visualization	3	3	0
Business Acumen, Commercial Awareness and Related Skills	5	2	-3
Quantitative Research	12	9	-3
Design / Graphic Design Skills (inc. UI / UX / Video)	15	12	-3
Thinking Skills	10	4	-6
Big Data Analytics/AI/Machine Learning	12	6	-6
Software Development/Coding/Programming Skills	17	7	-10
Marketing/Digital Marketing	Not ranked	19	N/A
Management Skills	Not ranked	15	N/A
Client Focus	Not ranked	14	N/A
Sales and Business Development	Not ranked	1	N/A
n=	164	428	

Higher ranked for Buyer

Higher ranked for Supplier

IN-DEMAND SKILLS BY PROFESSIONAL FOCUS: BUYERS

Looking more closely at Buyers, we see that priorities differ according how they focus their activities.

Those who perform a hybrid of functions – the largest group who therefore have the most influence on the overall rank – have two different skills in their top five: data analysis and ability to synthesize data or information from multiple sources. Business acumen and commercial awareness falls slightly to 8th, while storytelling is a distant 12th.

For strategic insights consultants, only one skill falls out of the top five, data science, which only falls to 7th for them. However, data analysis is not mentioned at all, although data analytics and technical skills move into the top five, and social

media-related skills is much higher than for other functions. They are the segment with the largest budgets and the most likely to work regularly with data and analytics providers, so they may be evolving more rapidly into less traditional areas of research.

Those performing a Voice of the Customer function look the most like the overall profile, though they were much less likely to mention a need for technical skills, quantitative research or design skills than others. In-house research providers may be more difficult to summarize due to their much smaller sample size, but they appear to be blending traditional approaches with new analytics supported by technical skills.

THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 3

Skill Ranking: Buyers	Hybrid of Functions	Strategic Insights Consultants	Voice of the Customer	In-House Research Provider	All Buyers
Market Research Knowledge/Comprehension	4	4	2	4	1
Storytelling	12	1	1	4	1
Data Science	1	7	3	8	3
Data Visualization	3	2	3	18	3
Business Acumen, Commercial Awareness and Related Skills	8	2	3	8	5
Data Analysis	2	18	6	18	6
Data Analytics	8	4	6	1	6
Ability To Synthesize Data/Info From Multiple Sources	5	10	6	18	8
Technical Skills	8	4	18	4	8
Thinking Skills	8	10	6	4	10
Other Analytics Skills	6	10	10	18	11
Quantitative Research	12	10	18	1	12
Big Data Analytics/AI/Machine Learning	12	7	10	8	12
Writing (inc. Report, Content Creation)	6	18	18	8	14
Social Media Related Skills (inc. social listening)	17	7	10	18	15
Design / Graphic Design Skills (inc. UI / UX / Video)	12	10	18	8	15
Qualitative Research (inc. moderating)	18	18	18	1	17
Software Development/Coding/Programming Skills	12	18	10	18	17
n=	71	39	26	20	164

IN-DEMAND SKILLS BY PROFESSIONAL FOCUS: SUPPLIERS

At a high level, Suppliers across segments look similar to each other with respect to needed skills, with a few predictable differences. As we will see, differences in needed skills are much more pronounced by company size.

Full/field service agencies are the largest group and have the most influence on the overall Supplier profile, yet one of the top five, big data analytics/AI/machine learning, falls all the way to 11th, replaced by storytelling. Data analytics is also somewhat lower for them, suggesting that they may not be delivering those services now or are partnering to do so.

Strategic consultancies have a typical top five, except with data analytics in fourth place while big data analytics/AI/machine learning is nudged into a three-way tie for 6th with data science and quantitative research. Clearly, they are making a push to provide more data-intensive offerings.

Data and analytics providers share four of the top five skills, as thinking skills drops out of the top five, replaced by management skills. Writing skills is also higher for them than for full/field service and strategic consultancies. Note that data analytics and data analysis are tied for 10th on the skills list for them; they did not put skills that they obviously have at the top of the list, because they need the ones they don't have.

Finally, technology providers, with the smallest sample size, have 13 skills in the top five due to ties for fifth. They are less likely to need traditional research skills, but express a need for market research knowledge and comprehension. They also have outstanding needs for data analytics, design, client focus, and writing.

THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 4

Skill Ranking	Full/Field Service	Strategic Consultancies	Data and Analytics Providers	Technology Providers	All Suppliers
Sales and Business Development	1	4	4	5	1
Business Acumen, Commercial Awareness and Related Skills	5	1	4	1	2
Data Visualization	2	2	2	5	3
Thinking skills	3	3	8	4	4
Big Data Analytics/AI/Machine Learning	11	6	1	3	5
Data Science	6	6	2	5	6
Software Developer/Coding/Programming Skills	11	10	7	2	7
Storytelling	4	10	16	5	8
Quantitative Research	6	6	10	20	9
Technical Skills	6	9	16	14	10
Data Analytics	13	4	10	5	11
Design/Graphic Design Skills (inc. UI / UX / Video)	9	15	16	5	12
Data Analysis	9	15	10	20	13
Client Focus	16	10	10	5	14
Management Skills	18	10	4	14	15
Writing (inc Report, Content Creation)	20	16	8	5	16
Market Research Knowledge/Comprehension	14	17	10	5	17
Marketing / Digital Marketing	14	17	20	14	18
Qualitative Research (inc. moderating)	19	10	16	20	19
Ability To Synthesize Data/Info From Multiple Sources	17	17	10	20	20
n=	185	128	66	40	428

Among full/field service agencies, smaller agencies are looking for much different skills than larger ones. Across the three size categories considered, storytelling is the only need that appears in the top five for each. Unlike agencies with 1,000 or fewer employees, the largest agencies do not have sales and business development, data visualization, and thinking skills among their top five; presumably, they already have those covered. Instead, they prioritize data science, data analysis, technical skills, and software skills as top five needs.

Agencies with more than ten employees have business acumen and commercial awareness in their top five, but it is only 11th for the smallest ones. They are more likely to be looking across a variety of skills, possibly for an area of specialization: data science, quantitative research, data analysis, design, and software skills.

Agencies with 11 to 1,000 employees are the largest group with the most influence on the overall profile, and they look similar to it, with the exceptions of prioritizing quantitative research higher but data science lower.

THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 5

Skill Ranking: Full/Field Service Agencies	10 or Fewer Employees	11 to 1,000 Employees	More than 1,000 Employees	All Full/Field Service
Sales and Business Development	1	1	9	1
Data Visualization	2	3	7	2
Thinking skills	3	1	9	3
Storytelling	5	3	2	4
Business Acumen, Commercial Awareness and Related Skills	11	3	2	5
Data Science	5	12	1	6
Quantitative Research	5	3	9	7
Technical Skills	4	9	2	8
Data Analysis	5	9	2	9
Design/Graphic Design Skills (inc. UI / UX / Video)	5	7	9	10
Big Data Analytics/AI/Machine Learning	11	9	7	11
Software Developer/Coding/Programming Skills	5	12	2	12
Data Analytics	13	7	13	13
n=	69	100	16	185

The skills needed by strategic consultancies also vary by employee size; no one skill appears in the top five across categories. The largest consultancies are looking for data analytics, business acumen and commercial awareness, quantitative research, storytelling, and client focus. The middle tier also needs business acumen and commercial awareness,

but also data visualization thinking skills, big data analytics/AI/machine learning, and software skills. Like the mid-tier firms, the smaller consultancies are looking for data visualization and thinking skills, and, like the largest firms, they need data analytics and quantitative research. They don't seem to have a completely distinct skill need.

THE EVOLVING RESEARCHER ROLE & SKILLS, TABLE 6

Skill Ranking: Strategic Consultancies	4 or Fewer Employees	4 to 100 Employees	More than 100 Employees	All Strategic Consultancies
Business Acumen, Commercial Awareness and Related Skills	8	1	2	1
Data Visualization	1	2	11	2
Thinking Skills	1	2	14	3
Sales and Business Development	1	9	6	4
Data Analytics	1	12	1	5
Data Science	6	6	6	6
Quantitative Research	1	12	2	7
Big Data Analytics/AI/Machine Learning	8	4	6	8
Other Technical Skills	8	6	6	9
Storytelling	6	12	2	10
Software Developer/Coding/Programming Skills	8	4	14	11
Client Focus	14	9	2	12
Qualitative Research (inc. moderating)	8	9	6	13
Management Skills	8	6	11	14
n=	41	61	26	128

THE BIG PICTURE

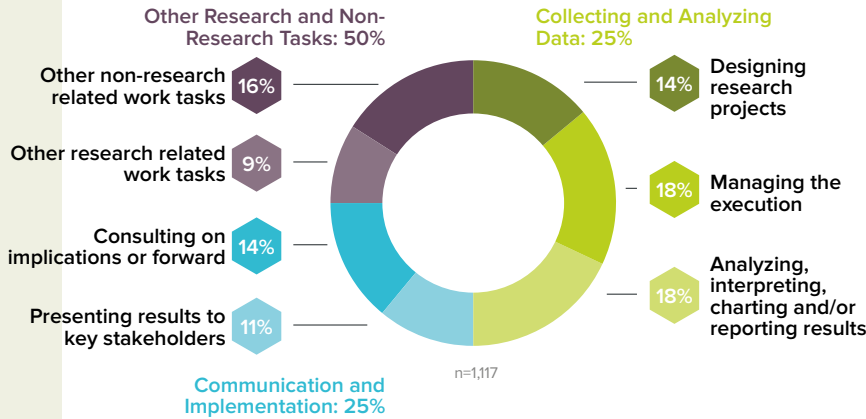
As previously mentioned, the profile of the in-demand skills for job candidates in the insights and analytics space is changing in specific ways, with an emphasis on applying a variety of technical skills focused on data and technology usage as well as a variety of soft skills that have generally been associated with business and strategy consultants more so than classical researchers. Fundamentals such as research design, moderation, applied statistics, proficiency with statistical packages etc.... surely are still useful, but

are not necessarily headline grabbing on a resume. Arguably this is a trend that has been in play for some time, but based on these data this is the dominant theme rather than an emerging trend.

The implication is clear; if you have been in the industry longer than ten years, building these skill sets is likely a requirement for career growth. If you are a prospective entrant, these are the skills necessary to be successful in standing out in the consideration set.

A DAY IN THE LIFE OF A RESEARCHER

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



The average day in the life of a researcher, whether a Supplier or Buyer, full-service researcher or corporate insights professional, is largely similar and remains stable compared to previous waves of research. About half of a research industry professional's time is dedicated to the process of conducting research, be it designing, managing the execution of projects or analyzing the result; a quarter of their time is spent presenting and consulting and the remaining time is dedicated to other tasks. This model is consistent around the world.

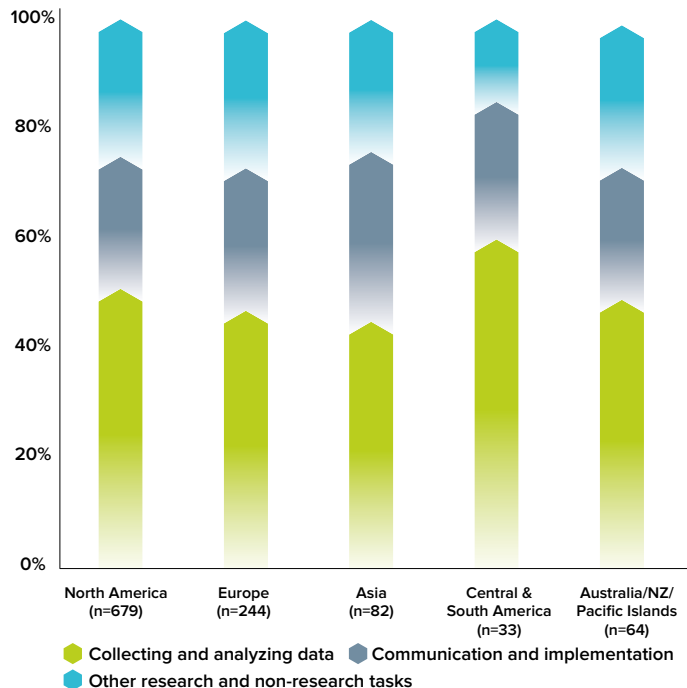
About half of a research industry professional's time is dedicated to the process of conducting research, be it designing, managing the execution of projects or analyzing the result



Some significant, but not disruptive to this model, differences distinguish global regions:

- North Americans spend more time managing the execution of projects and less time presenting results
- In contrast Asians spend more time on presentations to stakeholders
- In Central and South America, insight professionals allocate more time to analysis and reporting, less to non-research work tasks

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

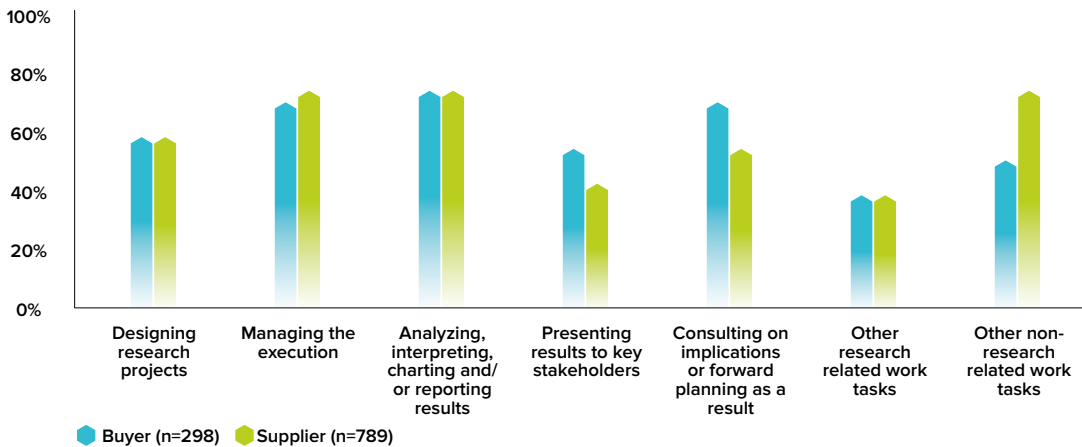


Breaking down some of these activities further however, some differences do come to the forefront. Perhaps unsurprisingly, Suppliers spend more time managing operations (non-research), while Buyers report dedicating more time to consulting and presenting. This dichotomy may explain some of the differences we see in satisfaction levels and investment priorities, wherein Buyers may want more Suppliers to participate in those functions, but do not find the level of support they need from many Suppliers. On the other hand, a significant proportion of Buyers may consider themselves to be the face of the research internally and therefore gladly take on more of the presenting efforts. The dichotomy may

also be a result of the situation where a Supplier presents findings once, then the Buyer presents it many more times to different audiences until there are no new audiences left.

Suppliers spend more time managing operational (non-research), while Buyers report dedicating more time to consulting and presenting. This dichotomy may explain some of the differences we see in satisfaction levels and investment priorities

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES (BUYERS VERSUS SUPPLIERS)

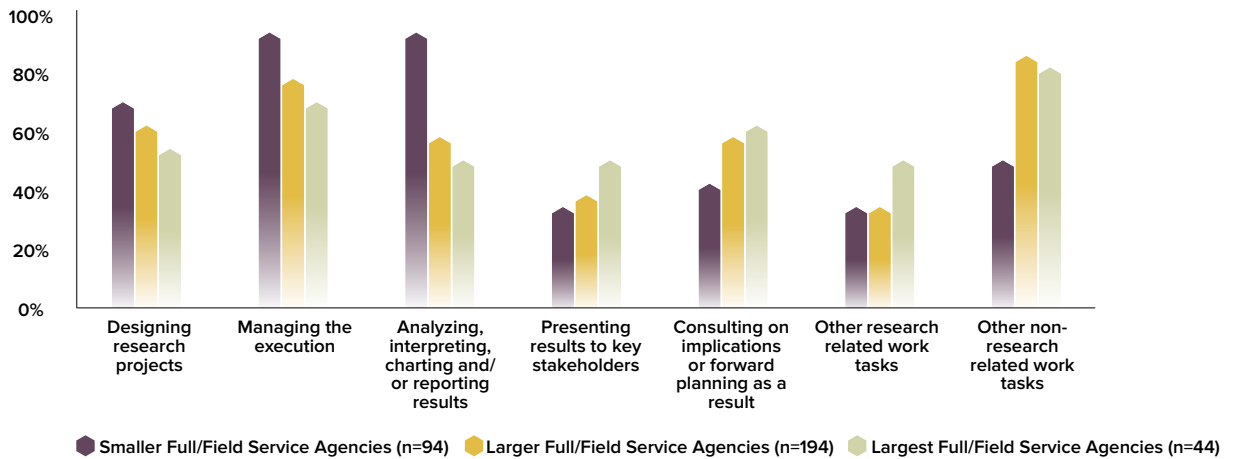


Looking specifically at those conducting Full-Service research, we see what we would intuitively expect: the smaller the business the more time is spent on the very functional elements of analyzing research data and in larger companies more time is spent on non-research related activities. A picture emerges of someone working in a small research company immersed in the foundational aspects of research projects and someone working in a bigger company spends more time on activities not directly related to research projects.

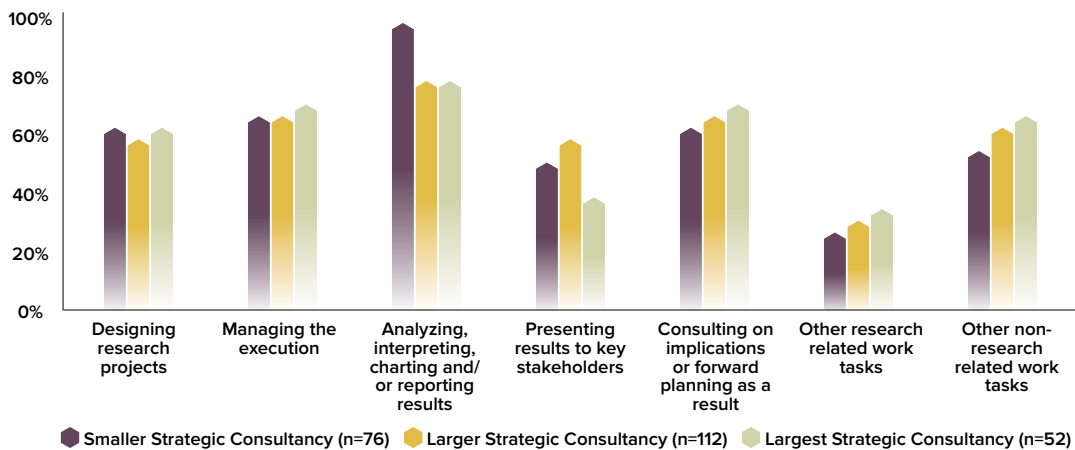
In contrast, if we look at small to large strategic consultancies, we see only minor differences in time spent on non-research tasks and a spike around analysis and reporting. Perhaps the difference between full/field service agencies and strategic consultancies regarding how time is allocated relates to their billing structures and practices.

The smaller the business the more time is spent on the very functional elements of analyzing research data and in larger companies more time is spent on non-research related activities

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES BY SUPPLIER TYPE (FULL/FIELD SUPPLIERS)



% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES BY SUPPLIER TYPE (STRATEGIC CONSULTANCIES)



There do seem to be big distinctions between how much time is dedicated to analyzing data and time spent on consulting and forward planning



Comparing Buyer insights professionals working in different industry sectors, (caution: small sample sizes ahead!), there do seem to be big distinctions between how much time is dedicated to analyzing data and time spent on consulting and forward planning, with the greatest differences being between two major category spenders: Consumer Non-durables and Healthcare with the latter reporting the most time spent on analytical tasks and

the former the least. On the consulting side, again, Consumer Non-durables lead the pack, reporting the most time spent on those functions. Of all the verticals we've looked at, Consumer Non-Durables is the only one in which not one single respondent identified as an in-house researcher; 96% identified as strategic insights consultant, Voice of the Customer, or hybrid.



Experts in Market Research Executive Search



Laura Drews-Freund

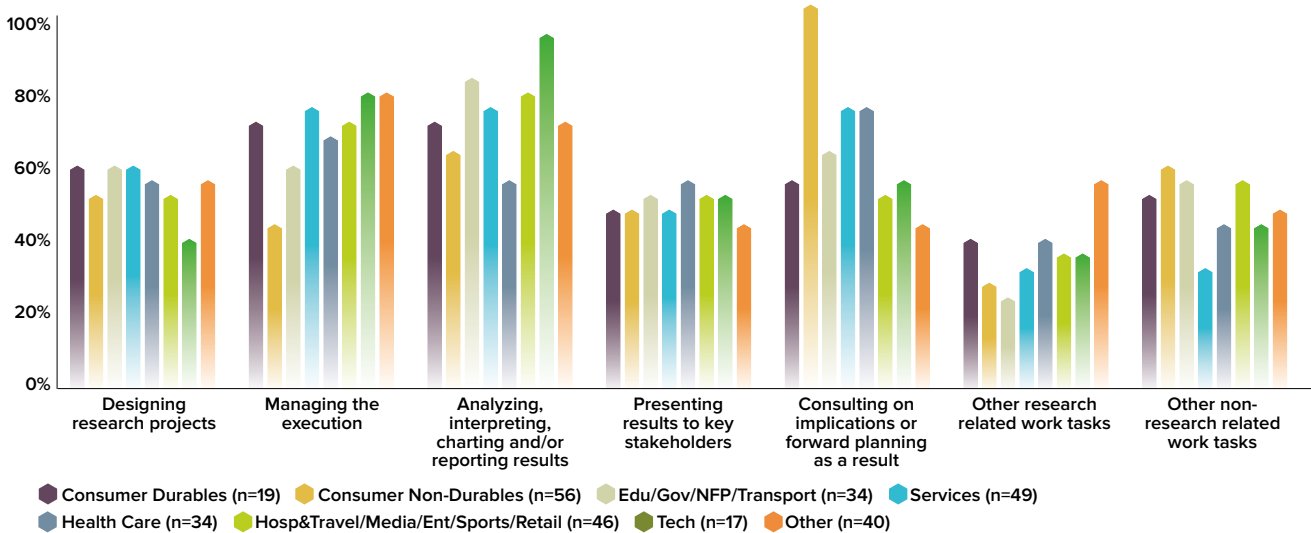
Partner with the Award-Winning Insights Recruiting Firm
 – Cranbrook Search Consultants –
 to Find Outstanding Insights Professionals



Matthew O'Mara

GET IN TOUCH

% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES BY VERTICAL (BUYERS)



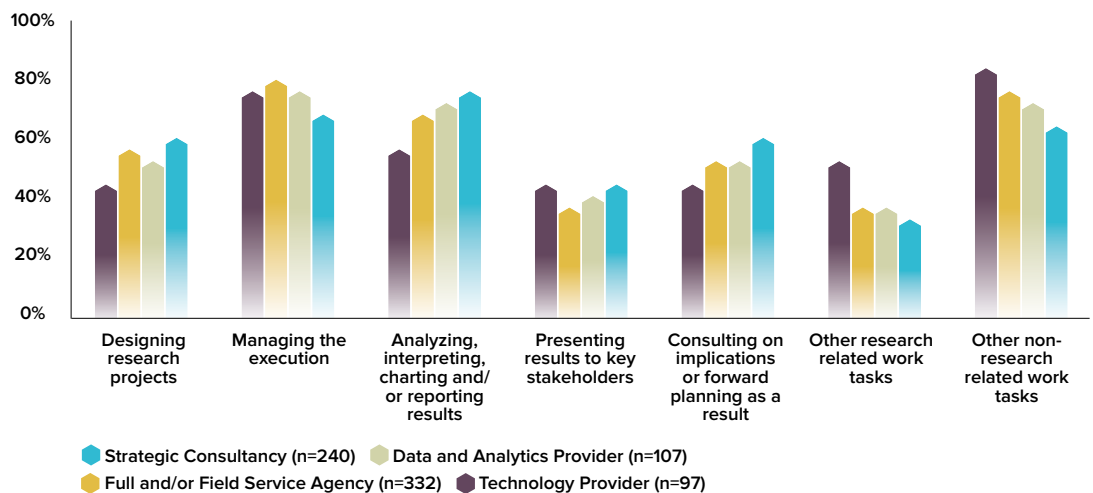
Finally, we looked at any differences between Supplier groups (a simpler version of our segmentation scheme). As one would expect, all Suppliers are more focused-on data collection and thus report the most time spent on managing research execution while Sample and Technology providers report the most time spent on non-research activities. Both facts align to what we know of these groups. However, and of perhaps concern based on previous conclusions related to the gap between Buyer demand and Supplier deliver on

consultative abilities, all groups reported the least time spent on designing projects, presenting results to stakeholders, and consulting on implications. Whether the aforementioned gap is due to Suppliers not offering these capabilities because they are not being asked for them, or Buyers simply moving on from asking for them due to dissatisfaction or lack of offerings, is a bit of a chicken or egg question that is beyond the scope of this study. However, there is absolutely a tension here that speaks to a possible opportunity for the industry.

Sample and Technology providers report the most time spent on non-research activities



% OF TIME SPENT ON RESEARCH PROJECTS & OTHER ACTIVITIES BY SUPPLIER TYPE (SUPPLIERS)



THE BIG PICTURE

As both Buyers and Suppliers strive to deliver more business value, we are not seeing a significant shift in how time is spent by insights professionals from this wave to others



As both Buyers and Suppliers strive to deliver more business value, we are not seeing a significant shift in how time is spent by insights professionals from this wave to others. The hypothesis of the industry has been for years that technology in all its various permutations would reduce the grunt work for both Buyers and Suppliers, freeing all up for more strategic, consultative and value-added work. We see no evidence of that as yet when we look at time spent on the fundamental aspects of conducting

research. Concomitantly, we do continue to see those functions as being significant parts of the Buyer standard task list.

Both conclusions are consistent with the in-demand skills we explored in the previous section, so we expect to see these issues to continue to play out over the course of the next few years as the industry evolves further.



YOUR NEXT STANDOUT RESEARCHER IS A MATHEMATICIAN & STORYTELLER, SCIENTIST & ARTIST, CODE-BREAKER & JOURNALIST

Rebecca “Bex” Carson

Chief Product Officer, Brandwatch

Twitter: @bexcarson_ | Website: www.brandwatch.com

LinkedIn: <https://www.linkedin.com/in/bex-carson-81578717/>

Being called a “master of none” has long been an insulting term to describe someone, or something, as lesser. This is no longer the case. When you’re looking for your next research hire, that person needs to be a master of none. If they are, they’re better prepared for future success.

Traditionally, market research has been broken down into two very separate houses - the dreaded silos that every expert, in seemingly every industry, has been screaming at you to tear down, get out of and avoid. Researchers are overly familiar with these houses: qualitative and quantitative. The skills that will better equip your researchers for 2020 and beyond is a combination and proficiency in both.

You want to see traditional, technical skills like coding in every member of your team. The tech that’s now in the hands of researchers has increased the scope and speed - not to mention cut costs - of the research one person can conduct, and coding allows you to further command and optimize every platform you use. Gone are the days where you should expect your researchers to come from a specific school or academic background.

Number-crunching and spreadsheet mastery are, of course, still valuable, but your quants need to be able to unearth the story behind the numbers when conducting their analysis. Similarly, traditional qual research needs to be built on a foundation of hard, diverse data and analysis. Data lakes are melting and blending together to provide a full, 360-degree view of your subject material. Social media data and survey results now complement one another. Similarly, you need quant and qual skills, but you need them together, because together you become greater than the sum of your parts.

This all may seem very obvious, but how many research teams still separate their work into the old houses of Qual and Quant? The information lost due to this separation is immeasurable and unknown. There is, undoubtedly, insight and solutions tucked away in inboxes that would provide true business value, but companies never realize them due to the separation of the two Qs. For some companies, specialist quant and qual roles are 100% justified. In those cases, the challenge is to help bridge learnings from both halves.

This skillset might seem rare to find in a single individual, and that’s because it is. However, it’s possible to build diverse teams that could operate with the right combination of qual and quant skills to overcome the traditional research divide. This can be achieved through communication and extensive collaboration. One hand needs to see what the other is doing, and ask questions all along the way. If you can’t find the scarce researcher who can access both halves of their brain ambidextrously, you can at least open the process between the two Qs, so that each camp can learn through osmosis.

Overall, specialized skillsets are still valuable, but the broader and more diverse the horizons within a single researcher or team, the more equipped they are to operate in a research landscape that assigns value to information and data coming from multiple sources.

Presenting:

THE GRIT FUTURE LIST

The Next Generation of Insights Leaders

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

Presented by:



GreenBook

THE FUTURE OF INSIGHTS

TO THE FUTURE OF INSIGHTS

GreenBook is proud to announce the second annual GRIT Future List — an awards program to inspire, support, and celebrate young leaders who are driving consumer insights forward in important and unexpected ways. The List recognizes leadership, professional growth, personal integrity, and a passion for excellence in the next generation of insight creators, users, and communicators. These honorees have outstanding academic backgrounds, multi-disciplinary career performances, and a wide range of research and community roles. They've published research, launched companies, received numerous awards and accolades, and spoken at conferences around the world.

With hundreds of nominations of impressive submissions, this year's judging process continued to be a challenge. Future List judge Jamin Brazil of HubUx describes his experience while reviewing the candidates: "To be part of the GRIT Future List you have to have a clear view of the current state of consumer insights, a picture of how things can be better, and the grit to see it through." Each of these honorees has less than a decade of experience in the insights industry, yet all are well on their way to having a lasting impact on the direction of our field. We are thrilled to bring to you the future leaders of insights.

A big thank you to this year's judging panel:



Anouar El Haji
Veylinx



Greg Archibald
Gen2 Advisors



Dmitry Gaiduk,
CoolTool



Jamin Brazil
HubUX



Jodie Wang
Midea



Joseph Chen,
Mondelez



Kristi Zuhlke
KnowledgeHound



Lukas Pospichal
GreenBook



Kristin Luck
ScaleHouse



Mario Carrasco
ThinkNow



Nikki Lavoie
MindSpark Research



Zontzir Johnson
Zappi

GRIT FUTURE LIST HONOREES



ALYONA AMEDELAYAN
CEO, Thematic

Alyona holds a Ph.D. in Natural Language Processing (NLP), with her academic work cited more than 2,500 times, and is a frequent speaker at events across the globe. Alyona has created a novel proprietary AI-algorithm for automatic coding of qualitative data.

FROM THE NOMINATOR:
"CEO of Thematic, which offers text analytics based on years of her research in natural language processing and machine learning."



AMY GREENWOOD
Head of Research & Insight, FlexMR

Amy has worked tirelessly to build and nurture a diverse, cross-disciplinary team. Amy is responsible for global research operations and has driven the development of the agency's empowerment services—embedding and activating insights outside of research teams. She is currently working to develop a 'professional development and skills achievement' program to encourage young researchers to develop diverse skill sets.

FROM THE NOMINATOR:
"Amy is a pioneer of research technology and insights empowerment. Her passion, dedication and enthusiasm is instrumental to inspiring a new generation of multi-skilled researchers."



ANDREW KONYA
CEO, Remesh

Andrew is a physicist by training who has spent the past eight years applying AI and machine learning algorithms to a wide range of problems—from material science and bio-sensing to peacekeeping with the United Nations. A previous Insight Innovation Competition winner, Andrew is driven by a passion for research to understand consumers motivations.

FROM THE NOMINATOR:
"Andrew is an Insight Innovation Competition winner, IIX speaker, and AI guru."

GRIT FUTURE LIST HONOREES (CONT.)



ATHENA LAM

Content Strategy Lead, Dalia Research

Athena works to develop iterative research questions to empower business and social innovators with data. She brings nine years of experience with startups, B2B technology, and social activism. Athena demonstrates a commitment to equality both through her work and volunteerism, with her award-winning project LGBTQ Glassdoor and having co-founded TEDxYouth@HondKong.

FROM THE NOMINATOR:
"Athena has used Dalia's platform to empower social impact organisations, as well as companies in emerging markets. She's cofounded initiatives and award-winning tech solutions for LGBTQ communities."



BARB PASZYN

Research Management Director, Sklar Wilton & Associates

Barb manages projects, moderates online communities and in-depth-interviews, analyzes complex data, and presents actionable insights using storytelling and advanced analytics. She founded the first Canadian chapter of Women in Research (WIRe) and has been honored with awards including the Environics Award of Excellence in Social Research and the 2019 QRCA Young Professionals Grant.

FROM THE NOMINATOR:
"On her own initiative, Barb started the very first Women In Research group in Canada. She was also a winner of QRCA's Young Professionals Grant. She's making our industry better!"



DANIELLE TODD

Account Director, Relish

With career recognition as an ESOMAR Young Researcher runner-up, WARC rising star, and regular conference speaker, Danielle revels in insights and strategy. Danielle loves her day job equally with her role as the WIRe London lead, a good bottle of red wine, dystopian fiction, and most recently, competing in the CrossFit Open.

FROM THE NOMINATOR:
"Like everything she does, she puts energy, drive, commitment, enthusiasm and passion into the outstanding (WIRe) events she hosts. She embodies curiosity."

GRIT FUTURE LIST HONOREES (CONT.)



ELLEN PIEPER

Chief Client Officer, Research Results, Inc

Ellen is responsible for the leadership, vision, and financial performance of a team of MRX experts. Ellen earned her degree in Psychology from Columbia University, and is currently the President-Elect of the Southwest Chapter of the Insights Association. Ellen has a passion for mentoring other women in insights, and regularly blogs to share her knowledge of market research.

FROM THE NOMINATOR:
"Ellen has her finger on the pulse of our industry and pushing us forward in meaningful ways. She is a generous connector, a consistent contributor to association, and has a vision for what MRX can become."



FRASER BRUCE

Consultant, Customer Research, Canadian Tire

Fraser's background in loyalty analytics allows him to create unique, holistic views of each customer. This added layer of depth helps round out strategic research projects for one of Canada's largest retailers. Fraser has led research into sustainability, hosted roundtable discussions, and has worked to merge survey and behavioral data to streamline research processes.

FROM THE NOMINATOR:
"Fraser moved from a big data group to a research team to enable the merger of survey and behavioral data, which he built."



HANNAH MARCUS

Strategist, Discover.ai

Hannah is a trained semiotician who brings her love of cultural insight and analysis to a wide range of projects, from understanding the emergent shape of television viewing to unpacking the future of intimacy. She has just completed a part-time MA in Cultural and Critical Studies.

FROM THE NOMINATOR:
"Hannah builds wonderfully human client relationships, packed full of integrity, super sharp thinking & insight led acumen. She's an AI advocate & natural innovator within Discover.ai & the industry."

GRIT FUTURE LIST HONOREES (CONT.)



JIMMY ZOLLO

Cofounder and CEO, Collaborata

Jimmy Zollo leads Collaborata, the first platform to enable clients to create transparency around expert-led insights projects. Jimmy developed his passion for innovation while driving early-stage growth at GrubHub. Jimmy utilizes his passion for market research to help provide clients with the skills needed to conduct a successful research project independently.

FROM THE NOMINATOR:

”Jimmy has started a successful insights company at a young age, with no formal prior MRX experience.”



MARIN MRŠA

CEO, Peekator

Marin earned an MBA at Cotrugli Business School and is the initiator of the CX Meetup, whose main purpose is to create and strengthen the local CX communities. Marin is currently working with machine learning and natural language processing in social listening, and hopes to use the technology to drive rich and honest insights.

FROM THE NOMINATOR:

”Marin is a young and ambitious founder, who is leading a rapidly growing CX research company Peekator, which introduces new technological innovations into the existing industry.”



MARK MICHELI

Vice President, Experience Innovation & Product Strategy, Kelton Global

With a career spanning journalism, content marketing, product management, and UX design, Mark uses multiple perspectives to elevate the voice of users and unite cross-functional teams around creating better products, services, and systems. He leads Kelton’s Experience Innovation practice and is a professor at IIT’s Institute of Design in Chicago.

FROM THE NOMINATOR:

”A former journalist and great storyteller, Mark is leading Kelton’s “Experience Innovation” team. He is on the forefront of combining design thinking, market research, and CX into an innovative mix.”

GRIT FUTURE LIST HONOREES (CONT.)



MURIEL SILVA

Consumer Research Manager - North America, Lactalis Canada

Beginning her career in Venezuela, Muriel has conducted research in countries throughout North and South America. She currently leads the research projects for over 13 brands across North America. Muriel is passionate about advocating for the consumer and always looking to find true global insights, and holds an MBA and Masters of Engineering.

FROM THE NOMINATOR:
"Muriel has run all the insights across Canada, US, and Mexico for her organization while completing her MBA at the same time. She has been an absolute delight to work with and is on top of everything."

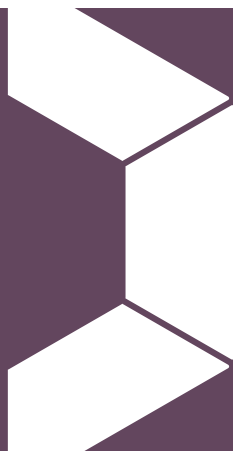


NIHAL ADVANI

Founder & CEO, QualSights

Nihal is a product and marketing expert, and the 2019 winner of the I-COME Global Startup Challenge. Originally an internationally ranked tennis player, he chose to follow his passion for technology and joined Microsoft, working in marketing and data roles across Search (Bing) and Display (Microsoft Media Network). Nihal combined his entrepreneurial spirit and interest in understanding the world by launching QualSights.

FROM THE NOMINATOR:
"Nihal's agility bridges the divide between qualitative and quantitative, reinventing our industry."



THE GRIT FUTURE LIST

GRIT FUTURE LIST HONOREES (CONT.)



OLIVIER TILLEUIL

CEO and Founder, EyeSee

Olivier is based in New York, though originally from Belgium. His passion for entrepreneurship and behavioral science led Olivier to found EyeSee, the fastest growing behavioral insights company. In 7 years, he scaled the company from 4 researchers to 90+ talents in 5 offices around the globe. Before EyeSee, he worked as a researcher at a business school.

FROM THE NOMINATOR:
"Olivier founded EyeSee in 2012 -one of the fastest growing insights companies in the world- to revolutionize insights by making behavioral insights scalable - fast, cost effective & global."



UJWAL ARKALGUD

CEO, MotivBase

Ujwal is an award-winning cultural anthropologist, author, and entrepreneur. He is a pioneer in the study of consumer beliefs and culture on the internet and led the creation of a big data ethnographic method. Ujwal is working on publishing his second book, and sits on the board for the nonprofit organization Center for Food Integrity.

FROM THE NOMINATOR:
"Ujwal is an ILeX speaker and behavioral science pioneer."

Join us at ILeX Europe and ILeX North America in 2020 as we honor these outstanding professionals onstage in front of their colleagues and peers!



FINAL THOUGHTS



At a fictional market research meeting, there are protesters outside yelling “What do you want?”. The throngs of client research buyers respond “Quality insights!”. And the journalists shake their heads wondering what they did to deserve covering this story. Because this story has been told many times.

Quality insights is what clients are buying and suppliers are selling. From such a perspective, our industry still has significant opportunities for improvement. Buyers’ satisfaction with suppliers is low at 55%. In 2019, the lowest rated industry measured by the American Customer Satisfaction Index was subscription cable TV services. That industry has a 62% satisfaction score...

It’s therefore incredibly valuable for this GRIT edition to explore the drivers of satisfaction in our industry. These include, in no particular order: understanding the business issue, understanding the research issue, telling a compelling story, providing good service, conducting good research, and providing good recommendations. These component parts constitute the real definition of “Quality Insights”. It is hard to leave any one of these out and be successful – whether you are an internal research department or an insights supplier.

In some cases, we are already making those needed improvements. More buyers and suppliers are using a wider variety of tools that are closely fit for purpose to execute research targeted to client needs. And those organizations that follow this path are generally doing better, based on budget and revenue.

Additionally, our industry is making the necessary investments in people and technology to stay at the forefront. Data Analysts and Data Scientists are key hiring priorities for many organizations along with investments in analytic platforms and data integration.

From a consulting perspective, people with skills in storytelling and visualization expertise are in high demand. And again, the technology investment in dashboards and other visualization tools support the need for the insights to be aligned to performance metrics and actionable recommendations.

There are other positive developments to note such as increased efficiency illustrated by the somewhat inverse relationship between the number of projects being done and the amount of money to do them. Also, the use of iterative, agile approaches is making our insights timelier and more embedded in the overall business processes. The budget growth we’ve seen from last year is encouraging and points to someone doing something right! And lastly, the talent that is leading the industry today represents a wider variety of skills, backgrounds, and areas of focus than has ever been the case before.

We have a LOT of work to do, but we are getting there. And I for one continue to enjoy the journey, even if I would prefer to step a little harder on the accelerator - as long as we don’t smash into those protesters (I like them!).



GREGG ARCHIBALD
Managing Partner,
Gen2 Advisors



APPENDIX METHODOLOGY AND SAMPLE

For those interested in understanding the sample the GRIT is taken from, the following detailed breakdown will provide you with the necessary information.

SEGMENT COMPOSITION

The total sample size for this wave of GRIT is n= 1,117. With 298 completed interviews amongst self-identified Buyers of insights & analytics, 790 self-identified Suppliers, and 29 “others” that upon review have generally been included within the Supplier analysis unless otherwise noted.

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

For this wave the largest Buyer segment was represented by respondents that described their organizations of hybrids of multiple segments (41%), followed by Strategic Insights Consultants at 21%, Voice of the Customer at 16% and In-house research providers at 14%. All other segments constituted less than 5% each.

For Suppliers, 42% define themselves as Full or Field Services Agencies, 30% as Strategy Consultancies, 14% as Data and Analytics providers, 12% as Technology Providers and 2% as “other” specialists.

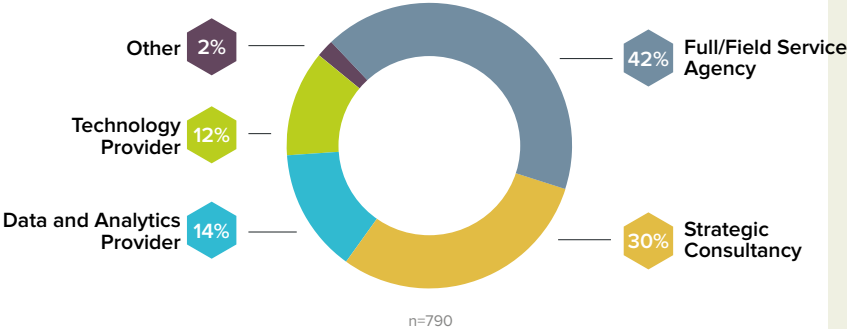
This sample is roughly analogous to previous waves of GRIT, with some variations due to sample artefacts.

As previously stated throughout the report, while we do not claim GRIT is a census or representative of the global industry (if such a feat is even possible in a rapidly changing and fragmented business category like insights and analytics), we do consider it strongly directional in terms of the overall trends associated with the topics we explore.

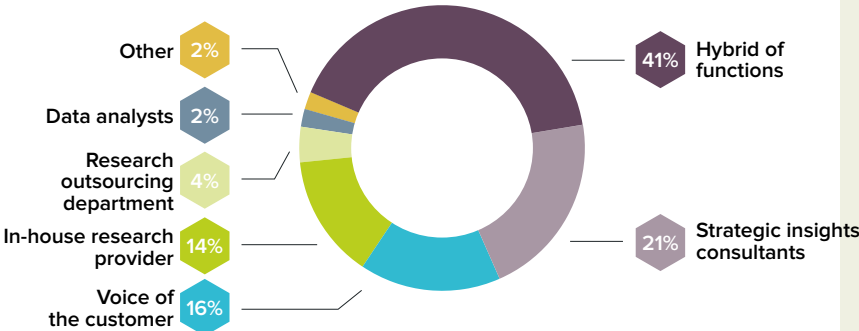
The total sample size for this wave of GRIT is n= 1,117. With 298 completed interviews amongst self-identified Buyers of insights & analytics, 790 self-identified Suppliers, and 29 “others”



SUPPLIER PROFESSIONAL FOCUS

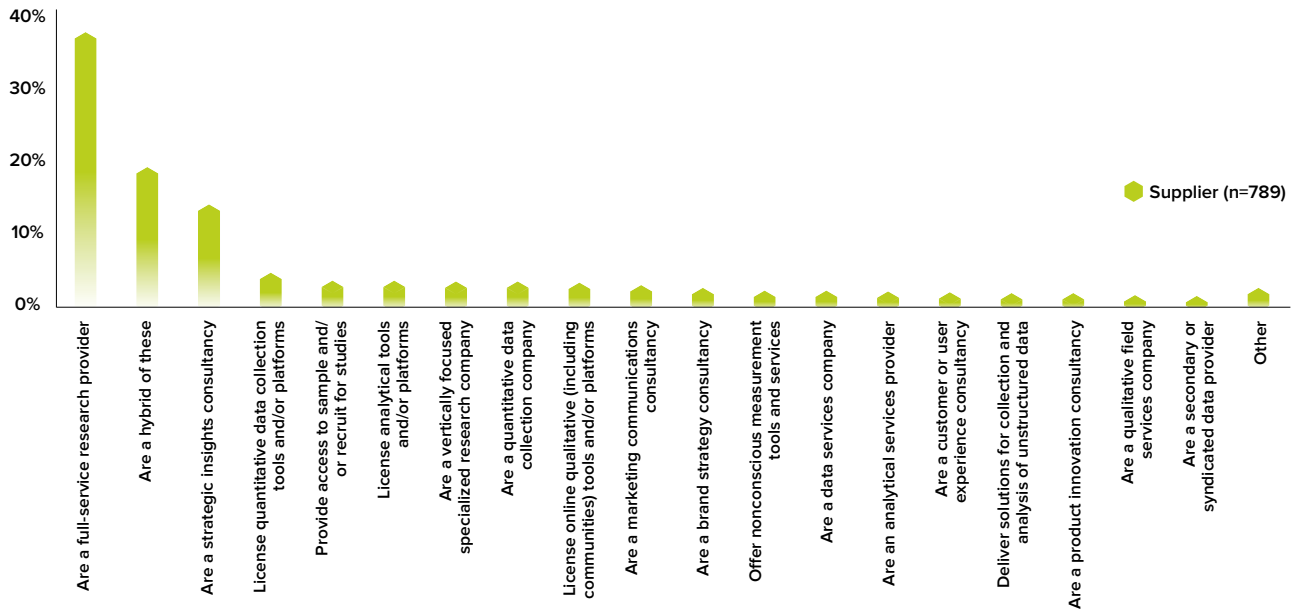


BUYER SEGMENT IDENTIFICATION

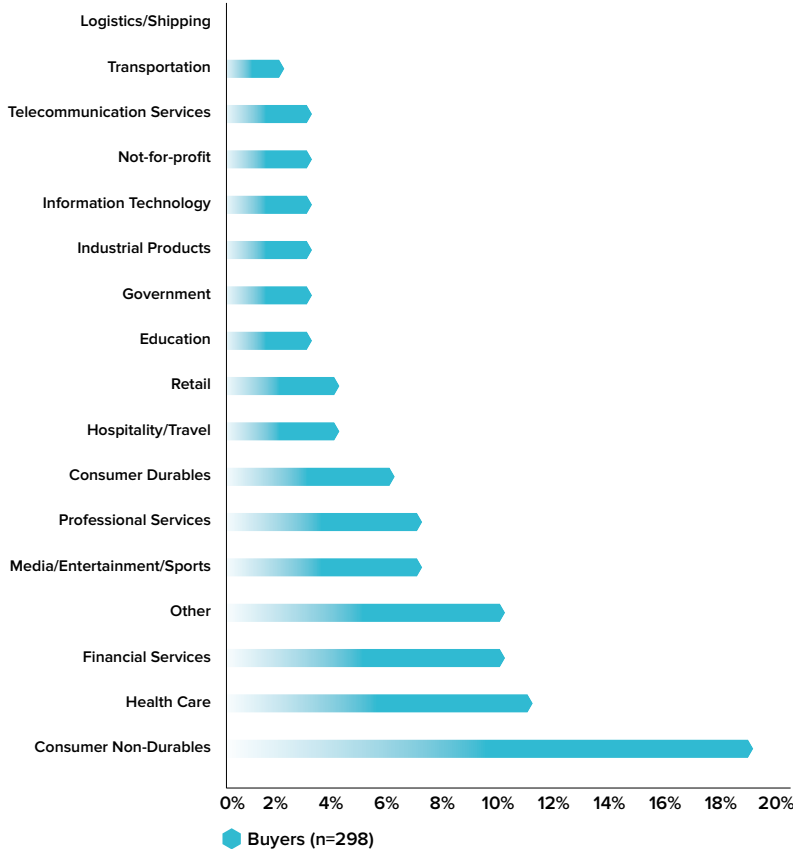


ORGANIZATIONAL AFFILIATION

SUPPLIER PRIMARY DESCRIPTION



BUYER BUSINESS SECTOR



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. This is in-line with previous waves. Proportionally, representation from all industry sectors has remained relatively constant across each wave of the study.

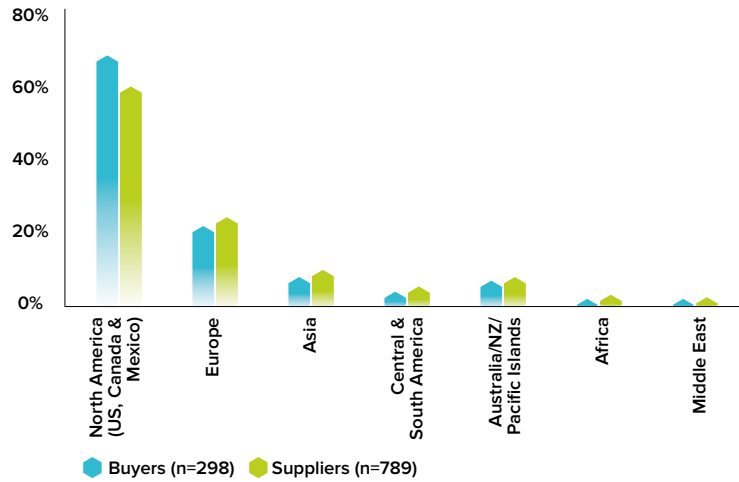
In looking only at self-identified Buyers of research, we have a well-rounded sample of respondents from many sectors, ensuring a wide breadth of experience and views are represented from our client-side colleagues. The proportion is also roughly analogous to the categories of largest Buyers identified in other industry reports with Consumer Non-durables, Healthcare, Financial Services and Media making up well over half of the sample.

Proportionally, representation from all industry sectors has remained relatively constant across each wave of the study

Regional sample sizes remained relatively consistent, with minor variances within each region. As previously noted, North American respondents comprised 61% of the sample, with Europe at 22%, Asia at 7% and the rest of the world making up the balance. These percentages are in-line with previous waves with some marginal +/- differences. We see little differences in the regional breakout in Buyers vs. Suppliers.

In exploring the physical location of GRIT participants via IP matching, we find that 123 different countries are represented within the sample, with respondent density shown in the map below.

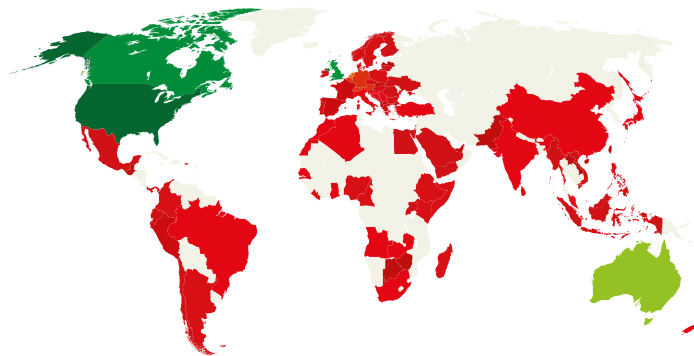
PARTICIPANTS BY REGION: BUYERS VS. SUPPLIERS



North American respondents comprised 61% of the sample, with Europe at 22%, Asia at 7% and the rest of the world making up the balance



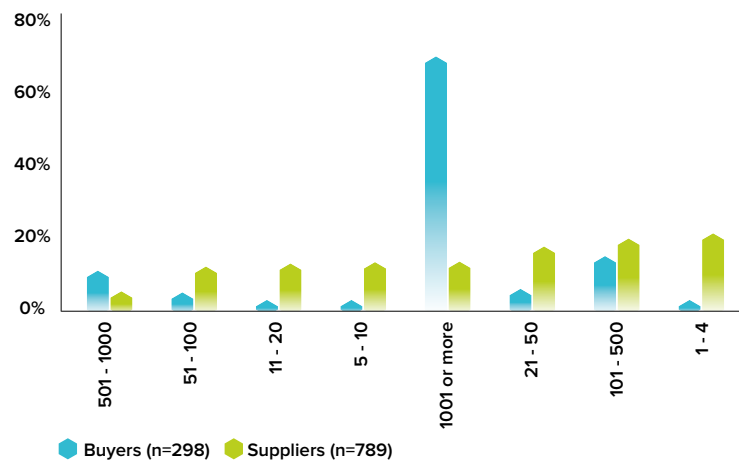
PARTICIPANTS BY REGION: BUYER VS. SUPPLIER



PARTICIPATION BY SIZE OF ORGANIZATION

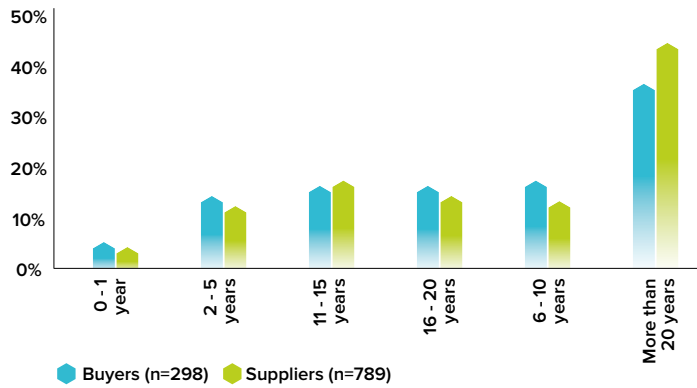
GRIT respondents generally fall into 3 camps: slightly less than half work within small organizations (under 50 people), a quarter in mid-sized organizations (51 to 500 people), and the remainder in large organizations with over 501 employees. This wave of GRIT did see an increase in large organization affiliated respondents, particularly within Buyers with fully 77% coming from that group. Suppliers were far more evenly distributed with no one group representing more than 20% of the sample.

ORGANIZATION NUMBER OF EMPLOYEES: BUYERS VS. SUPPLIERS



RESPONDENT SENIORITY

YEARS WORKED IN AN INSIGHTS-RELATED ROLE: BUYERS VS. SUPPLIERS

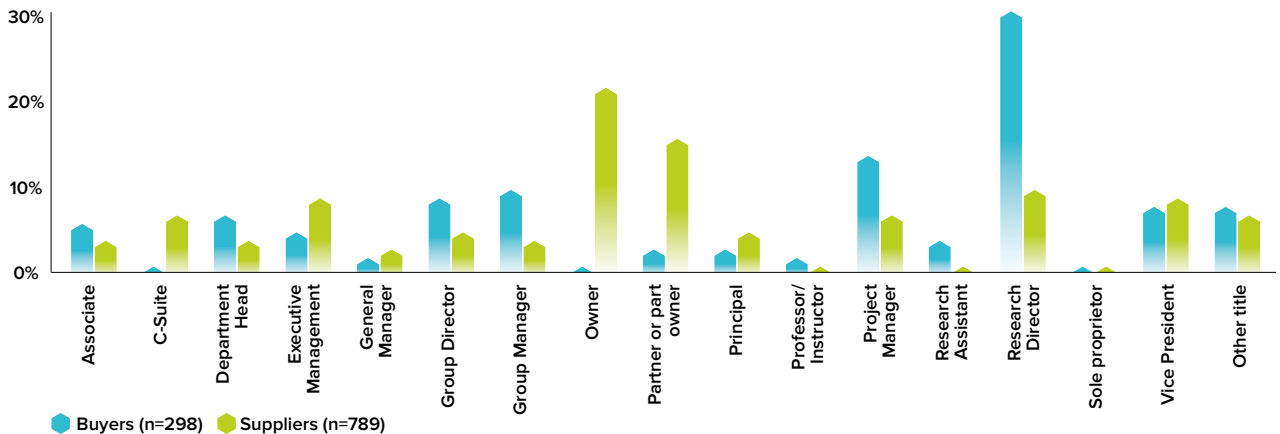


In analyzing other firmographic questions, the GRIT sample is comprised of largely senior level research professionals. The largest group among both Buyers and Suppliers have worked in the industry for more than 20 years, with less than 30% overall reporting working in an insights role for less than ten years.

Concomitantly, fully 40% of GRIT respondents are in senior-level roles within their organizations, and less than 10% describe themselves as being in non-managerial roles of any kind.

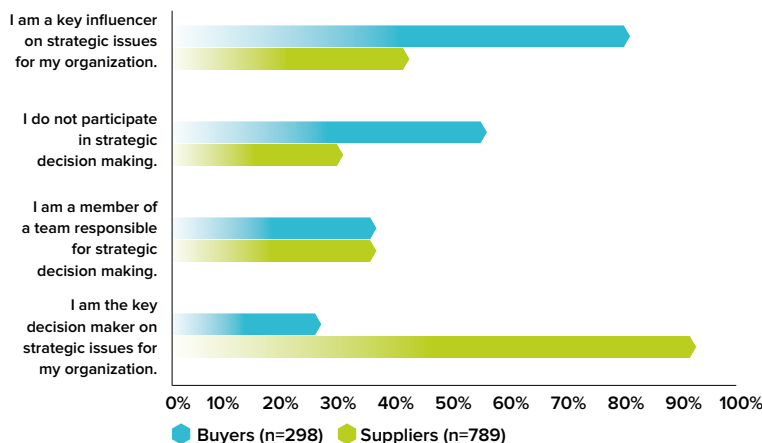
RESPONDENT TITLES

PARTICIPANT TITLE: BUYERS VS. SUPPLIERS



DECISION MAKING ROLE

STRATEGIC DECISION MAKING ROLE



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, with 47% of Suppliers claiming to be the key decision maker (as opposed to 13% Buyers). Conversely, 41% of Buyers are key influencers on strategic issues.

Overall, the sample of GRIT is broadly global while reflective of the order of size of market spend, and is largely comprised of very experienced and senior-level individuals from a spectrum of business sizes, types, and verticals.

ACKNOWLEDGEMENTS

Concept Originator & GRIT Executive Editor

Leonard Murphy – GreenBook

Report & Questionnaire

Gregg Archibald – Gen2Advisors

Melanie Courtright –
Insights Association

Larry Friedman, Ph.D. –
GreenBook

Jeffrey Henning – Market

Research Institute International

Elissa Moses – Braingroup Global

Leonard Murphy – GreenBook

Ray Poynter – NewMR

Jon Puleston – Lightspeed

Nelson Whipple – GreenBook

David Wolfe – Inguo

Sue York – NewMR

Project Coordinator

Kristine Mensching – GreenBook

Design Partners

Keen as Mustard

Idea Highway

Research & Production

AYTM – Ask Your Target Market

Braingroup Global

Gen2 Advisors

Infotools

Inguo

Insights Association

Lightspeed

Market Research Institute

International

NewMR

OfficeReports

Potentiate

Data Collection

AYTM - Ask Your Target Market

Data Processing

Infotools

Inguo

OfficeReports

Potentiate

Data Access

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OfficeReports

Infographic

AYTM – Ask Your Target Market

Publication

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Commentary Providers

AYTM

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Toluna

Advertisers

Brandwatch

Civicom® Marketing Research

Services

Cranbrook Search Consultants

Fuel Cycle

Inguo

my-take

Schlesinger Group

Sentient Decision Science

Toluna

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to access all GRIT data and charts via OfficeReports and KnowledgeHound, which you can use for your own analysis



RESEARCH & PRODUCTION



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KnowledgeHound

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Insights Association

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This Insights Association is the leading voice, resource and network of the marketing research and data analytics community, helping its members create competitive advantage through our agenda to Protect, Connect, Promote and Inform. All our revenue is invested in quality standards, legal and business advocacy, education, events, certification and direct support to enable our members to thrive in an evolving industry and drive business impact, thereby advancing the industry and profession in which we all share an abiding passion.

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Brandwatch is the world's pioneering digital consumer intelligence suite, helping over 2,000 of the world's most admired brands and agencies including Unilever, Walmart and Dell to make insightful, data-driven business decisions. The company underwent the industry-transforming merger with Crimson Hexagon in 2018, and has made three acquisitions to date: PeerIndex (2013), BuzzSumo (2017) as a standalone content marketing platform, and Qriously (2019) to add global survey capabilities.



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REPORT AND QUESTIONNAIRE CONTRIBUTORS



Gregg Archibald – Gen2 Advisors

Gregg Archibald is a marketing researcher and strategist dedicated to helping the research industry benefit from the consumer and technology changes that

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



Melanie Courtright – Insights Association

Melanie serves as the Chief Executive Officer at the Insights Association, where she advocates for the industry and its members in the areas of quality standards,

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



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.



Jeffrey Henning – MRII

Jeffrey Henning, PRC serves as Executive Director of Market Research Institute International (MRII) in January 2019. In cooperation with the University of Georgia Center for Continuing

Education, the MRII provides the Principles Express line of courses, covering every topic in the Market Research Core Body of Knowledge (MRCBOK). Before founding the survey-research consultancy Researchscape in 2012, Jeffrey co-founded Perseus Development Corporation in 1993, which introduced the first web-survey software, and Vovici in 2006, which pioneered the enterprise-feedback management category. A 33-year veteran of the research industry, he began his career as an industry analyst for Giga Information Group (now part of Forrester). Jeffrey is a member of the Insights Association and the AAPOR. In 2012, he was the inaugural winner of the MRA's Impact award, which "recognizes an industry professional, team or organization that has demonstrated tremendous vision, leadership, and innovation, within the past year, that has led to advances in the marketing research profession."



Nelson Whipple – GreenBook

Nelson brings over 30 years of market research experience to his consulting projects and role as Director of Research for GRIT. Much of his career has involved

quantifying, analyzing, and simulating customer preferences to inform product development and marketing decisions in B2C and B2B markets such as mobile devices, personal financial services, CPG, industrial equipment, telecom services, and retail.



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.



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.



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.



Elissa Moses – Braingroup Global

Elissa is CEO at BrainGroup Global (BGG) which guides clients from leading global brands to technology start-ups to leverage the latest in neurometrics, AI, Machine

Learning and Predictive Analytics, along with seasoned consulting to develop successful strategies and effective creative campaigns. She is also Partner in the recently launched HARK Connect, a division of MediaScience that is dedicated to digitally transforming the Qualitative Research industry, enabling advanced remote viewing, real time translations and transcripts, and neuro/emotional measurement. Elissa also serves as a Partner at Bellwether Citizen Response, which focuses on Public Policy and Political research and consulting.



David Wolfe – Inguo

David Wolfe is the CEO and Founder of Inguo.io. David began his career in International Policy, Conflict Resolution and Disaster Relief. This experience and the

reliance on data science, as well as within market research as it pertains to Urban Studies and Mass Communications brought his two passions of creating a better world though greater insights into what people want, think and feel full circle. David is a graduate of Portland State University and the Middlebury Institute of Intenational Studies at Monterey.

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