



GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT



BUSINESS & INNOVATION EDITION 2020

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OUR PARTNERS...





FOREWORD

Welcome to the 27th edition of the GreenBook Research Industry Trends Report, using data collected in Q1 & Q2 of 2020. This report continues the effort we began in 2018 to have each report focus on different aspects of the industry. This edition focuses on issues related to business dynamics and the role of innovation.

Little did we know when we fielded the survey in March that the world was about to go through a period of immense disruption! In some ways, it was fortuitous that GRIT was in the field from March to April as we were able to capture shifting attitudes and expectations as the COVID-19 crisis was developing.

Despite the lack of prescience in our design, never before has the need to understand changes in the insights industry been more important. I don't think I exaggerate when I say that the GRIT team rose to the occasion and provided vital, strategic direction for decision-makers during these uncertain times.

The sample size is somewhat smaller than usual for the Business & Innovation edition, although still in line with other GRIT reports. We chalk that up to people focusing on other priorities during the opening stages of the crisis, and rightfully so! We have made the effort to look at any significant changes in responses "pre" and "post" business lockdowns, despite the fact that the survey was not designed with this in mind. Still, we've been able to distill meaningful, relevant findings, which you'll find summarized in the "The Impact of COVID-19" section.

Another major feature of this edition of GRIT is that we use our (updated) industry segmentation model as the lens for viewing all findings. Although often in the report itself we focus on Buyer vs. Supplier or regional differences. This new framework will allow for more consistency across all waves of GRIT and deeper analysis that we plan to make available via other channels soon.

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

GRIT is a community effort and our authors, commentary providers, sample partners, advertisers, and especially our research partners make it all possible. Special thanks go out to AYTM – Ask Your Target Market, Deckchair Data, Displayr, Gen2 Advisors, Infotoools, Insights Association, Knowledgehound, MROI, NewMR, OdinAnswers, Stakeholder Advisory Services and Potentiate. We couldn't pull this off without their generous contribution of time, energy, and expertise.

Enjoy!

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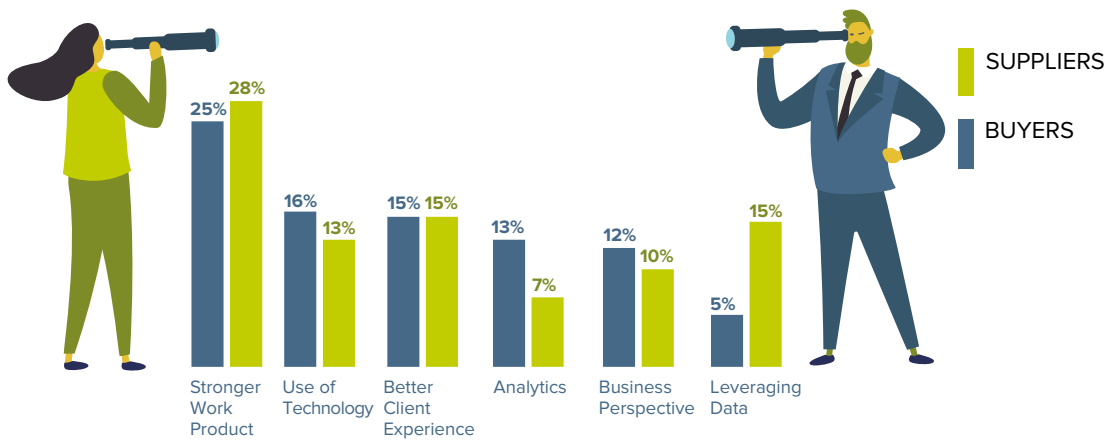
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EXECUTIVE SUMMARY

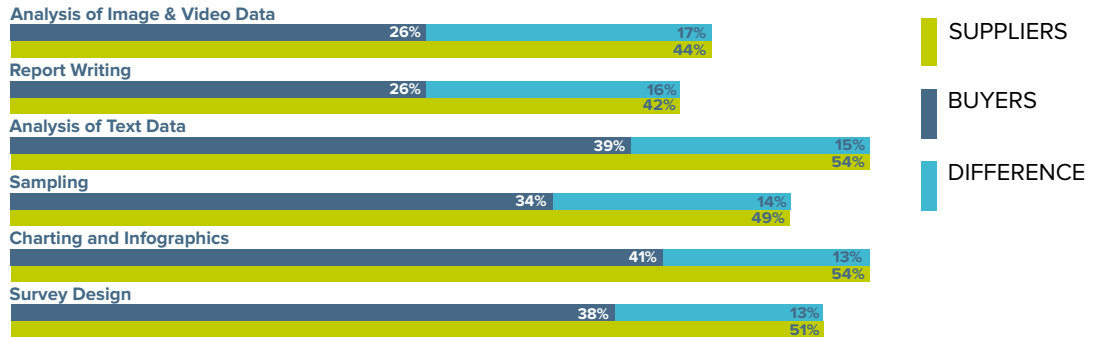
ALIGNED ON MACRO NEEDS; APART ON SPECIFICS

For the first time, GRIT asked Buyers for unmet needs that Suppliers could address for them and Suppliers for their perceptions of those needs. Buyers and Suppliers align, from improving the research and insights in their work products on down, but some Suppliers believe Buyers need to synthesize more data sources and better leverage existing data.

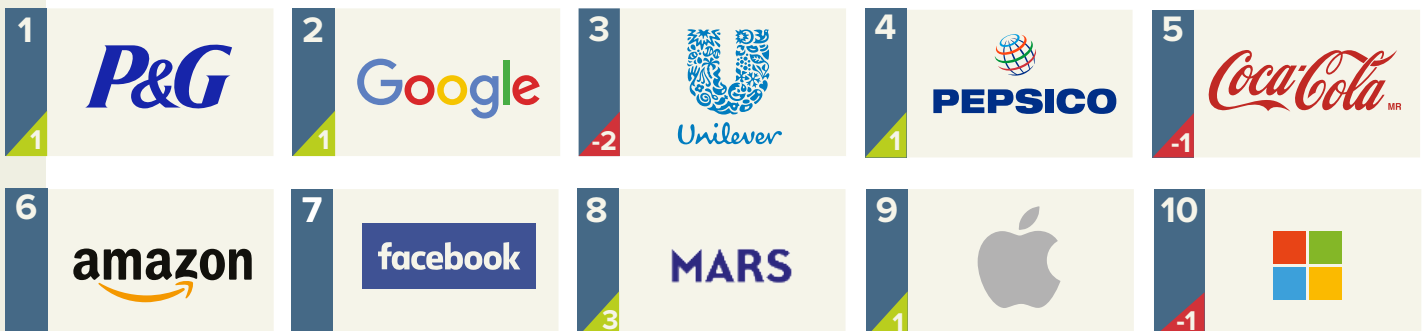


SUPPLIERS CONTINUE TO LEVERAGE AUTOMATION

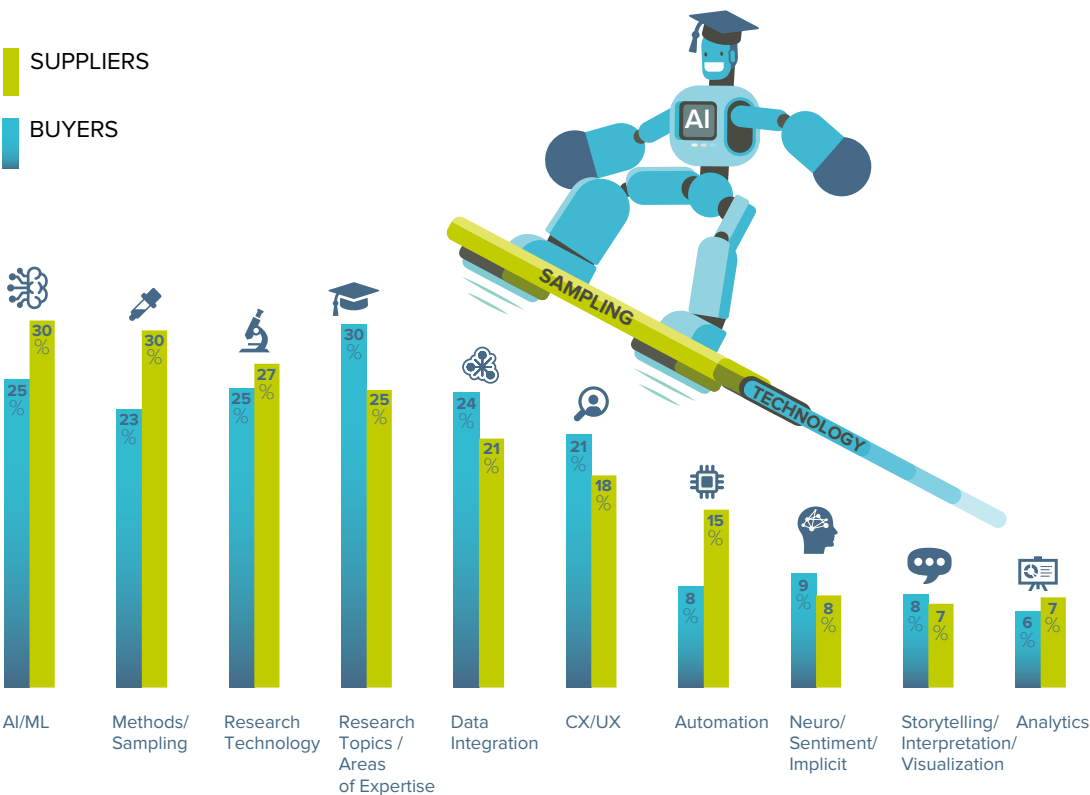
Automation continues to drive change across the industry, although with different focuses for Buyers vs. Suppliers. Analyzing unstructured data in all its forms and automating the reporting process showed the greatest levels of adoption across the board.



THE MOST INNOVATIVE CLIENT LIST IS STABLE

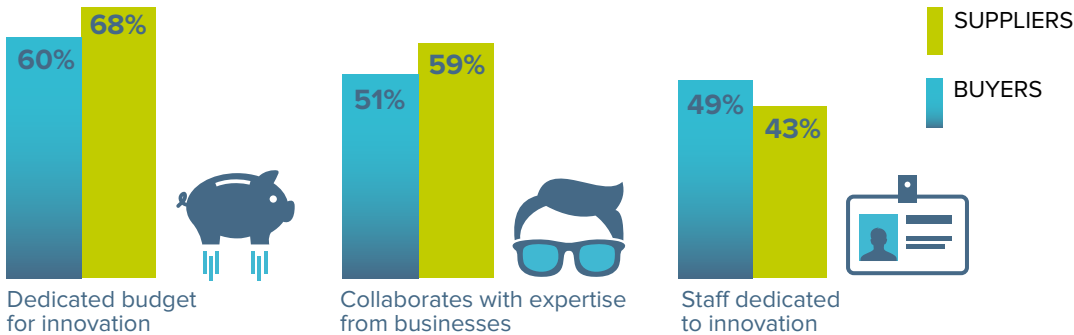


BUZZ TOPICS: TECH & THE SKILLS USED TO LEAD IT



Using an open end, we asked respondents what buzz topics were top of mind for them - no surprises - the push for greater efficiency and quality were on everyone's mind with AI, Sampling, Tech and the knowledge to pull it all together.

ORGANIZATIONS WALK THE TALK ON INNOVATION



Innovation isn't just a buzzword; both Buyers and Suppliers are focused on supporting it and dedicating organizational resources including teams and budgets to make it happen.

SUPPLIER RANKING CONTINUES TO SHOW CHANGES



METHODOLOGY AND SAMPLE

Despite fielding during the initial stages of the COVID-19 crisis, this wave of GRIT has a robust, global sample of 2,098 respondents from both Buyer and Supplier organizations.

GRIT respondents are recruited via GDPR compliant, opt-in email lists and a variety of social media channels by GreenBook and GRIT partners. These lists are comprised of both research Suppliers and Buyers. Most of the respondents come directly through GreenBook email invitations than all other sources combined. Respondents from the United States comprise the majority of all responses.

GRIT SAMPLE SIZE TREND YEAR-ON-YEAR

2014	2030
15W1	1879
15W2	1497
16W1	2144
16W2	1583
17W1	2942
17W2	1533
18W1	3930
18W2	1260
19W1	2880
19W2	1117
20W1	2098

For this report, the analysis is based on 2,098 completed interviews after rigorous data cleaning. 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 or you can refer to the sample size tables in the appendix.

The sample size for this latest survey (and GRIT 50) is consistent with the last several waves, although lower than expected due to disruptions arising from COVID-19.

Some regional differences across countries exist as well. For instance, this wave saw a larger proportion of Canadian respondents than in previous waves. However, we have strived 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 a rigorous cleaning process once field is completed. Simply put, we drop surveys that are partially completed and delete ones that are clearly poor quality or just plain phony. We remove duplicates, surveys that show a distinct lack of true effort or too much coaching, and any other type of response that we determine to be less than a clear and honest opinion from someone legitimately in the insights industry. Out of respect and appreciation for the people who make the effort to complete the survey, we take an “innocent until proven guilty” approach so that we do not systematically exclude legitimate opinions that may not be perfectly expressed.



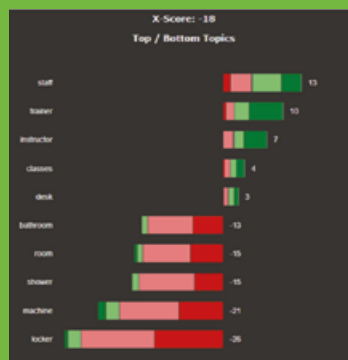
cx inspector

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X-Score Measure



X-Score Insights Report



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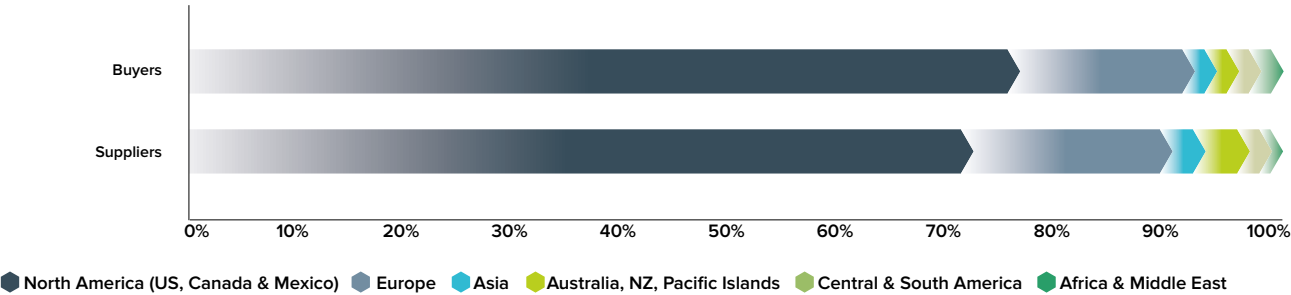
This effort is especially important when we conduct the GRIT 50 wave as some overly enthusiastic companies attempt to “lobby” for themselves. While unfortunate, the trade-off is that it usually results in a larger sample size (which is useful for other areas of exploration). We have designed robust data cleaning approaches to mitigate against that impact which we detail in the Data Cleaning Appendix.

GRIT SAMPLE COMPOSITION 20W1

Insights buyer or client	366
Insights provider or supplier	1,615
Provide other services	38
Internal insights for supplier	79
NET	2,098

The mix of respondents has varied slightly in wave on wave of this study, but within narrow bands. For this edition, 76% of respondents identified themselves as being Suppliers (n=1,615) and 24% identified themselves as Buyers (n=366). We also captured a small percentage of respondents who identified themselves as “Providing other services” (e.g., non-research insights services) or “Internal Insights for Suppliers” (e.g., employees of a Supplier who do not provide anything to external clients), but we found little to comment on for these populations. Due to their small bases, they have been excluded from Buyer/Supplier analyses.

GRIT SAMPLE BY GLOBAL REGION



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

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



BUSINESS SECTION



2020 GRITSCAPE

Developing a map of the insights industry by allowing both Buyers and Suppliers to define themselves using our segmentation model continues to underline how fragmented our industry is and how everyone struggles to define their organization clearly.

GRITscape, our take on the Lumascape concept, visualizes the insights industry as a geography populated by Buyer and Supplier companies positioned in the landscape according to the degree of similarity of their functions (Buyers) or services (Suppliers). The end result is driven by what insights

professionals told us about their own companies, with just a smattering of “expert opinion” to close any gaps. In some cases, individual respondents from the same organization classified their companies differently. To develop the GRITscape, we opted to use the most commonly selected category for each company as its final positioning segment.

We also added a dimension based on where the categories fit on a spectrum of strategic vs. tactical for clients or service vs. technology for Suppliers (with some gradations in between).

For Buyers, that matrix is:

Buyer GRITscape Categories	Kingdom	Positioning Variable	Big Bucket Category
“Voice of the consumer” within our organization	Cxia	Tactically Focused	“Voice of the consumer” within our organization
Data analysts within our organization	Analytica	Tactically Focused	Data analysts within our organization
Hybrid of these functions	Hybridorea	Strategic & Tactical	Hybrid of these functions
In-house research provider to internal clients in our organization	Internalia	Strategic & Tactical	In-house research provider to internal clients in our organization
Other internal function	The Free Cities of Niche	Other	Other
Research outsourcing department within our organization	Outsourciana	Tactically Focused	Research outsourcing department within our organization
Strategic insights consultants within our organization	Strategia	Strategically Focused	Strategic insights consultants within our organization

Individual respondents from the same organization classified their companies differently. To develop the GRITscape, we opted to use the most commonly selected category for each company as its final positioning segment



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

As in 2018, we wanted to do something visually interesting and even fun. We decided to create

a “fantasy world map”, and the response was so positive that we have done the same again. However, this year we are also including some more traditional visualizations to help give a high-level overview of the findings and insights that they have generated.

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

For Suppliers, the matrix is:

Supplier GRITscape Categories	Kingdom	Positioning Variable	Big Bucket Category
Analytical services provider	Analyserv	Technology Based	Data & analytics provider
Data services company	Datania	Technology Based	Data & analytics provider
License analytical tools and/or platforms	Analytool	Technology Based	Data & analytics provider
Secondary or syndicated data provider	New Secondaria	Service Based	Data & analytics provider
Full-service research provider	Fullservicia	Service Based	Full and/or field service agency
Offer nonconscious measurement tools and services	Neuroland	Specialized Niche	Full and/or field service agency
Provide access to sample and/or recruit for studies	Samplanina	Technology Based	Full and/or field service agency
Vertically focused specialized research company	Specios	Specialized Niche	Full and/or field service agency
Quantitative data collection company	New Quantservia	Service Based	Full and/or field service agency
Qualitative field services company	Fieldservicia	Service Based	Qualitative research provider
Brand strategy consultancy	Brandstrategia	Service Based	Strategic consultancy
Customer or user experience consultancy	Cxiaconsult	Service Based	Strategic consultancy
Marketing communications consultancy	Marcomia	Service Based	Strategic consultancy
Product innovation consultancy	Innovatia	Service Based	Strategic consultancy
Strategic insights consultancy	Strategiaconsult	Service Based	Strategic consultancy
Deliver solutions for collection and analysis of unstructured data	Unstructured Territories	Technology Based	Technology provider
License online qualitative tools and/or platforms	Qualitoolia	Technology Based	Technology provider
License quantitative data collection tools and/or platforms	Quantitoolia	Technology Based	Technology provider
Other type of Supplier	The Free Cities of Niche Protectorates	Other	Other
Other services	The Free Cities of Niche Protectorates	Other Services	Other services

To fully explore the GRITscape, we suggest that you click on the provided link to open it as a standalone high-definition PDF document:

<https://marketing.greenbook.org/hubfs/GRIT/business-innovation/lumiscapemap2020.pdf>



About GRITscape

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

In 2020 we're continuing the process with a lumascape that is changing as the industry changes, using the metaphor of a map with shifting borders and populations. And because we think it's cool, we doubled-down on the use of a "Game of Thrones" type fantasy world map as the context for the visualization.

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

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



WHAT DID WE LEARN ABOUT INSIGHTS SUPPLIERS?

Employees of many Supplier companies aren't really sure about their company's position in the marketplace, or don't know how to describe it consistently



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

When we count unique companies within usable responses, we have 131 distinct Buyer companies and 839 distinct Supplier companies. In looking at Suppliers, 81 companies had responses across multiple categories, and 36 had more than five categories selected by their own employees from the same company! That does not speak to a unified brand identity.

For large companies that offer a variety of different services/solutions this may simply be a bit of myopia. Employees may answer based on their role or focus. However, we believe this decided lack of clarity both internally and externally on brand

positioning is a significant issue for many Suppliers in our space. Being a "one-stop-shop" may be an effective strategy to capture share of wallet, but not an effective way to differentiate organizations in a crowded marketplace.

When differentiation on overall positioning is challenging, Suppliers have to find some means of separating themselves from their competitors. This is one reason why we think the brand attribute of "innovative" is important and document it via the GRIT 50 Most Innovative list and throughout this report. To differentiate in a crowded marketplace, "Being innovative" is a strong step in the right direction. All things considered though, our key takeaway is that the employees of many Supplier companies aren't really sure about their company's position in the marketplace, or don't know how to describe it consistently. This inconsistency was evident to some degree in almost every Supplier that had two or more employees participate. This means that leaders of Supplier companies need to clarify their market positioning and communicate that definition effectively throughout their organizations.

CHANGING MAKEUP OF THE INDUSTRY

One goal of the GRITscape exercise is to understand the changing composition of the industry in response to industry dynamics, and an effective way to do that is via Supplier positioning. As we compare changes over the last several years in our "Big Bucket" rollup categories, we see a few persistent trends. One of the key ones that jump to the fore are that Strategic Consultancies seem to be growing –

4% more than a year ago, while self-identified Full Service may be shrinking – 4% less than a year ago. Additionally, "Other provider" has lost about as much as Technology Provider has gained – perhaps tech providers are finding their identities?

Changes in those two categories were the largest by far, with all other categories being under 6%. The chart on next page shows the breakdown.

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





THE INSIGHTS INDUSTRY IS RIPE FOR RENAISSANCE

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Rebirth

The 14th century was a disaster for Europe. First, widespread crop failure starting in 1315 resulted in the Great Famine, and the death of anywhere from 10-25% of the population. Later that century, the Black Death was introduced to the continent by fleas traveling on merchant ships. The pandemic decimated the populace and killed off as much as 60% of the population. These incalculable events had devastating consequences to societal fabric at the time. Medieval banks failed, kingdoms disappeared, and social norms evolved rapidly.

These societal consequences allowed new thoughts, banks, industries and educational systems to spring up throughout Europe, giving rise to the Renaissance, which in French means “rebirth.” Out of the Renaissance came many of the works of art and literature that we prize to this day, including Michelangelo’s Sistine Chapel, Da Vinci’s scientific studies, and Machiavelli’s philosophy.

So, while there were terrible human consequences during the 14th century, they also gave way to ideas, art, and literature foundational to modern society. The potential for the insights industry is similar.

The Era of Constant Change

We are living in an era of constant change. While the COVID-19 pandemic, accompanying economic challenges, and consequential social movements are top of mind today, the truth is that we’ve been living in an era of accelerating change for some time. In the past ten years, we’ve witnessed venture-funded disruptors challenge incumbents in every sector, millions of workers move into the gig economy, and consumer spending patterns migrate wildly. There is no expectation for decelerating change in the future either.

Since 2008, the traditional global market research industry has eked out minuscule growth. For instance, between 2017-18, the North American MR sector reported growth of +0.1%. The previous year the traditional insights industry actually declined. In addition, a recent ESOMAR survey found that insights practitioners expect global MR turnover to decline by 22% during 2020, a languid performance for an industry that purports to be the conduit of consumer opinion.

In an era of constant change, when customer-centricity is requisite for financial success, why is the market research industry in decline? And a follow-up question: what would the insights industry look like if it started in 2020?

Market research is ripe for a renaissance. Many of the tools and methodologies used today haven’t substantively evolved since the 1970s other than migrating to digital platforms. Today, 80% of North American consumers have smartphones, each equipped with cameras that generate trillions of photos a year. Recent advances in machine learning make analysis of unstructured data like text and photos as simple as developing crosstabs. APIs connect data from multiple software platforms for a meaningful combination of behavioral and stated preference data. These advances should unlock new capabilities like agile qualitative, powerful integrations, and true automation.

In Summary

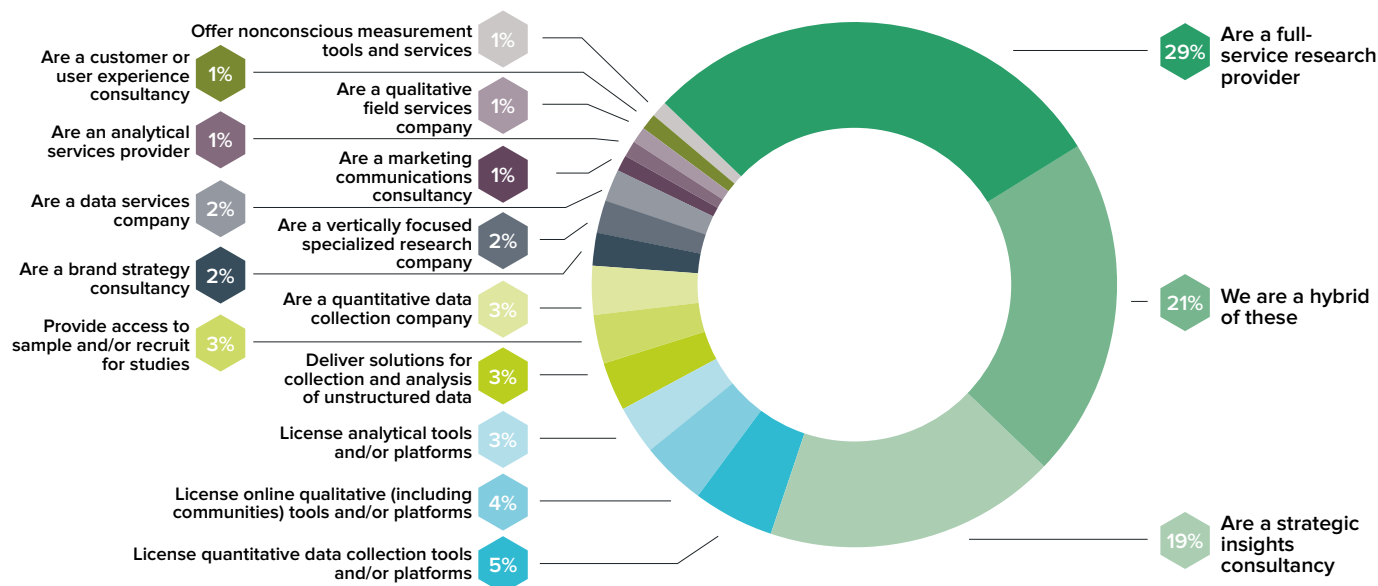
The short-term outlook for the insights industry is not good. But, with an insights renaissance that evolves the industry to new capabilities, it’s possible that we will ignite growth that’s been missing for a decade.

Sample Composition	Strategic Consultancy	Full and/or Field Service Provider	Technology Provider	Data & Analytics Provider	Other Provider Type
20W1 %	36%	28%	21%	15%	1%
19W2 %	30%	42%	12%	14%	2%
19W1 %	32%	32%	16%	13%	7%
Average	33%	34%	16%	14%	3%
Deviations					
20W1 %	3%	-6%	5%	1%	-2%
19W2 %	-2%	8%	-4%	0%	-1%
19W1 %	-1%	-2%	0%	-1%	4%

Diving a level deeper into the self-selected subsegments, we see an interesting nuance between the “Full-Service” (29%) and “Strategic Consultancy” (19%) dichotomy, with an interim grouping of “A Hybrid of these” for 22% of respondents. Note that “hybrid” includes companies that are technology-centric, but who are increasingly layering in various

services as well. This matches other industry observations that many technology companies have needed to offer a variety of service capabilities to serve client needs. This is a category to watch in future waves; we expect to see more and more technology firms following this path.

SUPPLIER SUBSEGMENT BREAKDOWN



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

That is something we cannot answer, but these data give us a reference to track that evolution.

GRITSCAPE FOR BUYER ORGANIZATIONS

We asked research Buyers to undertake a similar task, although with far less granularity, in an attempt to understand how they view themselves

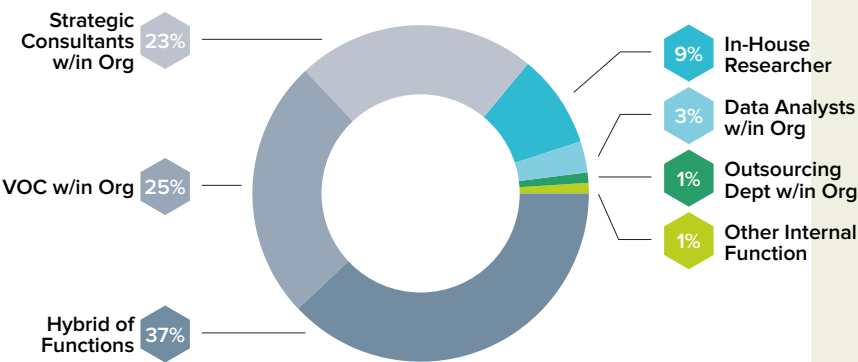
by role and impact within their organizations. Here is what we learned, again followed by a more nuanced analysis.

WHAT DOES THIS TELL US ABOUT BUYER ORGANIZATIONS?

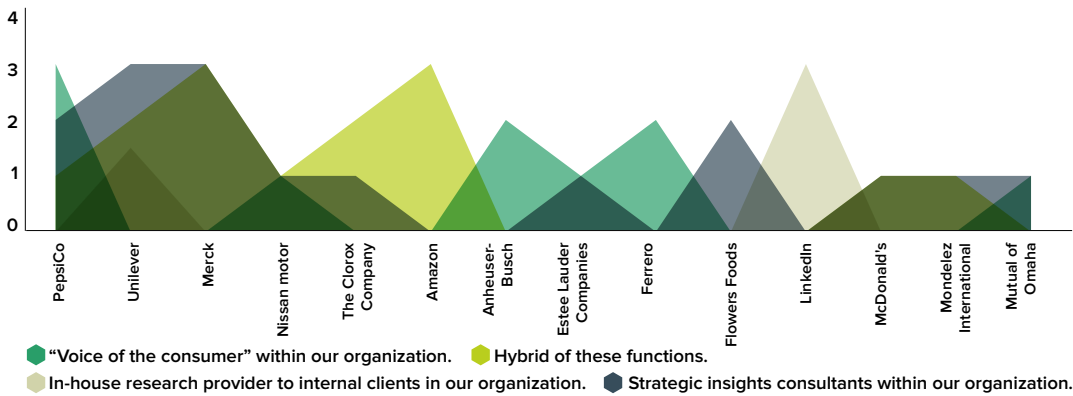
As we have found consistently since 2018, three functions dominate client-side research organizations: strategic insights consultants (23%), voice of the customer in the organization (25%), or a hybrid of these and other research/analytic functions (37%). This quantifies the stability within the Buyer segment.

Despite the stability of how Buyers define themselves overall, the issue of unclear or diluted identity also occurs in these organizations, although the problem is not nearly as pronounced as it is among Suppliers. Fourteen Buyers had more than two employees who chose two or more categories. For example, respondents from Unilever and PepsiCo selected more than five categories to define their organizations' positioning.

BUYER SEGMENTS



NUMBER OF SEGMENTS FOR TOP MENTIONED CLIENT ORGANIZATIONS



There could be a couple of explanations: The first is that client organizations are often more focused in their scope but aware of their context and, therefore, know both what they do and what they don't do. Secondly, there are fewer categories from which to choose, and therefore more consistency. Finally, there is the issue of tunnel vision. It is more

likely that respondents who work in large insights organizations tend to think in terms of their roles vs. the broader position of the industry. This means that as researchers, we need to become better marketers. Not just for our benefit, but also for the benefit of our clients – internal or external.

Three functions dominate client-side research organizations: strategic insights consultants (23%), voice of the customer in the organization (25%), or a hybrid of these and other research/analytic functions (37%)

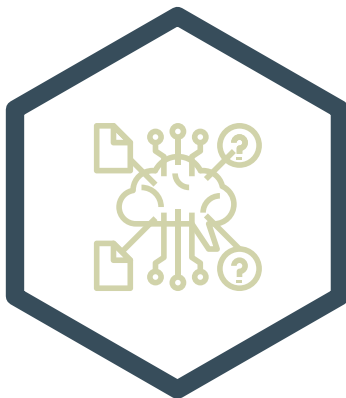


THE BIG PICTURE

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

We expect to see significant shifts in the number and size of the companies in the categories that we defined in the GRITscape exercise. Shifts caused by the changing nature of the industry include automation and other technologies, methodology changes, and resource constraints (including time).

The shift in how research is done will continue to impact processes within both Supplier and Buyer organizations. Our understanding of what we do (and what we don't) will have to constantly evolve. We'll explore these questions more deeply in subsequent sections to help provide some guidance on what that evolution may look like as it progresses.



Understanding where you fit, especially as a Supplier, is important for positioning and marketplace success



MOVE AT THE SPEED OF THE CUSTOMER WITH AI-ENABLED CONSUMER INTELLIGENCE

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We know social media has changed consumers radically. But brands are just beginning to understand how quickly this change has accelerated in recent years, and how this shift marks the solidification of a new era of marketing with consumers, at their pace, in their words, on their terms:

- People spend more time bonding on social media than they do in real life: (People spend 2.5 hours per day across 8 social networks, on average¹)
- They trust each other, not advertising: (Trust in advertising hit a record low of 25% in 2019²)
- Virtually everyone is exposed to social media: (The percentage of adult social media users has increased by 50% since 2010³)

Anyone can publish anything, anywhere, any time, and their stories can be viewed through any connected device. The world of media has democratized, and this tidal change demands an equivalent shift in the methods and technology we use to understand it.

Buzzwords like “digital transformation”, “marketing automation”, “agile marketing” and “customer centricity” have become mainstream, repeated by marketing pundits promising to future-proof the organization. Meanwhile, insight professionals struggle to adapt to the speed of the consumer.

What are the implications for insights work in practice? We can understand this by looking at the bread and butter of market research: customer segmentation and brand equity tracking.

Customer segmentation is being shaped by the emergence of tribes.

Until recently, understanding and grouping of consumer needs was accomplished through static customer segments, based on geo/demographics, lifestyle, and socio-economic groups. In turn, these groups were heavily influenced by advertising.

These psychographic groups are known by digital-forward organizations as “Tribes” or “Mindsets”. They are vocal, fickle, influence their peers, and engage in online, offline, cross-channel, and social buying journeys via billions of social media posts – both the audience and the media.

More importantly, these tribes are an unprecedented source of unsolicited feedback, attitudes, affinities, and aspirations – waiting to be mined, structured, understood, and put to use.

Brand equity is defined by consumers themselves.

Another significant shift is the way we understand equity. Today, the biggest influence on consumer sentiment is consumers themselves. This new media is not controlled by the brand, but an ever-shifting amalgam of cultural trends and identities. Digital culture, not fixed attributes, form the lines of new consumer segments.

While brands attempt to buy perception via ambassadors and other influencers, diverging and volatile messages have an inevitable impact on loyalty and curiosity to try something new. Compounding this is a growing volume of digital content, shorter attention spans, multi-screening, and less time exposed to any single media.

Clearly, the retrospective brand dipstick is no longer suitable, and even continuous studies only offer a periodic view. Instead, brands need to stay in front of changing variables and “nowcast” the near future to adapt to shifting tribes, cultural events, and social media trends. The only way to achieve this is via access to real-time social data, structured based on brand pillars and other contextual variables, and analyzed and visualized using AI.

Next up: moving from Social Listening to AI-enabled consumer intelligence

CMOs need tools to make customer and brand intelligence faster, more transparent, and more democratized, so that bureaucracy is flattened, and decisions can be made as fast as the modern consumer makes her decisions, while providing a single source of truth across functional silos and markets.

To do this, social listening companies must step up and provide off-the-shelf structured data solutions with combined quantitative and qualitative insights to explore tribes and shifting brand equities, and which address the new needs of insight teams to serve a transforming organization

1. <https://www.globalwebindex.com/reports/social>

2. <https://www.thedrum.com/news/2019/01/30/repetitive-obtrusive-and-unscrupulous-public-perception-advertising-hits-record-low>

3. <https://www.pewresearch.org/internet/fact-sheet/social-media/>

INDUSTRY SCOPE

As the industry evolves, new players are entering the market, and formerly adjacent categories are now overlapping with the insights space. Understanding who those players are, how they differentiate themselves, and how Buyer organizations are engaging with all Suppliers offers guidance on where we are headed.

STRATEGIC CONSULTANCY TOP-OF-MIND MENTIONS: BUYER VS. SUPPLIER

	Mentions		Rank	
	Buyers	Suppliers	Buyers	Suppliers
McKinsey	26	85	1	1
Ipsos	19	63	3	2
Bain & Company	14	58	6	3
LRW	5	50	10	4
Kantar	22	48	2	5
BCG	15	44	5	6
Hotspx	13	33	7	7
PRS IN VIVO	3	32	12	8
Nielsen	16	31	4	9
Deloitte	10	30	8	10
Accenture	7	29	9	11
Dig Insights	1	25	14	12
SKIM	1	19	14	13
Shapiro + Raj	4	17	11	14
PwC	3	15	12	15

New to this edition is a question regarding which companies come to mind when thinking of specific sectors: Strategy Consultancies, Technology Providers, and Data & Analytics Providers. We viewed this as an addendum to other market structure-focused questions in order to begin the process of defining the scope of the insights and analytics industry. Outside of the “usual suspects” who participate in GRIT, we expect to find other companies that are identified in terms of brand awareness as potential participants in the industry.

Although we anticipated some duplication with the GRIT 50 questions (and there is quite a bit in terms of companies mentioned), the goal here was different. We wanted to understand two key issues:

1. Differences between Buyers and Suppliers in top-of-mind responses when thinking of these purposefully broad sectors.
2. The changing competitive landscape in each.

The results are perhaps unsurprising but do address our issues. We'll look at each segment now.

While certainly the “usual suspects” in terms of traditional players in the market research category popped up, so did the big management consultancies like McKinsey, BCG, Bain, Deloitte, Accenture, and PwC with McKinsey leading across both segments



While certainly the “usual suspects” in terms of traditional players in the market research category popped up, so did the big management consultancies like McKinsey, BCG, Bain, Deloitte, Accenture, and PwC with McKinsey leading across both segments. What may give some Suppliers pause is that despite efforts by some such as LRW, Shapiro + Raj, and SKIM that have been working very hard to position themselves as competitors to the management consultancies, they are not top-of-mind for most Buyers using that terminology.

Is this indicative of a direct competitive relationship against these management consultancies? We think yes, because many of those names pop up elsewhere in this report as being considered players in the insights & analytics industry. Thinking about the challenges of differentiation we brought up in the GRITscape section, it would seem to indicate firms that want to be considered “strategic consultancies” have their work cut out for them to make that connection with Buyers.

In looking at Technology Providers, we see a similar mix of traditional and non-traditional players in the marketplace:

The Technology Provider Buyer-Supplier differences seem less stark than for Strategic Consultancies because all of the non-traditional players like Google, IBM, Microsoft, Apple, and Amazon have defined research offerings in addition to their broad product offerings. It’s also worth calling out that Qualtrics has obviously done a great job of positioning themselves as a technology company; they were the most mentioned brand across the board.

One difference to note is that, for Buyers, Nielsen is tied for third most mentioned while it is 18th for Suppliers. As a Strategic Consultancy, Buyers named Nielsen 4th most often while Suppliers named it 9th most often. Across categories, Nielsen has more of a top-of-mind presence for Buyers than for Suppliers, suggesting that Nielsen has a strong presence among

TECHNOLOGY PROVIDER TOP-OF-MIND MENTIONS: BUYER VS. SUPPLIER

	Mentions		Rank	
	Buyers	Suppliers	Buyers	Suppliers
Qualtrics	31	83	1	1
Google	21	49	2	2
FocusVision	4	43	14	3
Zappi	11	34	3	4
IBM	7	33	8	5
Confirmit	3	30	17	6
Microsoft	9	28	5	7
Voxpopme	3	28	17	7
Medallia	5	25	11	9
LRW	1	23	21	10
20/20 Research	0	23	22	10
Apple	4	22	14	12
Dynata	5	20	11	13
Hotspex	5	20	11	13
Ipsos	6	19	9	15
Cint	3	19	17	15
PRS IN VIVO	2	18	20	17
Nielsen	11	17	3	18
Tableau	4	16	14	19
SurveyMonkey	9	15	5	20
Amazon	6	14	9	21
Kantar	8	11	7	22

Buyers and plays multiple roles successfully. Even though we generally believe that being strongly identified with multiple categories dilutes a brand, it seems to be working for Nielsen, partly due to the fact that the company is represented through multiple well-positioned brand names.

DATA & ANALYTICS PROVIDER TOP-OF-MIND MENTIONS: BUYER VS. SUPPLIER

	Mentions		Rank	
	Buyers	Suppliers	Buyers	Suppliers
Ipsos	17	107	3	1
Nielsen	31	98	1	2
Kantar	23	82	2	3
Dynata	7	53	10	4
LRW	4	41	12	5
Qualtrics	9	31	7	6
GfK	5	30	11	7
Hotsplex	8	28	8	8
PRS IN VIVO	3	27	13	9
Dig Insights	2	24	15	10
Google	14	22	5	11
SKIM	1	19	16	12
Toluna	3	18	13	13
IRI	15	16	4	14
IBM	8	11	8	15
1Q	14	4	5	16

Finally, let's look at the Data & Analytics category.

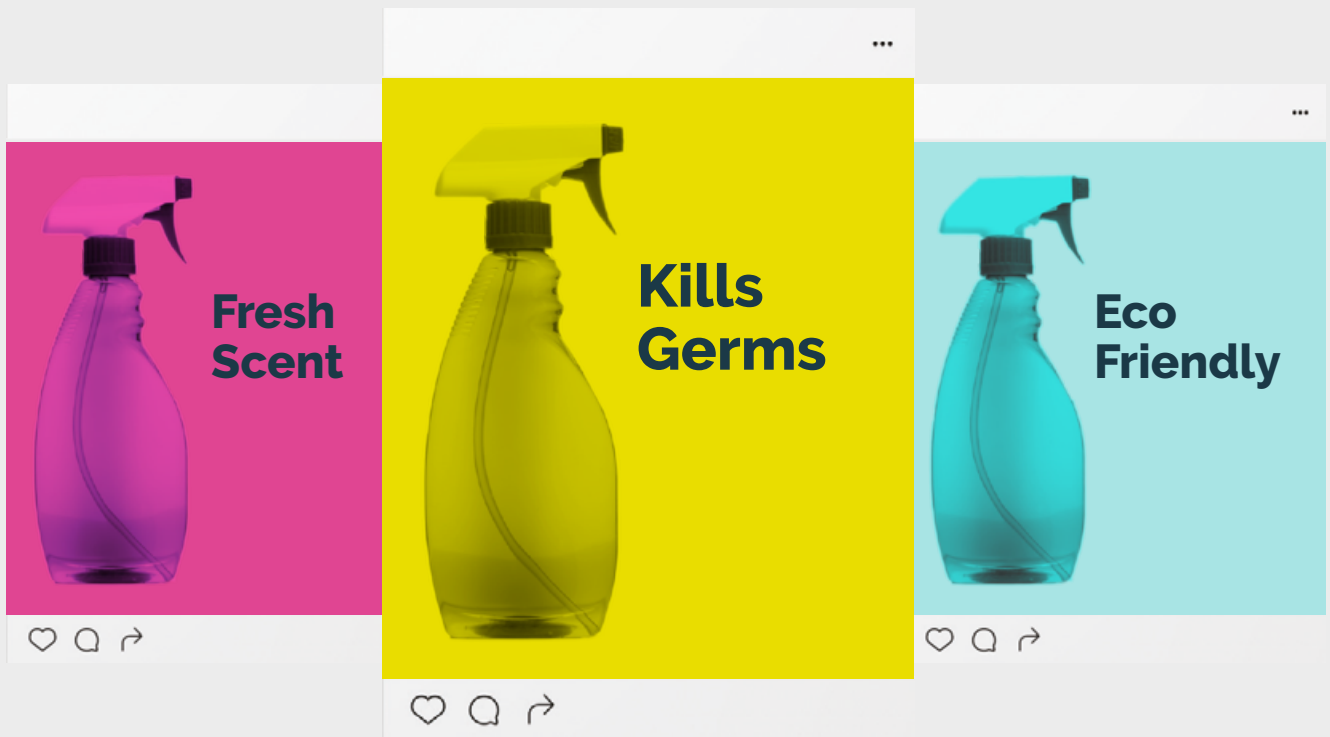
This category is far more straightforward, filled with only the companies we have come to expect when thinking of data and analytics-centric Suppliers, with predominately "traditional" research players having the highest levels of top-of-mind awareness. It is particularly interesting that Nielsen leads the way across both segments; their transformation from the Nielsen brand being positioned as a market researcher to a data provider seems to be complete based on these results. This is likely good news for a few other Suppliers such as Dynata, Toluna, and GfK who have been undertaking similar brand re-positioning strategies over the past several years.

On the perhaps not-so-good side, we see more evidence of brand confusion with companies like LRW, SKIM, Hotsplex, and PRS IN VIVO appearing on all three lists. This could be further evidence that their messaging is not painting a clear picture of their true differentiating factors in the minds of the market, especially among Buyers, where it is vital.

Thinking about the challenges of differentiation we brought up in the GRITscape section, it would seem to indicate firms that want to be considered "strategic consultancies" have their work cut out for them to make that connection with Buyers



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UNDERSTANDING KEY INSIGHTS STAKEHOLDERS

As part of our exploration of the evolving industry, we also added new questions in this wave to understand who the key stakeholders are in the insights buying process as well as internal consumers of insights deliverables. Our hypothesis was that possibly different Buyer and Supplier segments would have different experiences, shedding more light on an area of industry dynamics not previously explored.

First, let's look at how Buyers responded to these questions.

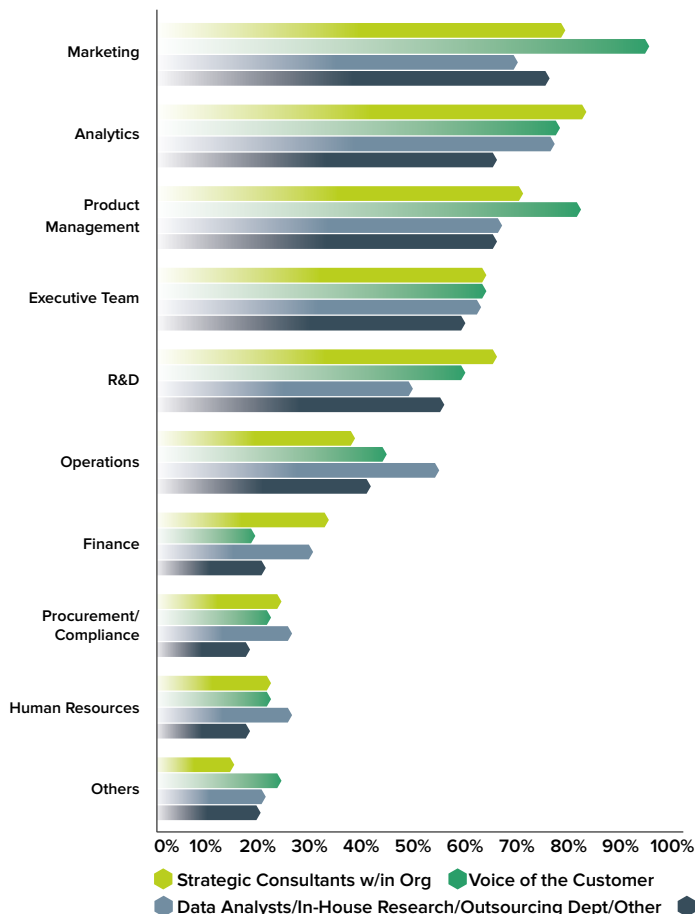
We asked Buyers to tell us who actively engages with insights deliverables, and we see some interesting differences when comparing by segments.

While there are numerous differences across segments, a few key ones jump out in this analysis. First, Buyers who identify as working with organizations that are best described as "Voice of the Customer" look to be more engaged in sharing deliverables with Marketing (93%) and Product Development (80%) teams than others. This perhaps indicates greater alignment to relatively immediate, revenue-driving activities while those who are Strategic Consultants within their enterprise may be looking across a longer time horizon and appear to be somewhat more engaged with the Analytics and R&D groups. Self-described Data Analysts/In house research organizations report being significantly more engaged in sharing deliverables with Operations teams.

Why is this important? "Know your customer" is a maxim for a reason. Suppliers who want to win and retain business should understand that their customers are not just those who commission the research, but are also the internal stakeholders who utilize the deliverables as well. That has significant implications in the design of those deliverables and in understanding the world of their client contacts so they can help make them "look good" within their own organizations.

As a next point we wanted to understand which Buyer organizational groups play a role in selecting methods and partners. Unsurprisingly, the Insights Group was by far the largest group of decision makers, however a few interesting differences emerged.

WHO ACTIVELY ENGAGES W/INSIGHTS FUNCTION AND DELIVERABLES? (BUYERS)



For VoC functions, once again Marketing is reported to take a larger role in decisions than in any other category. Data Analysts/In-house Research organizations reported that Operations plays a significant role.

Although Procurement is a key participant for many VoC and Analytics/In-house Research groups, interestingly, GRIT Buyers did not indicate that it plays an outsized role in the selection process. We might have expected them to play a larger role given the visible role Procurement plays in some large Buyer enterprises. VoC and Analytics/In-house Research groups are likely to be involved in licensing technology solutions to drive their functions, and so Procurement may need to be more involved in their selection processes.

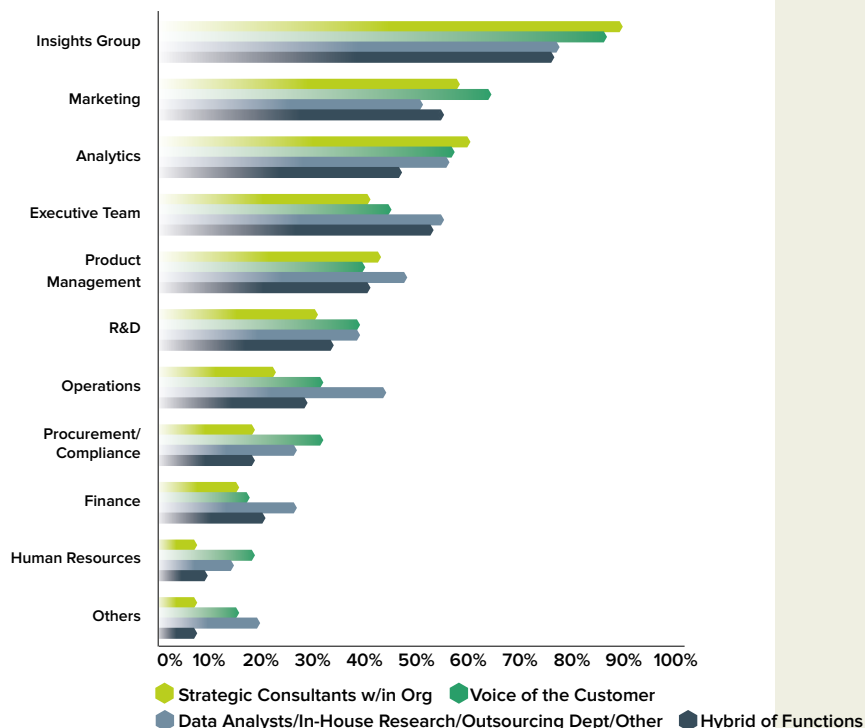
We asked Suppliers the same questions from their perspective, and there was a surprising amount of alignment in responses on who engages in deliverables and who is involved in buying decisions. Certainly, the vast majority of all Supplier segments report that the Insights organization is their key stakeholder group, but a few differences are worth noting.

Suppliers who want to win and retain business should understand that their customers are not just those who commission the research, but are also the internal stakeholders who utilize the deliverables as well

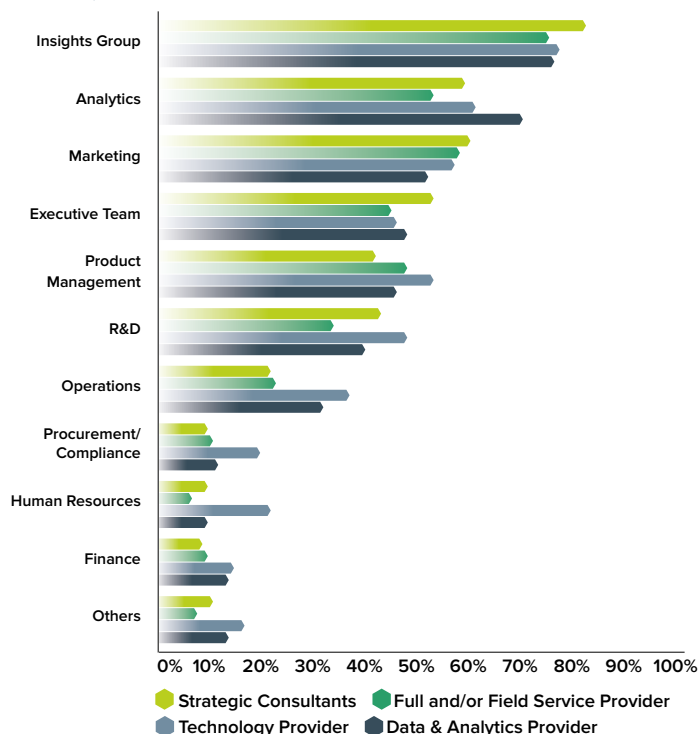


Technology Providers report much higher levels of engagement with their key deliverables (presumably their solutions and/or reporting) with "Operational Groups" such as R&D, Procurement/Compliance and Finance which is likely due to a diverse group of end users of their offerings.

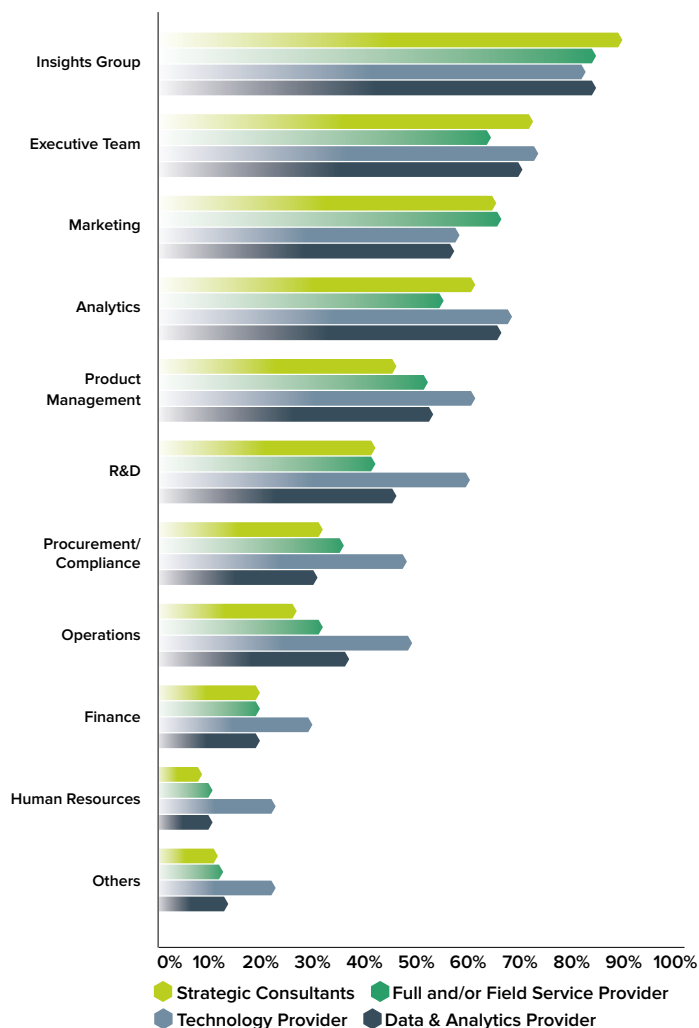
ROLE IN SELECTING METHODOLOGIES/PARTNERS (BUYERS)



WHO ACTIVELY ENGAGES WITH INSIGHTS DELIVERABLES (SUPPLIERS)



ROLE IN SELECTING METHODOLOGIES/PARTNERS (SUPPLIERS)



In terms of what groups Suppliers know to be involved in purchasing or methodological decisions, again it dovetails nicely with what Buyers reported, and differences across Supplier types make sense based on their offerings. Data & Analytics providers report more influence from Analytics organizations, while “Operational Groups” tend to have more influence over Technology provider selection.

THE BIG PICTURE

Our key takeaway here from the Supplier perspective is that while certainly the insights organization leads the way in decision making, other groups play a role in the selection process and may be entry-points for Suppliers who have specialized offerings focused on areas such as VoC, DIY or analytics solutions



Our key takeaway here from the Supplier perspective is that while certainly the insights organization leads the way in decision making, other groups play a role in the selection process and may be entry-points for Suppliers who have specialized offerings focused on areas such as VoC, DIY or analytics solutions. It is also likely that R&D and Marketing organizations are potentially worthwhile relationships to cultivate.

From a Buyer standpoint, their world is complex with multiple stakeholders involved in the insights process from start to finish. This reiterates our earlier point that Buyers are juggling multiple priorities across their enterprise and are looking for partners that can help them deliver with excellence that addresses the needs of all involved.



THERE ARE MORE COLLABORATORS WITHIN THE MARKET RESEARCH SPACE THAN EVER BEFORE – HERE’S WHY

Nick Langeveld

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Market research has always been an important business function, and it is going through a complete transformation, **again**. Over the last few years, interest in research has been renewed as businesses realize they can’t afford to make the wrong decisions, and they can now access insights more efficiently – company wide.

To understate things, 2020 has been a whirlwind. Given dramatic and ever-changing consumer behaviors, market researchers find themselves more pressed for time and more involved in added critical decision-making than ever before. Entire industries have pivoted on a dime, adjusting swiftly in light of COVID-19. As a result, researchers have been called on to test messages in nearly real-time (over time) and validate new business ideas, distribution concepts and more. In short, we’re doing more than adapting. We’re helping to chart the course for our organizations, presenting to our executive teams more often, and in the process collaborating with new stakeholders along the way.

The good news? We are ready for this heightened responsibility. We’ve already adapted, using smart automated insights solutions that empower us to collaborate with key stakeholders, who ultimately rely on output quality, so we can spend our time answering critical questions. Automated technologies have made market research more accessible and easier to deploy, allowing teams to perform 25% more work with 25% less staff and infrastructure. As businesses face pressure to increase or defend their market share by intelligently unlocking consumer insights, the role of market research is even more integral to business.

Workflow efficiency and information sharing provide efficiencies

Platform-based consumer insights approaches enable teams to work together seamlessly, collaborate, and build upon each other’s knowledge base. Companies can share surveys and reports through the same platform to ensure quality, consistency and accessibility of insights.

Collaboration is crucial as research becomes cross-functional

The rise of market research’s accessibility and perceived value has driven a corresponding uptick in company collaboration and a

renewed interest in the role of research – and researchers. What’s more, today’s market researchers are leading global automation initiatives and understand that to ensure these initiatives are successful they must be able to share best practices and collaborate with other stakeholders. Those stakeholders include other researchers and Chief Data Officers, who fuse claimed data with behavioral data, customer experience (CX) data and survey data. This type of collaboration means better decision-making, marketing outcomes, customer service, and monetization.

More access to data (and thinking) than ever

Market research has evolved into part of a richer, broader business story and strategy. From customer data to social media and other qualitative data, insights can tell a deeper story when coupled with additional information. As researchers, we’re now working with new teams –within the marketing team to data scientists and more. Businesses extract more value from their research initiatives, intelligently power decision-making and identify new opportunities.

Quality, and scalability provide opportunity

As platforms have evolved, they’ve empowered researchers to provide trusted resources to marketers, executives and other stakeholders to easily conduct and access high-quality research and instill confidence that their next business decisions are based on tangible data. With market research gatekeeping eliminated, more employees can access insights that drive real business outcomes, not merely validate preconceived opinions.

As market research continues to evolve, it represents a unique opportunity for research and researchers to play a pivotal role in the business and help accelerate change. Today’s consumers are increasingly complex, and only through data can we truly understand them and their requirements. With new easily accessible and real-time platform-based research offerings, researchers can collaborate across their organizations to help drive the customer engagement lifecycle, contribute to critical business transformation and ensure the most informed decision-making.

ORGANIZATIONAL SUCCESS FACTORS

What drives success in the insights world and how we measure up to our own expectations is critical for both business and professional growth. This is where KPIs are defined.

In keeping with our goal of understanding the changing structure of the insights and analytics industry, we asked a series of questions related to aspects of organizational success. We have asked these questions previously as potential inputs into models, but they serve equally well to elucidate marketplace changes occurring.

PARTNER USE

Most Buyers within each function work with each of the five Supplier types at least occasionally, and traditional research Suppliers are not the clear “go-to” Supplier for regular work within any functional group



We asked Buyers how frequently they work with the five Supplier types from our big bucket category structure for projects: Data & Analytics, Technology, Full and/or Field Service, Qualitative, and Strategic Consultancies. Traditional research Suppliers (Full/Field Service and Qualitative) are ubiquitous; at least 79% of Buyers in each functional group work with them at least occasionally. However, *most* Buyers within *each* function work with *each* of the five Supplier types at least occasionally, and traditional research Suppliers are *not* the clear “go-to” Supplier for regular work within *any* functional group.

Most Buyer functions are engaged with several types of Suppliers at one time or another. On average, each works with *at least four* of the five Supplier types regularly or occasionally, except for In-house Researchers, who work with only 3.5 types, on average. Although most In-house Researchers work with Strategic Consultancies and Data & Analytics and Technology providers, they are less likely to work with them compared to the other functions. In contrast, at least 80% of Strategic Insights Consultants work with each type of Supplier, a result of their higher likelihood to work with Strategic Consultancies.

SUPPLIER TYPES WORK WITH AT LEAST OCCASIONALLY (BUYERS)

	Strategic Insights Consultants	Voice of the Customer	In-house Researcher	Outsourcing Department or Data Analysts	Hybrid of Functions
Data & Analytics providers	96%	91%	64%	100%	89%
Technology providers	89%	75%	70%	88%	84%
Full and/or Field Service agencies	90%	83%	82%	81%	82%
Qualitative researchers	90%	91%	82%	88%	79%
Strategic Consultancies	80%	74%	52%	75%	71%
Average Number of Types	4.5	4.1	3.5	4.3	4.1
Sorted by “Hybrid”					

If we look only at *regular* instead of occasional work, the profile of each functional group becomes more distinct, although some of the tendencies we just discussed carry over. Strategic Insights Consultants have the broadest portfolio of Supplier partners, In-house Researchers have the narrowest, and other

functions are skewed toward the broad portfolio end of the spectrum. Collaboration with Strategic Consultancies is even less pronounced among In-House Researchers when regular interaction is considered.

WHO SUPPLIER TYPES WORK WITH REGULARLY (BUYERS)

	Strategic Insights Consultants	Voice of the Customer	In-house Researcher	Outsourcing Department or Data Analysts	Hybrid of Functions
Data & analytics providers	53%	57%	30%	75%	49%
Technology providers	46%	41%	30%	56%	44%
Full and/or field service agencies	60%	54%	36%	56%	43%
Qualitative researchers	57%	49%	27%	25%	44%
Strategic consultancies	44%	39%	12%	31%	29%
Average Number of Types	2.6	2.4	1.4	2.4	2.1
Sorted by "Hybrid"					

The other Buyer functional groups also have distinctive collaboration patterns:

- Strategic Insights Consultants are the only group in which most Buyers regularly work with traditional research Suppliers and Data & Analytics specialists. Their pattern suggests that their work focuses on integrating information that has been collected and analyzed in a variety of ways.
- VoC follows the priorities of Strategic Insights Consultants, but fewer work regularly with Qualitative researchers and Strategic Consultancies. Possibly, these are services they perform themselves.
- Outsourcing Departments and Data Analysts (grouped together due to sample size constraints) frequently work with Data & Analytics providers, and most also work regularly with Technology and Full/Field Service Suppliers.

- The largest group, "hybrid functions," spreads the work across all Supplier types except Strategic Consultancies. "Hybrids" seems to be a collection of different kinds of departments which may not have distinct Supplier collaboration patterns or else has pockets of similar patterns that wash out when aggregated.

It is significant to note that most Buyers within Strategic Insights Consultants, VoC, and Outsourcing Departments/Data Analysts work regularly with Data & Analytics providers. It possibly speaks to the growing focus on advanced analytics across the enterprise and Buyers' need to engage with partners who offer a set of capabilities beyond those of more traditional players. Previous sections in this report support this hypothesis; we have seen evidence of the consideration set of Suppliers expanding, as well as the participation of stakeholder groups beyond the insights function in the selection of Suppliers and methods. We've seen no noticeable differences in these findings across geographies or organization size/sector.

It is significant to note that most Buyers within Strategic Insights Consultants, VoC, and Outsourcing Departments/Data Analysts work regularly with Data & Analytics providers



Interestingly, regular work with Strategic Consultancies is the rarest among Supplier types within each Buyer function, save Outsourcing Departments/Data Analysts where it is next to last, just ahead of Qualitative researchers. This could be indicative of growing reliance on tools and partners that deliver actionable analytics, or perhaps these Suppliers are “moving upstream,” working outside of the traditional insights space, as hinted at in the preceding section on stakeholder engagement. It

could also be that many Buyers consider Strategic Consultancies to be more expensive, resource-demanding, or more appropriate for the occasional standalone project that has strategic implications than they are for ongoing work.

As the marketplace continues to evolve, we will continue to follow these trends so we can understand the dynamic between Buyer selection criteria, Supplier positioning, and business needs.

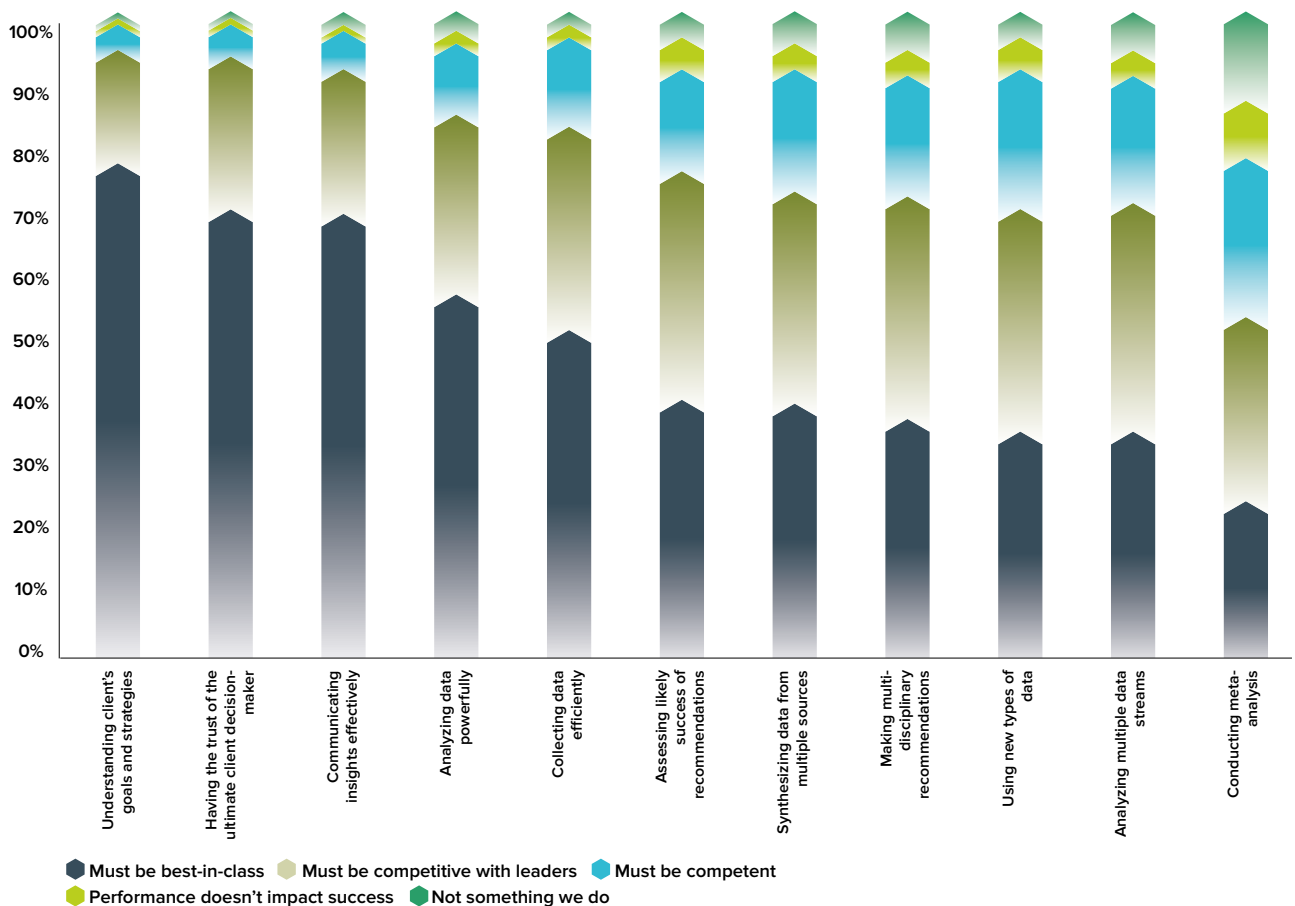
CRITICAL PRIORITIES

We also wanted to understand how Suppliers prioritize a variety of initiatives within their organization’s strategic plan. Identifying the areas in which insights Suppliers feel they need to excel and differentiate when meeting the needs of the marketplace and driving change within their

organizations reveals the extent to which Suppliers are tuned into the other trends we discuss in GRIT.

First, we asked Suppliers “How critical are each of these skills or initiatives to your company’s success?”

HOW CRITICAL TO YOUR 2020 SUCCESS? (SUPPLIERS)



Five factors rose to the top for the majority of Suppliers as “must be best-in-class”: understanding client’s goals and strategies (77%), having trust of the end-client (69%), communicating insights effectively (69%), analyzing data powerfully (55%) and collecting data efficiently (50%). All of these were up significantly from 2019 both in terms of percentages and in breadth of priorities. However, all factors other than “conducting meta-analysis” (23%) were claimed as “must be best in class” by over one-third of Suppliers.

To better understand how Suppliers intend to differentiate from the pack, we looked at how frequently the bar is set to “must be competitive with leaders” or “best in class,” then “best in class” by itself by Supplier type.

As with the aggregate Supplier perspective, we see that “conducting meta-analysis” is at the bottom of the list within each Supplier type. We also see across types, the top four initiatives across all suppliers are among the top strategies within each type: for “understanding client’s goals and strategies,” “having the trust of the ultimate client decision-

maker,” “communicating insights effectively” and “analyzing data powerfully,” at least 80% of Suppliers of each type plan to be at least competitive with leaders. Despite these similarities, differences by segment definitely come to the fore in other areas.

After the first four, type-specific tendencies begin to emerge. Full/Field Service skew more towards “collecting data efficiently” while Strategic Consultancies place less emphasis on it, and the reverse is true for the sixth initiative, “assessing likely success of recommendations.” As we look further down the list to the less frequently named strategies, compared to other types Strategic Consultancies tend to place the most emphasis each. Full/Field Service tend to lag the others when multiple data types or disciplines are involved, whereas Technology and Data & Analytics providers seem to emphasize multiple data streams and new data types. Data & Analytics providers tend to emphasize multi-disciplinary recommendations more than Technology providers do, and this is one of their main points of divergence.

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HOW CRITICAL TO 2020 SUCCESS? “BEST IN CLASS” OR “MUST BE COMPETITIVE WITH LEADERS” RESPONSES (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Strategic Consultancy	Full/Field Service Provider	Technology Provider	Data & Analytics Provider
Understanding client’s goals and strategies	97%	94%	92%	94%
Having the trust of the ultimate client decision-maker	96%	92%	88%	94%
Communicating insights effectively	96%	92%	84%	90%
Analyzing data powerfully	83%	81%	81%	88%
Collecting data efficiently	76%	78%	86%	81%
Assessing likely success of recommendations	80%	74%	68%	72%
Synthesizing data from multiple sources	76%	64%	65%	72%
Making multi-disciplinary recommendations	79%	67%	56%	66%
Using new types of data	67%	63%	70%	69%
Analyzing multiple data streams	34%	26%	35%	39%
Conducting meta-analysis	22%	17%	24%	24%
Average number of “differentiating” initiatives	8.1	7.5	7.5	7.9

Full/Field Service and Technology providers tend to choose fewer initiatives, on average, than Strategic Consultancies and Data & Analytics providers, and that could mean they are succeeding by focusing on a few core areas of excellence which may revolve around more focused sets of skills, such as research project management, data collection and processing (Full/Field) or particular kind of platform (Technology)



To be clear, when we use terms such as “lag” and point out that fewer Suppliers of a type emphasize a particular initiative, we do not mean to imply that those Suppliers are unmotivated or failing in some way. In fact, when we look to the Business Outlook section, we’ll see that the percentage of Suppliers whose revenue increased is so high that it is impossible to say that these variations in strategic priorities track with greater or lesser success, at least when analyzed at this level.

Rather, the variations in frequency of emphasis likely indicate diversity within Supplier types. For example, there are four initiatives that are pretty much universally emphasized across types (selected by at least 80% of Suppliers); despite being tagged as potential differentiators, these are likely table stakes. As the percentages drop – but do not approach 0% – it likely means that different Suppliers are carving out different value propositions. Full/Field Service and Technology providers tend to choose fewer initiatives, on average, than Strategic Consultancies and Data & Analytics providers, and that could mean they are succeeding by focusing on a few core areas of excellence which may revolve around more focused sets of skills, such as research project management, data collection and processing (Full/Field) or a particular kind of platform (Technology).

By contrast, Strategic Consultancies appear to focus on delivering business value via analysis of data and application of perspectives from multiple areas (though, clearly, this is not the only business model for them). This represents a more complex offering that requires multiple areas of excellence. Data & Analytics providers, on average, cite nearly as many initiatives as Strategic Consultancies, although there do not seem to be specific initiatives that directly account for the difference. As we suggested in the most recent GRIT Insights Practice Report, Data & Analytics providers may be searching for how to build a more complete offering in order to compete more effectively with firms who are adding data capabilities; at this point in time, there may not be a strong consensus as to what that looks like.

If we refine our focus to look at only initiatives tagged with the goal of being “best in class,” we see more differences emerge across types. As one would expect from companies focused on consulting, “understanding client’s goals” (85%) is the highest priority for Strategic Consultancies. This is also the highest priority for every other segment as well, but it’s especially high for Strategic Consultancies.

HOW CRITICAL TO 2020 SUCCESS? “BEST IN CLASS” RESPONSES (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Strategic Consultancy	Full/Field Service Provider	Technology Provider	Data & Analytics Provider
Understanding client’s goals and strategies	85%	72%	69%	69%
Having the trust of the ultimate client decision-maker	72%	62%	67%	67%
Communicating insights effectively	78%	66%	52%	63%
Analyzing data powerfully	56%	43%	55%	59%
Collecting data efficiently	40%	44%	64%	50%
Assessing likely success of recommendations	44%	35%	29%	35%
Synthesizing data from multiple sources	40%	29%	37%	44%
Making multi-disciplinary recommendations	46%	32%	22%	30%
Using new types of data	30%	28%	41%	36%
Analyzing multiple data streams	34%	26%	35%	39%
Conducting meta-analysis	22%	17%	24%	24%
Average number of “best in class” initiatives	5.5	4.5	5.0	5.2

Other initiatives that stand out as distinctive “best in class” objectives by Supplier type include:

- Strategic Consultancies, who average 5.5 “best in class” aspirations, stand out for “communicating insights effectively” and “making multi-disciplinary recommendations”
- Full and/or Field Service providers have the fewest aspirations, on average, and stand out for having less commitment to data analysis-related initiatives (such as “analyzing data powerfully” and “synthesizing data from multiple sources”)
- Technology providers stand out for “collecting data efficiently” and “using new types of data”
- Data & Analytics providers do not stand apart from other Supplier types on any particular initiative

As we can see, Suppliers are deliberate in how they choose areas of focus, but are they executing on those? Answering this would require an entirely separate report, but here is some food for thought:

- Those who say that *understanding the client’s goals and strategies* needs to be best-in-class are more likely to:

- Regularly interact with senior stakeholders.
- Be involved in strategic planning sessions at the corporate and business unit levels.
- Those who say that *assessing the likely success of recommendations* needs to be best-in-class are more likely to measure the ROI impact of their projects.
- Those who say that *synthesizing data from multiple sources* needs to be best-in-class are more likely to use multiple data sources instead of a single study to address business issues.

At this level of analysis, we have demonstrated only that some people answer questions consistently even when taking a longer survey. However, in each of these cases, the Suppliers were significantly more likely to report revenue increases than Suppliers who did not prioritize these initiatives. Again, we are not positioning this discussion as proof that Suppliers are “walking the walk” instead of just “talking the talk,” but it’s at least an anecdotal bit of evidence.

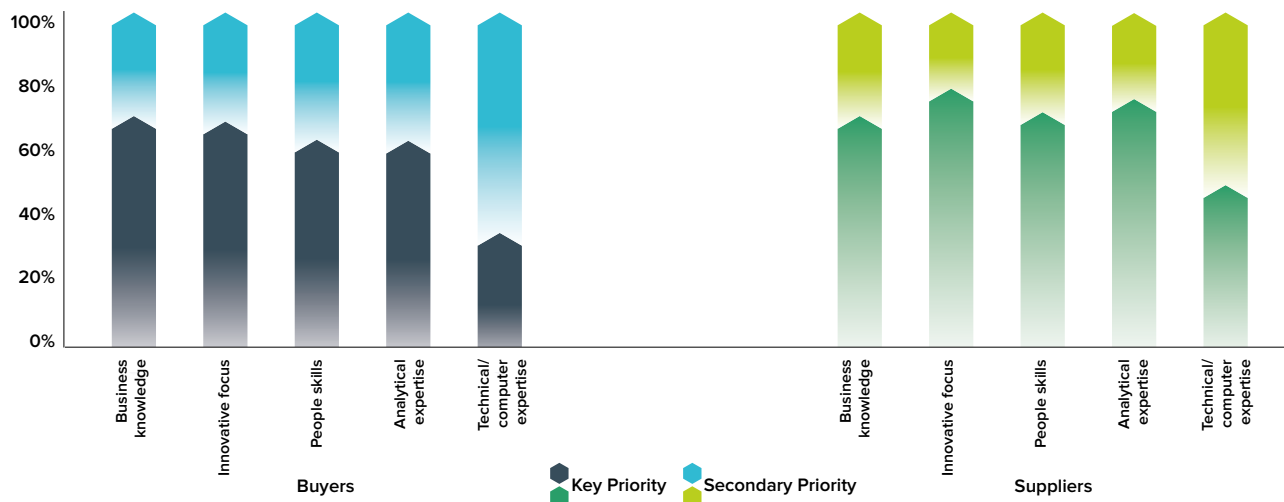
However, in each of these cases, the Suppliers were significantly more likely to report revenue increases than Suppliers who did not prioritize these initiatives



SKILL DEVELOPMENT PRIORITIES

Next, we asked both Suppliers and Buyers to prioritize skills needed within their organizations in support of their critical success factors.

SKILL DEVELOPMENT EMPHASIS: BUYER VS. SUPPLIER



In a crowded and changing marketplace, innovation is a path to differentiation, while Buyer demands for analytical prowess is table stakes



What is striking is that both Buyers and Suppliers equally indicate that *business knowledge* (68% for both) is a high priority skill their organization needs and *technical/computer expertise* is the lowest (28% for Buyers and 42% Suppliers). Unlike Buyers, Suppliers prize *innovative focus* as the single highest priority at 76%, followed by *analytical expertise* at 70%. Both these findings are in alignment with a common theme found throughout this wave of GRIT; in a crowded and changing marketplace, innovation is a path to differentiation, while Buyer demands for analytical prowess is table stakes.

Even though Suppliers as a group equal Buyers in their emphasis on *business knowledge*, this can vary greatly by type of Supplier. Looking

at how each skill ranks in terms of how often it is considered a “key priority” within Supplier types, we see different priorities:

- Among Strategic Consultancies, more than 75% name *analytical expertise*, *innovative focus*, and *business knowledge* as key priorities.
- For Full/Field Service, *business knowledge* and *people skills* are slightly ahead of *innovative focus* and *analytical expertise*.
- For Technology providers, *innovative focus* is the clear priority, and *technical/computer skills* are cited more frequently than for other Supplier types.
- Among Data & Analytics providers, *analytical expertise* is a clear priority.

SKILL DEVELOPMENT EMPHASIS (SUPPLIERS INVOLVED IN STRATEGIC DECISIONS)

	Strategic Consultancy	Full / Field Service	Technology	Data & Analytics	Strategic Consultancy	Full / Field Service	Technology	Data & Analytics
Business knowledge	76%	71%	64%	62%	3	1	4	3
Innovative focus	78%	66%	89%	66%	1	4	1	2
People skills	69%	70%	70%	61%	4	2	2	4
Analytical expertise	78%	67%	52%	76%	1	3	5	1
Technical/computer expertise	39%	33%	66%	34%	5	5	3	5

Perhaps the most noteworthy finding, however, is that within each Supplier type, most cite *business knowledge*, *people skills*, *innovative focus*, and

analytical expertise as key priorities. Regardless of service focus, most Suppliers seem to recognize the need to balance soft skills with hard science.

THE BIG PICTURE

Delivering efficiencies is vitally important, but so is being deeply collaborative and engaged to understand the needs of the client stakeholders and ensure that the project delivers to meet (or exceed) those needs



Buyers prefer to use Supplier partners for most of their needs but the bar is being raised on what it takes to be considered successful, and new competitors are emerging to fight for market share based on Buyer demands. Delivering efficiencies is vitally important, but so is being deeply collaborative and engaged to understand the needs of the client stakeholders and ensure that the project delivers to meet (or exceed) those needs. A variety of new skills and priorities are being implemented to support this imperative.

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



MARKET INSIGHTS PLATFORMS PAVE THE WAY FOR SKILLS DEVELOPMENT AND ORGANIZATIONAL SUCCESS

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It's heartening to read that insights leaders recognize the need to build great research teams using commercial, intellectual and empathetic prowess. It's also not surprising that GRIT 2020 respondents view technology as simply a means to an end. That echoes what we've been hearing from some of the world's most insights-driven businesses.

Companies own significant knowledge assets – our clients boast multi-million-dollar insights investments – so “knowing what they know” is the foundation for success. Once organizations know what they know, they can focus on innovation to fill in the gaps. Empathetic people skills are essential to drive innovative ideas home, by understanding the target audience to craft a story that resonates with them. All the while, analytical expertise is key to identify and synthesize relevant insights from multiple sources.

Business knowledge to navigate the landscape

Buyers value business knowledge skills above all else, but leveraging an entire knowledge asset to deliver results requires an insights framework to organize and navigate the landscape (categories, drivers, segmentations, etc.) and understand how it evolves over time. From an efficiency perspective, it's all about “knowing what you know.” Market insights platforms present and grow this knowledge to continually enrich your understanding of people and markets.

Innovation focus on knowledge gaps

The focus on innovation closely follows business knowledge. When you know what you **don't** know, you can explore the gaps and white spaces where opportunities lie. Thought leaders argue that market insights platforms help them to democratize curiosity, by equipping people to ask and answer questions within the knowledge asset to identify signals for old, new and adaptive behavior. The hypotheses that evolve from this combination of curiosity and knowledge propels further discovery.

People skills to empathize with your stakeholders

Insights leaders with the biggest impact know that understanding internal stakeholders' needs is just as important as understanding their customers. After all, we may think we make decisions based on logic – but our emotions play a huge role in what we remember and how we act. While a visual story will land much better with a brand creative and a strategist will most likely hunger for data, memorable stories trigger emotions for both groups. Designing stories for clearly defined audiences is more important than ever for remote teams, which is why popular insights platforms also offer targeted channels to guarantee delivery to your audience.

Analytical expertise to connect the dots

With the massive amounts of consumer and market data at their fingertips, decision makers need holistic guidance. Delivering an insight from a single study, based on expertise in one methodology, is no longer enough. Analytical expertise is needed to mash together, for example, insights from the latest piece of custom research alongside related social media verbatims and relevant performance indicators. This is why firms are investing in market insights platforms that help teams connect the dots from multiple sources in one cohesive story.

Technology behind the scenes

It's no surprise that this GRIT survey finds buyers place little emphasis on technical and computer skills. Why would they? As you'll see in the section “GRIT Top 50 Most Innovative Suppliers,” tech giants and new challengers are overwhelming practitioners with technology they don't need to understand to apply. Market insights platforms connect all these tools and data with Artificial Intelligence, so insight practitioners can focus on the Human Intelligence that's needed to bring insights to life. Insights are then transformed into winning actions so insights teams can do what they do best: focus on business knowledge, innovation, people skills and analytical expertise.

MEETING PROJECT GOALS

We are only as good as our last project, but how Buyers and Suppliers measure that can be different. Aligning to a mutual set of metrics is important to ensure we all know where to focus our efforts to deliver with excellence.

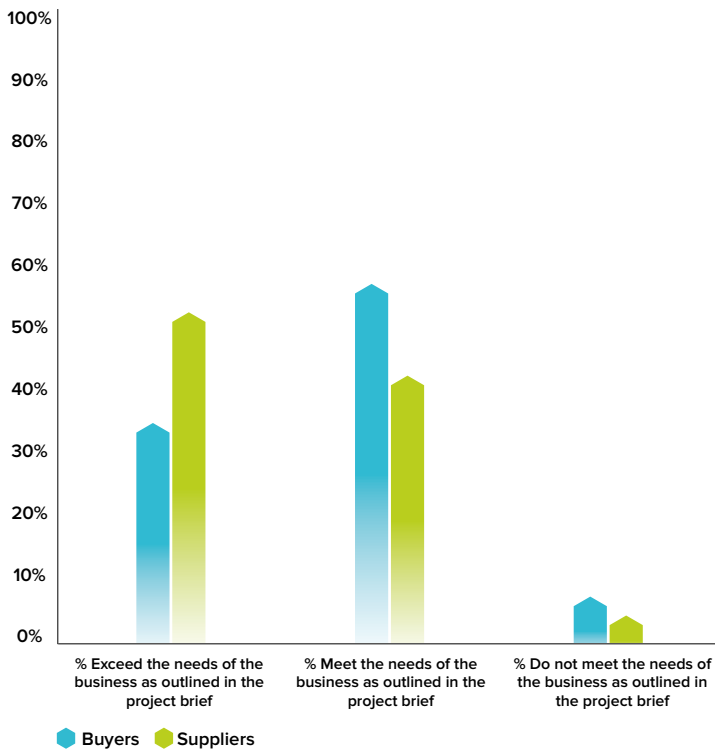
Unsurprisingly, Buyers tend to be more critical of performance; Suppliers are more likely to believe that fewer of their projects fail to meet the needs of the business while more of them exceed the needs, an opinion not necessarily aligned with Buyer experience



For several years we have been gauging how well GRIT respondents think their projects meet the documented needs of the business. The question text reads:

The industry continues to discuss how research can deliver impact, and the project is the primary vehicle for how that can happen. When thinking about all of the projects you work on for your company, and the final deliverables when the project is complete, what percentage of projects that you work on fall into these categories?

PROJECT PERFORMANCE: BUYER VS. SUPPLIER



To answer, respondents enter the percentages of projects that “Exceed the needs of the business as outlined in the project brief,” “Meet the needs of the business as outlined in the project brief,” or “Do not meet the needs of the business as outlined in the project brief.”

Looking by Buyer vs. Supplier, we find the story to be less than inspiring, just as we reported last year.

Perhaps the best way to characterize this performance is “adequate.” There is significant variation within each category (i.e., across Buyers and across Suppliers) regarding the percentages of projects that Exceed, Meet or Do Not Meet the needs of the business, and while it is true that only a small percentage overall fail to meet the needs of the business, on a per project basis, the number is higher than we would have liked or expected. Unsurprisingly, Buyers tend to be more critical of performance; Suppliers are more likely to believe that fewer of their projects fail to meet the needs of the business while more of them exceed the needs, an opinion not necessarily aligned with Buyer experience.

This assessment may seem harsh, but it fits the data and, to a large extent, our real-world conversations with insights professionals and organizations. However, we acknowledge that there may be many reasons why projects fail to meet expectations or to excel beyond the performance of the Supplier. These include:

- Unclear objectives
- Insufficient budget or resource planning
- Poor communication of results
- Failure to implement recommendations or poor implementation
- Projects executed internally without outside Supplier help
- Rote projects that cannot exceed expectations; the best they can do is to meet them

Although we did not delve into the specific causes for their performance, we did ask some additional

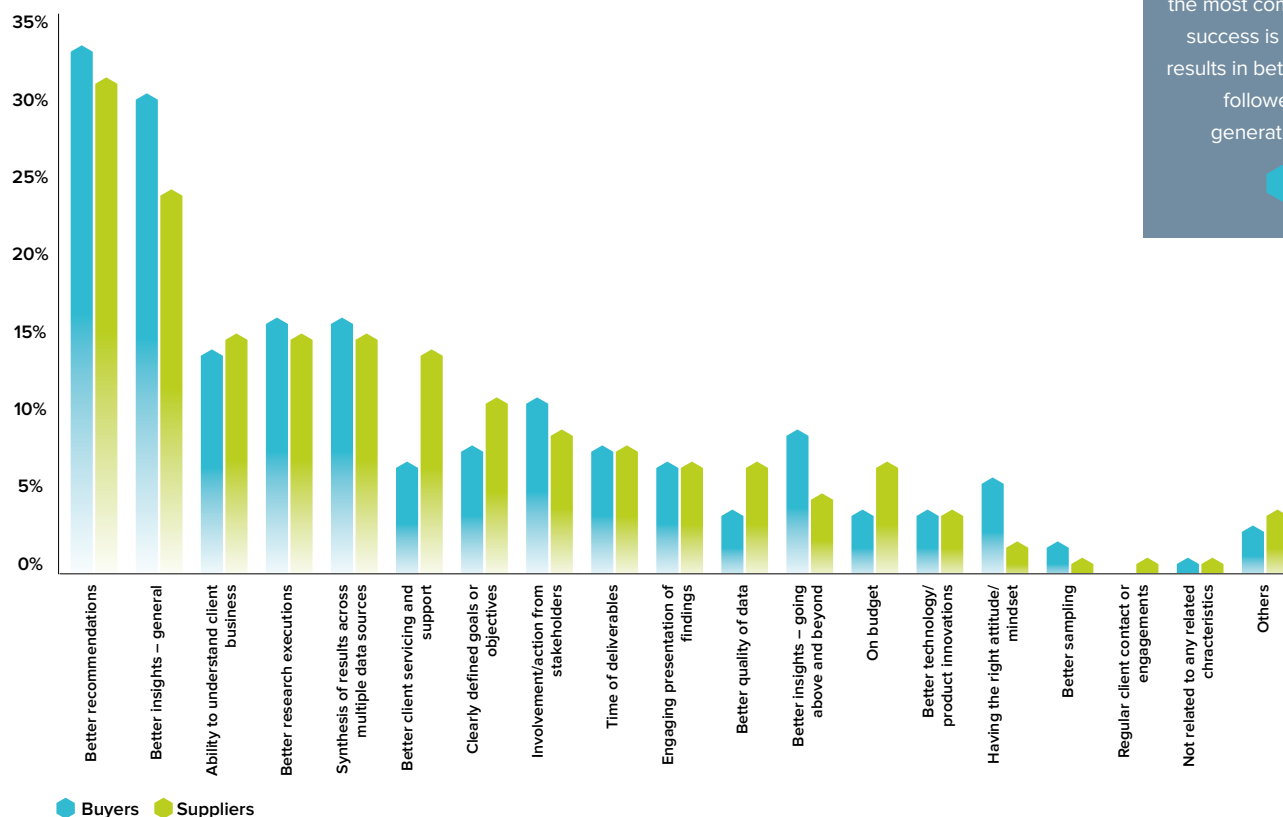
questions that give clear direction on how to help make projects more successful.

MEASURING PROJECT SUCCESS

As we continued to explore organizational success factors, we wanted to understand how respondents evaluate project success. We asked, “What characteristics separate a job that exceeds the

needs of the business from one that does not meet the needs of the business?” This was an open-ended question and we coded responses.

FACTORS THAT DRIVE PROJECT PERFORMANCE: BUYERS VS. SUPPLIER



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



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

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

- A job that exceeds and addresses the business need by identifying very clear and actionable insights for the challenge at hand, and also identifies broader consumer truths that lead to other new ideas.
- Answer their business question and on top provide solutions on how to implement.

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



- *Craft findings summaries and recommendations that display a thorough understanding of the business; or delivering insights that are novel and offer a new way to look at the consumer or category.*
- *Two characteristics drive an exceeding rating: one, resulting in a sales opportunity and two, keeps us from doing something stupid.*
- *It's important for us to link the learnings to the bigger and more strategic needs of the business. Answering the objectives of the research is a MUST but going the extra mile to really link those learnings to longer term business strategy is a great thing for us to do.*

From Suppliers, "better recommendations" include examples such as:

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

Regarding "better insights," Buyers made statements such as:

- *Providing insights that the requester didn't originally think of, providing them with new information they didn't consider, providing results faster than expected with new technology.*

- *Additional learning – an "aha" they weren't expecting or that conflicted with their ongoing hypotheses.*
- *Extra analysis that they were not expecting, connecting the dots with other sources of information.*
- *Delivering unexpected, "wow" insight that moves the business forward more than expected from the original objectives.*
- *Strong practitioners using innovative methodologies sometimes lead to unexpected findings, with implications far beyond the intended goals of the study.*

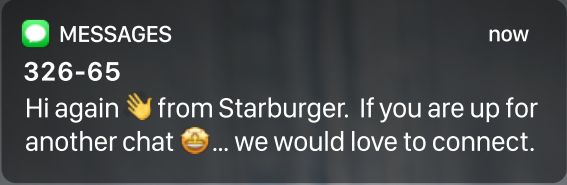
Examples of Supplier statements about "better insights" include:

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

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

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Finally, we asked respondents to rate their average project on how well it meets the needs of the business based on these performance metrics, and yet again, we see a disconnect between Buyers and Suppliers. Buyers take a “room for improvement” position: 70% say projects perform only “somewhat well” relative to their ideal. Most Suppliers (55%) also select that mediocre evaluation, but they also select “very well” 37% of the time versus only 13% for Buyers.

How bad is a rating of “somewhat well” versus “very well”? Buyers and Suppliers who rate their average project as performing “very well” experience

a 62% rate of projects exceeding expectations with only 3% failing to meet them. When the average project is rated as performing “somewhat well,” only 44% of projects exceed expectations, and the percentage of failures doubles to 6%. For lower ratings, 32% of projects exceed expectations while the failure rate doubles again, to 12%.

These evaluations are highly correlated with the perception of whether the organization exceeded, met, or fell short of its overall goals; average project performance and overall performance go hand-in-hand.

PERFORMANCE OF AVERAGE PROJECT AND OVERALL ORGANIZATIONAL PERFORMANCE: BUYER VS. SUPPLIER

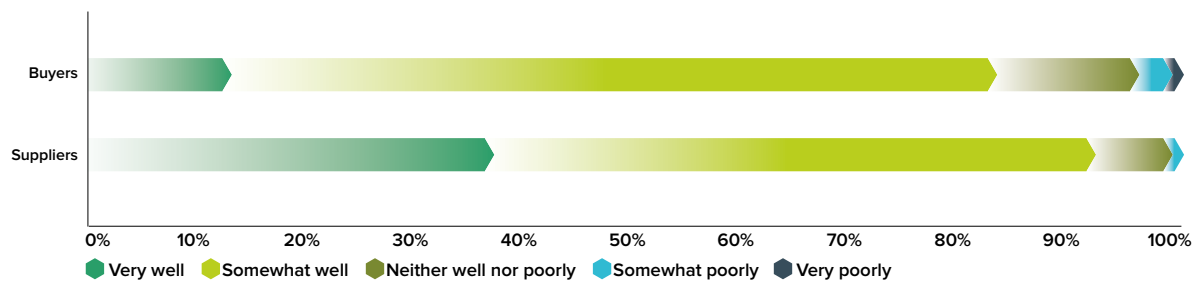
Overall Organizational Performance	Performance of Average Project: Buyers			Performance of Average Project: Suppliers		
	Very Well	Somewhat Well	Neither or Poorly	Very Well	Somewhat Well	Neither or Poorly
Exceeded Expectations	88%	51%	24%	74%	58%	41%
Met Expectations	13%	43%	62%	18%	31%	36%
Fell Short of Expectations	0%	7%	14%	7%	11%	23%

Is the Buyer-Supplier gap additional evidence of lack of clear communications on project expectations or post-mortems, or simply the effect of the differing views by both groups of the projects? We suspect a mix of both, but further exploration will be needed to clarify that. So far, we have not identified a clear relationship between how Buyers evaluate average

project performance and which Supplier types they work with regularly.

What is certain, though, is that the majority of Buyers would likely score their partners with a “needs improvement” vs. “excellent” for most projects.

AVERAGE PROJECT VS. IDEAL PROJECT PERFORMANCE: BUYER VS. SUPPLIER



THE BIG PICTURE

Suppliers generally have a more positive view of project performance versus goals than do Buyers, and it's not entirely clear why their perceptions are so different; are they experiencing the same projects differently or are they experiencing different projects? When it comes to evaluating what makes the difference between a project that exceeds expectations and one that does not, Suppliers and Buyers are pretty well aligned on the criteria, and both prioritize better recommendations and better insights.

As we have seen many times already in this report and will see again from here, Buyers tend to focus on business impact and Suppliers tend to focus on operational execution as the default context when evaluating their own success. This is reasonable based on the roles of each in the value chain. When we look at success at the project level, however, Buyers and Suppliers align on the primary importance of business impact. Yet, while Buyers and Suppliers agree on success criteria, they seem to apply that criteria differently when evaluating project success because they seemingly reach different conclusions. There needs to be alignment on shared KPIs between the key stakeholders, and we know that the real measure of project success is around creating business impact. Luckily, GRIT provides direction on defining that impact in the upcoming benchmarking section.

Yet, while Buyers and Suppliers agree on success criteria, they seem to apply that criteria differently when evaluating project success because they seemingly reach different conclusions





METHODOLOGY AND TECHNOLOGY ADVANCES WORTH CELEBRATING

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For many of us, our professional rhythm and responsibilities require a focus on the mechanics of generating insights. The GRIT report provides an opportunity to better understand the outcomes of what we produce as an industry. And, at a high level, the outcomes are good!

	Exceeds	Meets	Does not Meet	Exceeds or Meets	Exceeds to Fails Ratio
Buyer/Client	35.20%	57.10%	7.80%	92.30%	4.5x
Provider/Supplier	52.60%	42.60%	4.80%	95.20%	11x

When thinking about all the insights projects you work on and their final deliverables, what percentage fall into these categories?

- Exceeds the needs of the business as outlined in the project brief
- Meets the needs of the business as outlined in the project brief
- Does not meet the needs of the business as outlined in the project brief

Aside from the (expected!) score inflation from providers grading their own test, the most interesting trend to note is that the vast majority of projects are either meeting or exceeding the expectations of insights buyers. More importantly, based on their expectations, buyers are 4.5 times more likely to be delighted than disappointed.

So, what about failed projects? Categorizing the project success factors rated by survey participants, we see that the mechanics of generating insights are no longer the primary drivers of success. In fact, key decision makers and influencers define success as the quality of the recommendations coming out of projects (about a third cite this) and the insights provided (about one in six mention that). Other factors, like data quality, clearly defined goals, sample, execution, or even staying on budget, receive mentions only in the single digits.

These findings feel at odds with some industry dialogue and beliefs that quality is getting worse, price is the primary driver in service purchase decisions, and research results can no longer be relied on with confidence. It's also at odds with the frequent industry focus on *mechanics* rather than *outcomes*.

So, while significant challenges remain, it's worth recognizing and celebrating advances in our industry that underlie this high level of satisfaction with research project outcomes. Among them:

- Transforming how we match people with surveys. As demand for more granular data and rarer targets grows, survey start-to-complete ratios have risen. That means we're delivering fresher, happier people into surveys because they're not infuriated by repeated screen-outs and are more willing to keep taking surveys long term.
 - Improved screening experiences and more accurate targeting through AI-driven profiling based open-end question responses.
 - Overcoming barriers to access by making questionnaires mobile-friendly.
 - Offering a much broader set of "fit for purpose" data solutions at different price points.
 - Identifying, addressing and preventing fraud and data quality challenges with the assistance of AI.
 - Matching samples with 3rd party data sources to get rich data without asking questions.
 - Stopping the excessive emailing of survey invitations; instead using predictive modelling to make the match.
 - Giving the people who take surveys more choice and agency in the process and using AI to give them a much improved experience.
- Companies that excel at the mechanics of insights are improving. And having solved many problems of the past, are turning their attention to better definition of niche markets in, for example, the B2B and healthcare spaces.

But there's still much more to do! While we can celebrate progress made, we must devise new ways to help our customers get better insights at the speed of their business. And we still need much more transparency about how we do that. As the data show, this requires more focus on *outcomes* in addition to *mechanics*.

INDUSTRY BENCHMARKING

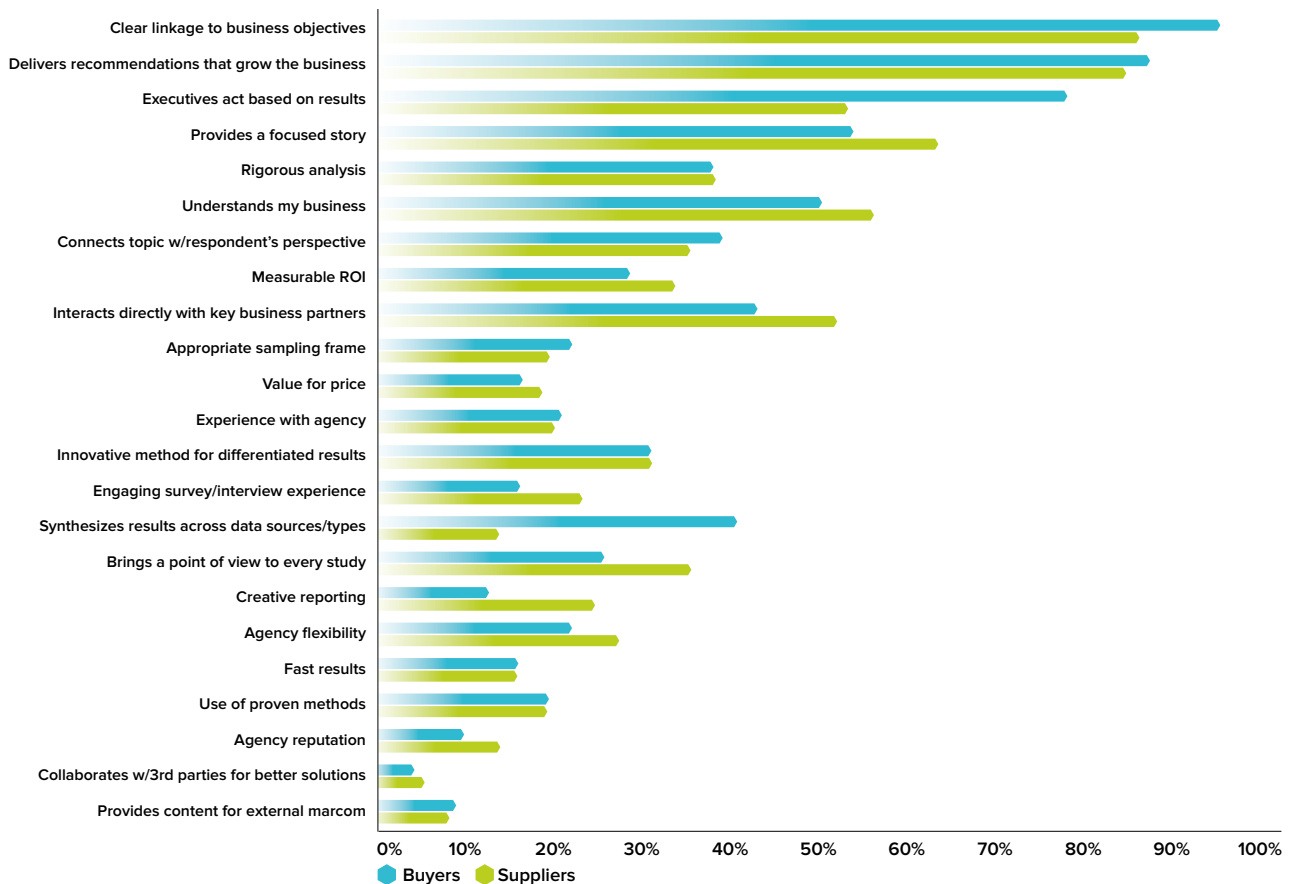
What are the best practices successful insights organizations use and how do our own organizations measure up to them? Benchmarking answers both questions, and here are the measures of that benchmark.

More than a year ago, we began benchmarking how insights Buyers and Suppliers prioritize various aspects of the research efforts they conduct. The learnings from this effort continue to deepen. In this edition of GRIT, we focus on the differences observed across the last two waves of the study as well as a few additional and interesting nuances. First, let's examine where insights Buyers and Suppliers agree

on the **most important priorities** when executing a research project for **maximum** impact. Consensus on this question among insight Buyers and Suppliers continues as was the case in the last wave. These include:

- Clear linkage to business objectives
- Delivers recommendations that help grow the business
- Executives implement action based on the results
- Provides a focused story
- Agency understands my business
- Interacts directly with key business partners to discuss findings

PRIORITIES FOR EXECUTING RESEARCH WITH MAXIMUM IMPACT: BUYER VS. SUPPLIER





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Given the long-term impact from the disruption caused by COVID-19 on our industry, there is no doubt that insight efforts of the highest value will be those that enable executives to drive their business forward despite the current economic calamities.

It is equally important to understand which priorities have the least influence if maximum impact is the goal. The bottom three areas across insight Buyers and Suppliers – and consistent with the last wave of GRIT are:

- Reputation of the agency
- Collaborates with third parties to achieve better solutions
- Provides content for external marketing communication

These are worth a short ponder. Reputation does not buy you much if the results of a study fail to have a positive impact on an executive's ability to make better informed decisions. Specialized boutique firms understand this and leverage this knowledge to win assignments from large agencies. Insights Buyers and clients forge strong partnerships with partner agencies because they demonstrate a consistent pattern of impact, not because of the strength of their brand.

Collaborating with third parties to achieve better solutions does not make a difference on its own. It might be argued this is table stakes – an expectation that a research agency will bring the correct skills to the assignment, be those skills internally provided or externally sourced. Whereas a Buyer may have a strong opinion regarding whether a project can have business impact if it does not “provide a focused story” (4th most important), they do not see a strong correlation between collaborating with third parties and business impact; it can be achieved either way.

In terms of providing content for external marketing, this ranked at the bottom of priorities in this wave as well as last. Perhaps this is driven by a diminished request for this type of work – or perhaps more likely – message testing has become such a highly automated and efficient process that it no longer differentiates itself as an important priority for having impact.

One final noteworthy point is the agreement among Buyers and Suppliers that ‘fast results’ do not rise to the top of as an element of research that drives impact. This is not to say that speed is no longer important. “Better, faster, cheaper” remains an often-uttered phrase. What it does point to is that speed is not a trump card in the absence of impacting business decisions. Agile research techniques have long proven their value, value defined as fast and impactful.

Given the long-term impact from the disruption caused by COVID-19 on our industry, there is no doubt that insight efforts of the highest value will be those that enable executives to drive their business forward despite the current economic calamities



Reputation does not buy you much if the results of a study fails to have a positive impact on an executive's ability to make better informed decisions. Specialized boutique firms understand this and leverage this knowledge to win assignments from large agencies



LESSONS NOT LEARNED

The last wave of analysis concerning priorities for executing research that has maximum impact showed several notable divergences between the priorities among research Suppliers and Buyers. These gaps have only grown, to the detriment of the research Supplier community. Insights Buyers focus much more heavily than does the Supplier community on two essential elements – synthesis of results across multiple data sources/types and having executives implement action based on the results.

The gap is remarkable, and it has grown substantially since the last GRIT wave. The clients and insights Suppliers who are more innovative know that

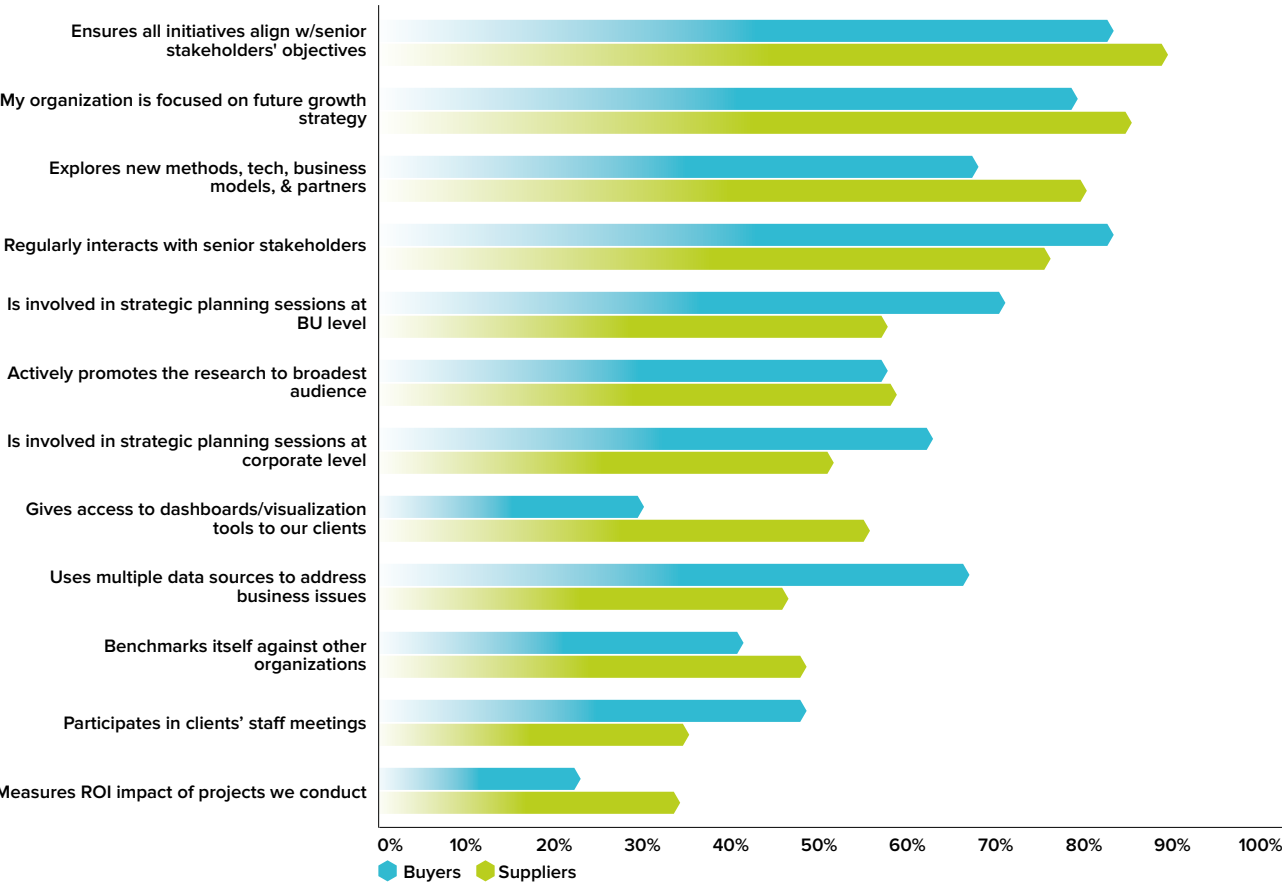
better solutions to business dilemmas can often be identified by merging various sources of information, not a singular survey. The world is complex, sometimes our research inputs need to be as well.

We’ve just seen that Buyers place more importance on synthesizing results across different sources, and the Buyer-Supplier gap is also evident in practice. Using multiple data sources to address business issues is one of the key efforts that is much more characteristic of Buyers than of Suppliers. Each of the others involve attending staff meetings or strategic planning meetings.

The clients and insight Suppliers who are more innovative know that better solutions to business dilemmas can often be identified by merging various sources of information, not a singular survey



FREQUENCY OF PRIORITIZING KEY EFFORTS: BUYER VS. SUPPLIER



DO PRIORITIES LEAD TO OPTIMISM?

How do less optimistic Buyers distinguish themselves? They place a higher priority on methods (both innovative and proven) and agency reputation. Less impact on business decisions yields less optimism



An interesting question. If we look at the differences in the priorities identified for research that will have maximum impact among the insights Buyers, we see those who are more optimistic about the future of the insights role at their company tend to place a greater emphasis than their less optimistic colleagues across four areas:

- Executives implement action based on results
- Providing a focused story
- Having an agency that understands their business
- Interacts directly with key business partners to discuss findings

Optimism is fed by the ability to tell a strong, focused story because they work with an agency partner that understands their business and interacts directly with business partners to discuss the findings. The net result? Executives who implement action based on the results of the research.

How do less optimistic Buyers distinguish themselves? They place a higher priority on methods (both innovative and proven) and agency reputation. Less impact on business decisions yields less optimism.

On the other side of the road, we can explore what separates insights Suppliers who are more optimistic about the future of their company than those who are less optimistic. These individuals place a higher priority on linking the findings they deliver to business objectives, providing recommendations that help grow the business, interacting directly with their client business partners, and bringing innovative methods to the table. As a result, they deliver a focused story that compels executives to implement action based on the results.

Their less optimistic counterparts place a higher priority on providing fast results, value for the price paid and are more heavily focused on the reputation of their agency. Not a winning formula when it is decoupled from impacting their clients' business.

Their less optimistic counterparts place a higher priority on providing fast results, value for the price paid and are more heavily focused on the reputation of their agency. Not a winning formula when it is decoupled from impacting their clients' business



THE BIG PICTURE

Our clients need us to make them more successful. We can and will if we heed the lessons derived from understanding what wins and what does not when it

comes to priorities required to deliver research that impacts business success.



STORY FINDING AND CONWAY'S LAW: RETHINKING SUPPLIER-BUYER COMMUNICATION TECHNOLOGY

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The industry benchmarking data tells us one obvious thing and one surprising thing. The obvious result is that research needs to help executives make decisions. The surprising result is that there's a mismatch between what's important to buyers and what suppliers think buyers want.

Buyers place an even greater weight on the importance of results being linked to objectives and executives acting on these results, as well as on data sources being synthesized. By contrast, suppliers place more weight on storytelling – creative reporting, a point of view, and focus – and on understanding and interacting with the business.

More important to suppliers	More important to buyers
<ul style="list-style-type: none">● Creative reporting (+1.5)● Brings a point of view (+1.3)● Provides a focused story (+1.2)● Interacts key business partners (+1.1)● Understands the business (+0.7)	<ul style="list-style-type: none">● Synthesize data source/types (+3.4)● Executives act on results (+3.4)● Clear link to business objectives (+1.2)

Why is there a mismatch? Why are the buyers placing a greater weight on the outcome of useful research? Why are suppliers more focused on the process of interactions with business partners and storytelling? Isn't it obvious that if a researcher has a strong relationship with the business and is able to craft relevant stories, that the research will be more relevant and thus more useful in helping the business to achieve its objectives? It may feel obvious to a researcher, but it's not obvious that it's the best approach.

Conway's Law says that:

Any organization that designs a system (defined broadly) will produce a design whose structure is a copy of the organization's communication structure.

Let's unpack this. A typical communication structure consists of:
marketer ↔ consumer insights ↔ client service ↔ reporting team ↔ data

The typical system used to produce research involves passing information. A brief is passed from left to right. A PowerPoint is returned. The large gap between the marketer and the data makes it easy for the system to fail. The PowerPoint may not contain the most useful data.

Conway's Law suggests that rather than trying to focus on improving the quality of communication (e.g., better storytelling), we should instead change the communication structure.

One way of doing this has been around since the industry started. Client service reps leave the big agencies and set up small agencies, where the client service team are also the reporting team. This reduces the distance between the marketer and the data. The research has a greater impact. The agency grows. To reduce costs, it decides to specialize the data analysis function, adding a separate reporting team, and the problem returns.

There's another way. Replace the debrief with an interactive workshop. Don't use PowerPoint. Instead use tools that allow the marketer's questions to be answered in real-time, such as Displayr, Tableau, or Dapresy. This is more than just a change in tech. It has the effect of bringing the marketer much closer to data, increasing the chance that the marketer sees helpful data. This also reframes the role of the supplier, from a guru charged with telling stories, to a guide helping clients synthesize data and find their story.

BUSINESS OUTLOOK

Diving deep into the business fundamentals and key drivers of performance across all segments goes beyond macro dynamics and allows business leaders to fine tune their organizations to adapt as needed to succeed. Our industry has multiple forces at work impacting business performance; here is where we uncover them and get direction on what to do to succeed.

It's probably foolish to launch into a business outlook discussion that is largely based on descriptions of the current state of the insights industry and summaries of the past year's performance while everyone is staring out the window at the coronasaurus, wondering if the formerly current state and past year mean anything at all. So, let's move away from the window and focus on the elephant in the room instead.

There's a separate section of this GRIT report that discusses potential implications of the COVID-19 pandemic for the insights industry based on how responses to the GRIT survey changed as the pandemic went from something happening "over there" to something happening "here." To examine that change, we compared surveys completed before March 11 to surveys completed after that date. March 11 is the unofficial date that the pandemic finally defeated the last bastion of denial outside of the Kremlin, the American public. That night, the world learned about Tom Hanks and Rita Wilson, the abrupt suspension of the National Basketball Association season, and America's prohibition on cargo from Europe. Although the prohibition turned out to be an honest misstatement, the resulting stock market crash on March 12 was as real as any since 1987.

To summarize the GRIT COVID-19 findings:

- Optimism regarding the insights *industry* was stable among Buyers and Suppliers throughout the course of the survey, which ended on April 6.
- Among Buyers, optimism about *their insights role* at their company did not change.
- Suppliers, overall, became significantly less optimistic about the futures of *their companies*, but not pessimistic.
- Trends in survey responses across Buyers suggest that budgets may become tighter; among Suppliers that project volumes may decline.
- In particular, smaller Suppliers seem most vulnerable to the fallout from the crisis.
- Reactions and responses are mixed; at least as of April 6, differences are likely driven by a company's overall vulnerability going into the crisis, its comprehension of the situation and identification of potentially effective alternatives, and its capabilities and resources to meet the challenges or even turn them into opportunities.

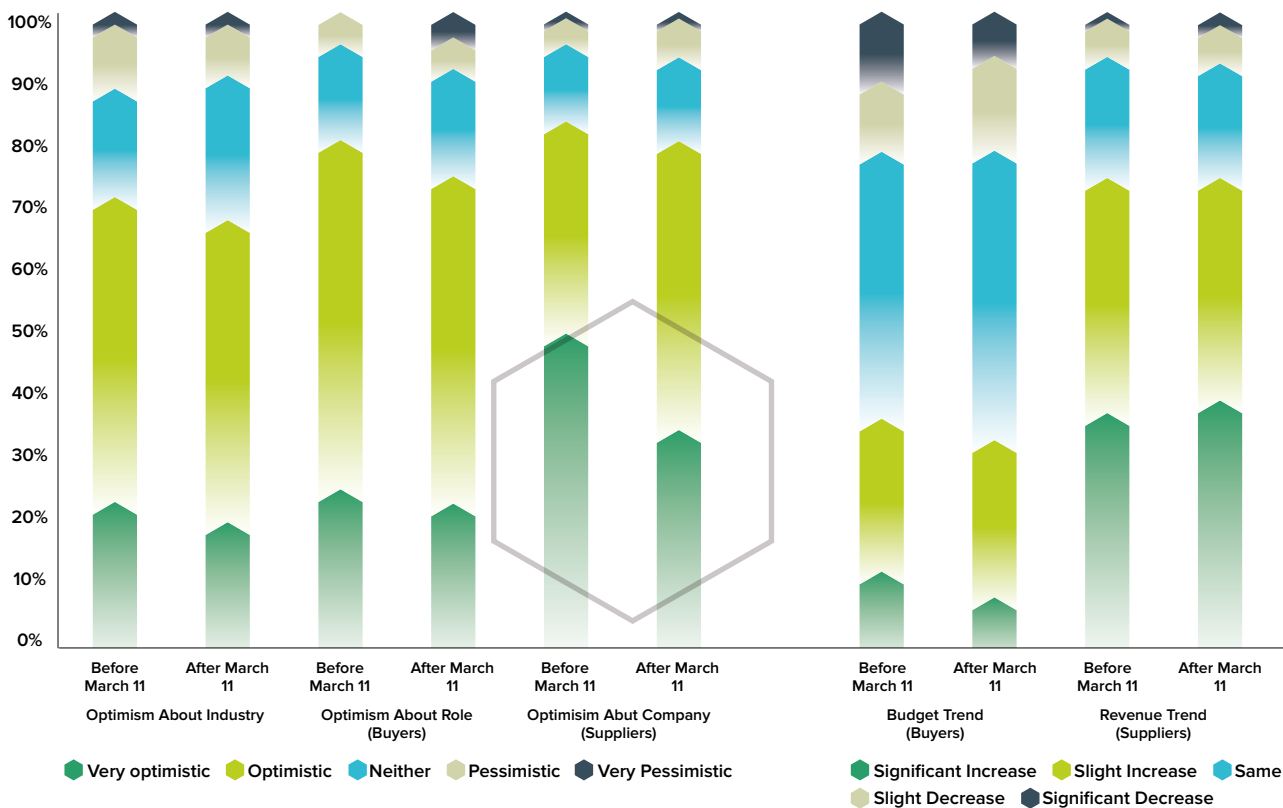
The GRIT survey is a snapshot taken during a period of unimaginably disruptive change, and it is not known how far up or down the curve the insights world was on any given issue at the time.

Within that context, the Business Outlook discussion may have straightforward implications if insights professionals remain optimistic and find ways to translate today's – or February's – approaches into the COVID-19 realities, or the discussion may serve as baseline for how the insights world is structured and its known vulnerabilities and opportunities.

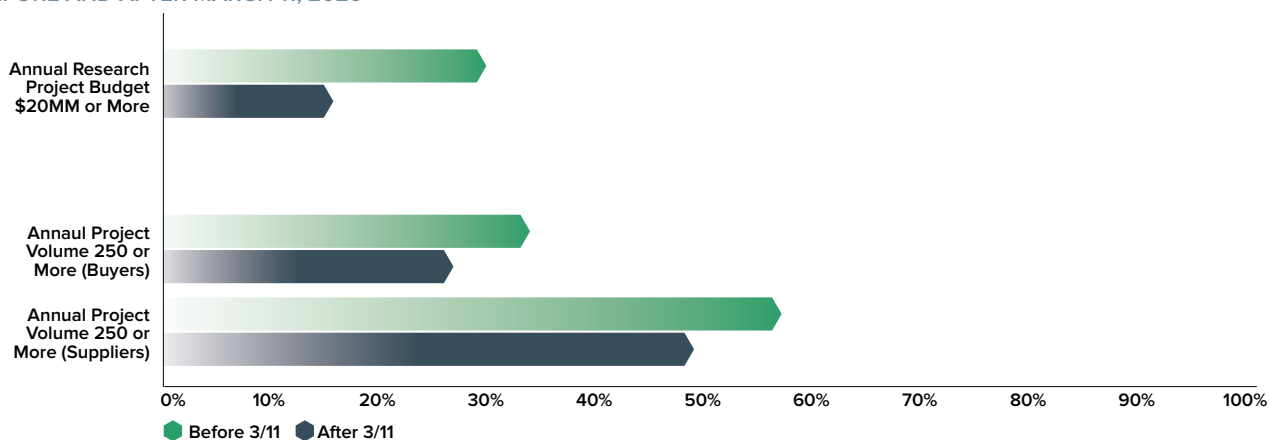
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OPTIMISM, BUDGET & REVENUE TRENDS: COVID-19 EFFECT



STATED ANNUAL RESEARCH PROJECT BUDGETS AND PROJECT VOLUMES BEFORE AND AFTER MARCH 11, 2020



IS (WAS) THE INSIGHTS & ANALYTICS INDUSTRY HEALTHY?

For the first time since late 2018, reports of annual research project budget increases exceeded reports of decreases, though not to the level of 16W2 and earlier



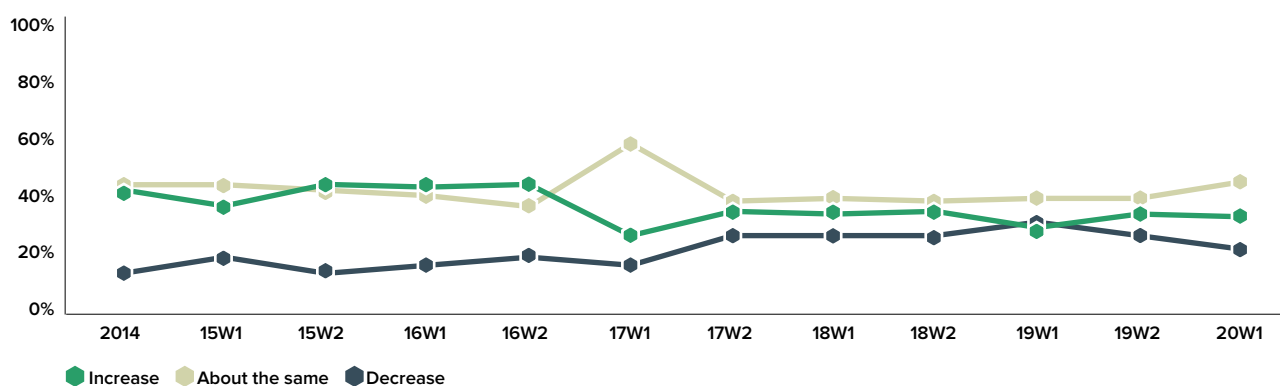
Heading into the COVID-19 era, annual research project budgets seemed healthier than in recent GRIT waves. For the first time since late 2018, reports of annual research project budget increases exceeded reports of decreases, though not to the level of 16W2 and earlier.

The proportion of budget decreases is largest among the highest budget size categories: 31% of respondents with budgets of \$15MM or more reported decreases compared to 24% or fewer in the lower budget categories. We saw a similar pattern in 19W2 when 42% of the \$15MM or more category

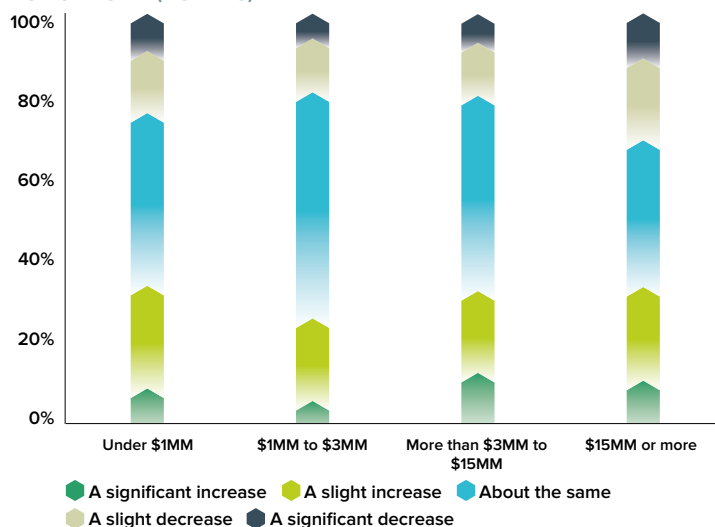
reported decreases compared to just 24% or fewer with budgets under \$3MM. However, the \$3MM to \$15MM category reported more decreases than the under \$3MM category, whereas in 20W1, their proportions are similar.

Further, in 19W2, the proportion of increases was much larger in the lower budget categories than in higher ones, ranging from 24% of the \$15MM or more category to 43% of the under \$3MM group. In 20W1, the proportions now fall into a relatively narrow band of 26% to 34% with no decreasing or increasing pattern from low to high budget amounts.

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



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

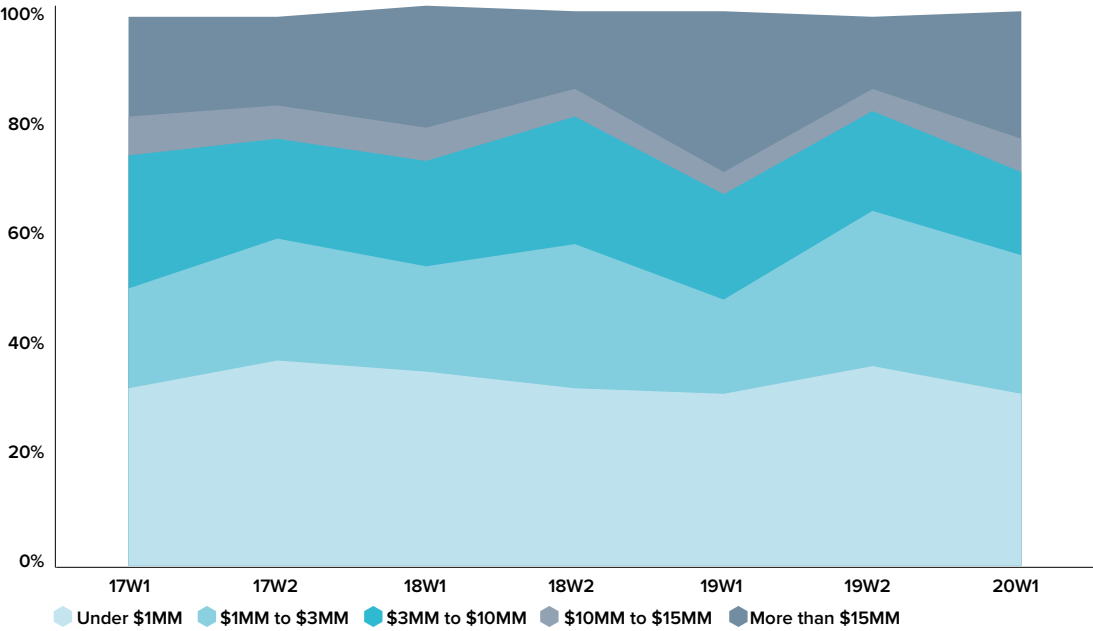


Although the \$15MM or more category has the highest proportion of decreases, the overall proportion of very large budgets may actually be higher than it was when GRIT began tracking it, increasing from 18% in 17W1 to 23% in 20W1. While this development seems positive, it comes with a caveat: we don't know if the total budget for the industry is larger or smaller because GRIT collects information about broad ranges and cannot estimate budget amounts with precision.

Annual Research Project Budget Size Category	Category Size (% of Buyers, Spring GRIT Waves*)				
	Smallest	Largest	Range	Net Change since 17W1	
Under \$1MM	31%	35%	4%	-1%	-1%
\$1MM to \$3MM	17%	25%	8%	7%	7%
More than \$3MM to \$10MM	15%	24%	9%	-9%	-9
More than \$10MM to \$15MM	4%	7%	2%	-1%	4%
More than \$15MM	18%	29%	10%	5%	

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

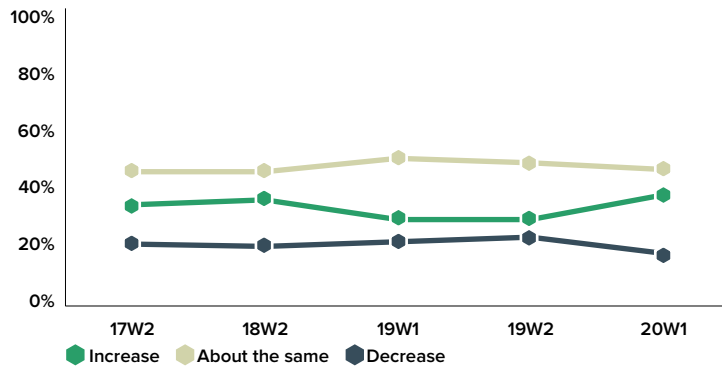
ANNUAL RESEARCH PROJECT BUDGET SIZE BY GRIT WAVE (BUYERS)



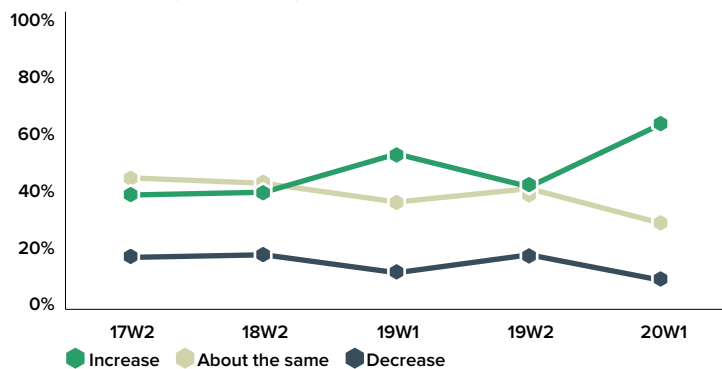
GRIT also asks for trends in the number of FTE positions. As this is not part of the research project budget estimate, increases in FTEs represent incremental investment in the industry beyond project costs. In 20W1, increases in FTEs among Buyers are more than double the decreases, with the highest gap since GRIT began tracking it in 17W2. The most increases (and fewest decreases) occur among Buyer companies with 501 to 2,499 employees. Among the largest Buyers, with 2,500 or more employees,

staff increases outpaced decreases, 35% to 22%. By contrast, in the last GRIT wave, increases and decreases were in a virtual tie in the largest Buyer category, 27% to 26%. The largest proportion of decreases occurs at the largest companies and we must caveat that we don't know the net gain or loss for the industry because we do not know the amount of decrease or increase.

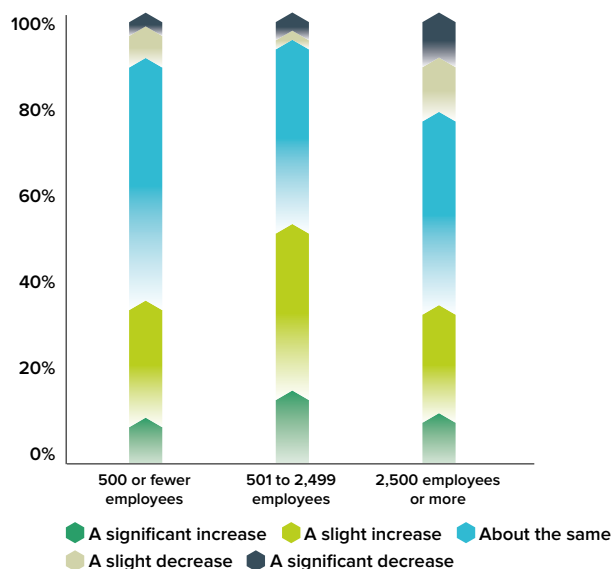
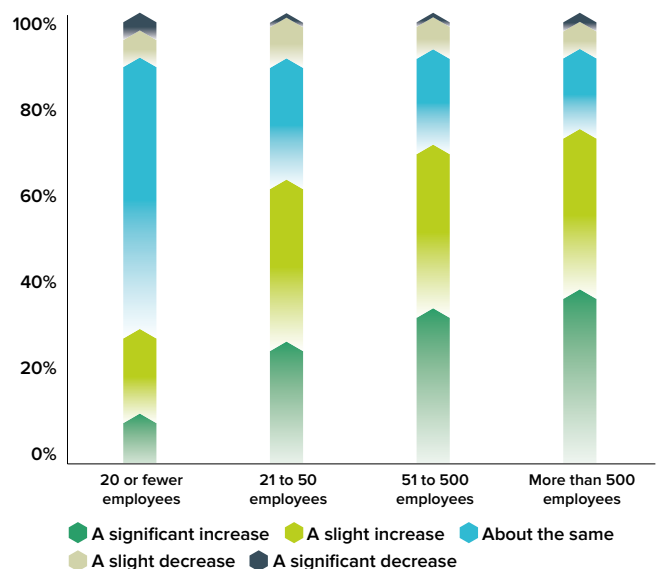
For Suppliers in every GRIT wave (starting in 2017), staff increases outpace decreases by a margin of more than 2 to 1, and in 20W1, the ratio is an unprecedented 8:1

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

For Suppliers in every GRIT wave (starting in 2017), staff increases outpace decreases by a margin of more than 2 to 1, and in 20W1, the ratio is an unprecedented 8:1. In contrast with Buyers, the proportion of increases among Suppliers grows with company size and the proportion of decreases declines slightly. In the last GRIT wave, growth was flat once the company size got above 10 employees, and the largest companies had more decreases than other sizes, so the 20W1 results represent improvement.

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

For Suppliers, we have to caveat that trend information is likely biased toward increases versus decreases because of the direct relationship between revenue performance and survival. When revenue decreases become chronic, companies are likely to close or sell, effectively removing them and their trends from the population. That said, the changes from wave to wave are meaningful.

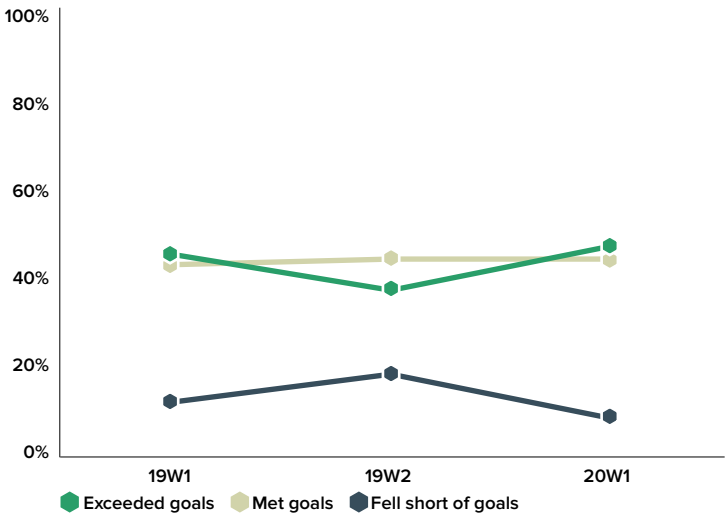
CHANGE IN NUMBER OF FULL-TIME EQUIVALENT
POSITIONS BY EMPLOYEE SIZE (BUYERS)CHANGE IN NUMBER OF FULL-TIME EQUIVALENT
POSITIONS BY EMPLOYEE SIZE (SUPPLIERS)

ARE INSIGHTS ORGANIZATIONS SUCCEEDING?

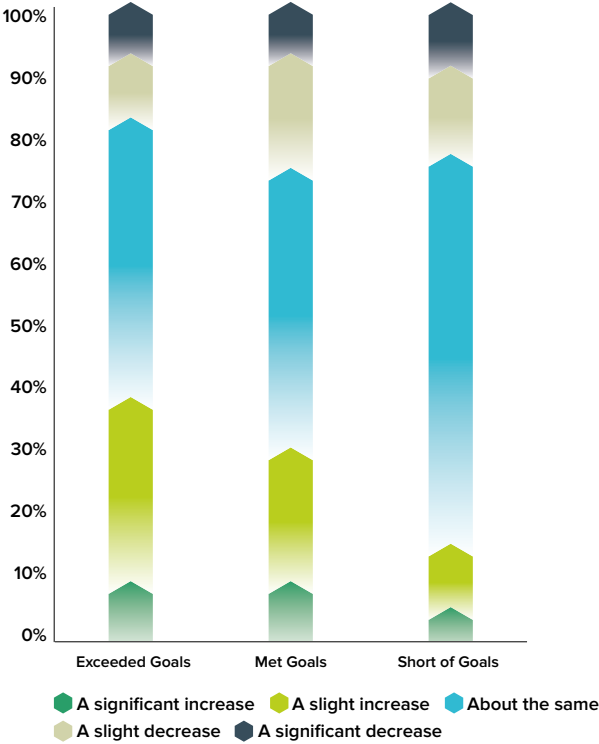
Going into the pandemic, Buyers and Suppliers were meeting or exceeding their goals on par or better than in previous GRIT waves, and spending and revenue trends were healthy. Buyers were exceeding their goals to the same level as 19W1, and a smaller proportion were falling short of them. Budget increases match performance: there are more increases for those who meet goals than for those who fall short, and those who exceed goals enjoy the most increases.

On the other hand, decreases occur in similar proportions whether meeting or falling short of goals; the penalties are equivalent, at least in terms of budget direction, if not amount. While fewer Buyers who exceed goals experience budget cuts than those who do not exceed goals, 18% experience budget decreases despite (or in some cases, because of) their success. While a few Buyers experience budget reductions because the previous year had one-time projects or their plan called for increasing efficiency, it is more common for the budget to be reduced due to company-wide cost-cutting measures. Presumably, such environments could cause budgets to be cut regardless of how well insights functions delivered against goals.

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



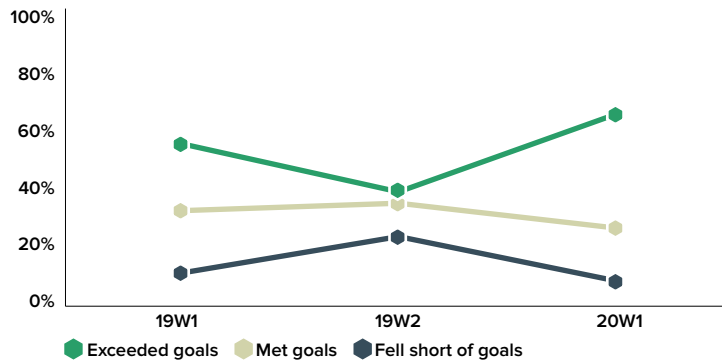
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS BY ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND (BUYERS)



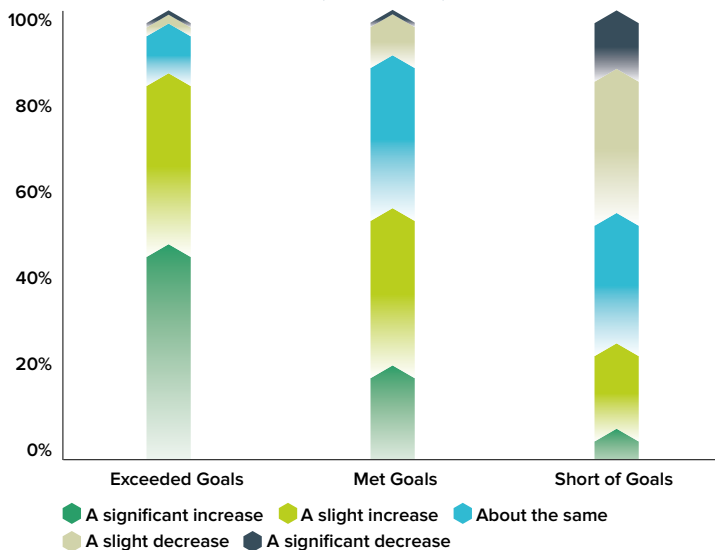
Going into the pandemic, Buyers and Suppliers were meeting or exceeding their goals on par or better than in previous GRIT waves, and spending and revenue trends were healthy



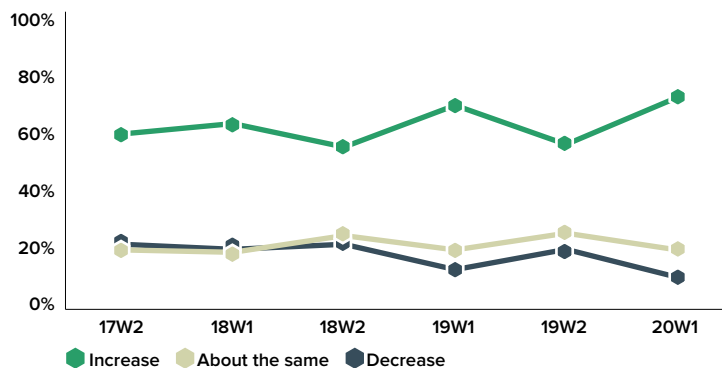
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS BY GRIT WAVE (SUPPLIERS)



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



REVENUE TREND BY GRIT WAVE (SUPPLIERS)



Supplier performance against goals was its best since GRIT began measuring it, and the proportions of those exceeding meeting, and falling short of goals mirrors the proportions of those increasing, maintaining, and decreasing staff. Supplier revenue trends are slightly more positive than 19W1, the previous high watermark, and the increase/same/decrease proportions almost duplicate the exceed/meet/fall short and increase/same/decrease proportions for goals and staff trends, highlighting the direct relationship between goals, revenue, and investment that tends to dominate the Supplier reality. The relationship between goals and revenue is clearly much more linear for Suppliers than Buyers (relative to budget): revenue increase is much steeper as performance improves and decreases accelerate as performance falls.

For Buyers, levels of optimism are directly related to changes in budget and performance against goals, suggesting that increased budgets are not only good for the industry, but for employee confidence



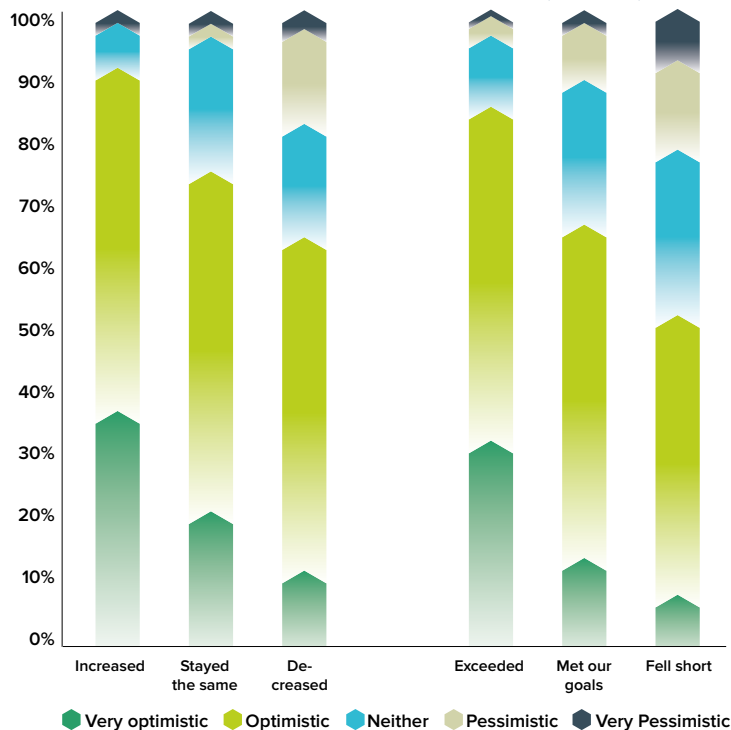
For Buyers, levels of optimism are directly related to changes in budget and performance against goals, suggesting that increased budgets are not only good for the industry, but for employee confidence. The same holds for Suppliers, except that the gains and losses in optimism are much steeper, highlighting the direct relationship between performance against goals and revenue (and survival), as well as the relative transparency and direct consequences to Supplier staff.

BUDGET TREND PROFILE

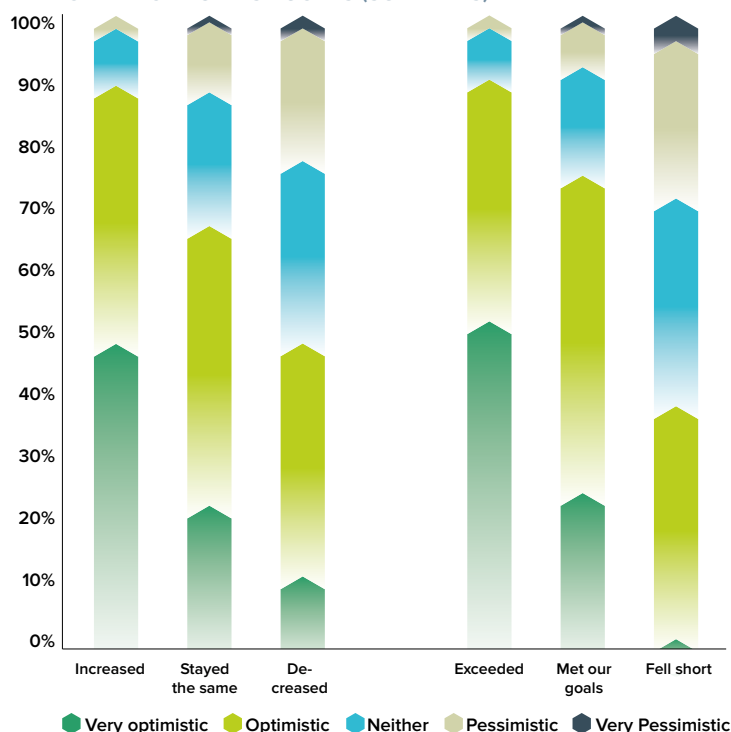
Budget Trend Profile	n	% Who Increased	% Who Decreased
Percent of Buyers	317	33%	22%
Performance/ outcomes	n	% Who Increased	% Who Decreased
Performance relative to organization's goals			
Exceeded	156	38%	18%
Met or fell short	161	29%	25%
Attitude toward future of insights role at company			
Very optimistic/ optimistic	91	42%	21%
Very pessimistic / pessimistic/neither	27	15%	44%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

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

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



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



REVENUE TREND PROFILE

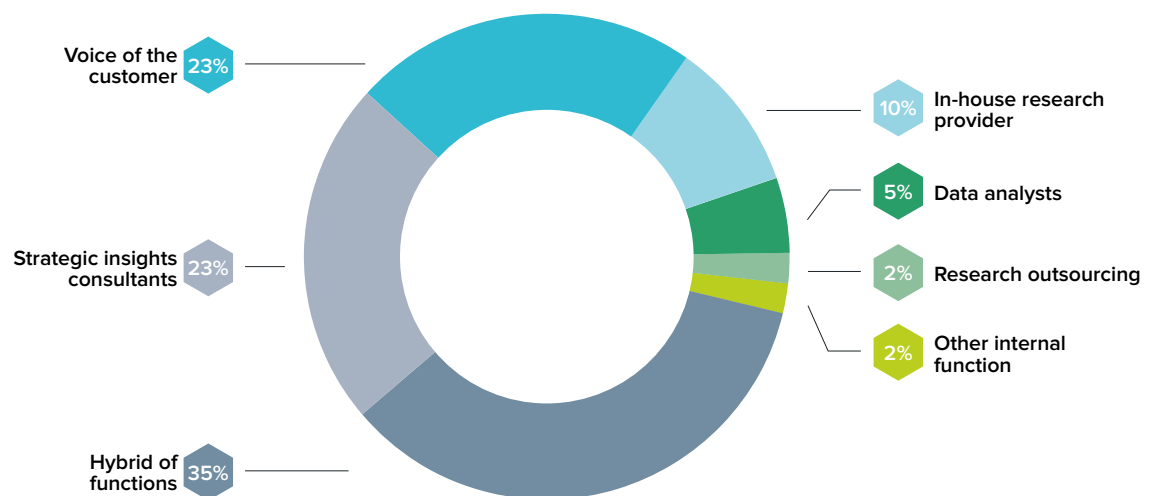
Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1516	74%	8%
Performance/outcomes	n	% Who Increased	% Who Decreased
Performance relative to organization's goals			
Exceeded	1029	86%	3%
Fell short	107	26%	45%
Attitude toward future of company			
Very optimistic	193	85%	3%
Very pessimistic/pessimistic/neither	94	38%	24%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

BUYER OUTLOOK: DEEP DIVE

In the GRIT survey, insights professionals at Buyers self-classify by function, and these classifications are fundamental to producing the GRITscape. The most frequent classification used by Buyer is “hybrid of functions,” followed by strategic insights consultants and Voice of the Customer for the organization. Other classifications include data analysts, in-house

researchers, and research outsourcers. Compared to 19W1, the proportions of Buyers identifying as “hybrid” and “in-house researcher” have increased, while those identifying as “Voice of the Customer” and “strategic insights consultant” have declined.

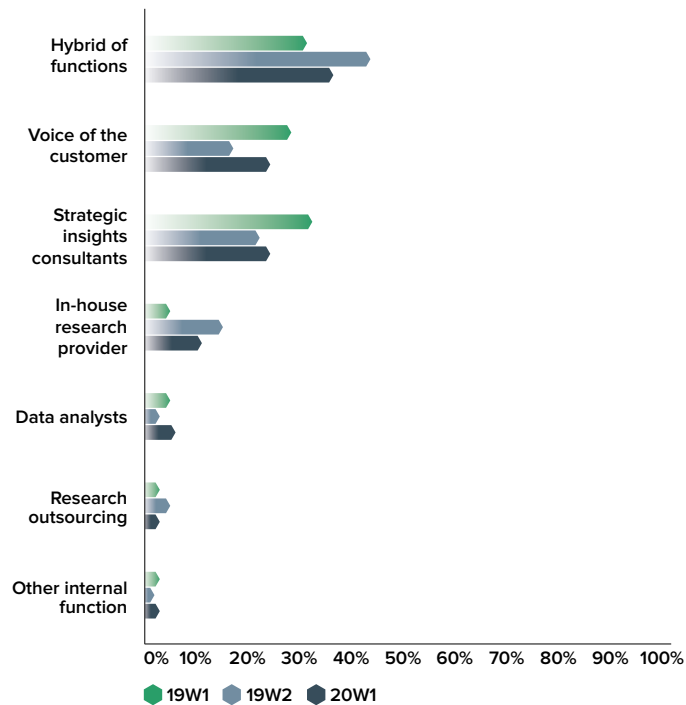
PROFESSIONAL FOCUS (BUYERS, DECISION MAKERS AND INFLUENCERS)



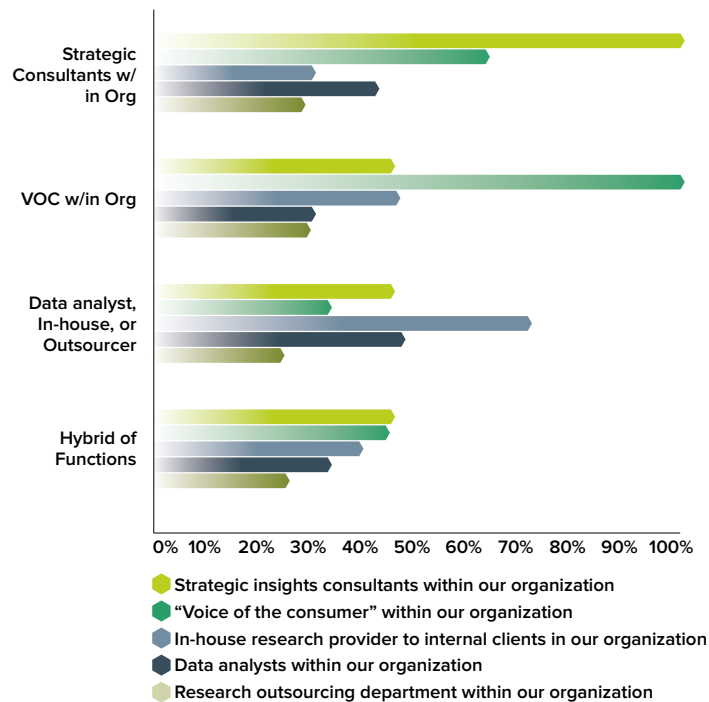
Buyers who self-describe as “hybrid” seem to fall into two groups, those who officially wear multiple hats and those who wear multiple hats by default, e.g., those in smaller departments with scarce resources. Ironically, “hybrids” perform only 2.3 functions on average, fewer than those who select a distinct primary role – strategic consultants perform 2.9 on average, VoC, 3.0, and others, 2.9. “Hybrids” most often function as strategic insights consultants and/or VoC, but their roles also seem to be fairly evenly distributed across the rest of the functions. Strategic consultants most frequently have VoC as their secondary function, but VoC are split between strategic consultant and in-house researcher as secondary functions.

Each primary function tends to be associated with certain distributions of company sizes, budget amounts, and project volume. Hybrids are more likely than others to have small budgets, and may be people who are forced to do many roles and no single role in particular. Strategic consultants are more likely than others to be at the largest companies and have the largest budgets and project volumes, and VoC are distributed across company and budget sizes. The other functions (grouped together for sample size considerations) are as likely to be at smaller companies as are hybrids. On average, strategic consultants and VoC work regularly with more types of Suppliers than hybrids and others, which is likely enabled by their greater presence at larger companies.

RELATIVE SIZES OF BUYER CATEGORIES OVER P12M (PROPORTION OF BUYERS)



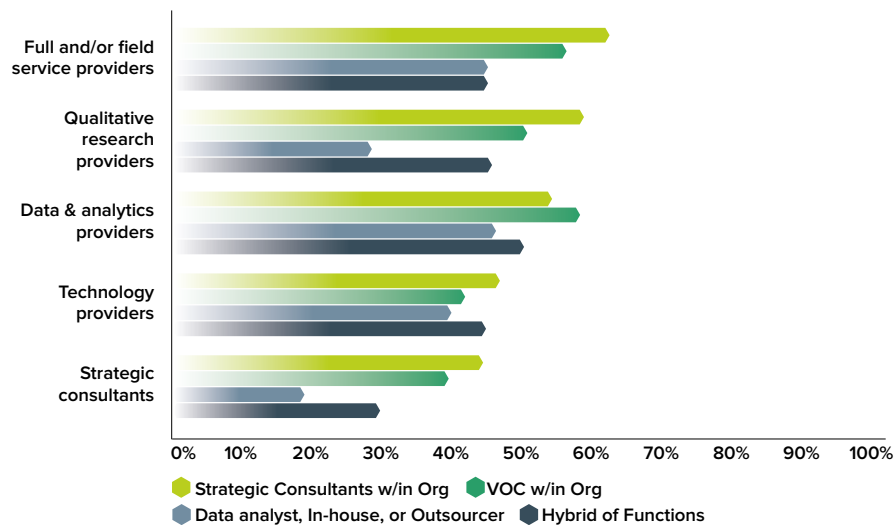
DESCRIPTIONS THAT FIT BUYER ORGANIZATION



PROFESSIONAL FOCUS PROFILE

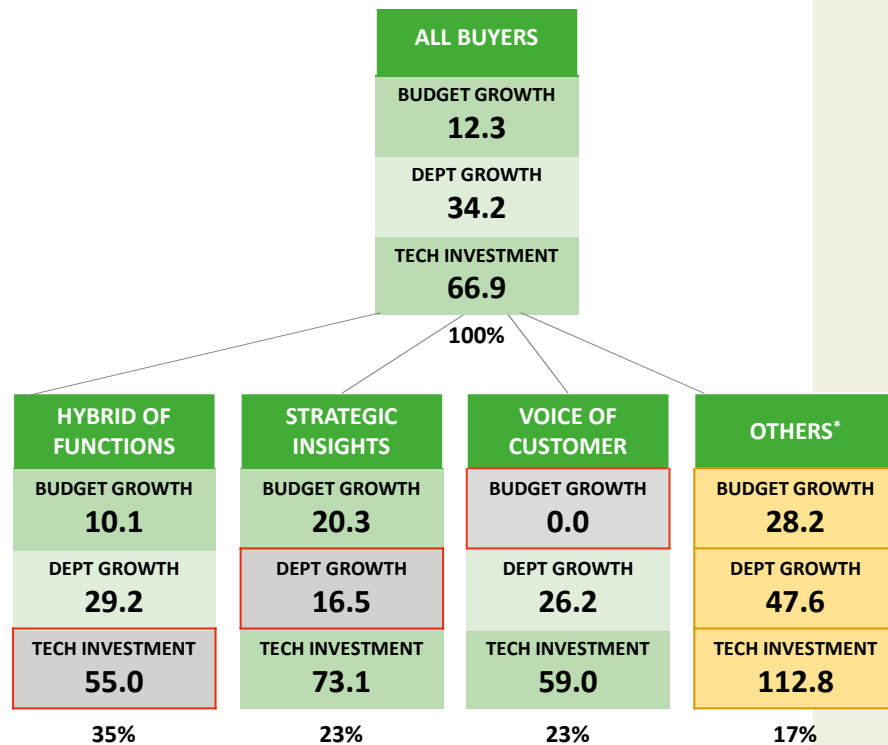
Professional Focus Profile	Hybrid of functions	Strategic Insights Consultant	Voice of the Customer	Data analyst, In-house, or Outsourcer
Buyers n	131	81	87	49
Company Employee Size				
Fewer than 100	20%	12%	21%	29%
101 – 500	16%	7%	8%	10%
501 – 1,000	10%	5%	9%	8%
1,001 – 2,499	8%	9%	5%	10%
2,500 or more	46%	67%	57%	43%
Annual Project Research Budget				
Under \$1MM	40%	17%	27%	42%
\$1MM to \$3MM	24%	26%	27%	18%
\$3MM to \$10MM	13%	15%	20%	12%
More than \$10MM	23%	42%	27%	27%
Annual Project Volume				
Fewer than 25	20%	10%	21%	22%
25 to 50	21%	9%	19%	29%
51 to 150	23%	24%	27%	16%
151 to 250	9%	14%	11%	18%
More than 250	27%	43%	22%	16%

BUYER CATEGORY BY SUPPLIER TYPES USE REGULARLY



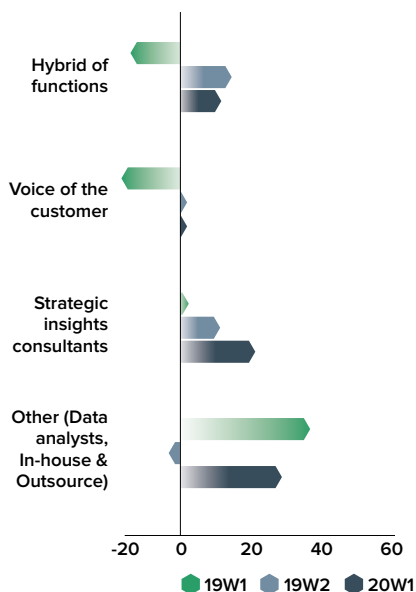
The “health tree” diagram breaks down the different Buyer functions to compare budget, department size, and tech spending trends. It simplifies the 5-point scales used to collect that trend information to a single number that can range, in theory, from -200 (e.g., everyone experienced a significant decrease in budget) to 200 (e.g., everyone experienced a significant increase in budget).

Outlooks for budget, staff, and tech spending are strong across functions, save VoC, which is less likely to see budget growth than others – same as last wave. Budget trends have varied across functions since 19W1, but staff trends have been stronger across functions, while tech spend trends have improved for “other” functions while slowing down for other functions.

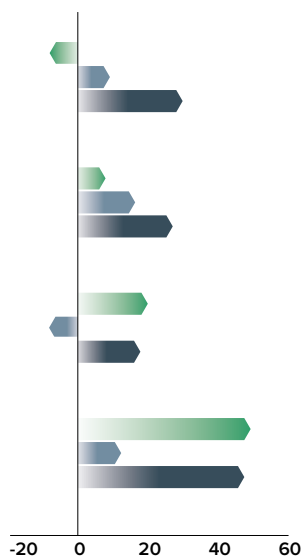


KEY TRENDS BY BUYER CATEGORY OVER P12M (BUYER TREND INDEXES)

RESEARCH SPENDING TREND



DEPARTMENT SIZE TREND



TECHNOLOGY SPEND TREND



Considering budget size and project volume, budget increases are most likely for those with annual project volumes between 5 and 250 projects. Decreases are somewhat more likely for the largest budget sizes and smallest project volumes. Aside from those, budget changes are not strongly related to budget size and project volume; likely other factors are more direct drivers. For example, the

largest project volume category has fewer budget increases than the next highest category, and this could be the result of a strategy, such as focusing on reducing the cost per project when volume is high. The largest project size category has grown; possibly Buyers are doing more, smaller projects to meet time demands.

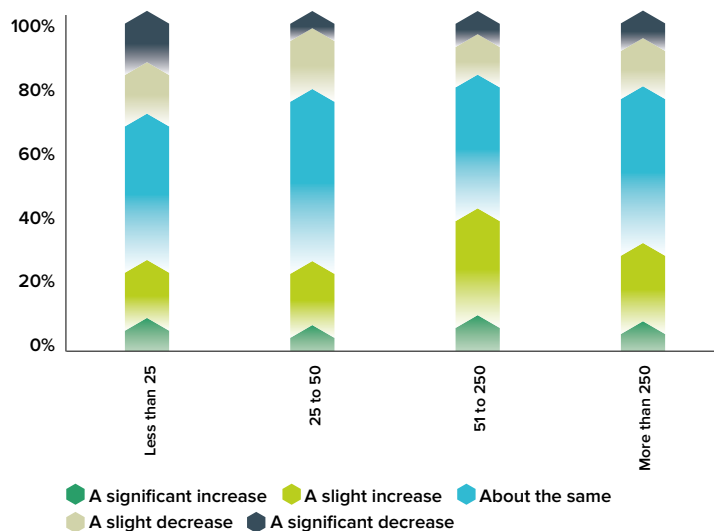
BUDGET TREND PROFILE HIGHLIGHTS

Budget Trend Profile Highlights	n	% Who Increased	% Who Decreased
Percent of Buyers	317	33%	22%
Scope of Department	n	% Who Increased	% Who Decreased
Annual Research Budget			
Under \$1MM	79	34%	24%
\$1MM to \$3MM	64	27%	19%
More than \$3MM to \$15MM	41	37%	22%
More than \$15MM	71	31%	27%
Number of Projects Annually			
Fewer than 25 projects per year	53	26%	30%
25 to 50 projects per year	57	26%	23%
51 to 250 projects per year	111	41%	19%
More than 250 projects per year	84	31%	23%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

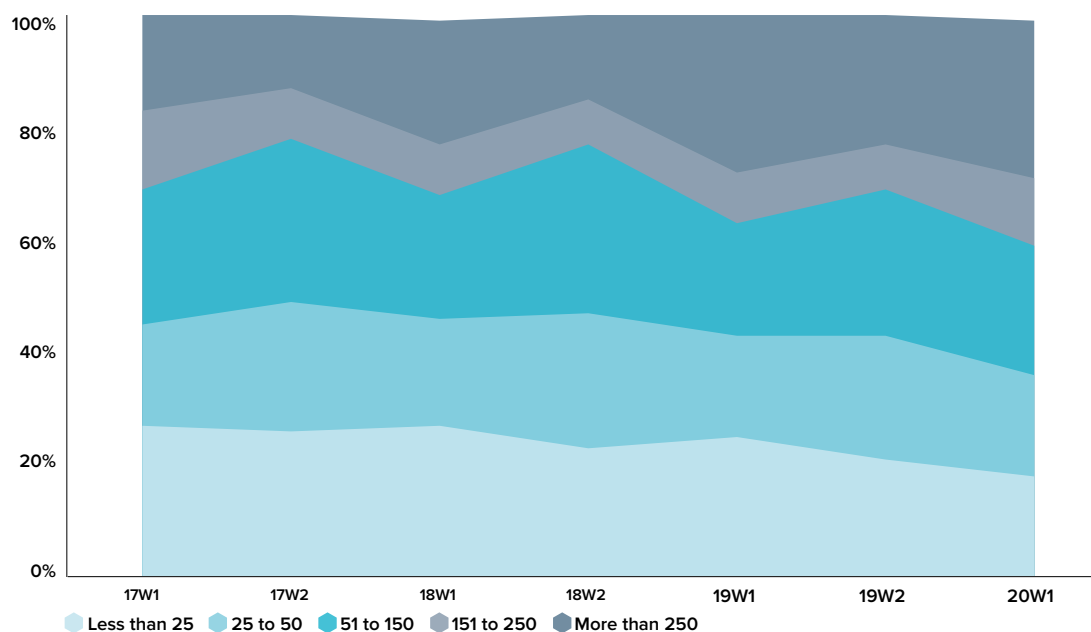
Budget changes are not strongly related to budget size and project volume; likely other factors are more direct drivers



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



ANNUAL NUMBER OF PROJECTS BY GRIT WAVE (BUYERS)



Budgets were more likely to increase for technology Buyers and service-oriented consumer businesses, and the latter are likely among the most vulnerable in the COVID-19 world, which could translate into less research spending due to resources or more spending due to increased need



ANNUAL PROJECT VOLUME SIZE CATEGORY

Annual Project Volume Size Category	Category Size (% of Buyers, Spring GRIT Waves*)			
	Smallest	Largest	Range	Net Change since 17W1
Less than 25	19%	27%	8%	-8%
25 to 50	18%	19%	1%	0%
51 to 150	20%	24%	4%	-1%
151 to 250	9%	14%	5%	-2%
More than 250	17%	29%	11%	11%

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

Budgets were more likely to increase for technology Buyers and service-oriented consumer businesses, and the latter are likely among the most vulnerable in the COVID-19 world, which could translate into less research spending due to resources or more spending due to increased need. Decreases continue

to be higher for those in consumer non-durables as well as companies more than 20 years old. Budget increases were similar across global regions, but decreases higher outside North America and Europe, perhaps suggesting more volatility.

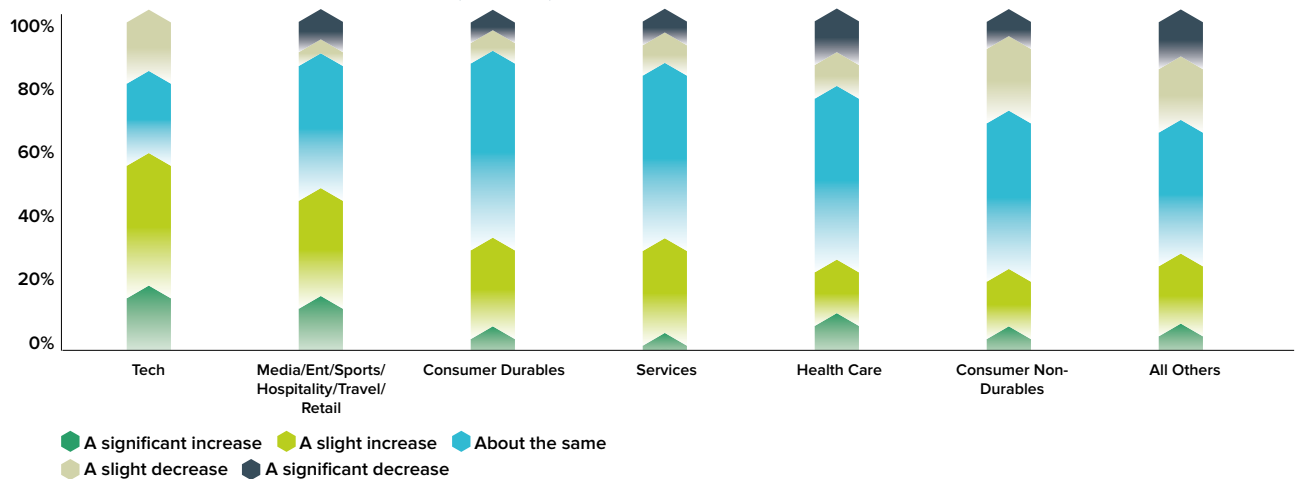
BUDGET TREND PROFILE HIGHLIGHTS

Budget Trend Profile Highlights	n	% Who Increased	% Who Decreased
Percent of Buyers	317	33%	22%
Company Characteristics	n	% Who Increased	% Who Decreased
Industry			
Technology	31	58%	18%
Retail/media/entertainment/sports/hospitality/travel	47	47%	13%
Consumer durables	31	32%	13%
Financial or professional services	54	31%	17%
Education/government/NFP/transportation	27	26%	22%
Consumer non-durables	78	23%	29%
Employee size			
500 employees or fewer	94	32%	15%
501 to 2,499 employees	51	47%	16%
2,500 or more employees	172	30%	27%
Global Region			
North America	241	34%	20%
Europe	48	31%	25%
All other regions	28	32%	36%
Company Age			
20 years old or younger	101	42%	12%
Older than 20 years	216	30%	26%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

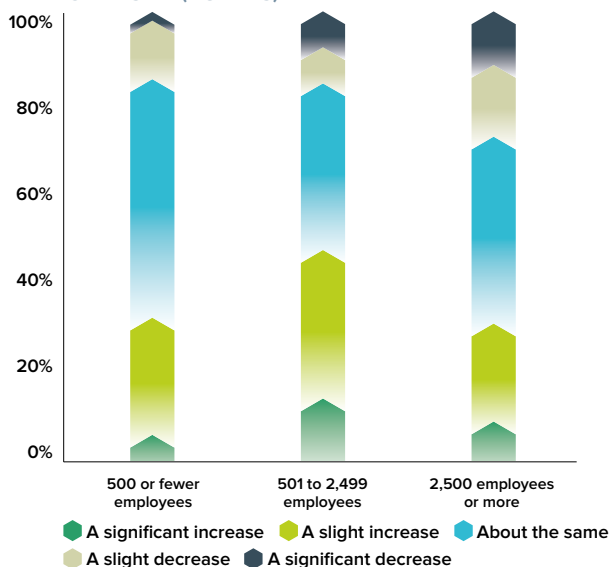
Interestingly, in the COVID-19 analysis, directionally, the prominent explanation for budget increases changed after 3/11



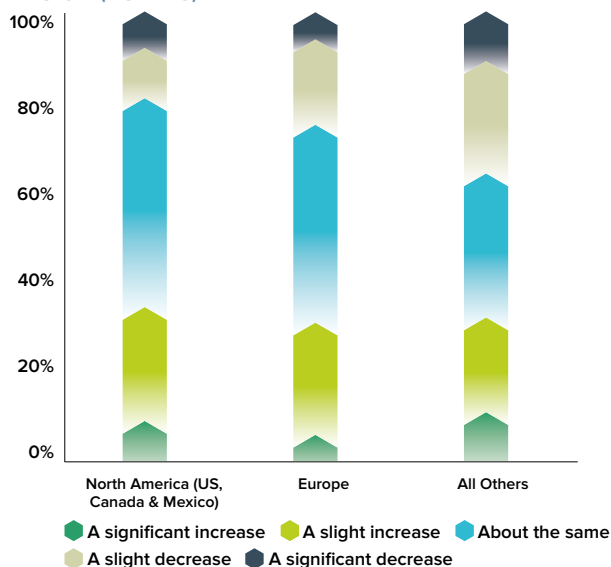
RESEARCH SPENDING TREND BY INDUSTRY (BUYERS)



RESEARCH SPENDING TREND BY
EMPLOYEE SIZE (BUYERS)



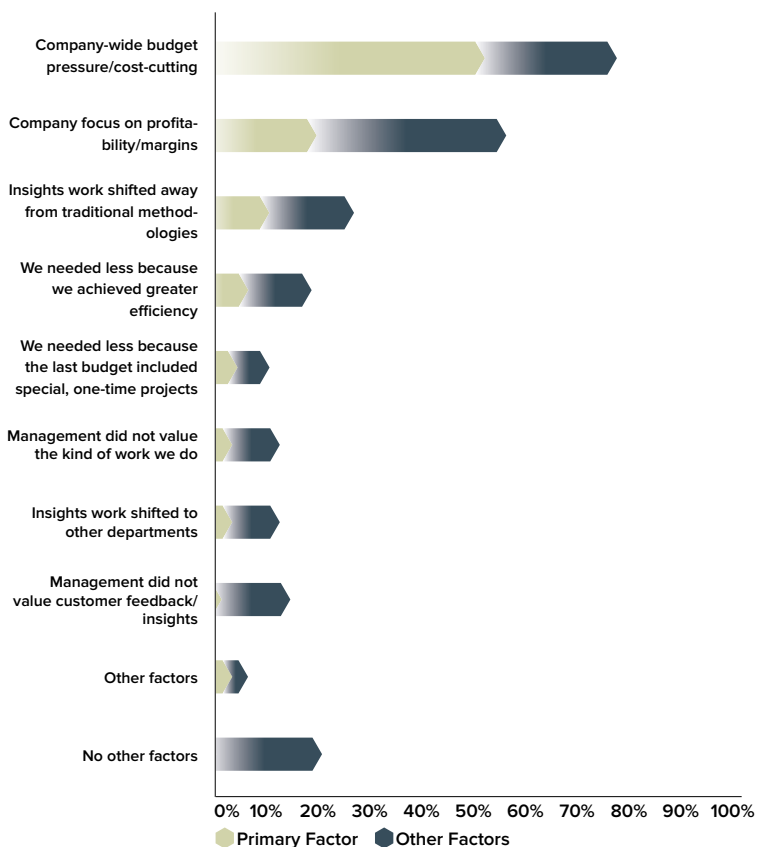
RESEARCH SPENDING TREND BY GLOBAL
REGION (BUYERS)



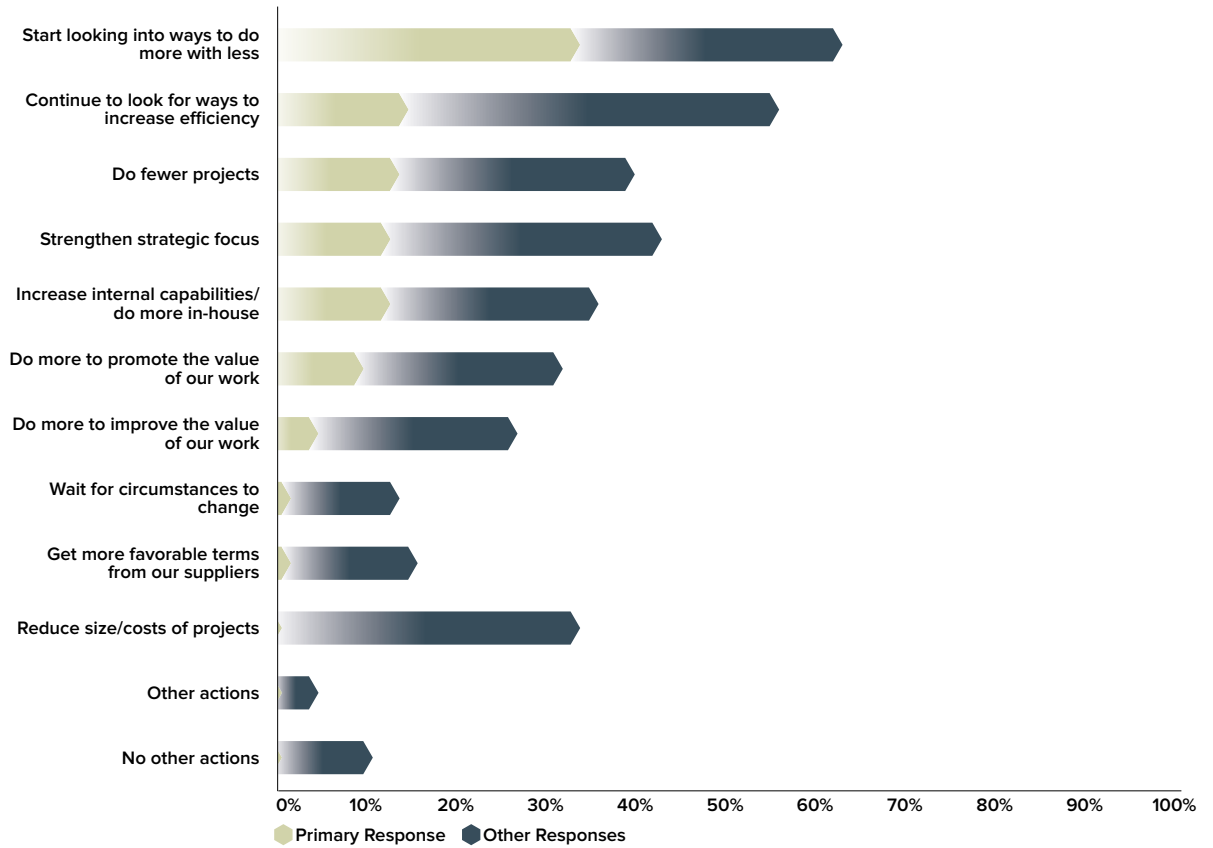
Budgets were more likely to be reduced due to companywide pressures than lack of perceived value or shift in methodologies. The most likely responses to the budget decrease reflect the relative powerlessness to get an increase when the company as a whole is experiencing cost or revenue issues. When budgets increased, some felt the company's success was a rising tide that lifted all boats, but more Buyers felt that the increase was earned by the value they provide as the recognition of it.

Interestingly, in the COVID-19 analysis, directionally, the prominent explanation for budget increases changed after 3/11. Prior to 3/11, most were likely to cite company growth and increased challenges (e.g., need to enter new segments) as drivers. After 3/11, the most commonly cited driver was somewhat more heroic-sounding, given the context: strong focus on delivering value plus management valuing the work and championing it.

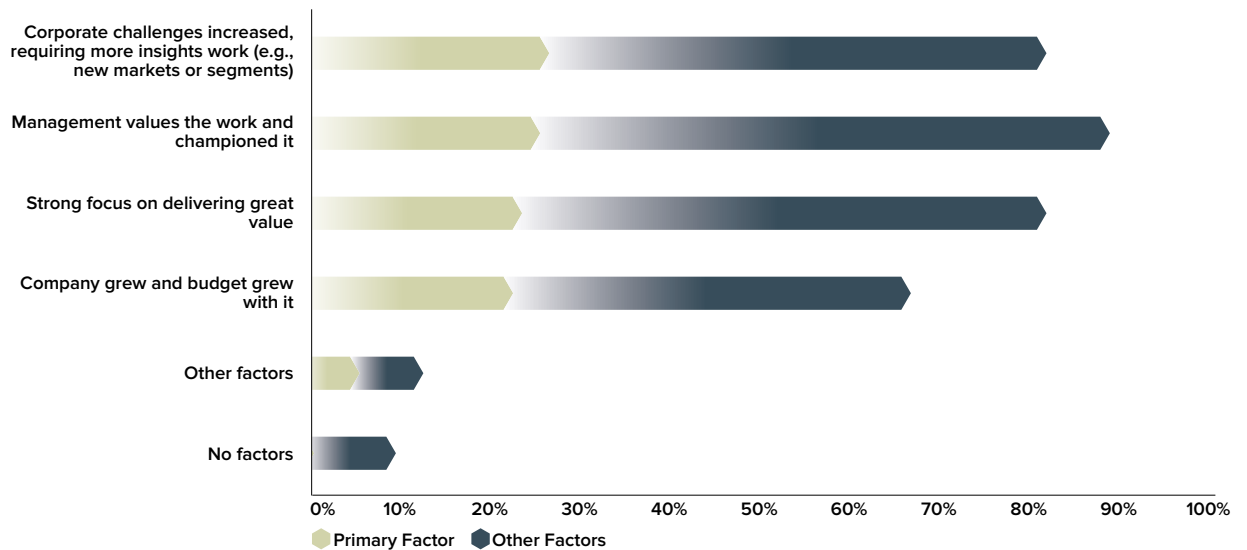
FACTORS BEHIND THE BUDGET DECREASE(BUYERS)



HOW INSIGHTS FUNCTION WILL RESPOND TO DECREASE (BUYERS)



FACTORS BEHIND THE BUDGET INCREASE (BUYERS)



Regarding typical behaviors, when the company is focused on growth and the insights people are involved with strategic planning, budget increases are more likely. Buyers who cite core research skills as an unmet need are much more likely to have increased budgets. Perhaps as the project

load increases relative to the budget, they are looking to build scale for their departments by hiring researchers or else by finding Suppliers who are strong researchers, outsourcing that expertise while focusing on developing other insights-related skills internally.

Budget Trend Profile	n	% Who Increased	% Who Decreased
n	317	33%	22%
Practices	n	% Who Increased	% Who Decreased
Always or frequently:			
Is focused on future growth strategy	94	38%	24%
Is involved in strategic planning sessions at the business unit level	91	41%	25%
Is involved in strategic planning sessions at the corporate level	84	39%	25%
Unmet needs Suppliers could address:			
Research Core Skills	33	42%	18%
Innovative technology	33	18%	36%
Better insights	19	26%	5%
Use of technology / product innovations	19	16%	47%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

Technology spending increases among Buyers has reached their highest level since GRIT began to track them in 17W2. Higher tech spending is related to budget increases which are, in turn, also associated with staff growth. We continue to see that investment in technology does not seem to mean that people are being replaced by tireless androids that don't need health care benefits. In fact, budget increases seem to be in lock-step with staff increases and are more likely to occur for Buyers who prioritize developing innovation focus and people skills (assuming the latter doesn't mean humanizing chatbots, insights departments still seem to value humans). Those who have increased staff size are

more likely than others to prioritize developing business knowledge, innovative focus, and tech expertise. Although they constitute a smaller set of Buyers, those who make developing tech skills a key priority have most frequently experienced budget growth.

Among Buyers whose top-of-mind interests include research tools and agile approaches, budget decreases are more likely. Many with budget decreases felt that it was due to company-wide issues and they would need to do more with less, likely pushing these topics to the forefront.

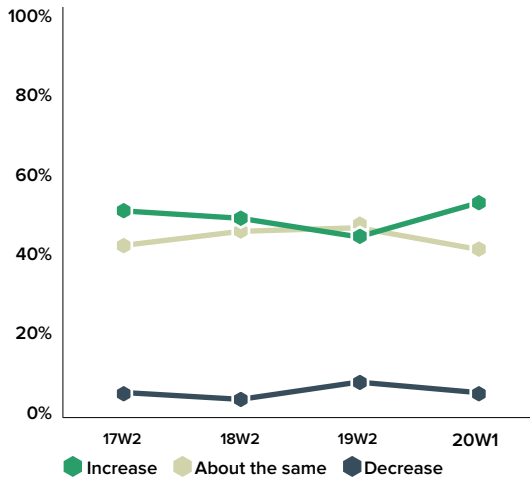
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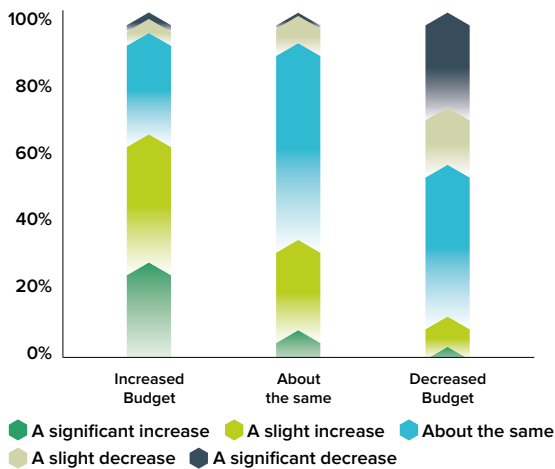
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CHANGE IN TECHNOLOGY SPEND BY GRIT WAVE (BUYERS)



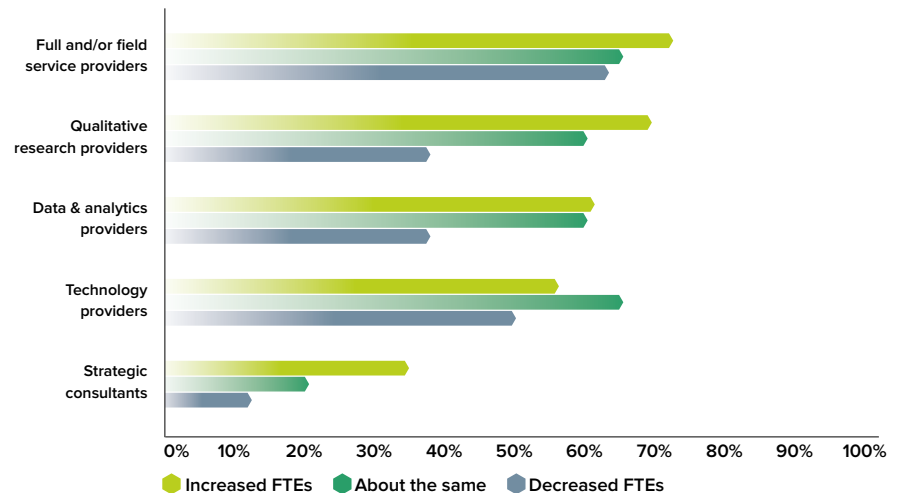
ANNUAL RESEARCH PROJECT BUDGET SPENDING TREND BY DEPARTMENT SIZE TREND (BUYERS)



Budget Trend Profile	n	% Who Increased	% Who Decreased
n	317	33%	22%
Priorities	n	% Who Increased	% Who Decreased
Changes to department's full-time staff			
Increased staff	166	48%	18%
Decreased staff	18	0%	89%
Investment in technology			
Increased spending	120	56%	6%
Decreased spending	49	12%	63%
Skill Development: key priority			
Technical/computer expertise	50	52%	10%
Innovative focus	101	44%	22%
People skills	93	41%	22%
Business knowledge	110	39%	25%
Analytical expertise	94	38%	27%
"Buzz Topics"			
Behavioral science / Behavioral economics	28	50%	18%
Research process (tools and agile approaches)	62	26%	34%
CX/Customer Centricity research	29	17%	31%

Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.

SKILL DEVELOPMENT EMPHASIS (BUYERS)





IT'S TIME FOR A CHANGE

Keith Rinzler

Founder and CEO, 1Q

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Our industry has developed tremendous tools and capabilities in recent years to become more agile, but the consumer has been forgotten in all of this. The quality of data depends heavily on how it is obtained, and quality cannot be consistently achieved so long as the industry treats consumers like zero-value commodities to be mined for free. It's time for a change!

Breakage Rate, Professional Survey Takers and the Rush to the Bottom

Consumers enter the survey ecosystem only to realize their hours of work are not going to meet a threshold for payout or as they near that payout threshold they mysteriously qualify for fewer surveys, so they quit. They feel ripped off, and rightfully so. This is a system that treats honest respondents badly and dishonest respondents well. It breeds professional survey takers by turning speeding into a winning strategy.

In this traditional breakage model, consumers provide opinions for a promise of future reward. If they give up before they reach the threshold level for payment, which a majority do, the survey company still benefits from the time they've already spent. Those become "completes" for which the company is compensated but no longer incurs an expense from the consumer. By setting an artificial barrier between giving opinions and qualifying for rewards, survey companies intentionally profit from breakage.

How Quality Takes the Hit

At first glance, this looks like a great system to get free consumer opinion. But insights professionals are not charged with obtaining data, they're charged with obtaining quality data. In a deferred-payout system, there's zero incentive for consumers to participate honestly while working towards those rewards – in fact, the opposite is true. We need to be in the "truth" business, not the "response" or "completion" business.

The Rise of the Bot

And even worse, while online survey platforms grew in popularity, so did survey taking bots. With a push for faster and cheaper, surveys are being put into the field with little or no anti-bot barriers or screening. Many systems do not require tokenization or have a way of asking follow-up questions to unique respondents, which is an open invitation to bots.

A Call for Transparency

The details about how data is collected and respondents are incentivized is more important than ever. Clients are increasingly no longer willing to accept the "magic black box" that many in our industry purport to have. More and more, they want to know where a panel came from, how it was developed, and exactly how the members are compensated.

Clients are waking up to the truth about the breakage model, professional survey takers and bots and how these adversely affect data quality, so we need to support initiatives like the CASE coalition in looking for solutions.

Changing the Business Outlook

When true agility was first imagined in the world of MR, it was believed faster could only be achieved at the cost of quality. But the industry has matured and "faster, cheaper and better" are now able to be achieved simultaneously. COVID provided a great test as many clients demanded agility with verifiable quality. If your MR firm's revenues did not grow during the first six months of the COVID crisis, you're probably not delivering on this leading edge of innovation and have some work to do.

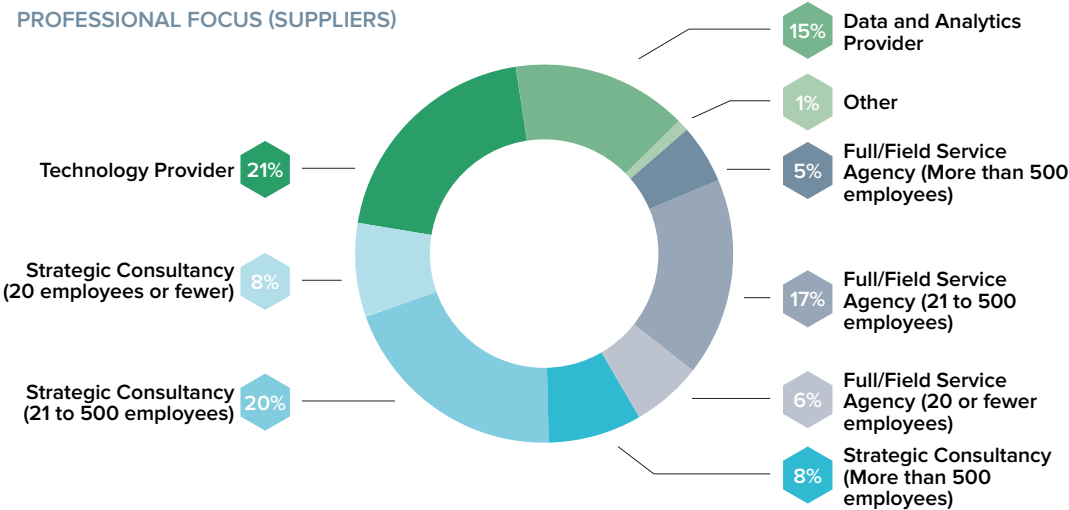
As an industry dedicated to understanding human behavior, we need to respond ethically to the behavior we are incentivizing and the bad behavior from which many profit. **To move the industry forward, we need to be truth-seekers who foundationally believe in the value of consumers' time and opinions, and compensate them fairly and quickly for that.** Otherwise, we have no right to expect honesty, validity, and depth of thought coming back. Are you ready for change?

SUPPLIER OUTLOOK: DEEP DIVE

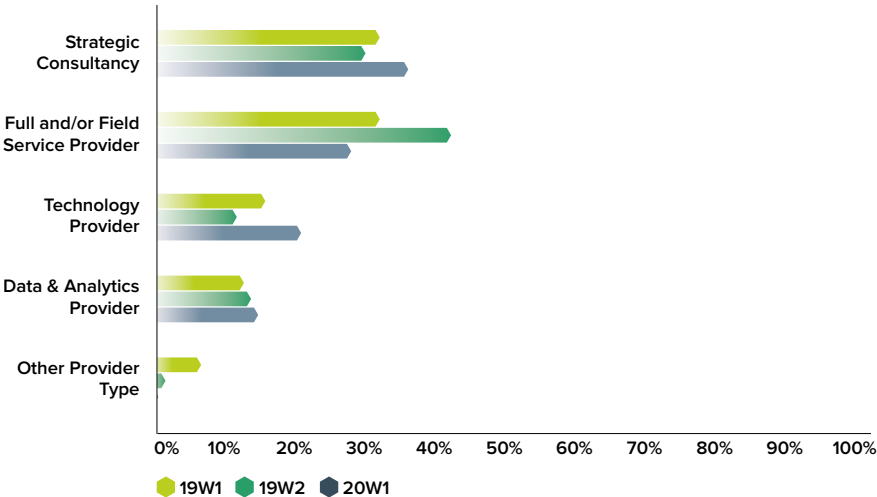
As part of the GRIT survey, Suppliers are asked to self-classify by a) type of service they primarily offer (e.g., technology-based) and b) a specific service that best describes their focus (e.g., license analytical tools). These are foundational inputs

in the GRITscape map. In this wave, Strategic Consultancies overtook Full Service for most common type of service provider, and those who self-classify as Technology tech providers also increased.

PROFESSIONAL FOCUS (SUPPLIERS)



RELATIVE SIZES OF SUPPLIER CATEGORIES OVER P12M (PROPORTION OF SUPPLIERS)



In this wave, Strategic Consultancies overtook Full Service for most common type of service provider, and those who self-classify as Technology tech providers also increased

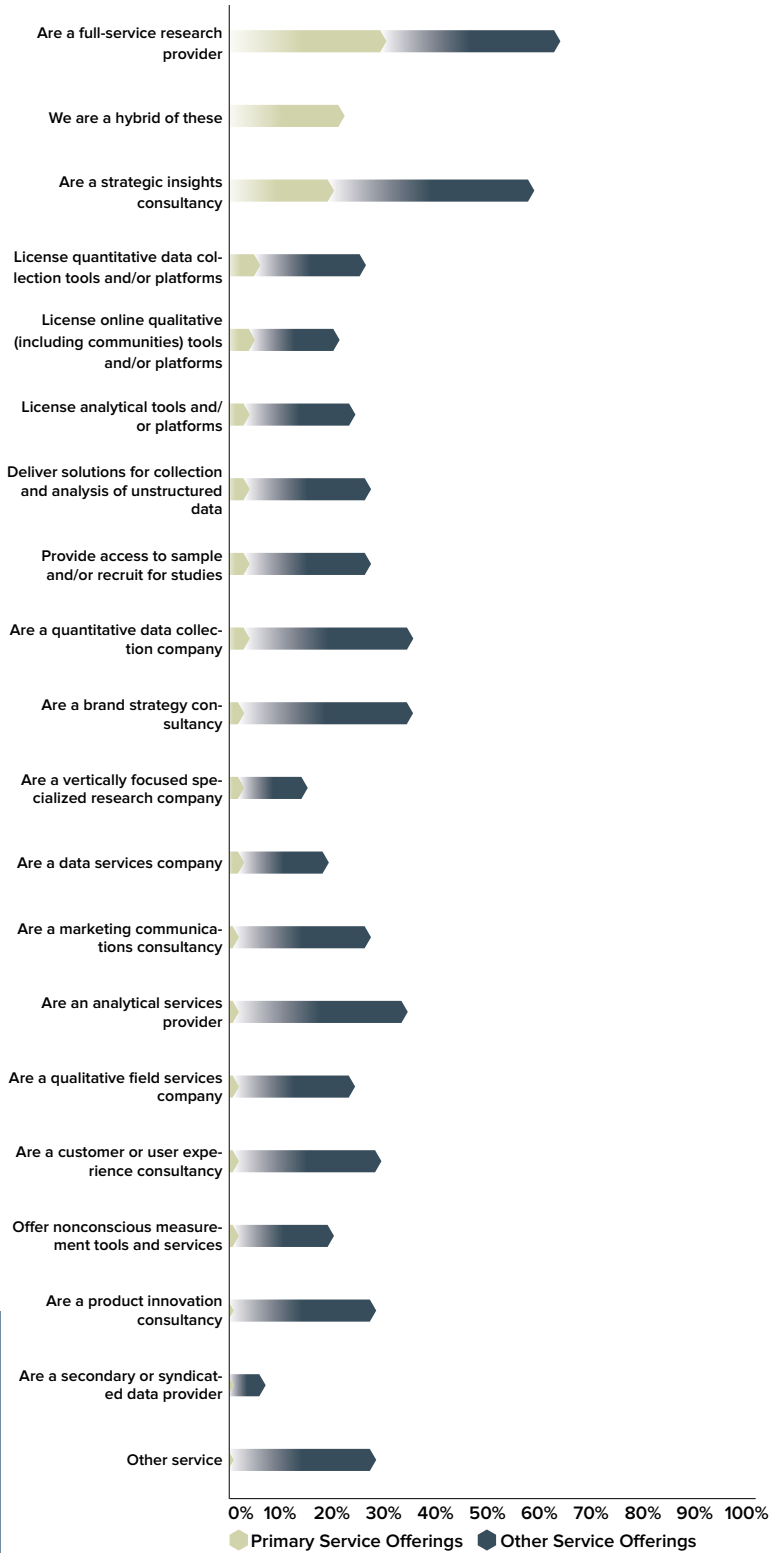


When asked which of 19 specific services best describe their offerings, three choices accounted for 69% of Suppliers: full service research (29%), strategic insights consultancy (19%), or hybrid of services (21%). After those, 5% said the service which best describes them was licensing quantitative data collection tools and/or platforms, and 4% said licensing online qualitative (including communities) tools and/or platforms. The remaining 22% is spread across 12 other services.

Overall, 62% of Suppliers have full service research as part of their offering portfolio, but strategic insights consultancy is close behind at 57%. No other services are offered by a majority of Suppliers. The next most offered services are brand strategy consultancy (34%), quantitative data collection (34%), and analytical services (33%). Combined, these three were considered to be the primary service by only 6% of Suppliers, but 64% offer at least one of these three. Of the 14 services named as “best describes” by fewer than 4% of Suppliers, three are offered by more than 30% of Suppliers; another eight by more than 20%, and three others by 10% or more.

Altogether, the average Supplier offers at least 5.3 services as part of their portfolios, and this average does not vary significantly across the four major service types. Instead, breadth of portfolio is more dependent upon Supplier size than Supplier service focus. Suppliers with more than 500 employees offer more than 6 services on average; those with fewer than 20 employees offer about 4.

SUPPLIER SERVICE OFFERINGS (SUPPLIERS)



Altogether, the average Supplier offers at least 5.3 services as part of their portfolios, and this average does not vary significantly across the four major service types. Instead, breadth of portfolio is more dependent upon Supplier size than Supplier service focus



Supplier Type	Employee Size	Avg. No. Offered	Three Most Frequently Offered
Strategic Consultancy	More than 500	6.9	Are a strategic insights consultancy Are a full-service research provider Are a brand strategy consultancy
Full/Field Service Agency	More than 500	6.3	Are a full-service research provider Are a strategic insights consultancy Are a quant data collection company
Strategic Consultancy	21 to 500	5.6	Are a strategic insights consultancy Are a full-service research provider Are a brand strategy consultancy
Technology Provider	All	5.3	License quant data collection tools and/or platforms License analytical tools and/or platforms Provide access to sample and/or recruit for studies
Full/Field Service Agency	21 to 500	5.1	Are a full-service research provider Are a strategic insights consultancy Are a quant data collection company
Data and Analytics Provider	All	5.1	Are a full-service research provider Are a strategic insights consultancy Are an analytical services provider
Full/Field Service Agency	20 or fewer	3.9	Are a full-service research provider Are a strategic insights consultancy Are a customer or user experience consultancy Are a qual field services company (tie)
Strategic Consultancy	20 or fewer	3.8	Are a strategic insights consultancy Are a brand strategy consultancy Are a full-service research provider

Except for one, every Supplier Type/Size offers strategic insights and full service research as two of the top three services. Regardless of size, for Strategic Consultancies, the third service is always brand strategy. For Full/Field Service providers with more than 20 employees, the third service is quantitative data collection; those with 20 employees or fewer offer CX/UX consulting or qualitative field services as their third service. For Data & Analytics providers the third service – not the first or second – is analytical services.

The picture seems similar to the one we drew in the last GRIT Report with perhaps a bit more definition. The service patterns suggest that some Full/Field Service providers are successfully evolving into Strategic Consultancies, and vice versa for Strategic Consultancies. In the former case, Full/Field Service providers evolve to a position from which they can offer more value-added services as well as touch more areas in the Buyer organization who might need their services. In the latter, Strategic Consultancies can own and control more of the project activities – each may be equally important – gaining revenue streams as well as the ability to provide more integrated solutions because they can manage more of the project phases to the business objectives.

The Data & Analytics category seems to be the most turbulent. It seems to include Data & Analytics specialists who are trying to expand their footprint (similar to Strategic Consultancies) and Full/Field Service Agencies who are repositioning themselves on analytics



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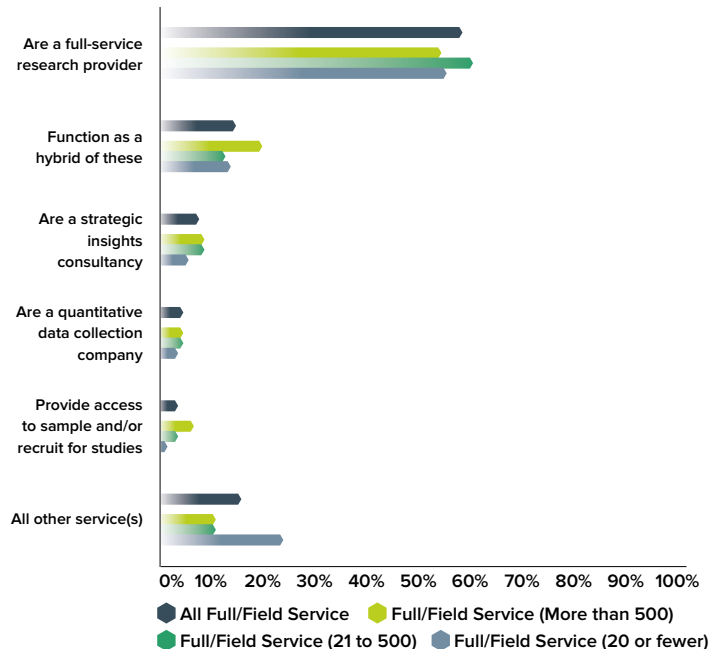
Technology providers, the lone category that does not count “strategic insights” and “full service” among their top 3, seems to be well-defined, focused, and, as we have mentioned in other parts of this report, growing. Again, this characterization is consistent with the most recent GRIT Report. We have seen evidence in each of these reports that Technology providers are interested in gaining more business and people skills. Our take is that they need these skills in order to improve sales, marketing, and client engagement; we do not get the impression that they desire these skills because they want to become Strategic Consultancies or Full/Field Service providers, though the question is by no means settled.

If we look at the overlap between the four major service types and the 19 services differently, we notice that most of those who classified their type of service as Full/Field selected “full service” as their primary individual service, *but 43% did not*. Services that make up the 43% include hybrid (14%), strategic insights consultancy (7%), quantitative data collection (4%), and access to sample and/or recruit for studies (3%); 12 other services account for the final 15%.

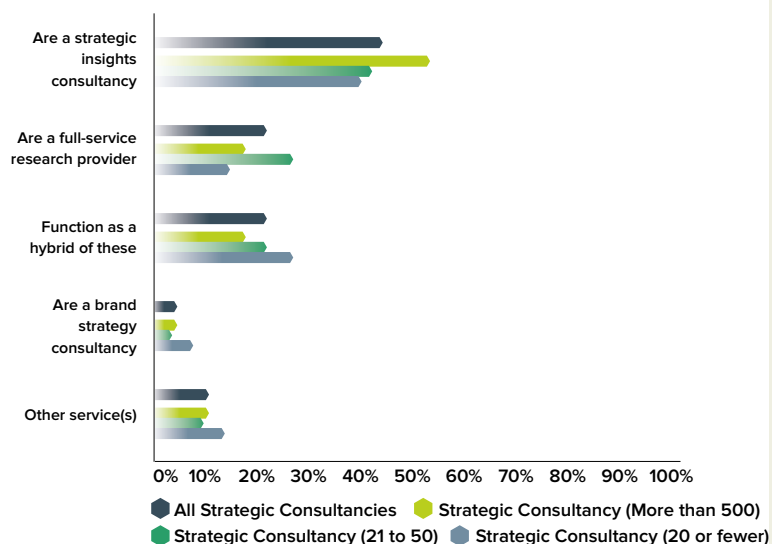
There is very little consensus regarding classifications to summarize the 43% who did not select “full service research.” Perhaps those who carried the “full service” mantle in earlier times have reclassified themselves, for example as Strategic Consultancies, leaving the category to Suppliers who provide “full service” only for whichever specialty they offer.

Among those who selected Strategic Consultancy as their primary service type, 43% selected “strategic insight consultancy” as the service which best describes them. The other 57% are made up of full-service research provider (21%), hybrid (21%), and brand strategy consultancy (4%); nine other services account for the remaining 11%.

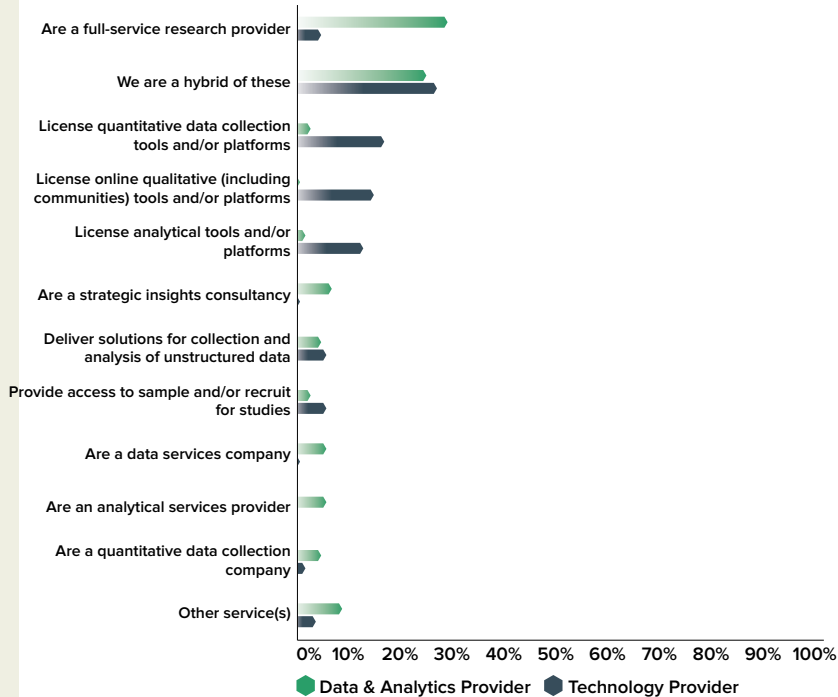
WHICH OF THESE MOST CLOSELY MATCHES HOW YOU WOULD DESCRIBE YOUR ORGANIZATION? (FULL/FIELD SERVICE AGENCIES)



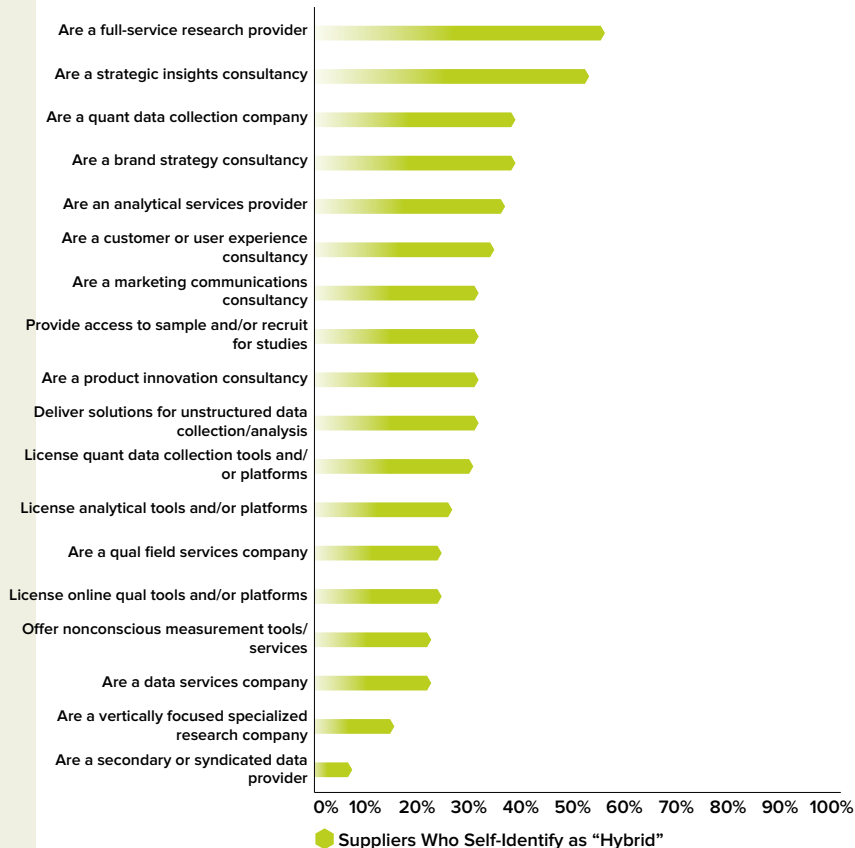
WHICH OF THESE MOST CLOSELY MATCHES HOW YOU WOULD DESCRIBE YOUR ORGANIZATION? (STRATEGIC CONSULTANCIES)



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



SERVICES OFFERED BY SUPPLIERS WHO PRIMARILY IDENTIFY AS "HYBRID" (SUPPLIERS)



Of these services, four seem like specific types of strategic consulting: vertically focused specialized research, marketing communications, customer or user experience, and product innovation; the remaining tend to specialize in forms of data collection. The largest Strategic Consultancies most strongly identify with the service "strategic insights consultancy" (52%); smaller ones are more likely to say they are hybrids or full service than "strategic insights consultant."

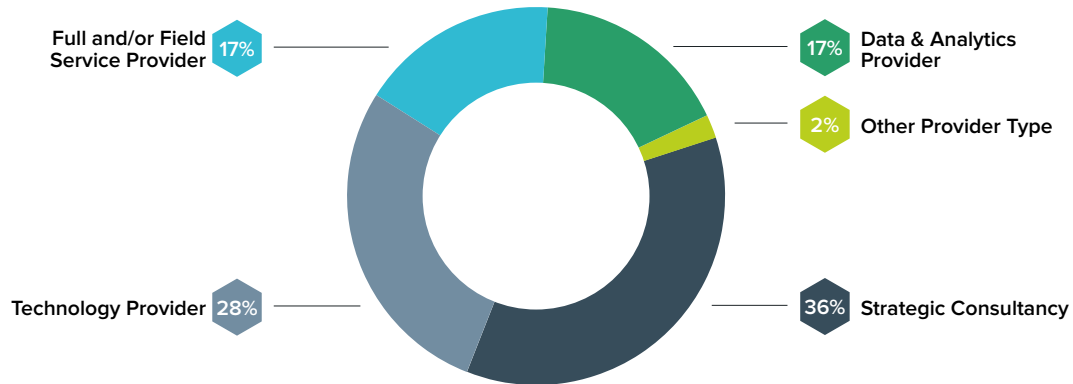
Specialists (Technology providers and Data & Analytics providers) are also likely to identify as hybrids, but Data & Analytics providers are much more likely to include "full service research" in their portfolio than are Technology providers, who are more concentrated across services that license tech-based tools.

Overall, 21% of Suppliers said that "hybrid" was the best description of what they offer, but what is "hybrid?"

These "hybrid" Suppliers offer 6.6 services on average, compared to 4.9 for the other 79%. Most include full service research (56%) and/or strategic insights consultancy (53%) in their portfolio. Perhaps, unlike those who chose full service research or strategic insights consultancy as the service that best describes them, hybrids consider their services to be truly integrated or offer so many that no single service is "primary."

When asked to self-identify as a type of Supplier without the option of picking "hybrid", these "hybrids" skewed more toward Technology provider (28%) as their highest revenue area and less toward Full/Field Service than did non-hybrids. When asked which types of services they offered, non-hybrids said they offered *every other type of service* more frequently than Technology. The over-simplified summary of "hybrids," then, is that they either a) consider technology to be the core of their offering or b) consider technology to be an afterthought, if thought of at all. There does not seem to be a middle ground.

GRITSCAPE CATEGORIES FOR SUPPLIERS WHO SELF-IDENTIFY AS “HYBRID” (SUPPLIERS)

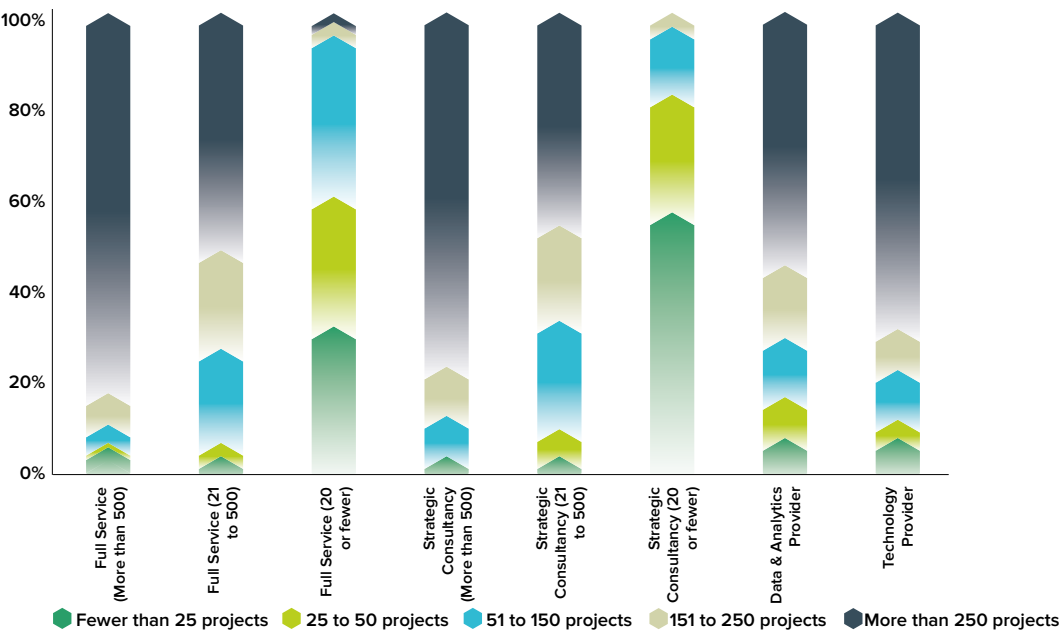


Perhaps unsurprisingly, the largest companies within Full/Field Service and Strategic Consultancies have the highest project volume. Technology providers have a similarly large project volume, but only 1/3 of them would be large enough to qualify for “largest” in Full/Field Service or Strategic Consultancy. Either they are doing more, smaller projects than Full/Field Service and Strategic Consultancy (e.g., they translate “project” as “license”) or a high volume of highly automated large projects.

ALL TYPES OF SERVICES OFFERED BY SUPPLIERS WHO PRIMARILY IDENTIFY AS “HYBRID” (SUPPLIERS)

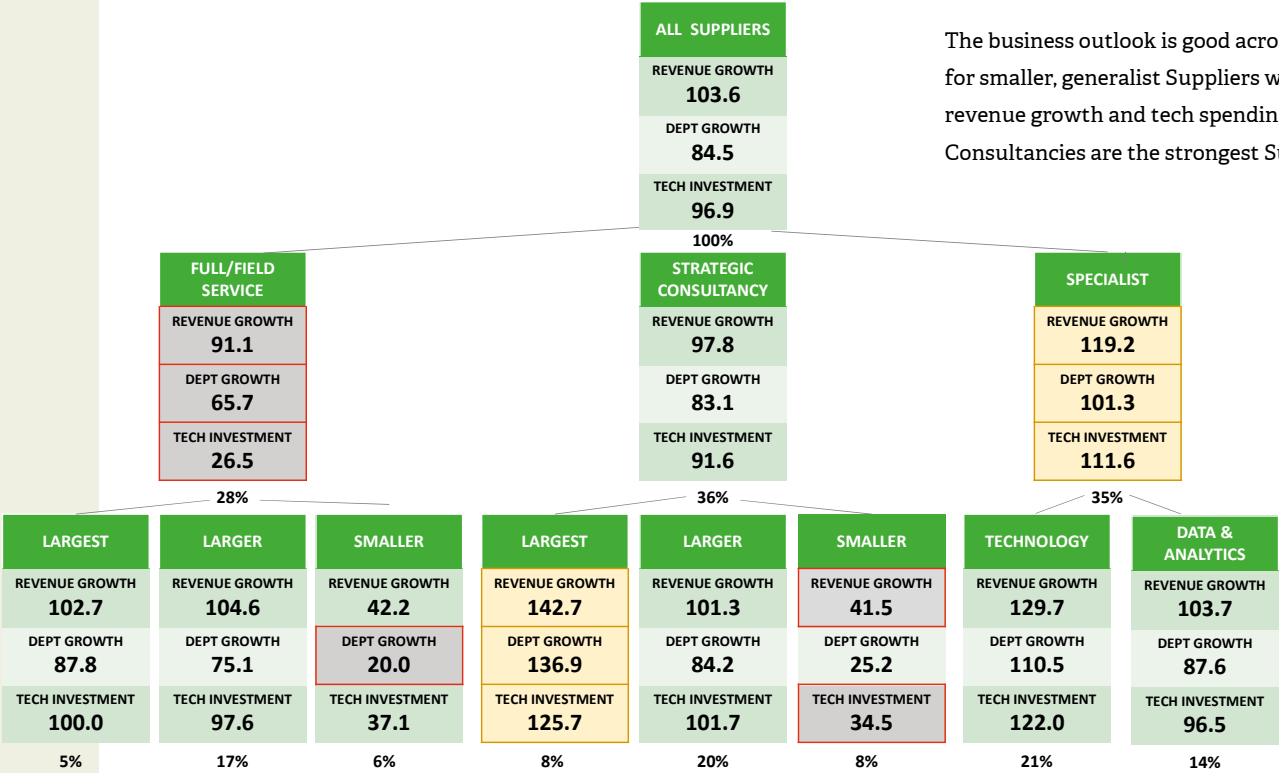


ANNUAL PROJECT VOLUME BY SUPPLIER PROFESSIONAL FOCUS (SUPPLIERS)

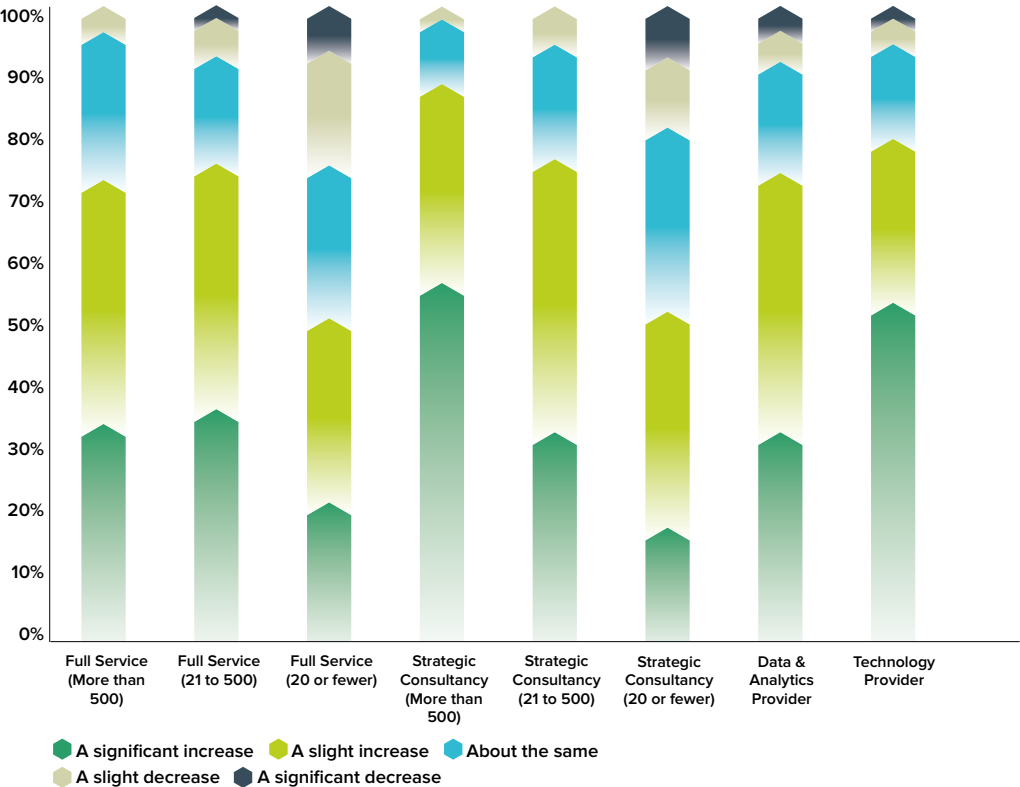


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REVENUE TREND BY PROFESSIONAL FOCUS CATEGORY (SUPPLIERS)



Revenue trends have been steady across Supplier types compared to 19W1, while staff trends are

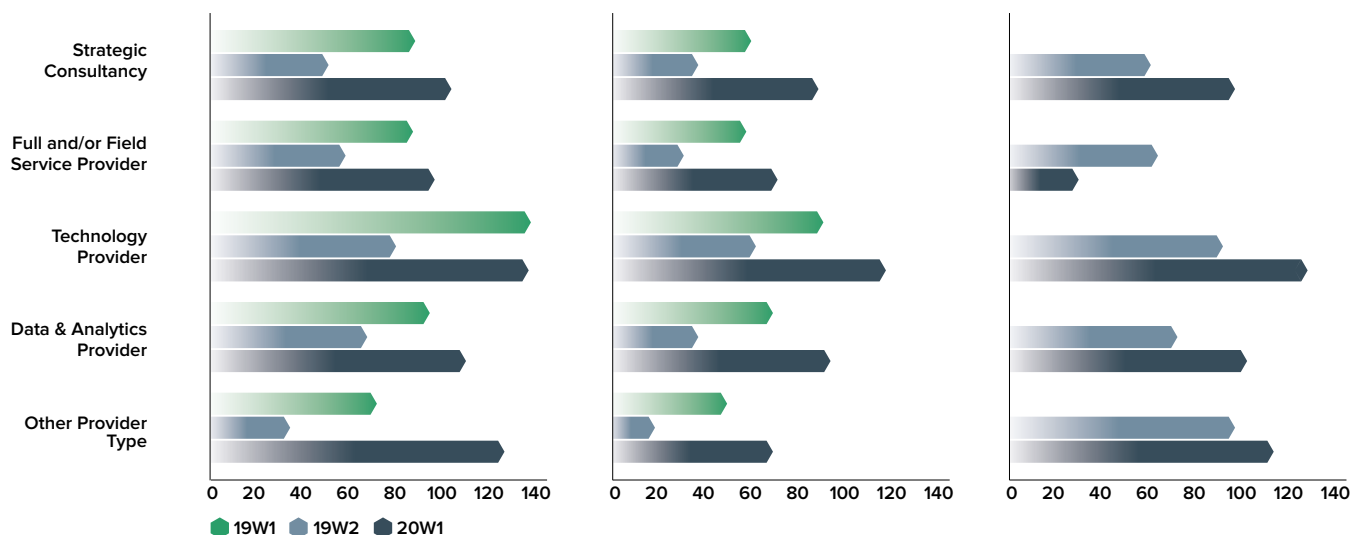
stronger for specialists since then. Tech spend is overall increasing across segments.

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

REVENUE TREND

DEPARTMENT SIZE TREND

TECHNOLOGY SPEND TREND



The highest proportion of revenue increases is among companies that offer at least three of the four service types and those doing more than 250 projects per year. Revenue increases also seem to be

more characteristic of companies 6-10 years old and those with 51 to 2,499 employees. Revenue increases are slightly more frequent in North America than elsewhere.

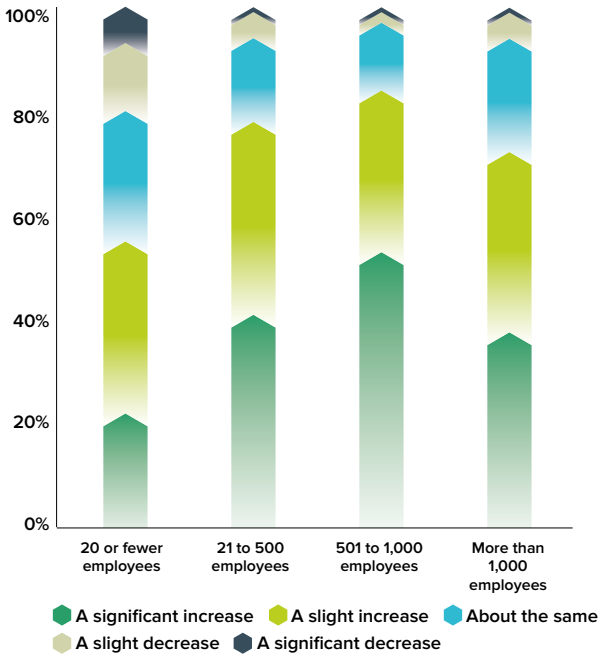
Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1512	74%	8%
Company Characteristics	n	% Who Increased	% Who Decreased
Professional Focus			
Strategic Consultancy (More than 500)	124	88%	2%
Technology Provider	316	80%	4%
Data & Analytics Provider	216	76%	6%
Full Service (21 to 500)	263	76%	7%
Strategic Consultancy (21 to 500)	302	75%	7%
Full Service (More than 500)	73	73%	4%
Strategic Consultancy (20 or fewer)	118	52%	19%
Full Service (20 or fewer)	90	51%	24%

The primary reason for the revenue increase was split across focus on innovation and focus on client needs

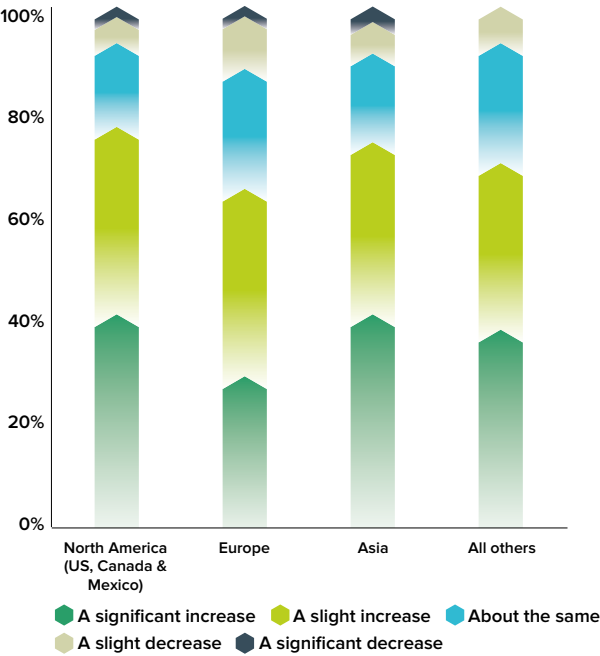


Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1512	74%	8%
Company Characteristics	n	% Who Increased	% Who Decreased
Number of service types with significant revenue			
One service area	715	67%	10%
Two service areas	351	78%	5%
Three or more service areas	450	82%	6%
Employee size			
4 or fewer employees	135	47%	27%
5 to 50 employees	319	72%	7%
51 to 2,499 employees	981	80%	5%
2,500 or more employees	81	60%	6%
Global Region			
All other regions	44	80%	2%
North America	1081	77%	7%
Asia	64	73%	9%
Europe	280	66%	11%
Australia/New Zealand/Pacific Islands	47	62%	11%
Company 6-10 years old	267	83%	6%
Scope of Business	n	% Who Increased	% Who Decreased
Annual Project Volume			
Fewer than 25 projects	127	43%	25%
25 to 50 projects	117	62%	17%
51 to 150 projects	247	69%	6%
151 to 250 projects	199	77%	5%
More than 250 projects	747	82%	5%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

REVENUE TREND BY EMPLOYEE SIZE (SUPPLIERS)



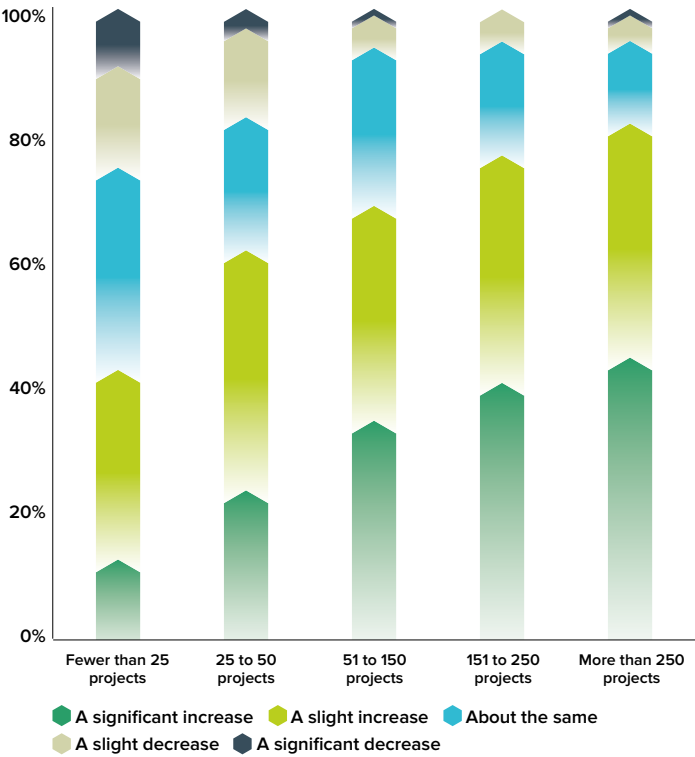
REVENUE TREND BY GLOBAL REGION (SUPPLIERS)



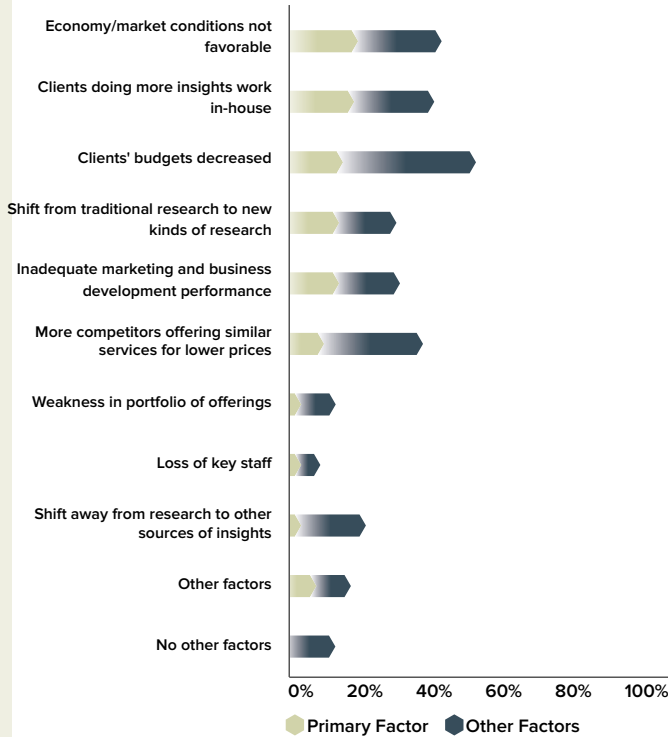
While “primary” factors behind the revenue decrease reflect the heterogeneity of the Supplier world, the most consensus is around client budgets decreasing, followed by an increase in lower priced competitors. On average, Suppliers whose revenue decreased selected 2.8 actions they would take, led by improving marketing and business development and followed by stronger strategic focus, better aligning with client needs, and vigorously promoting the value of their work.

The primary reason for the revenue increase was split across focus on innovation and focus on client needs (followed by others chosen less frequently). When all factors are considered, these two ran neck-and-neck, along with delivering great value, as the most frequent reasons given. Smaller companies that managed to increase revenue credited a strong focus on customers, followed by a focus on delivering value and the growth of their company’s reputation.

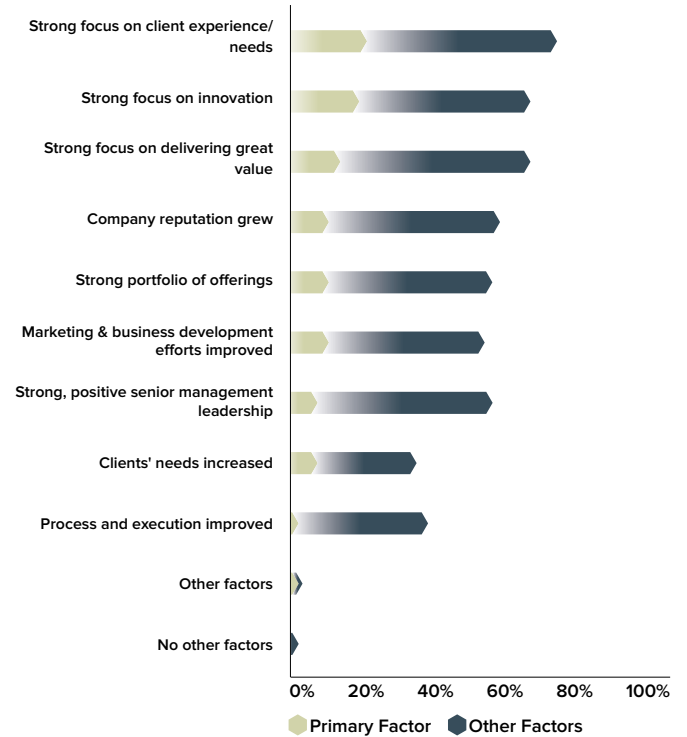
REVENUE TREND BY ANNUAL PROJECT VOLUME (SUPPLIERS)



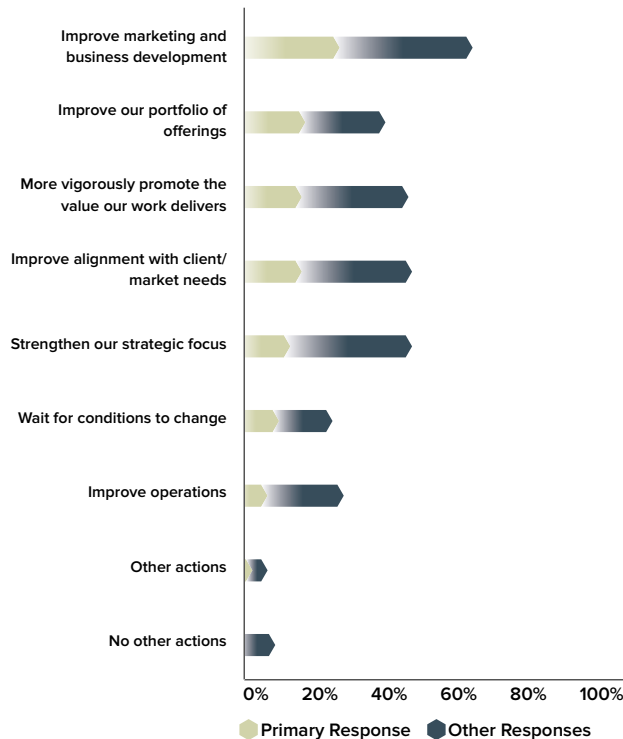
FACTORS BEHIND REVENUE DECREASE (SUPPLIERS)



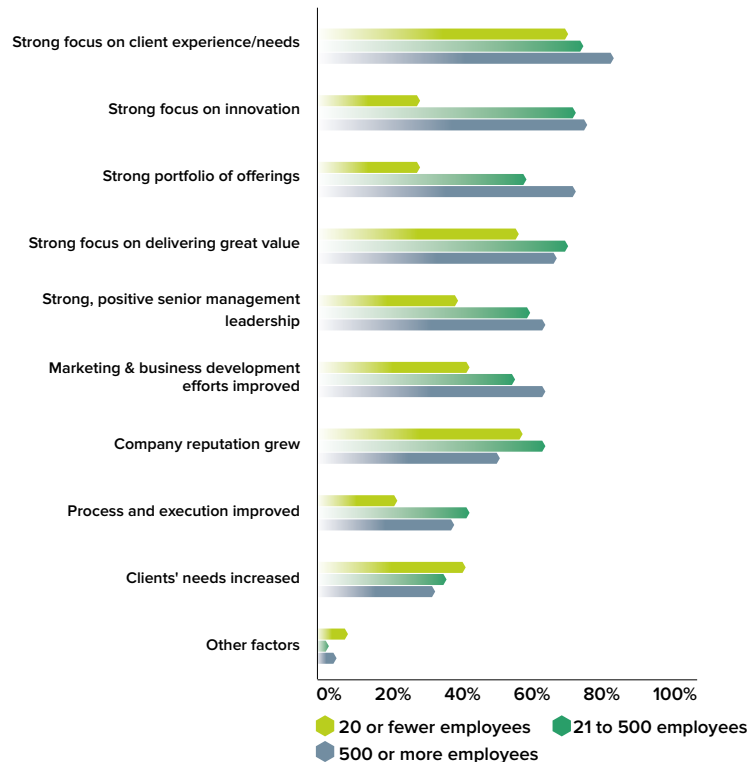
FACTORS BEHIND THE REVENUE INCREASE (SUPPLIERS)



HOW ORGANIZATION WILL RESPOND TO THE REVENUE DECREASE (SUPPLIERS)



FACTORS BEHIND THE REVENUE INCREASE BY EMPLOYEE SIZE (SUPPLIERS)





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Several Supplier behaviors are associated with increased revenue, led by measuring project ROI.

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers (Who Answered These Questions)	491	70%	11%
Practices	n	% Who Increased	% Who Decreased
Always or frequently:			
Measures the ROI impact of the projects we conduct	160	81%	8%
Gives clients access to active dashboards and visualization tools	260	79%	5%
Uses multiple data sources instead of a single study to address business issues	416	78%	6%
Benchmark self against other organizations	229	78%	7%
Is involved in strategic planning sessions at BU level	274	77%	8%
Actively promote the research we conduct	282	75%	7%
Regularly interact with senior stakeholders	363	75%	8%
Explore new methods, technologies, business models and partners	386	75%	8%
Is focused on future growth strategy	409	75%	9%
<i>Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.</i>			

Several Supplier “best-in-class” strategies are associated with revenue growth, suggesting that simply having a best-in-class aspiration is a key to

growth. Growth is also higher among suppliers who adopt (or plan to adopt) various types of automation.

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1516	74%	8%
Strategic Focus	n	% Who Increased	% Who Decreased
Skills & Initiatives: Must be best-in-class			
Using new types of data	519	84%	3%
Conducting meta-analysis	349	84%	4%
Analyzing multiple data streams	512	82%	4%
Synthesizing data from multiple sources	578	81%	4%
Analyzing data powerfully	838	81%	4%

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1516	74%	8%
Strategic Focus	n	% Who Increased	% Who Decreased
Collecting data efficiently	762	81%	5%
Assessing likely success of recommendations	595	80%	4%
Making multi-disciplinary recommendations	553	80%	4%
Understanding client's goals and strategies	1169	77%	6%
Communicating insights effectively	1047	77%	5%
Having the trust of the ultimate client decision-maker	1043	77%	7%
Where Automation Has or Will Have a Key Role			
Analysis of image and video data	661	83%	3%
Analysis of biometric/nonconscious data	451	83%	4%
Sampling	736	81%	5%
Analysis of text data	824	80%	4%
Integration into larger organizational business intelligence frameworks	597	80%	5%
Attribution Analytics	530	80%	5%
Project design	646	80%	5%
Survey design	770	79%	6%
Analysis of other data sources	743	79%	5%
Charting and infographics	822	79%	6%
Analysis of survey data	919	78%	6%
Automation Attitude: Agree Completely/Very Much			
Enables us to deliver projects faster	1076	82%	4%
Will grow in adoption within our organization	980	80%	5%
Allows us to deliver better quality research	759	79%	4%
Gives us a competitive advantage	910	79%	5%
Allows us to lower costs	880	78%	5%
Will grow in adoption in the insights and analytics industry	1128	77%	5%
Gives us access to tools previously not available	938	77%	6%
Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.			

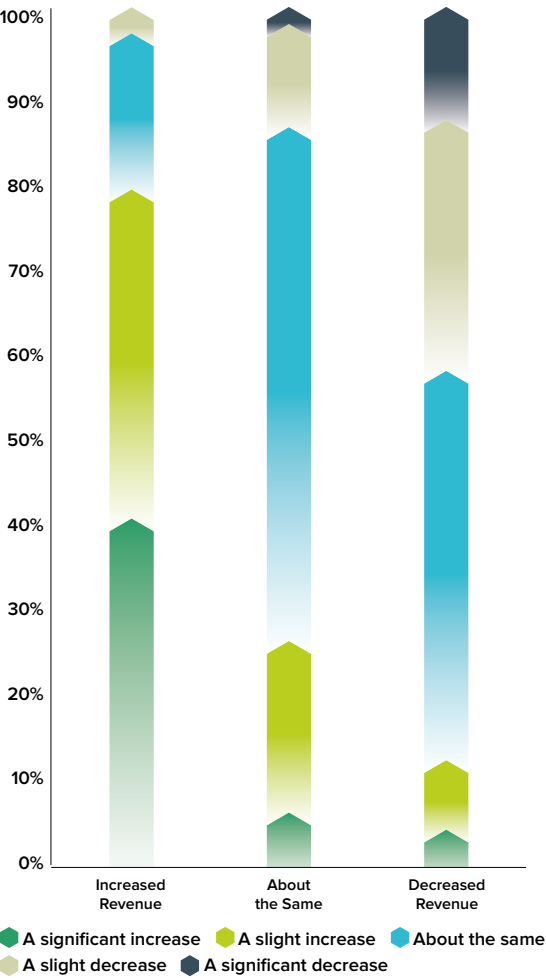
Revenue increase is also related to increases in staff and tech spend. Certain buzz topics are favored by Suppliers whose revenue increased, including data integration and interoperability, research automation, big data analytics, and communities.

Similarly, Suppliers with innovative clients who invest in tech and innovation and who admire Suppliers who stand out for research automation, tools, and investment in technology, were more likely to enjoy increased revenue.

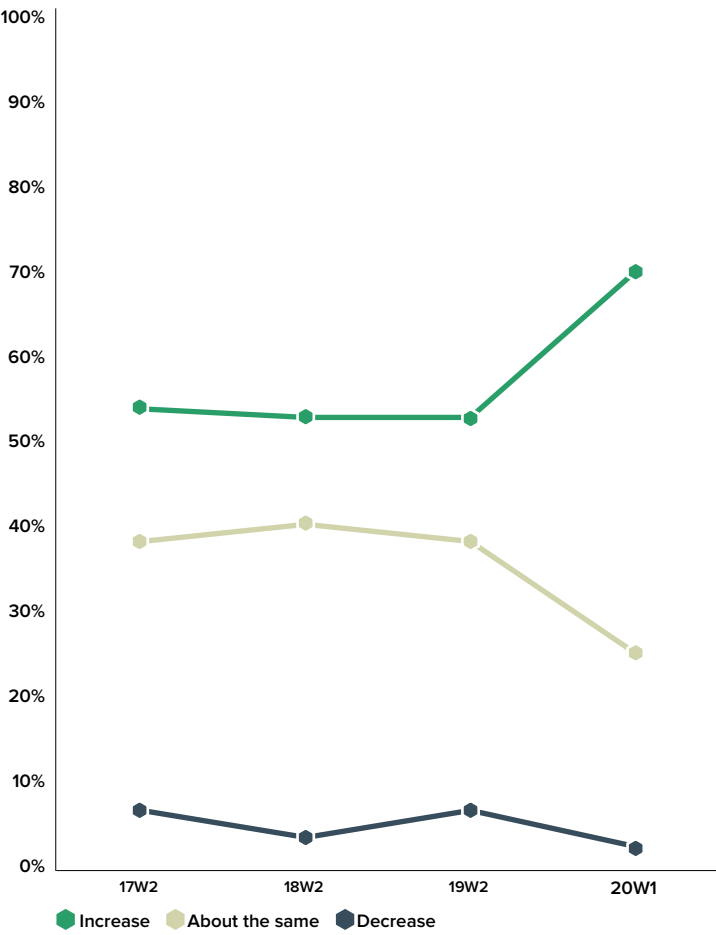
Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1452	74%	8%
Priorities	n	% Who Increased	% Who Decreased
Changes to department's full-time staff			
Increased staff	1024	84%	4%
Decreased staff	46	28%	46%
Investment in technology			
Increased spending	951	91%	1%
Decreased spending	124	31%	39%
Skill Development: key priority			
Technical/computer expertise	281	76%	6%
Innovative focus	498	76%	6%
People skills	444	75%	7%
Analytical expertise	468	73%	8%
Business knowledge	458	72%	10%
"Buzz Topics"			
Data integration and interoperability related	35	91%	3%
Research automation in general	121	88%	5%
Big data analytics	58	86%	7%
Communities	33	85%	6%
Shopper Research	38	63%	11%
Traditional or legacy research methods/ approaches/ thinking	38	63%	13%
Cultural Analysis	42	62%	17%
Digital qualitative platforms or tools	36	61%	19%
Politics or macroeconomics related	63	60%	11%
Why Most Innovative: Clients			
Investment in new technology / innovations	122	84%	7%

Revenue Trend Profile	n	% Who Increased	% Who Decreased
Percent of Suppliers	1452	74%	8%
Priorities	n	% Who Increased	% Who Decreased
Why Most Innovative: Suppliers			
Automation / Research automation	38	92%	3%
Specific product/tools/software mentions	74	88%	5%
Investment in new technology / innovations	75	87%	1%
Integrated platform	49	86%	0%
Implicit measures/approaches	32	88%	3%
<i>Note: These are row percentages and compare to the percentages at the top of the column. Statistically significant differences (if any) are in bold.</i>			

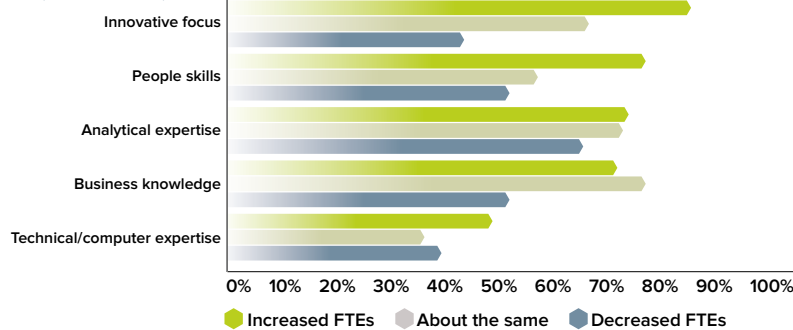
REVENUE TREND BY CHANGE IN NUMBER OF FTE POSITIONS (SUPPLIERS)



CHANGE IN TECHNOLOGY SPEND BY GRIT WAVE (SUPPLIERS)



SKILL DEVELOPMENT EMPHASIS BY CHANGE IN NUMBER OF FTE (SUPPLIERS)



For Suppliers who increased their FTEs, developing innovative focus and/or people skills are a higher priority than for those who did not increase staff.

THE BIG PICTURE

Just before the pandemic hit, Buyers and Suppliers seemed to be in good shape relative to previous GRIT waves, although smaller Suppliers, overall, struggle more. Now, the pandemic has altered reality, and we can't know whether this healthier reality that abandoned us by March will continue or return. Smaller Suppliers, like other smaller businesses, may suffer the most negative impact.

The "return" of a healthier reality will likely be strongly influenced by the net impact of independent actors. The section of this GRIT Report related to COVID-19 suggests that there may be opportunities for Suppliers, as Buyers will have to make additional efforts to understand a world that may operate completely differently in the near term and beyond. That section further suggests that AI and automation will continue to play important roles in the future, but strategically and pragmatically, and not without other new wrinkles.

Buyers – including the researchers, the marketers, and the business managers – will need quick answers to new questions while also understanding their customers' mindsets with enough texture to connect with them meaningfully. Access to fast, highly textured information may depend on the ability to efficiently collect, process and understand data collected formally by design (such as online qual) as well as data that is more opportunistic (such as social media) plus the capability to integrate different sources and analyze them quickly, accurately, and meaningfully.

'Oh,' you say, "you mean like we were already doing before 3/11?" To paraphrase that great intelligence leader, Spottswode, it will be like before 3/11 times 1,000!

One of the themes of this section of the GRIT report is how Buyers who increase budgets and Suppliers who increase revenue understand the value of technology, but resist living in the machine world. Throughout the GRIT editions we have seen technology spending increase in concert with staff increases, not instead of them. Buyers and Suppliers want to develop innovation focus, but the complement to this seems to be people skills or business skills; technology and computer skills are often a lower priority.

Perhaps Buyers, and Suppliers who consider themselves to be "hybrids" or strategic insights consultants, are telling us that they need to pay attention to the human skills that can make sense of what the machines bring forth, especially for the emerging marketing landscape. One of the key questions for Suppliers, particularly smaller ones, is how to adapt to and thrive in a context that seems to demand integration of methods, modes, and data types (at least one of which is likely to be outside their current expertise, and all of which seems terribly expensive). A key question for Buyers will be how to put these pieces together – how much in-house, how much outsourced, what portfolio of Suppliers are needed, or can you trust someone's all-in-one solution?

Buyers – including the researchers, the marketers, and the business managers – will need quick answers to new questions while also understanding their customers' mindsets with enough texture to connect with them meaningfully





INVESTING THROUGH A CRISIS: HOW THE DIGITISATION OF INSIGHTS WILL ENABLE A FASTER RECOVERY

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It's now clear that with or without a second outbreak of Corona Virus, the consequences on business will be severe and long-lasting. The outlook across the globe has never been more uncertain. Covid-19 has changed economies, social systems, fundamentally impacted consumer behaviors and altered what people value and demand.

There will be winners and losers and the speed of economic recovery and degree of lasting change is likely to hinge on confidence. Confidence for consumers to move and transact. Confidence for businesses to invest in renewal and innovation. Tomorrow's success stories will be dominated by the companies that understand this is not going to be about a quick return to the status quo, it's about adapting to fundamental changes and spotting the shifts which will sustain. To win they will need to make positive, timely and confident actions; clearly the research industry has a fundamental role to step-up and deliver here.

What's potentially different about this recession versus those before is the role of technology; for example, in 2008 Facebook counted the # of active users in mere millions, not billions. The digitisation of business models and adoption of new tools will have a profound effect on the speed by which industries and companies recover. This is equally true for consumer insights; it's no longer acceptable for the business to have to wait 3 months or even 3 weeks for answers.

Technology and the digitisation of insights will increasingly become a great enabler of competitive advantage and speed as companies navigate the fall out of the pandemic. In fact, there has never been a better opportunity to tear up the rulebook and change how you do things. At Black Swan, we can already see differences in our clients' approach. There are those that are accelerating investment in innovative technologies, such as ours, to help them better understand

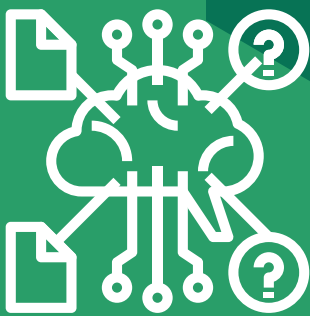
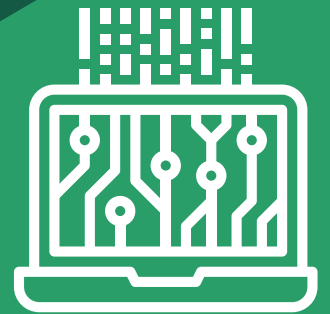
how they must adapt, and on the other side there are those who's budgets remain 'frozen', their heads down as the world changes around them. I think it will be only too evident which approach has more merit.

The million-dollar question right now is which changes in consumer behavior and drivers of consumer choice will be long term, sustained changes and which are simply short-term fads. Never before has the need for accurate 'foresight' been more important. The democratisation of AI and ML technology means we can now utilise 'passive' digital conversation data combined with scientific prediction models to accurately predict shifts in consumer behaviour and identify emerging trends earlier.

At Black Swan, we apply this technology to help clients rank and prioritise which pre-Covid growth drivers and trends are increasing vs decreasing in relevance. Similarly, we can predict which of the new disruptive trends, brought on by the pandemic, will sustain versus fade away. This is helping improve business confidence, identify new opportunities faster and ensure longstanding projects that are still valid continue to progress. Ultimately helping to fuel future growth and speed up the wider recovery.

It's likely we are only seeing the tip of the iceberg of the changing business outlook, perhaps the winning strategy after Covid-19 will be less about only beating your competitors and more about how businesses and their consumers can collaborate to combat larger, shared enemies like pandemics, climate change or, like recent events have reminded us only too well, inequality. If Covid acts as such a wakeup call is yet to be seen, but it has never been more important to understand consumer change and ensure a strategy of true business adaption.

INNOVATION SECTION



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BUZZ TOPICS

What's hot and what's next? Innovation doesn't slow down, and there are always new ideas that capture the imagination of the industry. Some fizzle out and some go on to utterly transform the industry; knowing what they are helps us prepare for either scenario.

Insights professionals are tasked with keeping our internal and external clients aware of trends in the marketplace and population, while also staying current about trends and changes in our own professional skills; including evolving our tools, methods, and techniques. When asked about which topics insights professionals are following, that responsibility and innate curiosity was evident. As an industry, we remain dedicated to following all of the information that enables us to understand the world around us and turn that into insights that drive business decisions.

The most frequently mentioned buzz topic of 20W1 was *Methods and Sampling*, both globally, as well as in North America and Europe. This category includes all forms of quality, fraud, and transparency, and the comments indicate a growing desire for improved confidence in the data that undergirds our decision making. It also includes sustainability, and new or improved ways of engaging people in the research conversation.

Some comments regarding *Methods and Sampling* include:

- Quantitative sample quality and respondent quality. Phone is no longer representative and panel is crap. If we can't get quality respondents, we can't get quality data, so we have nothing.
- Panel Sample (people hate River).
- Hackers are always finding ways to "cheat" surveys for incentives, and we look to continuously improve our quality control measures.
- Panel recruitment, because respondent types are important to our business and we do have a panel.

A close second in interest is *Artificial Intelligence and Machine Learning (AI/ML)*, where we seek to know more about technology that will increase our speed and understanding. As one participant articulated, Artificial Intelligence "will affect everything," both professionally and personally, and is a trend for understanding people as they react to an evolving world of data. AI is predicted to have an impact on society, the job market, and the world as a whole. AI/ML, of course, is also inspiring new opportunities for efficiency, changing how we do our jobs and what our average day looks like. A final note from many people, though, was that while AI & ML are hot topics, they don't yet have enough substance and proven techniques or results to consider them core to our toolkit.

Many respondents simply said "AI" or "ML," but others were more forthcoming:

- AI – Interesting to learn how we can use this new technology when it comes to panel recruitment, reach harder to find targets and conduct research with vulnerable populations.
- Practical application of AI project management as a way to better serve clients.
- AI & ML – I feel these tools will be enablers for the I&A industry, doing much of the "grunt" work and letting the Researchers and Data Analysts spend time evaluating /creating insights.
- AI, due to its ability to save time and money.
- AI and how that is pushing research forward, but it feels currently like a lot of buzz and very little substance.

When looking at the type of participant or company, insights Buyers and traditional Suppliers have similar levels of interest in the top four categories. Methods and Sampling and AI/ML earning the top two positions were driven by higher interest from companies that focus on "other" services and niche offerings, in part because it is the focus on those firms and their offers.

The most frequently mentioned buzz topic of 20W1 was *Methods and Sampling*, both globally, as well as in North America and Europe. This category includes all forms of quality, fraud, and transparency



Coming in third and fourth are *Research Technologies* and *Research Topics or Areas of Expertise*. Research technologies cover the tools used to collect data or engage participants, such as Blockchain, Programmatic, Research Platforms & Suites, 5G, Voice, Video, and Cloud-based computing. For these tools, participants focus squarely on the Value Pillars of Speed, Quality, and Price. Tools that improve two or more those elements are highly desirable. More specifically, speed is mostly about time before and after fieldwork, including making things more accessible to insights professionals through DIY applications that include automation of the research process, and comply with privacy regulations. Some representative comments include:

- Automation, dashboarding, end-to-end – across all organizations we’ve seen conversation center around maximizing the research they are conducting, being agile, doing more with less.
- It’s clear that using existing data sources rather than interviews are the future. I believe that although some experimental research will still be done, the flaws it has in terms of trustworthiness, especially if you compare it with the power of real data and spontaneous social media posts, will make us move more and more to that side.
- Data fusion because there are more and more sources of data beyond surveys to pull insights from.

Research Topics focuses on professionals who are seeking information, expertise, or trends in specific categories such as politics, media, products, branding, packaging, cannabis, health, sports, beauty, and food & beverage. Providers who can provide specific vertical consulting and services, and are able to translate that into differentiated reports and content, will see high interest from their clients. Respondents made comments such as:

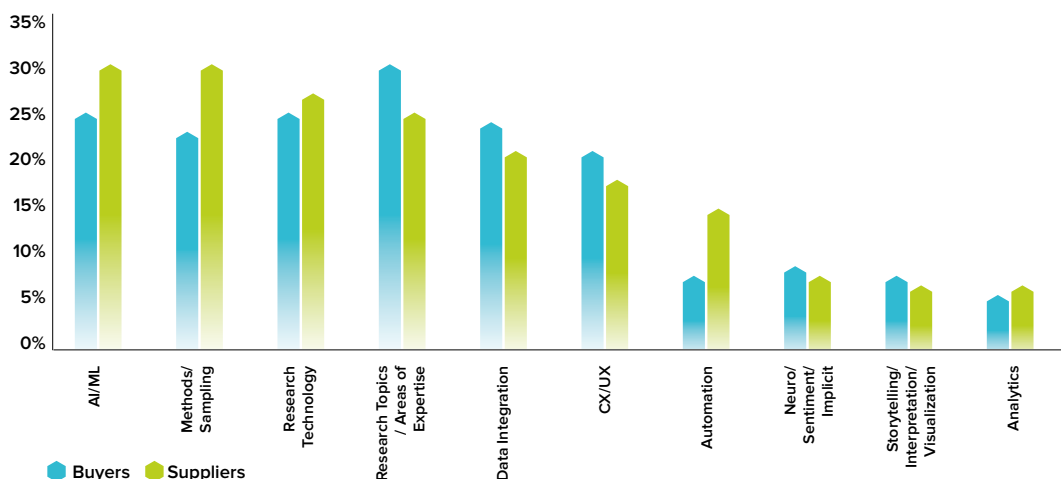
- Health and wellness insights, research with healthcare providers and payers, because these are areas where a significant majority of my business comes from.
- Streaming and e-sports as they are fast on the rise.
- The impact of COVID-19 on survey responses.
- Cannabis is a hot topic for many CPG clients.
- IT- migrating to the cloud.
- Generations studies.

Data Integration, CX/UX, and Automation round out the top seven categories. When considered as a group, these seven reflect a balance of needed information by the industry that enable us to grow our current skills while ensuring quality, enabling speed and efficiency, and evolving the data we use, all while focusing on the people and populations we represent.

For these tools, participants focus squarely on the Value Pillars of Speed, Quality, and Price. Tools that improve two or more those elements are highly desirable



BUZZ TOPICS: BUYERS VS. SUPPLIER



When looking at the data by geography, there are a few notable differences. Although it comes in 6th overall, Australia, New Zealand & Pacific Islands have a higher interest in CX/UX, “because it is hot, on client’s minds, and has become a key focus of many organizations.” Research that drives improvements in the human experience, customer centricity, and journey mapping would appear to be poised for

growth. This region also referenced storytelling and visualization. Together, these comments suggest delivering deep information about how to connect to people’s experiences with brands, products, and technology. Central & South America has higher mentions of data integration, including combining primary and secondary data elements to build larger data sets and tell broader stories.

“BUZZ” TOPICS BY GLOBAL REGION

Supplier Type	North America	Europe	Asia	Central & South America	Australia, New Zealand & Pacific Islands
AI/ML	28%	31%	31%	25%	37%
Methods/Sampling	30%	31%	22%	18%	19%
Research Technology	26%	31%	14%	11%	24%
Research Topics / Areas of Expertise	27%	24%	28%	18%	7%
Data Integration	21%	25%	11%	32%	11%
CX/UX	17%	20%	10%	25%	39%
Automation	13%	16%	14%	7%	19%
Neuro/Sentiment/Implicit	8%	9%	6%	0%	6%
Storytelling/Interpretation/Visualization	6%	7%	13%	4%	19%
Analytics	7%	9%	3%	14%	11%
Shopper	6%	5%	8%	14%	2%
Digital	6%	4%	7%	14%	0%
Coronavirus/Covid-19	5%	3%	13%	0%	0%
Trends/Innovation/Disruption	4%	3%	4%	7%	0%
Privacy, GDPR, NDA and other personal data security related	3%	2%	1%	0%	2%
Data integration and interoperability related	1%	5%	1%	4%	6%
Other	6%	7%	3%	0%	4%



WHAT'S HOT & WHAT'S NOT IN MRX

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Once again, OdinAnswers was asked to help quantify and analyze all relevant comment data in this year's GRIT survey. This was an interesting year for GRIT with almost 2100 people responding, and 1755 of those providing written feedback to the open-ended questions (84% OE response rate). Far higher than the typical survey comment response rates (~33%). Of most interest perhaps was the question "At any given time, several topics may enjoy significant "buzz" in the insights & analytics industry. Which topics do you follow most closely and why?". People were allowed to respond in their native languages, though most were in English.

Sometimes how much people say tell us something about their interest level and passion around a subject. The average word count for a response was 12, with respondents discussing deep learning being the most verbose averaging 35 words.

Automation and AI (Machine Learning) was the hottest topic overall however, with 33% of respondents mentioning it. For the first time, a good number of people mentioned "NLP/Natural Language Processing" (3%) as part of automation, which while probably not as large as where it should be in terms of importance to AI, does show that market researchers are beginning to understand what the term actually means.

Respondents from the Australia/New Zealand region showed the most interest in AI and automation, with 45% of their respondents mentioning it. However, North Americans were more likely than others to exclusively mention "AI/Automation" in their comments, without mentioning anything else.

While AI/Automation was also popular elsewhere, including in Europe, discussions around other areas of data were deeper there as well, with people discussing issues around big data, data modeling, data quality, and data-based insights. It seems while North Americans are now less likely to mention "Big Data" than they were a few years ago, it's still very much still a term of interest in Europe.

Behavioral science remains a popular buzz word as mentioned by 5% of respondents.

Many terms such as dashboards, visualizations, were a few of several terms mentioned nearly exclusively by suppliers. This was a trend OdinAnswers identified in a previous year. Suppliers are far more likely to mention buzz words and methodology specific terms, while clients are far more focused on ROI and actionable insights. Perhaps no other terms exemplified this trend better than the terms "Qual" and "Quant". While still important to suppliers, clients could seemingly care less about the distinction. And with NLP/Text Analytics, the distinction is now vaguer and more confusing than ever.

Finally, as COVID-19 hit in the middle of fielding, OdinAnswers spotted at least one key difference Pre-Post COVID. "Ethnographies" saw a significant increase in mentions after the lockdowns began.

Of note in this particular wave of research is the mentions of following the impact of COVID-19. The data was flagged at the point of the Presidential Address on Coronavirus and the mentions moved from 1% to 6% of the comments, and 13% in Asia. At the time of the survey, the Asian markets were most affected by the pandemic, while European and American effects were still emerging. Participants mentioned following the pandemic's outcomes on shopper behaviors, face-to-face research, the health and recovery of our industry, the world economy, and the long-term change to human beings. These topics are still truly relevant as insights professionals

strive to understand and articulate the “new normal” to their business stakeholders.

These areas collectively represent a tremendous amount of information insights professionals need to follow. As we share this information, we should consider how to deliver the content in ways that are consumable, differentiated, quantifiable and applicable to diverse audiences. Developing ways that allow busy professionals to learn quickly will advance both individuals and the industry as a whole.

THE BIG PICTURE

The most frequently mentioned buzz topic of 2020 was *Methods and Sampling*, which includes all forms of quality, fraud, and transparency, indicating a growing desire for improved confidence in the data that undergirds our decision making. A close second in interest is *Artificial Intelligence and Machine Learning*, where we seek to know more about technology that will increase our speed and understanding. Coming in third and fourth are *Research Technologies* and *Research Topics or Areas of Expertise*. *Data Integration*, *CX/UX*, and *Automation* round out the top 7 categories. When considered as a group, these seven reflect a balance of needed information by the industry that enable us to grow our current skills while ensuring quality,

enabling speed and efficiency, and evolving the data we use, all while focusing on the people and populations we represent. Of note in this particular wave of research is the mentions of following the impact of COVID-19.

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When considered as a group, these [top seven categories] reflect a balance of needed information by the industry that enable us to grow our current skills while ensuring quality, enabling speed and efficiency, and evolving the data we use





WELCOME TO THE NEXT NORMAL – LIKE IT OR NOT

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You've seen the headlines, been in a billion meetings on the topic, and likely spent many nights lying awake in your bed worrying about yourself and your family. Over the last few months, COVID-19 has occupied your heart, mind, and soul. We've all pondered the question of our very existence, along with much less existential questions like, "what, if any, research projects should move forward?"

The irony is that those who had already adapted and transformed their insights programs to agile, fast technology-driven research didn't have to labor on this question for very long. They took home field advantage and just...moved ahead.

Digital Transformation Is No Longer a Choice

Aytm's tracker study, "COVID-19 Pandemic Impact on US Consumers," shows that up to 70 percent of Americans have reduced discretionary spending, and more than 80 percent have experienced stockouts of products they intended to buy. These product shortages have become a significant driver of brand switching, and many shoppers don't plan to fully return to their previously-used brands post-pandemic.

What does this mean for consumer brands? You're now chasing a moving target that shines a light on the importance of speed. This requires evolving your insights approach to be less reactive and more proactive. Because the time when there was a choice to innovate is now long gone. The slow evolution we were making toward transformation is suddenly here, today – and it's not going anywhere.

Today it's a pandemic, tomorrow a fast-moving challenger brand, next week? There was always going to be something. Embrace the forced evolution.

It's Much More Than Technology

Digital transformation is a broad activity that is about much more than just purchasing a technology platform. Adapting large scale portions of your insights program to embrace the time and cost savings of technology requires cultural shifts in strategic approaches to survey cadence, design, and analysis. You need the right partners who are with you on this journey and are actually dedicated to helping you reach the destination.

At aytm, we often think of ourselves as "tour guides" or a "bridge," enabling large scale change by helping brands make iterative changes that, in the long term, deeply impact their ability to meet the next normal. Yes, technology plays a major role in this work, but so do people. The idea of "service" in our business really needs to shift from "do it for me" to "help me do it" to ultimately "do it yourself." For some, this transition will be easy, and for others, not. Either way, it's needed and it's possible.

Change Can Be a Blessing in Disguise?

While a global pandemic is far from good, the change in focus is a moment of opportunity for you to assess how you do things today and embrace change. From reimagining your home lives to professional strategies, it's giving you the time to realign that you may not get again in your lifetime.

Your stakeholders and leaders are more open today than ever before. You no longer have to be considered a radical change agent to drive transformation. With the right partners who can help you build a path forward, you can make sure that when the next thing comes, and it will, you are ready.

UNMET NEEDS IN THE INDUSTRY

If we don't know there is a problem, we can't fix it. But too often, we forget to ask what we don't know. Defining unmet needs is the first step in filling them and moving the industry relentlessly forward.

For the first time, we asked insights Buyers to describe their unmet needs, in particular, needs that could be filled by external Suppliers:

What, if anything, is the biggest need you have that could be filled by an external supplier, but currently is not?

We also asked Suppliers to articulate the needs that they think insights Buyers have that could be filled by external Suppliers:

What, if anything, do you think is the biggest need that insights buyers have that could be filled by an external supplier but currently is not?

The goals were to identify potential areas for innovation, as well as any areas of disconnect between Buyers and Suppliers. Areas of disconnect could indicate that Suppliers don't understand what Buyers need, or it could mean that Suppliers have keen insights into the Buyer's challenges that Buyers cannot see on their own. Suppliers, for example, may have expertise that is quite different from a Buyer's. They may have the objectivity of a participant observer, and, most importantly, they likely have experience with a variety of Buyers and exposure to different ways that Buyers have addressed common challenges. Finally, if a Supplier has a different view of a Client's challenges and the potential ways to address it than a client has...isn't that why Client's hire them in the first place?

These were verbatim questions, and responses were coded and then further aggregated into categories. We have grouped the top ten topics in the accompanying chart for simplicity.

Creating business impact was the clear #1 need that Buyers thought Suppliers could help address, while Suppliers could not choose a favorite from their Top 3 candidates: *creating business impact*, *research core skills*, and *advanced analytics and data synthesis*. For Buyers, *research core skills* tied for second while *advanced analytics and data synthesis* was fifth. Aside from the two that are in the top 3 for both Buyers and Suppliers, *creating business impact* and *research core skills*, Buyers placed two other needs ahead of *advanced analytics and data synthesis*: *innovative technology* and *business consulting skills*. Among Suppliers, these ranked 5th and 4th respectively. So, the top needs are pretty well aligned across Buyers and Suppliers, and after *creating business impact* among Buyers, these needs differ in mentions by 5% or less.

In fact, the entire set of needs is pretty well aligned across Buyers and Suppliers; the largest percentage differences are for *creating business impact* (Buyers are 7% higher) and *innovative technology* (Buyers are 5% higher). All other needs are mentioned within 3% of each other, which leaves us with the question of why there is a larger gap for Buyers' most pressing needs.

Creating business impact was the clear #1 need that Buyers thought Suppliers could help address, while Suppliers could not choose a favorite from their Top 3 candidates: creating business impact, research core skills, and advanced analytics and data synthesis



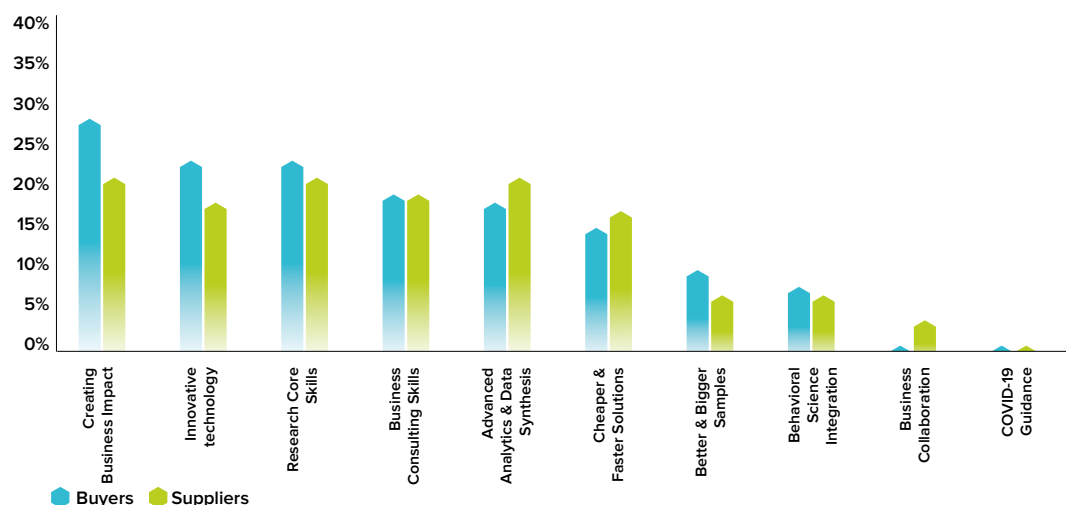
REPRESENTATIVE COMMENTS REGARDING UNMET NEEDS

	Buyers	Suppliers
Creating Business Impact	<ul style="list-style-type: none"> The need for suppliers to have a better understanding of the business, integrate better and proactively drive the deployment of cutting-edge technology and methodology to aptly address business issues. Measuring CX ROI. 	<ul style="list-style-type: none"> True business issues understanding on the part of research and insights providers. Not just MR. Business issue orientation is becoming a lost art. Translation of these insights into actual sales data.
Innovative Technology	<ul style="list-style-type: none"> Powerful digital ethnographic tools that go beyond providing analytics. Geo fencing and dashboard development. 	<ul style="list-style-type: none"> Automation of mundane research practices. Companies still not sitting down and working out smart ways to re-engineer their operations and use the automation technology that is available to them.
Business Consulting Skills	<ul style="list-style-type: none"> Better client teams – too many junior people who know how to run projects but cannot really add value. Thought partnership and tech. Training on effective data visualization/ interactive reporting approaches for our team. 	<ul style="list-style-type: none"> Insights buyers are typically small teams (sometimes even a single person). External suppliers could be utilized more as consultants/partners....I hear from a lot of our clients that they feel “lonely”. The insights buyers are working in a closed world. They worry about not having access to the newest thinking and support of the experts.
Research Core Skills	<ul style="list-style-type: none"> Nothing fancy. Just solid strategic thinking and execution of research where I don’t have to re-do the analysis or re-write reports! I think we are missing out on 1) research basics and 2) building empathy with consumers. Technology seems like a big overpromise at this point that is being sold in to make us believe that there will be lower costs (there isn’t really), faster timelines (maybe but not always) or better quality data (more data doesn’t equal better data). I believe that the market research industry needs to take back the conversation from technology companies. 	<ul style="list-style-type: none"> Qualitative human understanding. More understanding, true knowledge of what is involved in research/projects. Clear understanding of what methods can and cannot do, including how to accurately interpret and apply results. Truly right-sizing projects so that we are able to deliver better quality and be rewarded as a trusted partner, rather than being treating us as vendors so that we are trying to extract the most in every proposal.
Advanced Analytics & Data Synthesis	<ul style="list-style-type: none"> Expertly designed and managed ML/DL-supported parsing and analysis of open-ends and long-form verbatims. NB: “expert” does NOT mean a great programmer, or a pretend-computer scientist, or an ‘experienced’ ML/DL practitioner. Use of Blockchain. Artificial intelligence to provide fast and deep analytics for syndicated data. 	<ul style="list-style-type: none"> The predictive power of large datasets applied to custom questions. Leveraging internal data and past research studies, etc. to optimize research dollars. Insights buyers do not prioritize this for some reason. Looking for the ability to use AI to go through video and come up with quotes, video clips that will save manual time.

Suppliers may specialize in particular areas and not have much insight into others, or perhaps they are jacks-of-all-trades but masters of none. In either case, they are likely to have a fragmented view of the insights world



BUYERS' UNMET NEEDS V. WHAT SUPPLIERS THINK THEY NEED



With respect to unmet needs, however, Suppliers are more than 3 times as likely as Buyers to name synthesis of results across multiple sources/types as an unmet need that a Supplier could fill



Arguably, GRIT Supplier respondents are more diverse than Buyers, at least with respect to insight generation. Suppliers may specialize in particular areas and not have much insight into others, or perhaps they are jacks-of-all-trades but masters of none. In either case, they are likely to have a fragmented view of the insights world. Buyers, on the other hand, have the opportunity to “travel the world” by engaging different types of Suppliers and so on, gaining a more holistic, ringside view of the insights and analytics industry. Therefore, Buyers are more likely to be more homogeneous than Suppliers, to agree more, and, as a consequence, stand out more in a column or bar chart.

Suppliers differ with respect to *creating business impact* and *innovative technology*, and these differences are related to their areas of focus. If we consider only Strategic Consultancies and Full/Field Service providers, the gap on *creating business impact* is only about 3% (28% for Buyers/25% for these Supplier types). If we consider only Technology providers, Buyers are actually 6% *less* likely to name *innovative technology* as a need. On the other hand, if we considered only Strategic Consultancies, Full/Field Service, and Data & Analytics providers, Suppliers look completely out of touch on *innovative technology*.

PERCEPTIONS OF BUYER UNMET NEEDS BY SUPPLIER TYPE

% Mentioning Need	Strategic Consultancy	Full/Field Service	Technology	Data & Analytics
Creating Business Impact	26%	24%	11%	17%
Business Consulting Skills	21%	18%	12%	20%
Innovative Technology	14%	16%	29%	17%
Cheaper & Faster	18%	16%	16%	17%
Better & Bigger Samples	5%	6%	11%	7%
Behavioral Science Integration	7%	8%	4%	7%
Business Collaboration	3%	4%	6%	1%
COVID-19 Guidance	2%	1%	0%	1%

In fairness, however, these gaps are partially a function of limitations of the methodology. On average, Buyer comments touched 1.4 of these 10 categories while Suppliers averaged 1.3. Realistically, if you were a Strategic Consultancy or a Full/Field Service provider and you had one bullet, would you waste it on *innovative technology* or would you take a shot at *business impact*? If you were a Technology provider, would you take aim at *creating business impact* or *innovative technology*?

We mentioned that the verbatim comments were coded, then aggregated into 10 categories. If we peel off some of the individual topics, there's another interesting finding.

Earlier in the report, we discussed how Buyers were more interested than Suppliers in new data sources, multiple data streams and so on. With respect to unmet needs, however, Suppliers are more than 3 times as likely as Buyers to name *synthesis of results across multiple sources/types* as an unmet need that a Supplier could fill. Further, this proportion holds pretty steady across Supplier types; each is at least 3 times more likely to mention this than Buyers, so this result is not driven by an outlier Supplier type.

There are possible explanations for this apparently counter-intuitive result. We could go back to the "single bullet theory," but it doesn't seem to fit this scenario as well as it did for *creating business impact* and *innovative technology*. If we flash back to the Organizational Success Factors section, we'd see that *analyzing multiple data streams* and *synthesizing data*

from multiple sources were in the bottom half of Suppliers' critical priorities. Fewer than half said *synthesizing data* was a best-in-class goal for them, and fewer than 40% said *analyzing multiple streams* was a critical priority. However, if only a third of those who felt these rated best-in-class attention mentioned *synthesis of results across multiple sources/types* as an unmet need, we'd easily achieve the 13% who mentioned it.

Why are Buyers so much lower than Suppliers? Perhaps *synthesis of results across multiple sources/types* is a salient issue for them, but they may have too many other priorities to mention before they get to this one. Or, perhaps they consider it to be an unmet need, *but not an unmet need that Suppliers can fill*. Fewer than half of Suppliers have made this a top priority, and many Buyers may not have met a Supplier that would be credible in filling this need.

It is interesting to note that many of the unmet needs mentioned align with priorities and benchmarking measures identified multiple times in earlier in this report. There is a definite theme that has emerged of both Buyers and Suppliers recognizing that consulting skills, analytics and data synthesis, and more efficient insights generation are critical for the industry.

We also found it interesting to look at the ungrouped coded responses through the filter of Buyer organization positioning, which we identify in our GRITscape as strategically focused, tactically focused, or both.

	Unmet Needs % Mentioned (Buyers)			Unmet Needs % Mentioned Rank (Buyers)		
	Strategically Focused	Tactically Focused	Strategic & Tactical	Strategically Focused	Tactically Focused	Strategic & Tactical
Use of technology / product innovations	13%	19%	18%	1	1	1
Better insights	5%	19%	13%	13	1	3
Better samples/sampling/reach	8%	11%	9%	6	3	4
Research and data automation	10%	6%	5%	2	7	7
Data science / Statistics / Mathematics related	8%	3%	15%	6	12	2
Faster time to deliverables	8%	8%	7%	6	5	5
Cheaper costs / Cost effectiveness	10%	6%	4%	2	7	13
Better quality of research or data	5%	11%	4%	13	3	13

	Unmet Needs % Mentioned (Buyers)			Unmet Needs % Mentioned Rank (Buyers)		
	Strategically Focused	Tactically Focused	Strategic & Tactical	Strategically Focused	Tactically Focused	Strategic & Tactical
Understanding client's business	5%	8%	7%	13	5	5
Qualitative skills	3%	0%	4%	18	18	13
Better research management	8%	3%	0%	6	12	19
Soft skills and employees	8%	0%	5%	6	18	7
Behavioral science and related	10%	3%	5%	2	12	7
Other research methods / approaches	10%	3%	5%	2	12	7
Synthesis of results across multiple sources/types	5%	3%	5%	13	12	7
Engaging presentation of findings	0%	6%	5%	19	7	7
AI and machine learning related	5%	6%	4%	13	7	13
CX / Voice of Customers	0%	6%	3%	19	7	17
Being consultative / Offers consultation	8%	3%	0%	6	12	19
Implicit measures/approaches	8%	0%	3%	6	18	17

Across all three groups, *use of technology and/or innovative products* is the most frequently mentioned unmet need. **For Strategic & Tactical, the top 5 unmet needs are:**

1. Use of technology / product innovations
2. Data science / Statistics / Mathematics related
3. Better insights
4. Better samples/sampling/reach
5. Understanding client's business
5. Faster time to deliverables (tie)

For Tactical, the top 5 unmet needs are:

1. Use of technology / product innovations
1. Better insights (tie)
2. Better quality of research or data
2. Better samples/sampling/reach (tie)
3. Understanding client's business
3. Faster time to deliverables (tie)

Finally, for Strategic, the top 5 unmet needs are:

1. Use of technology / product innovations
2. Research and data automation
3. Cheaper costs / Cost effectiveness
4. Behavioral science and related
4. Other research methods / approaches (tie)

THE BIG PICTURE

According to Buyers, Suppliers have roles to play in helping them fill unmet needs. Buyer needs range from business-focused to technology-related to analytics to core research skills; Suppliers happen to have specialties in strategic consulting, technology, analytics, and full service research. On the surface, there may appear to be disconnects between how Suppliers see Buyer needs and the needs that Buyers actually have. However, if you focus on the perspective of the Supplier whose professional focus is best positioned to meet a particular need, Buyers and Suppliers are very well aligned.

Similar to arguments made elsewhere in this report and in the most recent GRIT editions, the key to closing the gap on unmet Buyer needs might be an "Avengers, assemble!" strategy: calling together the right portfolio of Supplier super-powers necessary to successfully combat specific and unique business challenges. Complex business challenges need to be met with the right set of skills and capabilities, and these are out there, but perhaps not under one roof. Someone must have the vision to diagnose the challenges, the ingenuity to define a solution, the knowledge to find the right skills and capabilities suited to the challenge, and the temperament to bring it all together.



DRIVING BUSINESS GROWTH: THE KEY METRIC FOR SUCCESSFUL INNOVATION

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What is the old adage? The only thing constant in life is change. We have seen a rapid evolution in the way we shop, communicate, and even in the way we work, in response to changes that have accelerated in the last year, particularly in light of COVID-19 and the resulting global economic crisis. Consumers are adapting, perhaps permanently, and brands are challenged to keep up.

Another truism is that the more things change, the more things stay the same. Structural changes in retail and product consumption make it even more essential for brands to influence consumer choice to their advantage if they are to drive business growth. Those of us in the market research business who subscribe to the principles of behavioral science, would footnote this for emphasis: the drivers of influence in human choice architecture, which are critical for clients to identify and leverage, remain constant, even as consumer context changes.

This year's GRIT survey identified those factors which clients are expecting from their research and strategic consultancy partners. Unsurprisingly, at least to PRS IN VIVO, client respondents ranked creating business impact the most significant need for suppliers to address. Facilitated by advances in new technologies and core research skills, this is the formula that clients expect suppliers to apply to their innovation initiatives.

It feels obvious, but starkly cautionary for the insights industry that buyers classified "creating business impact" as an "unmet need". Innovation without this objective is hollow and will not become a lasting best practice.

For clients, impacting business growth is not new, but an imperative that is contextual, elastic, and reactive to changing business conditions. Brands have always needed to influence shopper choice, but now the context of choice has changed; new interventions need to be developed based on brands' abilities to leverage authentic consumer behavior. Old tools won't necessarily uncover the insights brands need to drive their business. This is even more critical as the shopper path-to-purchase is evolving and moving with accelerated momentum to digital retail platforms with which some clients have little or no experience or precedent.

The best innovations marry deep understanding of the growth objectives of clients, long standing and proven behavioral frameworks to understand consumers, and the acumen to utilize the best, most reliable technologies to the quest for actionable insights. Speed, efficiency, and cost effectiveness are table stakes. And the GRIT Report confirms that.

At PRS IN VIVO, our own innovation strategy in recent years has leveraged decades of research and domain expertise in shopper and product experience, a proven behavioral framework and the ability to apply best in class technology in agile ways with one goal in mind: helping clients to achieve lasting business impact.

The GRIT Report of 2020 showcases the best innovators and we are proud to have been recognized on this list. This recognition validates our focus on evolving client challenges and innovating in order to deliver the strategic guidance that makes an actual difference. We commit to this as a key measurement of our innovation and value in the future. Because our clients' needs will always be the same, even as consumer contexts change.

ADOPTION OF AUTOMATION PLATFORMS

Automation continues to drive change across the industry, although with different focuses for Buyers vs. Suppliers. What can be automated will be automated, but knowing the difference it can make and what gains will be delivered will define the pace of progress.

CURRENT ADOPTION AND CONSIDERATION

Automation continues to be one of the key topics of conversation in market research. We revisited this topic in 17W1 and 18W1 to create a benchmark for

the adoption of automation. This year, we revisit the topic to evaluate the latest picture and changes.

AUTOMATION IS WIDESPREAD IN MARKET RESEARCH

INTERPRETATION OF AUTOMATION ADOPTION ANSWER CHOICES

% Mentioning Need	Adoption	Commitment
Has a key role	In use	Committed
Will have a key role	Not in use (otherwise would choose "Has a key role")	Committed
Testing it	Partially adopted	Committed to trial
Considering, but not trying it	Not adopted	Open to it
Not considering it	Not adopted	Not top-of-mind or already rejected
Not applicable to us	Not adopted	Rejected

The big picture is that many organizations have adopted automation platforms, and this is especially true in the area of quantitative research. The accompanying bar chart illustrates this widespread adoption, and from left to right the response categories roughly represent decreasing commitment to automation. While not a true continuum, the response categories represent degrees of adoption and commitment, though imperfectly. While we ideally would like separate measures of adoption and commitment, we chose to ask the full set of potential areas for automation rather than reducing the set simply so we could ask about them twice.

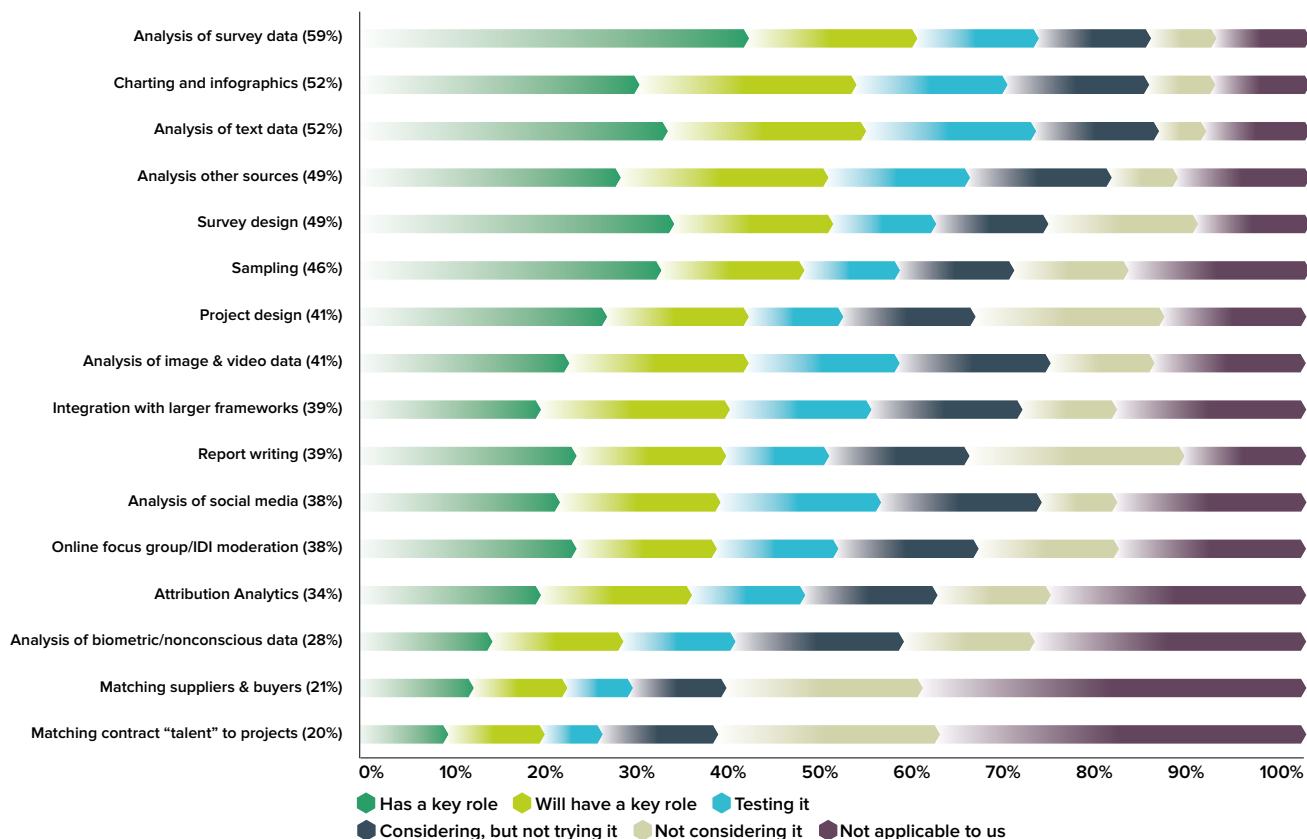
The big picture is that many organizations have adopted automation platforms, and this is especially true in the area of quantitative research



The leftmost bar segment represents those who say that automation already *has* a key role and is followed by a segment representing those who say it *will have* a key role in the future. To the left of the

axis, the combined percentages for *Has a Key Role* + *Will Have a Key Role* are shown in parentheses; these represent the proportion who are most committed to automating that area.

AUTOMATION ADOPTION – 2020 (ALL SEGMENTS)



The potential areas of automation most likely to play a key role tend to be associated with quantitative research, led by *analysis of survey data*; 41% already say it has a key role, and the net 'have/will have a key role' is 59%. The top six areas have at least 50% saying it has or will have a key role or else they are approaching the majority benchmark.

The ratings of the bottom four, from *matching contract "talent" to projects* to *Attribution Analytics* are dominated by large numbers of people who say it does not apply to them. For the lowest rated area, almost 40% say that it does not apply to their business. Clearly, if an organization does not perform a task, it is unlikely to automate it.

Perhaps, then, we should look at adoption and interest as a percentage of *eligible* organizations instead of *all* organizations. In other words, does a different picture emerge if we look at the proportion of organizations that *could* adopt it who *are* adopting it or interested in adopting it? For example, the area in which automation is least anticipated to play a key role is *matching contract "talent" to projects*; only 19% of respondents say automation does or will have a key role in this area. However, 39% say this area does not apply to them. If we look at the 61% for whom it does apply, we can see that 31% of those who could make use of automation in this area think that it does or will play a key role (19% / 61%).

The ratings of the bottom four, from matching contract "talent" to projects to Attribution Analytics are dominated by large numbers of people who say it does not apply to them



Matching contract “talent” to projects and matching suppliers and buyers may be latent needs that do not come to the forefront until automated solutions gain more traction



Without this transformation, *matching contract “talent” to projects* ranks 16th among 16 potential areas for automation. When we apply this transformation to all areas, however...it remains 16th of 16. In fact, the top four remain in the same positions, and the top eight remain the same. After that, there are some small variations, but our overall conclusion is that areas are not “penalized” if they apply to fewer situations; the rank order is basically the same even when controlling for that.

Of course, we need to question whether an assessment of “not applicable to us” really means that the organization is not a candidate for automation in that area or if it means they don’t think they are a candidate because they do not currently operate in that area. To continue with the *matching contract “talent” to projects* example, when a respondent says it does not apply to their organization, is that because they don’t need to *match contract “talent” to projects* or because they don’t currently do it and,

therefore, can’t automate it. In the unmet needs section, we raised the hypothesis that Buyers and Suppliers may need to find ways to better match skills and capabilities to projects. The strata of projects which are more strategic tend to require a broader portfolio of skills and capabilities in order to maximize their value, and that portfolio may be unlikely to exist in one organization. Therefore, *matching contract “talent” to projects* and *matching suppliers and buyers* may be latent needs that do not come to the forefront *until* automated solutions gain more traction.

Another point of note are the four categories where more than 20% say they are not considering it. The two *matching* categories are part of this four, but so are *project design* and *report writing*. Perhaps people feel that software can’t do these latter two tasks well enough or efficiently enough, or perhaps they hope it can’t? We’ll revisit this question in the COVID-19 section.

A “TIME OUT” FOR GRIT METHODOLOGY

Before discussing how automation adoption and interest have changed since 18W1, we need to be clear about how the survey instrument has changed from the earlier waves. Although we hate to break our topical flow, we know that setting the context will help with the interpretation and that some people have a high interest in these issues.

These questions were originally written in order to set a benchmark for tracking automation adoption, and we realize that changes to the questions compromise the ability to track this. However, we are always concerned with improving our instruments and noticed some weaknesses in the existing questions during our recent reassessment. If we make changes, we lose the ability to make apples-to-apples comparisons. On the other hand, do we want to compare new apples to apples that we know we don’t want to buy again? Frankly, this is the question that everyone who runs a tracking study needs to ask themselves frequently.

Our 20W1 adjustments address three weaknesses:

- *The question was double-barreled, but the answer choices were single.* The question asks how automation is currently used or how it will be used in the future. The answer choices, however, only deal with how it is used currently and gives us close to no clue about how they might plan to use it in the future. Instead of asking two question sequences – one for use, one for future intentions – we decided to adapt the answer choices. It may not be the most methodologically pure solution, but we feel that it optimized the trade-offs we faced.
- *The question asks about research functions, but the areas in question are not necessarily research-focused.* As GRIT evolves, we want to be sensitive to the fact that the scope of what we want to document – the insights and analytics industry – encompasses more than simply research functions, the “R” in GRIT notwithstanding.

If we make changes, we lose the ability to make apples-to-apples comparisons. On the other hand, do we want to compare new apples to apples that we know we don’t want to buy again?



Especially when we review all of the verbatim responses from the survey, we realize the gap between how we position a question and the diversity of the audience we are measuring. We try to continually identify those gaps and improve our methods in response.

- *Not sure how to interpret “Not sure.”* “Not Sure” resonates as the name of the main character in “Idiocracy,” but its meaning in the context of this question is puzzling. Are they “not sure” they are going to use automation because they are not thinking about it, not trying it, or testing it and don’t know the outcome yet? Are they “not sure” what the function in question represents or how it would be automated? Or, are they “not sure” they should be answering the question or taking the survey because they can’t form an opinion about how their own organization might use automation? In retrospect, we believe that the earlier version of the response choices already had two ways to indicate “not sure” and did not need a third one.

We think it is fair to expect insights professionals to have an opinion on this and that these response choices cover the majority of reasons why someone might be “not sure.” One practical implication is that in 18W1, for example, 24% of participants said they were “not sure” how they would approach automation with respect to *project design*. The “in use” number for *project design* was reported as 37%; 14% had automation in widespread use and 23% were piloting it. The non-users of automation in *project design* break out as: 20% thinking about it, 20% saying it is not applicable, and 24% saying they are “not sure.” If we report automation use in *project design* as 37%, that means we are assuming that 24% are *not using it* when, in fact, we are NOT SURE if they are using it or not. Perhaps every one of those who are “not sure” work for a company that is using automation in *project design* and the “in use” percentage is actually 61%! The problem is, we don’t know if they are using it or not but we assume they do not when the better assumption would be to remove them from the percentages.

In 18W1, *project design* had a moderate “not sure” percentage compared to the other areas tested, and its 24% is high enough to be considered a red flag about the question design. Although there are no ways to perfectly eliminate this issue, there are alternatives. One might be to filter the question and only ask it to people who should be expected to know. For 20W1, we decided to restructure the answer choices so that those who were “not sure” could tell us whether to put them in the numerator and denominator, the denominator only, or take them out entirely. Those who were “not sure” because the jury is still out would be funneled to “testing it” or, more likely, “not considering it.” Those who were “not sure” because they are truly out of the loop would most likely choose “not considering it” or “not applicable to us.” In any case, they would be able to choose where they should be counted. While not a perfect solution, we think it is the best one because it helps classify more respondents more accurately.

GRIT stands for GreenBook Research Industry Trends, not GreenBook Precise Volumetric Forecasting. That would be GPVF. It's not even a word

Wave(s)	Earlier Waves	20W1
Question(s)	How are you currently using automation to address these research functions, or which do you see ahead in your future?	In your organization, which best describes how automation affects each of these activities? In your organization, which best describes how automation is or could be used for each of the following?
Response Choices	Already have adopted widely	Has a key role
		Will have a key role
	Exploring pilot use cases	Testing it
	Thinking about it but have not tried it	Considering, but not trying it
	Not sure	Not considering it
	Not applicable to our organization	Not applicable to us

By making this change, we are not proposing to throw the baby out with the bathwater. The 17W1 and 18W1 data are useful, but only if we understand what it tells us and its limitations. Our ability to track true adoption may be compromised relative

to 17W1 and 18W1, but we believe GRIT has more years ahead of it than behind it. Besides, GRIT stands for GreenBook Research Industry Trends, not GreenBook Precise Volumetric Forecasting. That would be GPVF. It's not even a word.

CHANGES IN AUTOMATION ADOPTION

The accompanying table compares the 20W1 data with 18W1 and 17W1. As we have noted, the wording of the questions in 17W1 and 18W1 were different from those we have used in 20W1, so

these are not direct comparisons, but, hopefully, will tell us something about the trends in adoption and acceptance.

Potential Areas to Automate	Adopted Widely or Piloting (17W1)	Adopted Widely or Piloting (18W1)	Has Key Role or Testing (20W1)	20W1 – 18W1 Change	Rank (18W1)	Rank (20W1)
Attribution Analytics	26%	19%	31%	12%	14	13
Online focus group/IDI moderation	36%	26%	36%	10%	12	10
Sampling	42%	34%	41%	7%	9	6
Survey design	41%	38%	43%	5%	5	4
Matching contract “talent” to projects	16%	10%	15%	5%	16	16
Analysis of biometric/nonconscious data	25%	21%	26%	5%	13	14
Analysis other sources	*	38%	42%	4%	5	5
Analysis of survey data	56%	51%	55%	4%	2	1
Report writing	32%	30%	33%	3%	11	11
Analysis of image & video data	36%	35%	38%	3%	8	7
Matching suppliers & buyers	17%	15%	18%	3%	15	15
Integration with larger frameworks	*	31%	33%	2%	10	11
Project design	29%	37%	36%	-1%	7	9
Analysis of text data	53%	52%	50%	-2%	1	2
Analysis of social media	46%	44%	38%	-6%	4	8
Charting and infographics	56%	51%	45%	-6%	2	3

The rows are ranked in descending order of change since 18W1.

The main story is that in general, the level of usage has increased, the median increase being 3% points. Given the pace of software development and the two-year gap, it is not surprising that the norm is for utilization to have increased. Overall, however, the rank order of these areas for automation is practically identical to 18W1, the notable exception being *analysis of social media* which dropped from 4th to 8th.

Analysis of social media is one of two categories that has moved in the opposite direction, and it had also declined from 17W1 to 18W1. This is consistent with other findings from GRIT studies, which indicate that social media analytics is becoming less focused on traditional research Suppliers. If *social media analytics* are consolidating within a smaller group of expert organizations, then automation would decline as the result of fewer opportunities for it. If we were able to look at this by project volume, we might see a different trend.

The other area to decrease, *charting and infographics*, had dropped from 17W1 to 18W1, too.

Another point to consider: when does “automation” cease to be automation and simply become mainstream? Most researchers are using computers for a wide variety of tasks, all of which would have counted as automation in the past. For example, most survey research is conducted via online data collection, which would have counted as automation in the past, and most charts are not produced with a pen and graph paper, but at the push of a button – but we do not think of these as automation in 2020. As automation becomes common, we tend to stop calling it automation.

CHANGES IN ADOPTION: BUYERS VS. SUPPLIERS

Comparing automation among Buyers with Suppliers yields some insights. In most cases, Suppliers report a higher level of use than Buyers (median difference +5%). This is consistent with earlier waves of GRIT and reflects the fact every Supplier needs to do some analysis, whereas only some Buyers are actively involved in volumes of analysis large enough to support automation.

The one glaring exception to this is *analysis of social media*, for which 47% of Buyers use automation compared with just 36% of Suppliers. This finding is consistent with a trend that GRIT has been reporting for several years, i.e. that Buyers are far more likely to be using social media than agencies are to be supplying it. Hypotheses to explain the difference include a) Buyers are doing it in-house, b) they are using Suppliers outside the GRIT universe, c) social media analytics capabilities are concentrated within a small set of Suppliers, and d) some combination of these.

Regarding hypothesis c), some Supplier segments use automation for *analysis of social media* as often as Buyers (47%). These include Suppliers with 500 or more employees (53%), and this holds true for each type with more than 500 employees:

- Strategic Consultancies (58%)
- Technology providers (53%)
- Full/Field Service providers (52%)
- Technology providers (53%)
- Data & Analytics providers (47%)

Further, among Buyers, the higher usage is driven by those with more than 1,000 employees. Among these larger companies, 51% use automated *analysis of social media* compared with just 42% for Buyers with 101 to 1,000 employees and 32% for those with 100 or fewer. It seems that automation of *analysis of social media* is the province of very large companies, Buyer or Supplier, and the GRIT universe has higher proportions of very large Buyers than very large Suppliers which drives the gap we observe.

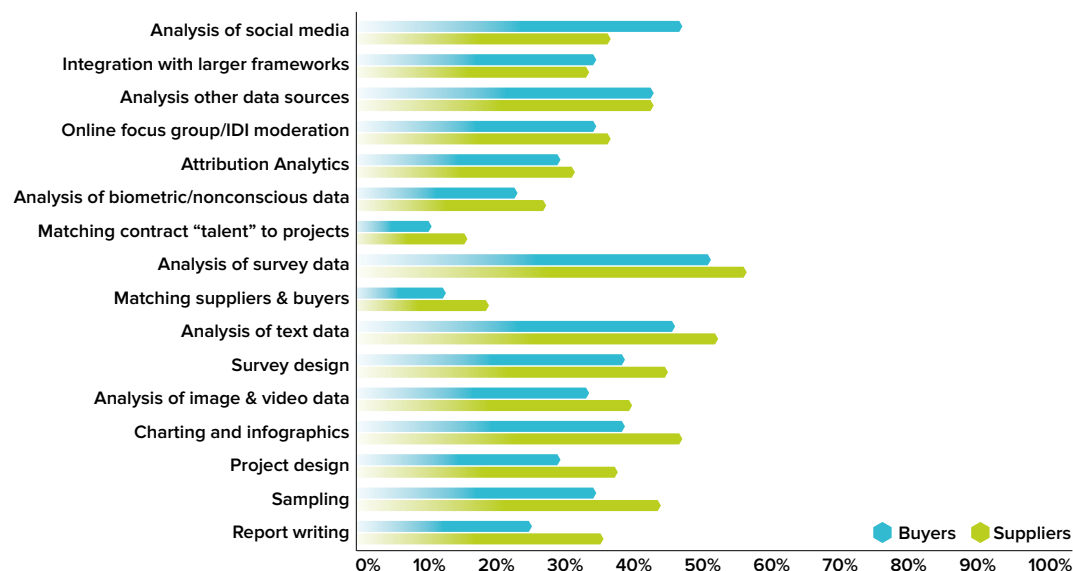
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AUTOMATION ADOPTION: BUYER VS. SUPPLIER – 20W1 (SORTED BY BUYER–SUPPLIER DIFFERENCES)



CHANGES IN ADOPTION: GLOBAL REGIONS

The table below shows the differences in terms of four broad regions:

North America (USA, Canada, & Mexico), Europe, Asia, and the Rest of the World.

Automation Adoption by Region	North America	Europe	Asia	Rest of World
Analysis of survey data	53%	59%	51%	64%
Analysis of text data	50%	50%	47%	46%
Charting and infographics	44%	47%	43%	54%
Survey design	43%	44%	47%	42%
Analysis of social media	43%	50%	56%	67%
Analysis of other data sources	42%	41%	46%	46%
Sampling	42%	38%	53%	36%
Online focus group/IDI moderation	42%	38%	53%	36%
Analysis of image & video data	38%	40%	44%	34%
Project design	36%	36%	43%	30%
Integration with larger frameworks	33%	35%	40%	31%
Report writing	33%	33%	44%	38%
Attribution Analytics	30%	32%	30%	34%
Analysis of biometric/nonconscious data	26%	28%	21%	23%
Matching suppliers & buyers	18%	16%	35%	16%
Matching contract "talent" to projects	16%	13%	25%	17%
Average Mentions	5.9	6.0	6.8	6.1

With the exception of Asia, the pattern of adoption is markedly similar across the regions (the average number of mentions ranging from 5.9 in North America to 6.8 in Asia.) This is perhaps not surprising since many of the automation tools are provided as SaaS solutions are available globally.

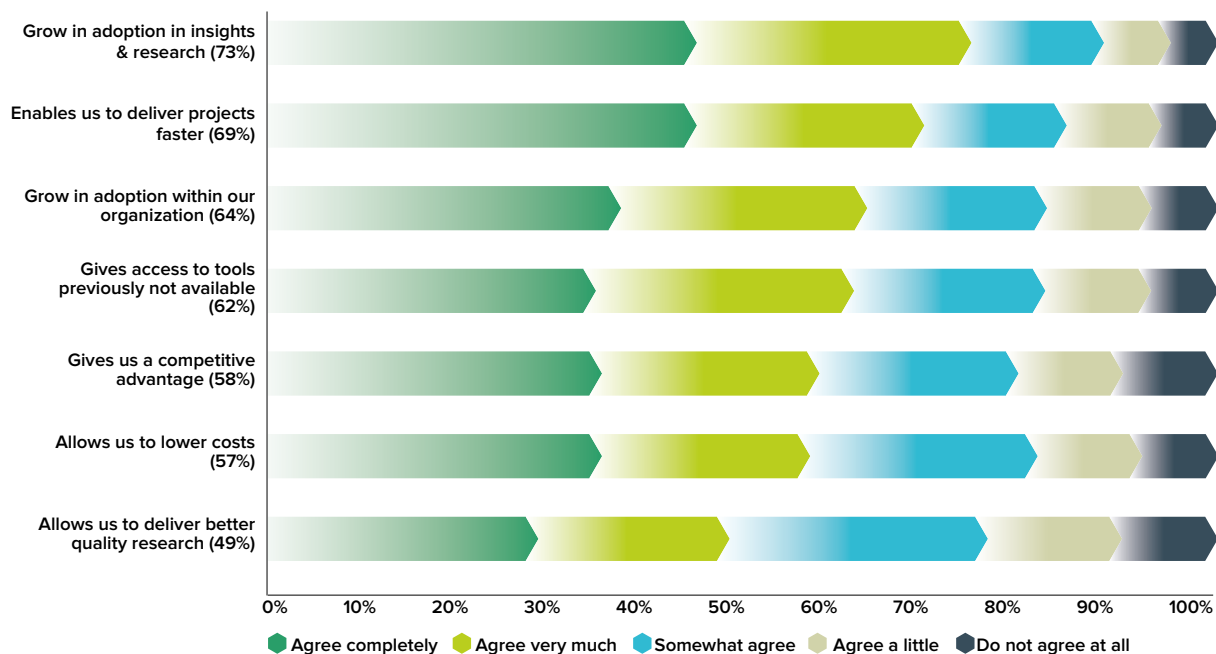
The explanation for the higher scores from Asia could reflect a depth of sample difference (as well as underlying differences in usage and definition). Fewer people from Asia participated in the study, so these might represent insights professionals who are more attuned to the latest trends in insights and research and are early adopters of automation.

CHANGES IN ATTITUDES TOWARD AUTOMATION

To further clarify the impact of automation, a battery of seven attitude statements were added to the 18W1 study. These statements focused on what

automation will deliver in the future and what it has already delivered. With a few minor changes, the scale was used again in 20W1.

ATTITUDES ABOUT THE IMPACT OF AUTOMATION – 2020 (ALL SEGMENTS)



As in 18W1, very few people disagreed with any of these propositions, and, in all but one case, more than 50% agreed in strong terms with the propositions. The highest agreement is for *automation will grow in adoption in the insights and analytics industry*, followed closely by the idea that *automation enables*

us to deliver projects faster. Lowest agreement occurs around the concept that *automation allows us to deliver better quality research* – whilst just under 30% agreed completely, most people only thought it was partly true.

Automation ... (top two boxes)	18W1	20W1	20W1 – 18W1 Change
Gives us a competitive advantage	47%	58%	11%
Enables us to deliver projects faster	59%	69%	10%
Gives access to tools previously not available	56%	62%	6%
Allows us to lower costs	52%	57%	5%
Allows us to deliver better quality research	47%	49%	2%
Will grow in adoption in insights & research	79%	73%	-6%
Will grow in adoption within our organization	71%	64%	-7%

In 18W1 the GRIT survey identified that automation was a key trend, and this is confirmed by comparing the data from 18W1 to 20W1.

Note: in 18W1 the top two boxes were 'Agree Completely' & 'Somewhat Agree', in 20W1 the top two were "Agree Completely" & "Agree Very Much." Most of the statements show increased agreement between 18W1 and 20W1, indicating that the 18W1 prediction that the use and benefits of automation would increase was accurate. The forecasts for the future of adoption are not quite as high as in 18W1, but they remain remarkably high.

ATTITUDES TOWARD AUTOMATION: BUYERS VS. SUPPLIERS

Automation ... (top two boxes)	Buyer	Supplier	Supplier – Buyer Difference
Gives us a competitive advantage	49%	60%	11%
Enables us to deliver projects faster	62%	71%	9%
Allows us to deliver better quality research	41%	50%	9%
Will grow in adoption in insights & research	68%	74%	6%
Gives access to tools previously not available	57%	62%	5%
Allows us to lower costs	53%	58%	5%
Will grow in adoption within our organization	60%	64%	4%

There are some marked differences in the experiences of Buyers and Suppliers of market research, which are shown in the accompanying table.

Suppliers are more likely than Buyers to agree with each of the statements. The three statements that show the largest difference are: *gives us a competitive advantage*, *enables us to deliver projects faster*, and *allows us to deliver better quality research*. Apparently, these benefits are being realized more by Suppliers than Buyers, the same pattern as in 18W1.



WHY RESEARCH TECHNOLOGY SHOULD NOT BE EXPENSIVE

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I am a 20+ year market research industry veteran and a tech executive studying the adoption of research technology. We provide emerging technology that automates video management from capture to output in a single platform for both online and in-person studies. From my experience, I hope to provide a unique perspective into how to increase adoption of technology.

The research technology adoption challenges that we see today remind me of the industry's hesitance with online research in the early to mid-2000s. The Internet was in high use and costs of an online quantitative study were about one-third of traditional methods. Concerns that the research industry would shrink were common. However, lower costs actually increased usage, spending didn't dip, and we attracted new customers such as small businesses.

Similarly, we must look at the cost and value equation again to drive adoption. In a time study comparing our video management system with other off-the-shelf software, we found that a full day of work is reduced to an hour through low-touch video management automation. We reduce search, editing, and clip making into seconds without need for NLP to demonstrate that low cost and high productivity is possible.

It is our mission to eliminate inefficiencies to increase technology adoption. Here are a few observations to help show how to lower the price of research technology without sacrificing product quality.

Lack of automation of basic system processes

Because the research industry is not a rapid adopter, technology companies may not invest up front to automate tasks. In technology, this is commonly called the person "behind the curtain" (Wizard of Oz). This is where a human handles the task instead of it being automated. This is fine for the MVP (early testing) stage, but technology companies usually do not charge for or even share a task that is manually performed. However, in the research industry, maybe because of industry norms, we find technology companies often are charging for these manual tasks which keeps prices extraordinarily high and kills adoption.

Unnecessary Services

Systems can be too complex and so technology companies offer technical support and customer service to ensure "success" at a cost of \$100+ per hour. Systems should be built for reliability and ease of use, eliminating the need for costly, unnecessary labor.

Require Initial High Investment and Commitment

Upfront costs and subscriptions discourage trial and adoption. Subscriptions are for committed customers. Adoption costs should be amortized over time, not upfront. Intuitively engineered technology is easy to adopt, thus lowering upfront costs.

A low price of entry is necessary because the value of technology grows with use. First timers need "no-commitment" pricing that keeps the risk of adoption costs on the technology company to prove the value.

Hidden costs acting as a Service Business

Some providers are not sure if they are a research service or a technology company. They are struggling to provide both with quality in a cost-effective way. A straddle strategy like this can create organizational complexity and inflate overhead. Engineering world-class technology that is reliable, intuitive, and cost effective is challenging enough.

Building everything is expensive

Integrating other systems is a quick way to create a cost-effective platform and may lower the learning curve for a user. For instance, we integrate common technology and tools that users are already comfortable with rather than building each component from scratch. This increases speed to market, lowers cost, and provides value from a wider variety of features we can offer without investment.

In conclusion, lowering the costs of research technology can be done. There are new players on a mission to price technology for everyday use so we can double the productivity of the research industry. Come join us.

ATTITUDES TOWARD AUTOMATION: GLOBAL REGIONS

The table below shows the patterns of agreement with the seven statements across the four global regions.

Automation ... (top two boxes)	North America	Europe	Asia	Rest of World
Will grow in adoption in insights & research	73%	75%	74%	76%
Enables us to deliver projects faster	68%	72%	76%	78%
Will grow in adoption within our organization	63%	67%	73%	62%
Gives access to tools previously not available	60%	62%	75%	68%
Gives us a competitive advantage	56%	59%	76%	66%
Allows us to lower costs	56%	57%	63%	66%
Allows us to deliver better quality research	49%	47%	60%	49%

In each region, the optimism about the impact and potential impact of automation is high. As in 18W1, the agreement appears to be a little lower in North America than elsewhere, perhaps reflecting that

automation is more embedded in North America and, therefore, less likely to offer differential benefits than it is in other markets.

THE BIG PICTURE

Automation continues to be a hot topic and a good news story for the insights and analytics industry. Sometimes you will read posts by pundits who wring their hands and say that market research and insights are bad at innovating. However, the data makes it clear that a large part of the industry has automated, is automating, and will continue to automate. The focus has been around the analysis of survey data, survey design, text data, and sampling, but there is real hunger for this to be expanded to even more key tasks.

One of the key drivers of the adoption and impact of automation is the ubiquity of the task to be automated; the more the task is performed and the longer it takes, the more obvious the benefits of automating it become. Perhaps the most widely conducted, time-absorbing activity in market research is the analysis of survey data. Consequently, it is the area where we see the largest impact of automation, a combination of the pull of demand and the push of innovation. The creation of markets to match resources to tasks did not exist before automation, so there is no structured 'pull' and change has to depend on the 'push' of innovation (and, in that context, one-in-five saying the automation of matching resources to tasks is quite an achievement.)

The data makes it clear that a large part of the industry has automated, is automating and will continue to automate





THINKING STRATEGICALLY ABOUT AUTOMATION

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To say that we are living in a time of massive change and disruption might be an understatement. We are seeing the impacts of a changed way of life on every facet of business, including research and insights. These shifts have allowed brands and end-clients to take the time to re-evaluate their research process, especially with data being more important than ever before. What has been working? What could be improved upon? It is clear that a lack of time has required everyone to become nimbler and more agile in their execution. It has also become crucial to begin considering what tools or processes will add incremental value, while centering around being faster and more cost-effective.

But how do you enable teams to do more, without outsourcing research, in a time when budgets are shrinking? You begin to think strategically about the way in which insights are being conducted, taking a holistic approach. This is where automation can be helpful. By finding the right automation tool(s), researchers can do more on a smaller budget in shorter timeframes. However, there are many important things to consider when looking for a research automation tool. First and foremost, ease of use is a critical factor. Does the company provide training and help with change management? Is there support readily available? Is the user experience intuitive and easy to follow? Utility is everything for platforms, and simply buying one is only the first step. How do you plan on getting it into the hands of everyone? How will you ensure that it becomes part of the process instead of just being another tool collecting virtual dust? This is where the training from the company becomes critical. Introducing a new technology to a team requires guidance and patience from a provider willing to become partners in your success. It won't matter how many great features the platform has if no one ever uses them.

The next things to consider when looking for new automation tools are which will give more credibility to the insights group. This is important because increasing the credibility of this group will in turn allow for more strategic input at the executive level. The goal of uncovering all this data is to make better decisions, but that won't happen if the data isn't even being heard. Think about what tools will "wow" your marketers by showing the speed and creativity of research, and again help create better buy-in. This can even go beyond the confines of your organization and begin to create positive PR for researchers in general.

Finally, it is imperative to look at what skill sets you (and your team) are willing to adjust internally, as opposed to what you still want to outsource. Is sampling something that can be done in-house, or is it still best served by an outside provider? Take an inventory of skillsets and resources, and determine which tools will be best utilized by your team to reach those goals of moving faster at a lower cost.

Technology, and within that, automation, is a powerful tool that can take research and insights to new levels, allowing professionals to focus on the highest-value tasks of analysis and interpretation. Integrating these technologies does not come without challenges though, and it is crucial that they are thoroughly integrated if they are going to provide tangible value. By evaluating the above factors, you and your team can make the best choice about what automation tool will best serve you and allow you to reap all the benefits research automation has to offer.

INNOVATION STRATEGY

“Walking the talk” is always important, but when it comes to innovation, what does that mean? This is where we begin to answer that question with a new series of foundational questions.

Making innovative focus a key priority is associated with increased Supplier revenue, increases in staff size, and increases in technology spending, so there seems to be some business rationale for it



After re-christening the GRIT spring edition “GRIT Business & Innovation Report” in 19W1, we decided we needed to do due diligence on the “Innovation” half of it and take a deeper dive in 20W1. We added a series of questions to understand how much attention insights organizations pay to innovation, how they invest in it, what the critical enablers of innovation are, and who is responsible for it.

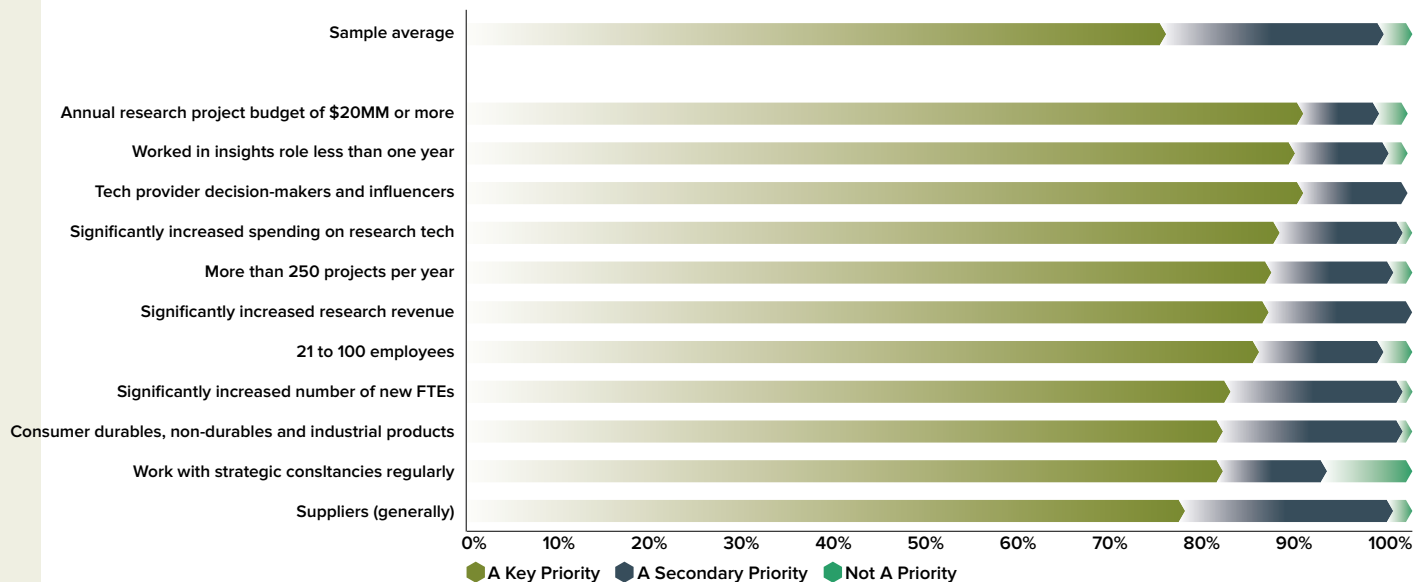
Granted, not everyone is enthusiastic about innovation. Some survey participants don’t believe it is happening (“I haven’t seen any innovation that is truly innovative,” “No one’s really doing interesting, groundbreaking work”) and others express that being asked about innovation (in a “business and innovation” survey) is annoying and not a topic they care about.

On the other hand, 63% of Buyers and 76% of Suppliers call innovative focus a key priority for them to develop, and only 3% overall said it is not a priority. We asked those who consider it to be at least a secondary priority if they have a formal, documented innovation program, and one-third of Buyers and a similar proportion of Suppliers said they do have one. Insights organizations and professionals who are most likely to consider innovative focus to be a key priority include:

- Companies with high annual project volumes
- Buyers with budgets of \$20MM or more
- Buyers from product companies (consumer and industrial)
- Buyers who regularly work with strategic consultancies
- Suppliers in general
- Decision makers and influencers at Technology providers
- New insights professionals

Making innovative focus a key priority is associated with increased Supplier revenue, increases in staff size, and increases in technology spending, so there seems to be some business rationale for it.

WHO IS MORE LIKELY TO MAKE INNOVATIVE FOCUS A KEY PRIORITY? INNOVATIVE FOCUS IS KEY VS. SECONDARY VS. NOT A PRIORITY



INVESTMENT IN INNOVATION

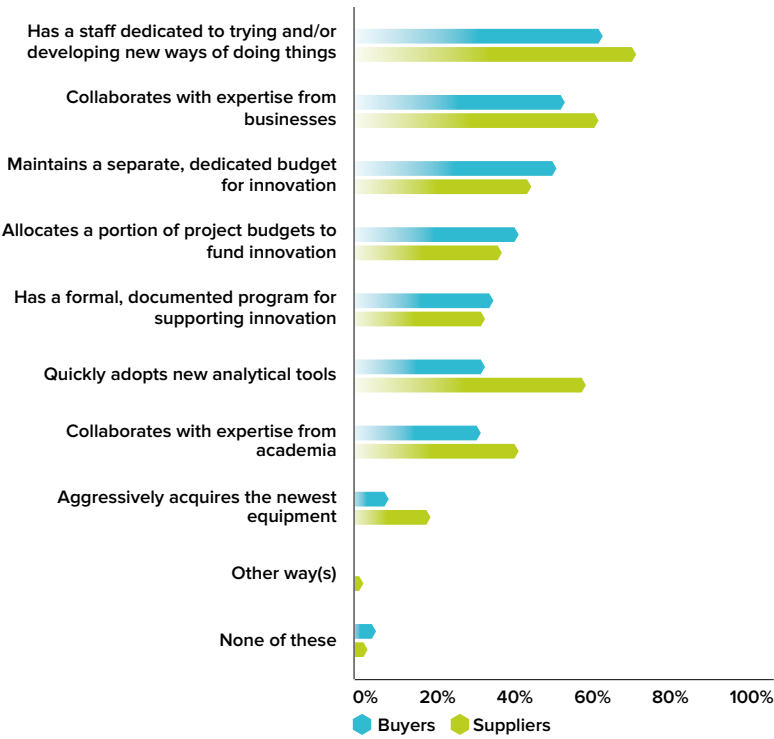
Two thirds (67%) of those who say that innovative focus is at least a secondary priority claim to have staff dedicated to “developing new ways of doing things.” Given that only 44% of participants say they maintain a dedicated budget for innovation and only a third (33%) have a formal program for supporting innovation, it seems unlikely these staff are *literally* “dedicated.” Perhaps innovation is part of their formal responsibilities or perhaps they interpret “dedicated” in the sense of “committed.” Also, 40% of Buyers and 36% of Suppliers say they use project budgets to fund innovation, and this seems more consistent with a strategy of supporting innovation more opportunistically than with a fully dedicated staff.

Most Buyers and Suppliers invest in some kind of collaboration with external organizations as a means of developing innovative focus. Collaborations are stronger with businesses than academia: most Buyers and Suppliers develop innovation via collaborating with expertise from businesses, while four out of ten (39%) collaborate with academia.

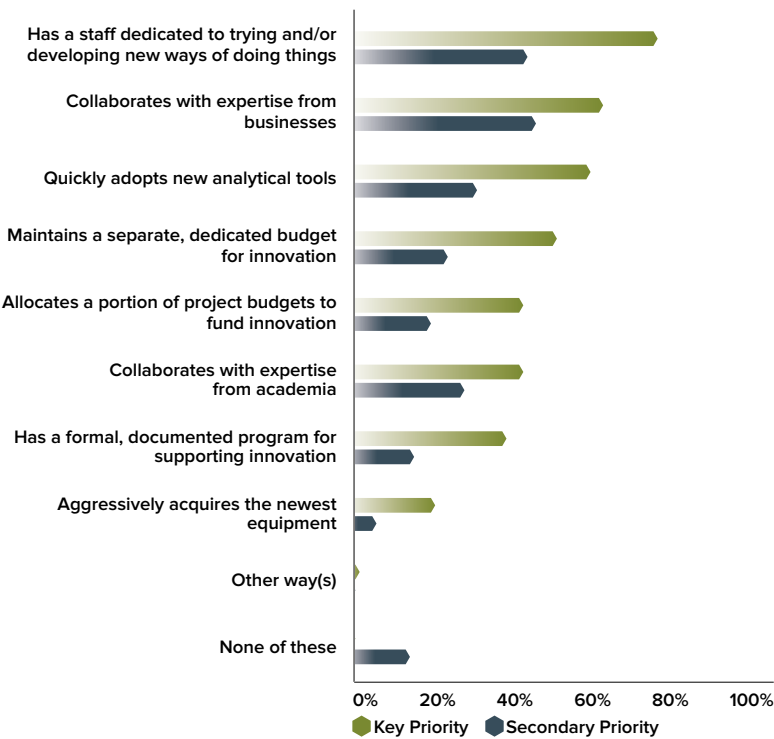
Buyers and especially Suppliers are more likely to invest in analytical tools to drive innovation than hardware. Only two out of ten (18%) “aggressively acquire the newest equipment” as a means to support innovation while 56% of Suppliers and 32% of Buyers support it by quickly adopting new analytical tools.

Those who make innovative focus a key priority list 3.9 ways they invest in it, on average; when it is a secondary priority, 2.3 ways are listed. When it is a key priority, 50% or more invest in “dedicated” staff, business collaborations, quickly adopting new analytical tools, and maintain a separate, dedicated budget for innovation. When it is a secondary priority, the top four types of investment are the same as for the key group, but less pronounced, which indicated that there is less consensus among these companies than among the ones with a stronger focus on innovation.

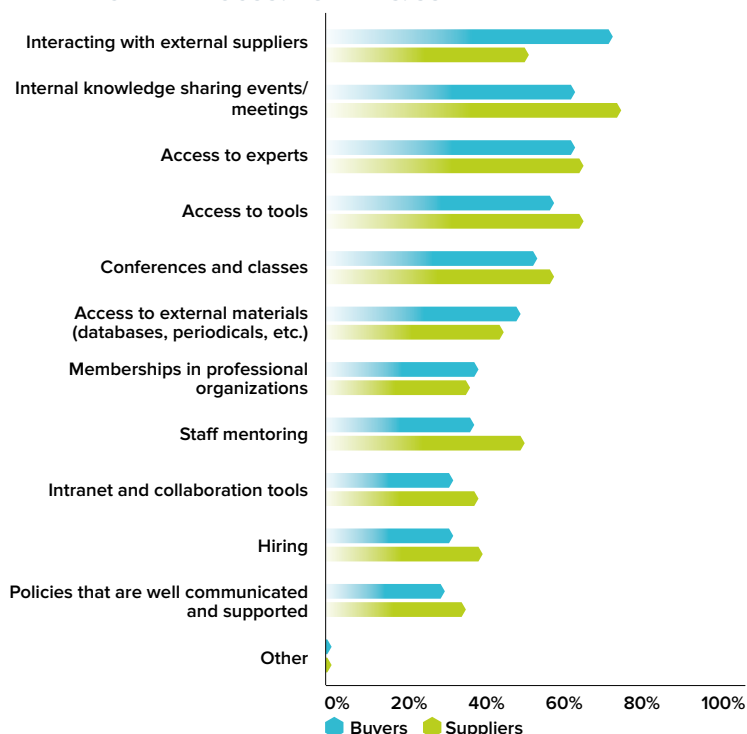
HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? BUYERS VS. SUPPLIERS



HOW DOES YOUR ORGANIZATION INVEST IN INNOVATION? INNOVATIVE FOCUS IS KEY VS. SECONDARY PRIORITY



MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? BUYER VS. SUPPLIER



CRITICAL ENABLERS OF INNOVATION

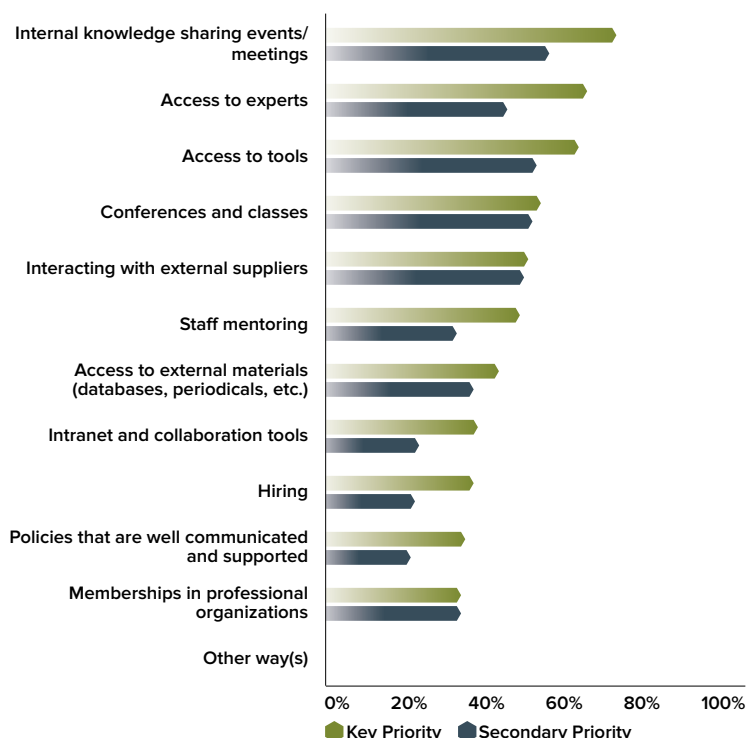
To enable innovation, most Buyers and Suppliers rely on one or more of the following:

- Internal knowledge sharing events/meetings (68%)
- Access to experts (61%)
- Access to tools (60%)
- Conferences and classes (53%)

Buyers and Suppliers tend to place the same priority on these enablers, with two exceptions. First, and not surprisingly, Buyers are more likely to use interactions with external suppliers to develop innovative focus (68% to 47%). Second, Suppliers are more likely than Buyers to employ staff mentoring (47% to 35%).

Overall, only a third rely on memberships in professional organizations (35%), new ideas from new hires (35%), intranet usage (35%), and policies (33%).

MOST CRITICAL WITH RESPECT TO DEVELOPING AND MAINTAINING AN INNOVATIVE FOCUS? INNOVATIVE FOCUS IS KEY VS. SECONDARY PRIORITY



With respect to global regions, nearly half of Asian firms (49%) rely on intranet and collaboration tools compared to 37% of North American firms and 29% of European firms.

Insights organizations are not limited in their choice of enablers; several are used whether innovative focus is a key priority (5.5 on average) or secondary (4.4). A few enablers are clearly more likely to be used when developing an innovative focus is a key rather than secondary focus:

- Internal knowledge sharing events/meetings
- Access to experts
- Staff mentoring
- Intranet and collaboration tools
- Hiring
- Policies that are well communicated and supported



INNOVATION – A SUPPLY SIDE PERSPECTIVE

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Innovation is an interesting term in our industry, as it means a variety of different things to different people. As the GRIT Report survey shows, Innovation can simply mean a 'new way of doing things' to 'aggressively acquires the newest equipment', which I can only surmise means an investment in technological advancement.

With even the response sets blurred, innovation truly rests in the eye of the beholder. From the Supply Side of our business at Quest Mindshare, we look at Innovation as it relates to our deliverables. How do we make them better? I believe that any panel source of quality in this industry must be asking themselves that question every day. How do we, as the engine for online research, better our deliverable?

From my perspective, Technical Innovation is key. Best practices, structure, and 'doing things a different way' are all important indeed, however, technical innovation is what separates. It also is the single most expensive line item in any good supplier's ledger – as many of my contemporaries have attested to during many not so happy, happy hour conversations.

So how do we manage technical innovation from a supply side perspective?

It starts the way any good planning session does. Identify your problem. Years ago, for us, security was affecting the quality of our deliverable. While we felt very strongly about our offerings, nefarious characters were getting better and better at getting into our partner network as well as our panels, Opinion Champ and Panel Champ. We needed to develop systems that would engage these security breaches not only at the panel level but at a transactional level.

Next a good plan... So, we decided to throw a bunch of money at it... Ok, maybe not just that, but yes, a lot of that.

We created a system we call Quest Detect. A front end, in the moment system that catches bad actors in the act. A whole new department, structure, technical engineers, full stack developers, the whole shebang. As a company whose technical department was mostly geared towards transactional respondent health, going the other way was a massive challenge.

Our team was wholly geared towards the respondent experience. But now we had to create a system that inherently was suspicious of them. One department is designed to love our panelists. Worrying about things like ominous panel health metrics (yes, that is actually a real thing...), to respondent experience (that too) where now we were building a system that is solely designed to do the exact opposite. Find them, weed them out, expose them, shame them.... Crush them! Quite a task of Innovation.

Next is execute. From creating tools to device mine, detect and expose automation and create extensive respondent learning mechanisms to improve quality, Quest Detect has grown into our single most important innovation – a complete game changer for us...

Finally, we expand it, grow it, learn it, and continue to double down on its investment as the next evolution of Detect brings us to bigger and better things.

The bottom line is innovation is simply a must, especially on the supply side. As the GRIT Report survey points out, 67% of companies have staff dedicated to innovation. That is a tremendous number and bodes well for our industry. If we are all innovating and getting better, our industry strengthens, our deliverables improve, benefitting us all.

On a final note – Innovation is led mostly on the executive level with about one-third of those companies with formal programs having it led directly by the CEO. Which in some way is oddly comforting to me that maybe I'm not the only one agonizing over 'Innovative' line items in my ledger!

Which of these describe the person (or persons) who runs your innovation program?	%
Chief or head of innovation	43%
Executive or leadership team	41%
CEO or COO	35%
R&D head/department	25%
Head of insights organization	22%
Chief Learning Officer	8%
CMO	7%
Human resources head/department	4%
Other	7%

	Small 1 to 100	Medium 101 to 1,000	Enterprise 1,001 or more
Chief or head of innovation	26%	59%	47%
Executive or leadership team	42%	46%	37%
CEO or COO	49%	38%	21%
R&D head/department	20%	25%	24%
Head of insights organization	14%	18%	18%
Chief Learning Officer	5%	11%	13%
CMO	5%	6%	8%
Human resources head/department	5%	6%	0%
Other	12%	3%	5%

RESPONSIBILITY FOR INNOVATION

When insights organizations have a formal program for innovation, the responsibility to run it is often a senior responsibility involving one or more of CEO or COO (35%), Chief Learning Officer (8%), CMO (7%), or other executive or leadership team (41%). For 88% of companies with 1,000 or fewer employees, these kinds of executives are involved in leading the programs; at larger companies, the percentage falls to 72%. As with most differences related to company size, this is more likely to be a senior responsibility among research Suppliers than Buyers. For instance, four out of ten (40%) Suppliers have a CEO run the innovation program compared to one out of ten Buyers (9%).

Interestingly, although the GRIT survey focuses on insights professionals, only two of ten name the head of insights as having responsibility for running the innovation program. More than twice as many say that a chief or head of innovation manages the program (43%). This figure closely matches those with dedicated innovation budgets (44%) and may be a more accurate indicator of truly dedicated innovation programs.

Looking at differences by Supplier size (the Buyer sample to this question was too low to repeat this analysis) reveals that only 26% of small businesses have a chief or head of innovation, vs. 59% of medium sized businesses, and 47% of enterprises. Conversely, the CEO or COO is responsible for innovation in nearly half the small businesses (49%), four out of ten medium firms (38%), and two out of ten (21%) enterprises.

THE BIG PICTURE

Innovation isn't just an empty buzzword (with apologies to GRIT respondents who say it is precisely that – we'll have to agree to disagree). Both Buyers and Suppliers are focused on supporting it and dedicating organizational resources including teams and budgets to make it happen



Innovation isn't just an empty buzzword (with apologies to GRIT respondents who say it is *precisely* that – we'll have to agree to disagree). Both Buyers and Suppliers are focused on supporting it and dedicating organizational resources including teams and budgets to make it happen. Suppliers and Buyers employ multiple approaches to enable innovation and these include a mixture of internally and externally focused activities. Internal knowledge

sharing events/meetings seems to be the closest thing to a universal enabler, and organizations pick and choose their own combinations of activities to construct their formal or informal programs.

Innovation has become a core driver of the business, and the industry will have to continue to up its game to keep up with the demand for new solutions.



AGILE RESEARCH WAS MADE FOR TIMES LIKE THIS

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This summer's GRIT Report highlights that the most innovative businesses are those that can balance the demand for speed and flexibility with quality service and expertise, which are the decided hallmarks of agile. Brands looking to position themselves for future growth and success should partner with research suppliers who can marry these qualities to enable agility within their client organizations and capitalize on innovation opportunities in today's dynamic environment.

The GRIT Report found that 67% of respondents have employees focused on "developing new ways of doing things." However, the research also shows that only 44% of respondents maintain a dedicated innovation budget, and even less (33%) maintain a formal program for supporting innovation. This disparity suggests that businesses aren't totally committed to their innovation strategy, which is a mistake. Innovation is critical to the success of any single organization – regardless of sector or size – and it's on business leaders to implement a strategy that embraces that reality. Suppliers need to serve as a north star here and generate the insights and recommended business actions to inform their clients' strategies and next steps.

Over the past few months, the coronavirus pandemic has impacted the economy and our lives like never before. But throughout history, it's difficult times like today's environment that have sparked the creation of many successful companies. For example, the Great Recession of 2008 was the breeding ground for Uber, Venmo, and AirBnB, among several other unicorns. Likewise, our current situation has created an opportunity for growth, and businesses must evolve with the times to take advantage of that.

Consumer behaviors and attitudes seem to be changing by the minute and certainly new habits are being formed. This dynamic will create significant disruption and opportunity in the market. In order to capitalize on these fast-moving changes, brands will need to adopt an agile approach to better understand their current and prospective customers.

It's important to note that the entire world of business is moving to a faster and more agile approach. Why? Because they want to reap the proven benefits of agile, including quality of results, faster time to market, continuous improvement, error reduction, and more collaboration to name a few. Agile has proven its value, and its ubiquity will only increase.

The technology industry is the headwaters of the agile movement, but other sectors are quickly adopting this way of thinking. For example, Google, one of the most successful companies in the world, the #2 most innovative research buyer as noted in the GRIT Report, and one of our own clients, has used agile research to inform its innovation and communications strategies for years. Another client, Nestlé, is a great example of a leader in CPG who has embraced agile, and is reaping the rewards of applying this philosophy to their product innovation efforts. With this muscle memory of leveraging agile, firms like Google and Nestlé are positioned to capitalize on the well-documented consumer changes happening in the market.

COVID-19 has caused a significant amount of disruption in the marketplace, making right now an ideal time to innovate within your business. But to do that successfully, you must take an agile approach and dedicate the necessary resources to that innovation strategy. Ensuring that your next moves will match up with what your audience is thinking, feeling, and demanding is a reliable path to success in a rapidly changing environment, and adopting an agile philosophy will play a key role in helping you accomplish that.

GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

Which companies have successfully embedded innovation into their brand and across all communication touchpoints? Who is capturing mindshare (and market share!) as a result? Here is where those questions are answered.

For over a decade the GRIT Top 50 has been one of the key metrics many companies use to understand their position in the marketplace. However, there remains some confusion regarding exactly what the GRIT 50 measures. Fundamentally, it is a brand tracker that uses the attribute of “innovation” as the key metric. It has become a reliable way for the players in the insights and analytics ecosystem to measure their own brand awareness and perception vs. their competitors. This is critical because of the strong correlation between brand awareness and growth. After all, if you are not in the consideration set, you won’t get the opportunity to earn business.

Further, as we have seen consistently in this report, the concept of “innovation” is something to which both Buyers and Suppliers are keenly attuned. It is often a key part of Supplier differentiation strategy and Buyers increasingly prioritize it as a factor in their partner selection process. Suppliers who do a good job of marketing around this brand attribute are rightfully responding to market signals.

To be clear: the GRIT Top 50 is NOT intended to evaluate all the real-world innovation successes of insights organizations and make a determination of which Suppliers have contributed the greatest good to the most insights professionals; how could such a metric even be developed? What would be the basis for comparison even if using an “expert panel”? Instead, this is a metric of which companies are PERCEIVED to be innovative as a core brand attribute. We want to understand which companies are using the concept of “innovative” to capture mindshare in the marketplace, and

then to understand what actually denotes “being innovative” in the minds of our respondents. That isn’t to say that these companies are not innovative; being industry insiders we would argue that they all are indeed doing their part to earn this perception, and the prevalence of young, smaller companies who are indeed doing new things in the list proves it.

So, despite the occasional confusion on what being a GRIT 50 Most Innovative Supplier means and why it is important, we continue to use this as the process for understanding brand awareness in the industry.

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

1. Using an unaided awareness verbatim question, we ask respondents to list the insights and analytics Suppliers they consider to be most innovative. They can name up to four.
2. We then ask them to tell us of the Suppliers they listed, which do they consider to be the most innovative.
3. Finally, we ask another verbatim as to what factors make the Supplier they chose the most innovative.

We also ask respondents to help us segment the Suppliers mentioned in their responses into a few broad categories aligned with our overall segmentation schema. The question text is “Which of these best describes each company you listed?”

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

Fundamentally, it is a brand tracker that uses the attribute of “innovation” as the key metric. It has become a reliable way for the players in the insights and analytics ecosystem to measure their own brand awareness and perception vs. their competitors



Then, after rigorous data cleaning (see the Appendix for more details) and adhering to a set of rules we established based on industry dynamics, we simply count the mentions of each company. It is a pure “top-of-mind” question type with no prompting from pre-defined lists determined by us; GRIT respondents create the list based on their responses.

We’re often asked how companies can “get on the list,” and our response is always the same: effective marketing. Because of the nature of the question, there is no option but for a company to build organic awareness among insights professionals in connection to the idea of being “innovative.” There are many ways to get there: events, content marketing, educational programs, advertising, word-of-mouth, social media, etc. Regardless of the channels used and marketing tactics employed, every company on the list has become top-of-mind for many in the industry when they think of innovative companies.

While a company’s inclusion and relative position in the GRIT Top 50 rankings mostly reflect successful marketing, we believe the rankings are also a good proxy for business footprint and growth, based on financial performance information, including funding rounds (in some cases) of the companies listed.

We are also aware that some companies attempt to “game the system” in a variety of ways, but due to our data cleaning process those efforts are ineffective and sometimes counterproductive. We catch them and delete them. In this wave, we eliminated hundreds of completed interviews during our data cleaning process, and either recoded or deleted responses that we felt were likely attempts at “vote stacking.”

On a related note, some have mentioned that the larger companies in the industry have an advantage due to their number of employees who may take the survey, and there might be a modicum of truth to that on the surface, but in our analysis we look at IP addresses and email domains and we have never seen evidence that this is a significant factor;

if large companies have an advantage, it is in their reach and marketing budgets, not in driving “votes.” This is also borne out by the in-depth demographic and firmographic analysis we conduct; the sample is simply too diverse and large on all measures to be suspect. And, empirically, it is demonstrably false: while of course the large players are represented here, the majority of the list are smaller to mid-size companies, many of which are close in mentions to their larger competitors.

For this wave, using the aggregate of total mentions, we developed a list of over 906 unique companies from 3,342 total responses. Many of these companies are single mention, so during the coding process we focus on firms with a minimum threshold of mentions and then code them. In this wave we coded 158 companies with multiple mentions.

Only companies that received 14 or more mentions made it on to the core GRIT Top 50 list. However, as the industry has continued to evolve, last year we decided it was appropriate to look at more than one list. The reason we included a classification question was to develop sub-lists of companies in those categories, so although the GRIT Top 50 is still the definitive aggregate list, we have 5 new rankings that we believe are just as important to pay attention to:

1. GRIT 25 Data & Analytics Providers
2. GRIT 25 Full/Field Service Agencies
3. GRIT 25 Qualitative Researchers
4. GRIT 25 Strategic Consultancies
5. GRIT 25 Technology Providers

Although the threshold to be included in these new rankings is lower within each category, candidate companies were pulled from the 158 companies with five or more aggregate mentions. We’ll dive deeper into the purpose for this expansion in this section.

In some cases, due to ties, each list may have slightly more than 25 companies out of fairness to represent those that met the basic threshold within each sub-list while ensuring at least 25 companies were included within these rankings.

While a company’s inclusion and relative position in the GRIT Top 50 rankings mostly reflect successful marketing, we believe the rankings are also a good proxy for business footprint and growth, based on financial performance information, including funding rounds (in some cases) of the companies listed



As always, a note on our process is warranted.

Because the rankings are derived from verbatims, it's messy. Besides data cleaning for quality control of sample and responses in general, a significant amount of human intervention is needed within the GRIT 50 question set due to name changes, M&A activity, variants, spelling, translations, etc. It's as much an art as a science (but still a science). As such, we established a few rules to guide our process that are useful to know as you review the list:

1. Normalizing all spellings or alternates (ex: Nielson, Neelson, Nelson, Nielsen, etc.).
2. If a company bought another company and rolled them in as a *division or product*, we recode to the acquiring company (ex: Schlesinger and LRW with their recent acquisitions)
3. If it is a *product or division* of a parent company, we recode to the parent company (ex: Nielsen BASES = Nielsen, Methodify = Delvinia).
4. If a parent company has a minority investment, the sub-brands were counted separately.
5. If a parent company is consolidating all sub-brands (ex: Kantar and Dynata), all were counted toward the parent company.
6. If a company has recently re-branded, old branding was recoded and counted under the new brand.
7. If two companies have the same name, we default to the larger company as what was intended.
8. Gobbledygook, comments such as "I don't know", "there are none", etc. ... we code as "none"
9. We ignore ties; we determine a logical minimum of mentions closest to 50 and develop a straight rank order based on that.

As you can see, this is a complex process and literally only a few people in the world have the requisite knowledge to do it. It may not be perfect, but we are not aware of any other team that could undertake this with the level of transparency, rigor, and consistency that we achieve.

Now, after providing the appropriate context and other details, without further ado, here are the 2020 GRIT Top 50 rankings:

LESSONS FROM THE TOP 10

For the second year in a row Ipsos is considered the most innovative company in the world by GRIT respondents. They continue to be recognized for their efforts to embrace new business models and launch new products to edge out their main competitors. We see signs that Ipsos may very well retain this leadership position based on how their large competitors are now positioning themselves in the market. Ipsos is relatively unchallenged by their traditional competitors (Kantar, GfK, Nielsen) as those firms seek to differentiate themselves in a variety of ways that create distance between themselves and our traditional view of insights Suppliers in the past.

That said, there are multiple smaller companies that are making significant headway as challengers to the number one spot, edging out the other "Big 4" for both mindshare and market share. LRW moved up two spots to 2nd place and HotspeX moved three spots to 3rd; PRS IN VIVO made an impressive leap of ten spots to the 4th position, while Kantar dropped three spots to take 5th place. These insurgents may soon be nipping at the heels of Ipsos and are all working hard to earn the mantle of being "most innovative" in their marketing and product portfolios. We expect more volatility in the top five in the future.

Rounding out the top ten, Zappi moved down one position from 2019 to be in 6th place, a still impressive accomplishment for a company barely out of start-up mode and moving into the scaling phase of their business. Qualtrics is up one to 7th place, Nielsen dropped five to 8th, and Dynata remained stable in 9th. However, our new 10th place entrant is worth calling out specifically; Dig Insights jumped nine spots from 2019 to break into the Top 10, one of a handful of Canadian companies making big moves this year.

Last year we noted that the Top 10 of the GRIT 50 is emblematic of the broader trends of the bifurcation of the industry between technology and service, with all of the companies falling pretty cleanly into one of those categories (although the

There are multiple smaller companies that are making significant headway as challengers to the number one spot, edging out the other "Big 4" for both mindshare and market share



2020 Rank	Supplier	Mentions	2019 Rank	Change
1	Ipsos	190	1	0
2	LRW (Kelton Global + all LRW brands)	179	4	2
3	Hotspex	164	6	3
4	PRS IN VIVO (BVA Group + PRS IN VIVO)	140	14	10
5	Kantar (includes all products)	129	2	(3)
6	Zappi	107	5	(1)
7	Qualtrics	103	8	1
8	Nielsen (includes all products)	97	3	(5)
9	Dynata	96	9	0
10	Dig Insights (Dig Insights + Upsiide)	85	19	9
11	Voxpopme	73	11	0
12	SKIM	69	21	9
13	Delvinia (AskingCanadians + Delvinia + Methodify)	66	12	(1)
14	Shapiro + Raj	66	24	10
15	Toluna	61	20	5
16	Google (includes all products)	60	16	0
17	Lucid (includes all products)	57	17	0
18	Cint (Cint + P2Sample)	55	DEBUT	DEBUT
19	Medallia (LivingLens + Medallia)	53	13	(6)
20	AYTM	48	15	(5)
21	1Q	46	45	24
22	Fuel Cycle	44	26	4
23	GfK	42	23	0
24	My-Take	39	DEBUT	DEBUT
25	Schlesinger Group (OTS + 20/20 Research + MarketCube)	39	49	24

2020 Rank	Supplier	Mentions	2019 Rank	Change
26	System1 Group	39	7	(19)
27	Insites Consulting (Insites Consulting + Join the Dots)	36	10	(17)
28	Remesh	36	18	(10)
29	Reid Campbell Group (Reach3 Insights + Rival Technologies)	31	DEBUT	DEBUT
30	Maru/Matchbox	29	42	12
31	IBM (includes all products)	28	34	3
32	TRC Research	28	33	1
33	Confermit	27	DEBUT	DEBUT
34	Logit Group	27	DEBUT	DEBUT
35	Haystack Consulting	26	DEBUT	DEBUT
36	Microsoft (includes all products)	26	46	10
37	Amazon (includes all products)	23	DEBUT	DEBUT
38	Discuss.io	23	28	(10)
39	Recollective	23	DEBUT	DEBUT
40	FocusVision (includes all products)	22	22	(18)
41	Black Swan Data	19	37	(4)
42	NAILBITER	18	DEBUT	DEBUT
43	Omnicom (C Space + Hall & Partners + Omnicom)	18	23	(20)
44	Quantilope	18	DEBUT	DEBUT
45	Vision Critical	18	50	5
46	McKinsey	16	35	(11)
47	Potentiate	16	DEBUT	DEBUT
48	Protobrand	16	32	(16)
49	Buzzback	15	DEBUT	DEBUT
50	Canadian Viewpoint	14	DEBUT	DEBUT

Editor's Note: A previous edition of the Report mistakenly included Big Sofa under Ipsos as #1 on the GRIT Top 50 List, mistaking a minority investment by Ipsos as a majority investment. Big Sofa has since been removed.

The surge of new entrants indicates that the industry continues to look outside of the “usual suspects” for solutions and that no Supplier can rest on their laurels



The continued growth of the big tech companies into the insights and analytics space is a trend that could cause much disruption in the future, especially as an emphasis on analytics from Buyers drives the market; they are well positioned to dominate in that arena if they decide to devote the resources to do so



reality is all tech companies offer some service and all service companies are investing in tech offerings). However, we continue to see an interesting experiment with several companies crafting a third option that is redefining the role of insights and marketing by integrating the two to a great extent, while also leveraging a mixture of technology, consulting, and actual marketing execution all under one roof. Last year we said:

“We’ve been thinking about the development of the “Full Stack” model in insights and analytics, mostly with an eye towards technology-focused companies building in service capabilities but this trend may indicate a corollary in more service-driven business we can call the “Full Cycle” model: insights-driven Suppliers functioning as a one-stop shop to help clients to engage, understand, and activate their target populations in a virtuous circle. Both “Full Stack” and “Full Cycle” models appear very much in line with the challenges and opportunities we previously discovered, as well as aligned to the factors that are driving growth.”

We stand by that, especially in looking at the repositioning of Kantar, Nielsen, and GfK who are practicing variations of that, but also with the growth of many other forms in the ranks of the GRIT 50 list (or making their debuts).

These observations are bolstered by almost every other data point we have captured in this wave of the report, especially in the preceding “Business” section as we mapped out the structure and dynamics of the industry.

If we were plotting this out in a quadrant analysis, the X axis could be “Tech” and “Service” while the Y axis could be “Insights” and “Activation”: the story of how these companies are working to find their white space along those dimensions is the story of our industry as it evolves.

CHANGES IN THE TOP 50

Volatility defines the remainder of the list, with 13 debuts. Cint debuted the highest at #18, followed by #24 My-Take, #29 Reid Campbell Group (Reach3 Insights + Rival Technologies), #33 Confrimit, #34 Logit Group, #35 Haystack Consulting, #37 tech

giant Amazon (joining the ranks of other big tech companies on the list), #39 Recollective, #42 NAILBITER, #44 Quantilope, #47 Potentiate, #49 Buzzback, and #50 Canadian Viewpoint. The surge of new entrants indicates that the industry continues to look outside of the “usual suspects” for solutions and that no Supplier can rest on their laurels because “challenger brands” (and in the case of Amazon, companies that have massive advantages) are entering the market and aggressively positioning themselves as alternatives to traditional Suppliers.

On the significant upward movement trend, we see significant leaps from 1Q up a massive 24 spots to #21 and Schlesinger Group (OTS + 20/20 Research + MarketCube) also leaping a huge 24 spots to #25, Maru/Matchbox up 12 spots to #30, Shapiro + Raj up 10 spots to #14, tech giant Microsoft moves up 10 spots to #36, SKIM up nine spots to #12, Toluna up five to #15, Vision Critical up five places to #45, Fuel Cycle jumps four spots to #22, another tech giant IBM moved three to #31, and TRC Research moved up one to #32.

These are the companies to watch over the next year to see if they can capitalize on their momentum as we have seen some of the Top 10 companies do over the last few waves to move into the upper echelon of rankings.

We should also reiterate that the continued growth of the big tech companies into the insights and analytics space is a trend that could cause much disruption in the future, especially as an emphasis on analytics from Buyers drives the market; they are well positioned to dominate in that arena if they decide to devote the resources to do so.

And just as there was movement, some Suppliers moved down. We would suggest to them that as a measure of brand awareness this should be a wake-up call to redouble their efforts to make a deep impression on the industry with their marketing.

Congratulations to all of this year’s GRIT Top 50 listers; regardless of their rank, each are leaders in the industry and deserve kudos for their efforts in a crowded, fragmented, and highly competitive marketplace!



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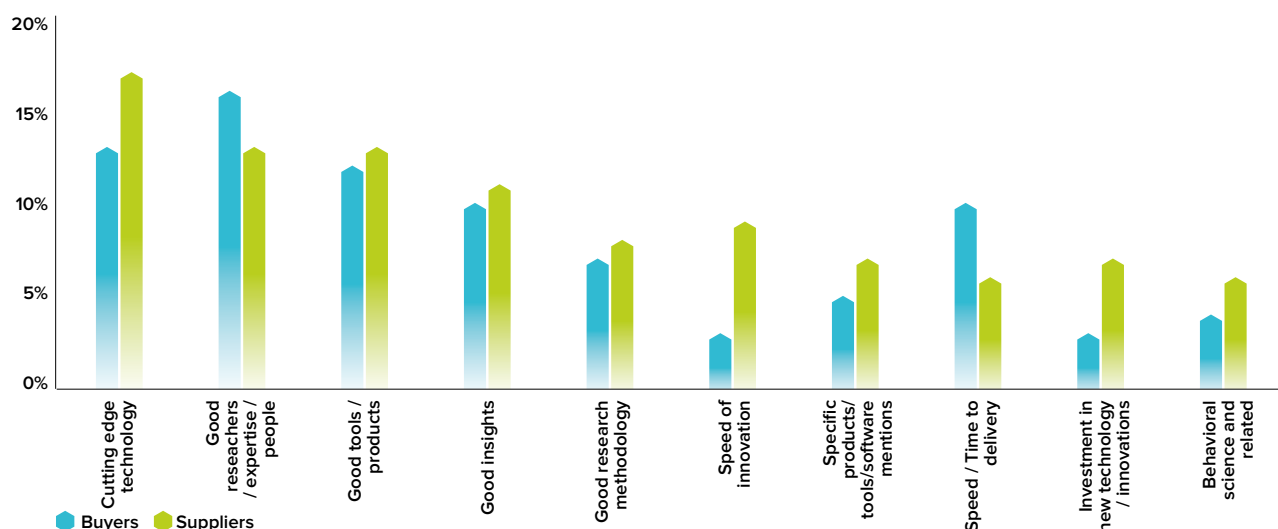


WHY ARE THESE SUPPLIERS CONSIDERED INNOVATIVE?

We asked respondents to explain their choice of an insights Supplier as “most innovative” via a verbatim response that we then coded. There are some clear differences between how Suppliers and Buyers characterize leading innovation. While Suppliers think in terms of more explicit tactical features referencing technology, methodology, innovation, and products, Buyers, on the other hand, are far more likely to mention more tacit features

like expertise and speed of delivery. In essence, what Buyers consider innovative is how well offerings address their challenges around speed, cost, and resources while Suppliers’ perspective on innovation is based on “how to” conduct research. Both are aligned with regard to “producing good insights” (quality) as a factor in their perception on innovation as well.

WHY SUPPLIERS ARE CONSIDERED INNOVATIVE: BUYER VS. SUPPLIER



It seems that a truly innovative Supplier needs to balance the speed and flexibility required to stay current technologically and methodologically with the quality service and expertise. These should come as no surprise since these insights are a common theme in this report.

CATEGORY RANKINGS

As mentioned previously, we asked respondents to categorize the Suppliers they listed as most innovative into five groups:

1. Data & Analytics Providers
2. Full/Field Service Agencies

3. Qualitative Suppliers
4. Strategic Consultancies
5. Technology Providers

Our goal here was to accomplish a few things: to showcase even more companies that are leaders in specific areas, to understand how companies are perceived in the marketplace, and to compare how companies are perceived by the market versus how they are positioned by their own employees via the GRITscape (which we covered in the GRITscape section of this report).

Additionally, although the core GRIT 50 list is based on “rollups” into parent brands, we recognize

It seems that a truly innovative Supplier needs to balance the speed and flexibility required to stay current technologically and methodologically with the quality service and expertise



that many Suppliers have specific product and service offerings targeted to specific business issues and sectors, so this analysis allows us to look at those “sub-brands” within Suppliers to understand their image as discrete and separate subjects rather than under the shadow of their relationship to a larger

entity. This means that within these rankings there is sometimes duplication of parent companies due to the recognition of specific offerings having a unique brand identity that resonates with the market.

Note that due to the amount of ties in number of mentions, some lists are slightly longer than 25.

DATA/ ANALYTICS PROVIDERS

Rank	Data/ Analytics Providers	
1	Nielsen	47
2	Dynata	37
3	Ipsos	37
4	Hotsplex	33
5	Kantar	28
6	Google	24
7	Zappi	23
8	Qualtrics	22
9	LRW	19
10	1Q	18
11	Dig Insights	17
12	Toluna	17
13	PRS IN VIVO	16
14	Black Swan Data	12
15	GfK	11
16	IRI	11
17	SKIM	11
18	AYTM	10
19	TRC	10
20	ProtoBrand	9
21	System1 Group	9
22	IBM	8
23	Lucid	8
24	Methodify	8
25	AskingCanadians	8
26	Logit Group	8

FULL/FIELD SERVICE PROVIDERS

Rank	Full/Field Service Providers	
1	Ipsos	92
2	Kantar	62
3	PRS IN VIVO	46
4	Hotsplex	43
5	Dynata	39
6	LRW	33
7	Nielsen	24
8	SKIM	24
9	Dig Insights	18
10	Toluna	18
11	Lucid	15
12	GfK	14
13	System1 Group	14
14	TRC	12
15	Logit Group	12
16	Insites Consulting	12
17	Maru/Matchbox	11
18	Shapiro + Raj	11
19	Canadian Viewpoint	11
20	Delvinia	11
21	Zappi	10
22	AYTM	9
23	Schlesinger Group	9
24	Qualtrics	8
25	Prodege	8
26	Catalyx	8
27	De la Riva	8

This means that within these rankings there is sometimes duplication of parent companies due to the recognition of specific offerings having a unique brand identity that resonates with the market



QUALITATIVE RESEARCHERS

Rank	Qualitative Researchers	
1	Voxpopme	21
2	Shapiro + Raj	16
3	PRS IN VIVO	14
4	Hotspx	13
5	Ipsos	12
6	20/20 Research	10
7	Kantar	9
8	Insites Consulting	8
9	1Q	8
10	Dynata	7
11	Nielsen	7
12	Qualtrics	6
13	Discuss.io	6
14	Remesh	6
15	Happy Thinking People	6
16	CRIS	6
17	Toluna	5
18	Logit Group	5
19	Schlesinger Group	5
20	De La Riva Group	5
21	iTracks	5
22	Recollective	5
23	Medallia	5

STRATEGIC CONSULTANCIES

Rank	Strategic Consultancies	
1	LRW	119
2	Hotspx	72
3	PRS IN VIVO	58
4	Ipsos	47
5	Dig Insights	45
6	Shapiro + Raj	35
7	SKIM	32
8	Kantar	28
9	Haystack Consulting	23
10	Nielsen	17
11	Kelton Global	15
12	Insites Consulting	14
13	Maru/Matchbox	13
14	McKinsey	11
15	System1 Group	10
16	BVA Group	10
17	GfK	9
18	Reach3 Insights	9
19	Fifth Dimension Research	9
20	Qualtrics	6
21	Fuel Cycle	6
22	Buzzback	6
23	C Space	6
24	Catalyx	6
25	Deloitte	6



TECHNOLOGY PROVIDERS

Rank	Technology Providers	
1	Zappi	65
2	Qualtrics	59
3	Voxpopme	43
4	Cint	35
5	Methodify	34
6	Fuel Cycle	30
7	LivingLens	30
8	My-Take	29
9	Lucid	27
10	Google	25
11	AYTM	25
12	Upside	24
13	Remesh	24
14	Confermit	24
15	Rival Technologies	20
16	Recollective	17
17	Microsoft	17
18	Toluna	16
19	Medallia	15
20	FocusVision	15
21	IBM	13
22	Discuss.io	12
23	Delvinia	11
24	Vision Critical	11
25	1Q	10

MAKING MULTIPLE LISTS: A CAUSE FOR APPLAUSE?

Several Suppliers earned positions on multiple category lists, and the immediate benefit to them is...more mentions in the GRIT Report! While we won't argue against the immeasurable value of that additional exposure, we can't help but think that the multiple-list distinction is somewhat dubious and counter-productive.

If it has not been made clear in other sections of this report and in previous GRIT editions, let's be clear now: we believe that a brand is marketing itself optimally if the market has a single, top-of-mind consensus opinion regarding which category best represents it. If a brand appears on multiple category lists, we see that as an indication that marketing resources are being wasted, and the Supplier is not getting back all it deserves. We established this point of view when we discussed which companies come to mind first for insights professionals when they think of a category and doubled down when we pointed out that employees of the same Supplier do not always share the same vision of where the company competes for revenue.

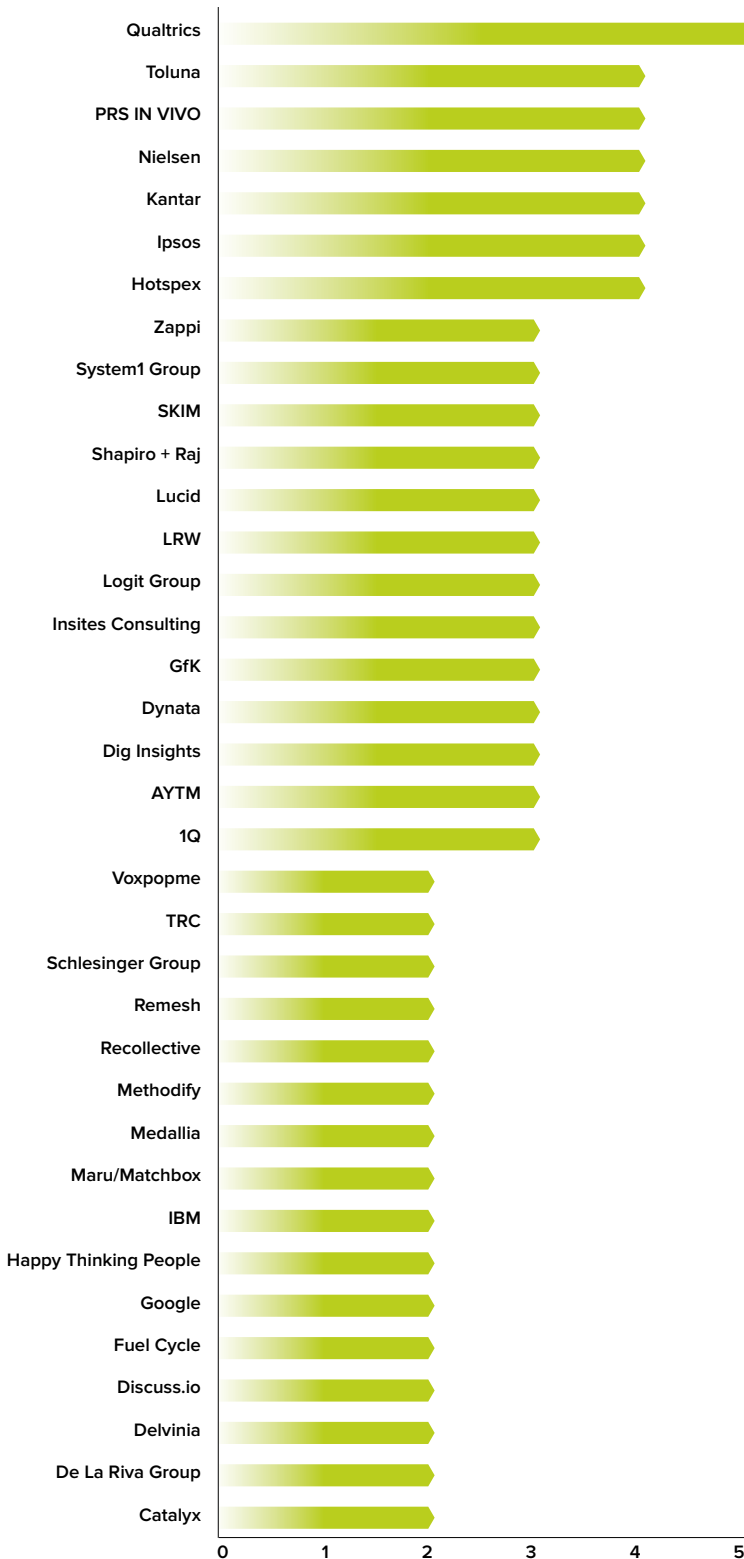
To be *perfectly* clear: we have no issue with the fact that Suppliers, on average, earn significant revenue from multiple service categories – that's just good business. We have no issue with companies who have a strong presence in multiple categories because they own subsidiaries who have strong brand identities – that's just good brand management. However, we do object when Suppliers dilute their brand by cultivating multiple identities in the market – that's just wasteful. We believe that a brand can have many offerings, but should grow and maintain a single consensus image.

When we compile Supplier rankings within service type, we see evidence of sub-optimal returns on brand investments. Our first takeaway is that an insights professional's direct experience

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NUMBER OF CATEGORIES MENTIONED



with a Supplier dominates their image of it; brand marketing does not, and consistent brand positioning is not part of their direct experience. Similar to the adage of the blind men and the elephant, depending on how you interact with a Supplier you may see it differently. For large organizations that offer a wide breadth of services such as Ipsos, Kantar, Nielsen, etc...that is unsurprising and perhaps even on-brand.

However, for a company like Qualtrics that touts itself purely as a Technology provider, it is curious that they are seen as fitting into all five categories! The same is true for many other Suppliers that we think of as having a clean categorical fit, but that the insights world at large experiences differently than we do. Of the four major types of services, Strategic Consultancy, Full/Field Service, Technology, and Data & Analytics, the *average* Supplier says they derive significant revenue from 2.9 of them, and even Suppliers with 100 employees or fewer claim 1.8 significant revenue sources. So, it may not be *surprising* that insights professionals differ with respect to how they categorize Suppliers, but we believe it is not *good*.

To illustrate this issue, here is a look at the Suppliers that appear in two or more category lists:

Is this an example of Suppliers increasingly trying to be “all things to all people”, a symptom of “experiential tunnel vision” by respondents, or is it indicative of a challenge Suppliers have in consistently communicating a clear positioning via all market touch-points? Or is it a mix of all of these?

Clearly many Suppliers do not have the same disconnect because they appear on only one list, and their consensus category assignment by respondents fits with their intended positioning. Based on this, we don't believe the disconnect arises from lack of knowledge in the market since many of the assigned categories match what we ourselves would have chosen for these companies.

In the GRITscape section we explored the differences between how companies “self-identify” vs. how they are perceived; our working hypothesis is that the lowest common denominator is how.

EXAMPLES OF MARKET CONSENSUS ON THE “CORRECT” SUPPLIER CATEGORY

20/20 Research	Qualitative
AskingCanadians	Data/ Analytics
Black Swan Data	Data/ Analytics
Buzzback	Strategic Consultant
BVA Group	Strategic Consultant
C Space	Strategic Consultant
Canadian Viewpoint	Full/Field
Cint	Technology Provider
Confirmit	Technology Provider
CRIS	Qualitative
Deloitte	Strategic Consultant
Fifth Dimension Research	Strategic Consultant
FocusVision	Technology Provider
IRI	Data/ Analytics
iTracks	Qualitative
Kelton Global	Strategic Consultant
LivingLens	Technology Provider
McKinsey	Strategic Consultant
Microsoft	Technology Provider
My-Take	Technology Provider
Prodege	Full/Field
Protobrand	Data/ Analytics
Reach3 Insights	Strategic Consultant
Rival Technologies	Technology Provider
Upside	Technology Provider
Vision Critical	Technology Provider

Suppliers market and position themselves; it is the only means they have in impacting positioning perception. Suppliers who are “one stop shops” may argue that they benefit from having multiple personalities, but there is significant risk for Suppliers with more focused service lines if potential Buyers are confused as to their offerings and do not know to include them in their consideration set.

DIFFERENCES BY REGION AND BUYER VS. SUPPLIER

When we take a deeper look at the GRIT Top 50 by a few other variables we get slightly different rankings that yield interesting insights into what works from a marketing and branding perspective in different parts of the world and across segments.

When looking at the subset of the Top 10 by region, it’s no surprise that we see North America as the largest source of mentions across all of mentioned Suppliers. Conversely, we see that LRW, Hotspx, and Dig Insights enjoy significant brand awareness in North America but have not gotten through to respondents in other regions. All other companies have relatively well-balanced brand awareness by region. Of course, the Big 3 lead based on their global scale, although PRS IN VIVO and Dynata do well globally, too, without the benefit of the same scale of global presence as the industry leaders. It is interesting to note that the overall Number 1, Ipsos, is not Number 1 in any single region. It reaches global Number 1 by being strong everywhere.

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Top Ten Suppliers	North America	Europe	Asia	Rest of World
Ipsos	131	43	8	10
LRW (Kelton Global + all LRW brands)	175	2	2	0
Hotspx	148	11	3	2
PRS IN VIVO (BVA Group + PRS IN VIVO)	82	48	9	1
Kantar (includes all products)	94	21	9	5
Zappi	72	30	1	4
Qualtrics	77	16	3	7
Nielsen (includes all products)	63	11	15	8
Dynata	63	20	7	6
Dig Insights (Dig Insights + Upside)	82	2	1	0

Editor’s Note: A previous edition of the Report mistakenly included Big Sofa under Ipsos as #1 on the GRIT Top 50 List, mistaking a minority investment by Ipsos as a majority investment. Big Sofa has since been removed.

Top 10 Suppliers	Mentions by Buyers	Mentions by Suppliers
Ipsos	52	134
LRW (Kelton Global + all LRW brands)	9	161
Hotspx	49	108
PRS IN VIVO (BVA Group + PRS IN VIVO)	12	120
Kantar (includes all products)	42	83
Zappi	31	75
Qualtrics	24	73
Nielsen (includes all products)	26	60
Dynata	6	81
Dig Insights (Dig Insights + Upside)	7	76

Editor's Note: A previous edition of the Report mistakenly included Big Sofa under Ipsos as #1 on the GRIT Top 50 List, mistaking a minority investment by Ipsos as a majority investment. Big Sofa has since been removed.

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

Ipsos maintains their leading position among Buyers, while LRW (which, interestingly, does not sell to Suppliers) is the undisputed leader among Suppliers. Dynata, the only sample Supplier in the Top 10, unsurprisingly has strong awareness among Suppliers but the least awareness among Buyers. Dig Insights, which is a full-service firm, also has minimal awareness from Buyers but is strong among Suppliers.

For Suppliers who want to achieve solid brand recognition among Buyers, these are useful examples to benchmark their efforts against. These companies conduct their marketing efforts in a more industry-wide way and here we see how those efforts are paying off.

THE BIG PICTURE

As we said before, the GRIT Top 50 is designed to do two things: identify how much the brand attribute of innovation drives brand awareness and what the term innovation means to the insights industry. Our belief, based on market dynamics, financial performance, M&A activity and other independent measures, is that the more strongly a Supplier is connected with the attribute of innovation, the more likely they are to succeed in the marketplace. While we are far away from developing a predictive model to quantify this, anecdotal evidence certainly points in the direction of a strong relationship. This story remains the same in 2020, although we are moving closer to having models that can predict market success as we have shown in other sections of this report.

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

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

The volatility in the rankings shows how newer companies continue to disrupt the status quo while perfecting their marketing, earning the awareness of the industry in the process. This competitive pressure is forcing incumbent larger players to sharpen their own efforts, up their own game, and work hard to stay ahead of the pack, which is illustrated by the strong performance of companies like Kantar and Ipsos. This all points to a healthy and dynamic industry where no one can rest on their laurels, and we look forward to seeing how things shift again in 2021.

The volatility in the rankings shows how newer companies continue to disrupt the status quo while perfecting their marketing, earning the awareness of the industry in the process





DON'T LOOK DOWN: THE MR BALANCING ACT

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For Market Research agencies – like any other business – success is a matter of balance. Balancing a focus on winning new clients vs. effectively servicing existing customers. Or balancing short-term demands for new offerings against the already-defined strategic roadmap. For research businesses, a critical balance is that between technology and service. Or, to put it another way – between being smart and being clever.

What do we mean by that? Most of today's MR technology tools are highly evolved and enable researchers to perform all manner of sophisticated and specialized functions across the full gamut of research; from data collection, to analytics and data visualization.

Technology allows you to answer clients' demands for speedy, actionable insight. It enables you to deliver great value to research buyers, but critically, it means you can do so without sky-high costs and exhausted team members. This report makes clear that technology remains at the heart of the MR business, with tech spend slowing down a little but still very healthy.

But – and as a technology provider, it pains me a little to say this – technology isn't everything. And there are a couple of things that MR leaders must consider to keep moving forward. Firstly, are you implementing technology for technology's sake? Shiny new tools are always tempting. But you must choose technology with human users in mind, not an idealistic vision of what you wish technology could achieve.

There are examples of this all over the place. Remember a couple of years ago when so many got very hot under the collar at the idea of using VR for gamified data collection? Pretty sexy. But uptake was minimal. The tech was too unwieldy, delivered an uncomfortable experience for the respondent and the insights were not necessarily "value adding". Clever, but not smart.

The second consideration is where service comes into play. If "smart" technology is all about creating scalable, repeatable solutions that underpin your core work and generate value, then services fill the gap between what clients want and what the technology delivers.

As is noted elsewhere in this GRIT report, most tech-driven companies now have to offer a level of service to meet client needs. That's great, but do they exceed expectations? Of course, most vendors can answer the common questions, but do they ever truly partner with you to solve your or your clients' business challenges?

As you read the rest of the GRIT report, particularly the areas around technology, consider these questions. Particularly if your heart beats a little faster at some of the ideas...

- Will this support my day-to-day research requirements?
- How does this benefit my people? Will it make them more efficient or just deliver a feel-good buzz?
- Will this technology create or reduce complexity?
- Will this increase creativity within my team or reduce it?
- Is this a better way of achieving my clients' goals and objectives – or just a different one?
- Does my team have the necessary skills to exploit the technology in a productive way?
- Will the vendor be the supportive partner we need to be successful with this tech?
- Will the investment business case for adopting this technology deliver short-term or long-term returns?

Take a step back. What is the tool's real benefit? Take time to assess, plan and understand the real objectives. Technology needs to drive efficiencies and technology vendors services need to do more than "meet your basic needs". The combination of the two has to be clever enough to help you differentiate your business, and give your customers a new perspective.

As MR companies move towards reframing themselves from "clipboard people" to valuable business advisors, getting this balance between smart and clever is more important than ever. Keep thinking and keep balancing. Just don't look down.

GRIT TOP 25 MOST INNOVATIVE CLIENTS

Innovation isn't just an imperative for Suppliers; many Buyers have made this a focus of their business, including within their insights organizations, and these companies set the standard for everyone year-after-year.

To accompany our review of the most innovative Suppliers, we asked participants who the most innovative clients are. The data was collected in the same way as when we asked about the most innovative Suppliers. The client data focuses on the top 25 mentions as the numbers tend to aggregate on a few companies and then dissipate faster than is the case with Suppliers.

The table on right shows the rankings for 2020, along with the rankings from 2015 to 2019. The table also shows the change in rankings, from 2019 to 2020, the number of mentions in 2020, the location of the brand's HQ, and its broad category. Grey cells means they were not in the top 25 that year.

STABILITY AT THE TOP

The top five companies, P&G, Google, Unilever, PepsiCo, and Coca-Cola have been in the top six for the last five years. The top four companies were the only ones to get more than 100 mentions, and the numbers of mentions drops away rapidly after the top seven companies.

The stability over time of the rankings drops away after the top 10 companies, but by this point the brands are only securing a fraction of the mentions that the top brands received.

INNOVATIVE AND NOT SO INNOVATIVE INDUSTRIES

The top ten innovative companies come from just five categories, which in turn could be grouped into two mega-categories. These two mega-categories are CPG/Soft Drink/Confectionary and Online/IT.

As well as looking at which brands comprise the top 25, and which categories they are from, it is interesting to note the categories that do not appear

in the top 25, or which are barely reported. The missing categories include:

- Auto (no car manufacturers).
- Transport (there are no airlines, boat, or train companies, or even Uber).
- Telco (there are two handset manufacturers, Apple, and Samsung, and two mobile operating system manufacturers, Apple, and Google), but no Telco's.
- Retail (Amazon is listed as Online and McDonald's as Fast Food, but there are no conventional retailers).

Given the timing of this year's study, we should pay attention to whether the categories (and the brands) that are most innovative tend to do better during and after the pandemic crisis than the less innovative categories and brands.

The top five companies, P&G, Google, Unilever, PepsiCo, and Coca-Cola have been in the top six for the last five years



Brand	2020 Rank	2019 Rank	2018 Rank	2017 Rank	2016 Rank	2015 Rank	Change from 18	Mentions	Country	Category
P&G	1	2	2	6	1	1	1	213	USA	CPG
Google	2	3	3	2	3	4	1	182	USA	Online
Unilever	3	1	1	1	2	3	-2	153	UK/ Netherlands	CPG
PepsiCo	4	5	5	5	6	10	1	121	USA	Soft Drink
Coca-Cola	5	4	4	3	4	2	-1	93	USA	Soft Drink
Amazon	6	6	6	8	7		0	84	USA	Online
Facebook	7	7	7	4	8	19	0	71	USA	Online
Mars	8	11	20				3	59	USA	Confectionary
Apple	9	10	8	7	5	6	1	47	USA	IT
Microsoft	10	9	11	10	11	7	-1	46	USA	IT
Colgate Palmolive	11						DEBUT	43	USA	CPG
Clorox	12	23		24	24		RE-ENTRY	41	USA	CPG
McDonald's	13	13	15			0	2	40	USA	Fast Food
Nestle	14	8	9	9	9	11	1	38	Switzerland	CPG
Mondelez	15						DEBUT	34	USA	Confectionary
AB InBev	16	15					DEBUT	28	Belgium	Alcoholic Beverages
Disney	17		16	14	16	24	RE-ENTRY	26	USA	Entertainment
L'Oréal	18	15	19				4	26	France	CPG / Personal Care
Royal Bank of Canada	19	20					DEBUT	23	Canada	Finance
McKinsey & Company	20						DEBUT	20	USA	Management
Reckitt Benckiser	20						DEBUT	20	UK	CPG
Samsung	20	23	12	18	13	15	-11	20	Korea	IT
Heineken	23	20	14	11	12	18	-6	18	Netherlands	Alcoholic Beverages
Danone	24	18	21	22	25	20	3	17	France	CPG
Alpro	25						DEBUT	16	Belgium	CPG
IBM	25						DEBUT	16	USA	Management
Kimberly-Cark	25						DEBUT	16	USA	CPG
Merck	25	18	17	24			-1	16	USA	Pharma

WHO IS A CLIENT?

In the increasingly complex world of insights, the boundary between the definition of Supplier and client are becoming less clear. The client of a panel company may be a market research agency, companies such as Google and Facebook both buy and sell research. However, to maintain consistency with previous GRIT waves, the survey set the context:

Client-side is any organization that provides insights-related research, consulting, support, platforms, and/or tools to people within their company, with or without the use of external suppliers.

This definition excludes market research agencies (who are eligible for the Innovative Suppliers list), but it does include a few clients, such as Google who also appear on Supplier lists.

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



THE BIG PICTURE

To summarize, there are a few clients that really stand out as innovative to a wide range of insights professionals, and then some that have a reputation for innovation among a narrower set.

For those clients that drive innovation forward in a very public way, we assume innovative focus is a core corporate value ingrained throughout the organization. For companies that make their commitment to innovation apparent to their Suppliers and their peers, and in this study, GRIT recognizes that effort.



There are a few clients that really stand out as innovative to a wide range of insights professionals, and then some that have a reputation for innovation among a narrower set



RESEARCH EVOLVED: BLURRING THE LINE BETWEEN BUYERS, SUPPLIERS, AND TECHNOLOGY PLATFORMS

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The buyer-supplier relationship has been the backbone of market research for the past 100 years. Built on a foundation of trust, co-operative learning, and most importantly innovation, it has withstood the test of time.

Buyers and suppliers have always held an utmost respect for one another. Buyers bringing challenging unmet research needs to the table with strategic insights for their clients, suppliers bringing creative collection and methodological based solutions to provide the insights the buyers need.

Over the years the line between what constitutes a buyer and supplier has blurred. So too has the relationship between them. As technological advances continue to define how and why we cultivate insights, companies who have been able to capitalize on technological innovation have become disruptors. The embracing of technological innovation has led to expedited insights, marginalized costs and overall a less intrusive way in which research is conducted. Traditionally, suppliers have been the ones to push the boundaries on technological innovation, giving them a competitive edge in providing services for buyers. With the advent and promotion of big data, buyers now find themselves in an ideal situation to further leverage the insights of their user base, both inside and outside their organizations.

This year's GRIT Top 25 Most Innovative Clients list is a who's who of disruptors, companies that have staked out their claim as leaders in their respective fields. It comes as no surprise then that embracing and fostering technological innovation has been an important part in each of their successes. These companies have not only continually changed the way in which they conduct business but have also by proxy forced competitors and those working with them to change the way in which they operate to remain relevant.

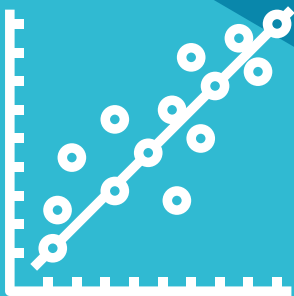
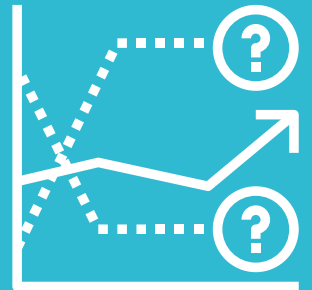
As buyers become more adept, it creates opportunities for the research community to further embrace and radicalize change. It presents scenarios in which we can further advance the buyer supplier relationship through shared technology and in turn create better insights.

At Logit we continually get asked by our clients "what's the latest and greatest that research has to offer? How do we leverage new tech to ensure that the insights we provide are not only reactive, but also proactive to how consumers will think in the future?" It's these types of conversations that have sparked debate and creative problem solving, that have shaped our industry as we know it today. Many of our products and services including our real-time voter validation tool, Votified, and our interactive sample platform, Zamplia, have resulted directly from these conversations and prove that the buyer-supplier relationship is stronger than it ever has been.

As we look towards the remainder of 2020 and 2021, many of us are wondering what's next? Where will research go from here, and what will be my involvement in shaping the new world of MR? As this list of companies demonstrates, those who aim to be successful will need to refuse the status quo. Whether it be utilizing technology to help with automation or finding ways to better harness and understand robust data sets, or simply disrupting something that is already being done, we can all find key ways to innovate.

The buyer-supplier relationship is changing and the definition of what constitutes both are being blurred, however the underlying philosophy and end goal remains steadfast: Finding innovative ways to provide meaningful and robust insights. That's market research executed.

COVID-19 SECTION





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THE IMPACT OF COVID-19

We all know COVID-19 has changed so much, so fast. The burning question is which changes are transient and which will stick. Although the insights industry is tasked with answering those questions for our clients and stakeholders, we need to understand the answers for ourselves too. We have some possible answers here.

BUT GRIT DOESN'T HAVE ANY QUESTIONS ABOUT COVID-19...

On the night of March 11, 2020, Tom Hanks and Rita Wilson announced they had tested positive for COVID-19; Utah Jazz center Rudy Gobert also tested positive as the National Basketball Association abruptly suspended its season; the United States proclaimed, among other things, a ban on cargo from Europe, sparking the biggest Wall Street nosedive in 33 years; and several hundred people had completed the 20W1 GRIT survey. By morning, even Americans could no longer ignore the gravity of the pandemic, and the world continued to complete GRIT surveys.

While acknowledging that GRIT was not designed to understand how a pandemic would affect the insights industry, we have compared the surveys completed before that climactic night to the ones that came later to see what insights about the future – or, at least, clues about it – could be gleaned, however imperfectly. Spoiler alert: the findings do not provide a comprehensive picture of the post-pandemic insights world and they may not contain any show-stoppers, but we believe they provide a unique window into how the insights industry is reacting to the crisis.

WHAT WERE RESEARCHERS THINKING?

The GRIT survey doesn't ask people directly for their thoughts on COVID-19, but it did ask them which topics in the insights and analytics industry they follow most closely. Our friends at OdinAnswers were kind enough to review all the sets of verbatim responses from the survey, select which ones were likely to provide the most insight, and model them on their analytics platform.

They concluded that prior to the night of March 11, insights professionals' thoughts couldn't have been more dominated by AI and automation than if they had been embedded in season 3 of *Westworld*, which would debut just a couple of days later. On March 11, however, everything changed, and now insights professionals' minds were dominated

by AI and automation, just not as much. To some extent, this is to be expected because the question specifically asked about topics within insights and analytics, not the world at large (and the remaining survey period overlapped with *Westworld*'s vision of a 2058 where humans are enslaved by AI models that accurately predict their every action).

On the other hand, the shrinkage of automation and AI was significant and notable. Of the terms under the "automation and AI" umbrella, all but one shrank: Natural Language Processing (NLP) and Text Analytics. As one GRIT participant noted:

Social Listening – it's the core of our business and it's evolving quickly as an unobtrusive way to gather insights from populations that may otherwise

be challenging to research. I also pay attention to machine learning, artificial intelligence, and software so we can continue to strike a balance between automation tools and the power of a human analyst.

Post-3/11, topics and terms that became less prominent included:

AI	Quant
Automation	Technology insights
Agile	Semiotics
Insights types and improvements	Client solutions
Insight research	Actionable insights

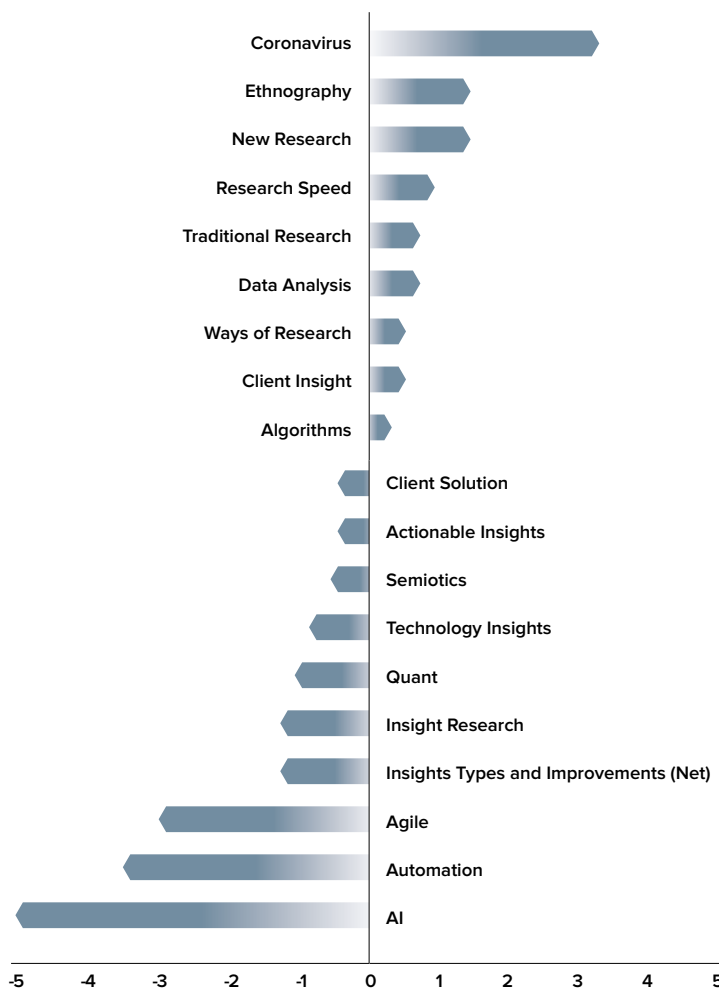
At the same time, the following increased:

Coronavirus	Data analysis
Ethnography	Ways of research
New research	Algorithms
Research speed	Client insight
Traditional research	Actionable insights

As we ruminated over these results in the context of a world that was experiencing lockdown for the first and possibly not the last time, witnessing great tragedy and turmoil, and feeling anxiety in the face of unprecedented uncertainties, a picture emerged. We saw insights professionals thinking less about the long term (e.g., developing an agile work process) and solutions, and more about how to get immediate answers to pressing questions that would help them navigate to a world that might have enough stability to support long-term strategic programs once again. We pictured insights professionals pondering which methods would be appropriate in this world and considering alternative sources of data, perhaps more qual methods such as ethnography or text analytics.

These differences represent shifts in emphasis, but not a wholesale change of priorities. Automation and AI are still very prominent top-of-mind topics overall, but some share of mind has at least leaked out to ethnography, speed of results, new and rational research, etc. Further, the last survey was completed more than 3 weeks later on April 6th, and these results reflect that period, which may represent the beginning of the ascension of these other terms and topics, a brief spike in interest, or an already “flattened curve.”

CHANGE IN PROMINENCE OF TERMS/TOPICS AFTER MARCH 11, 2020

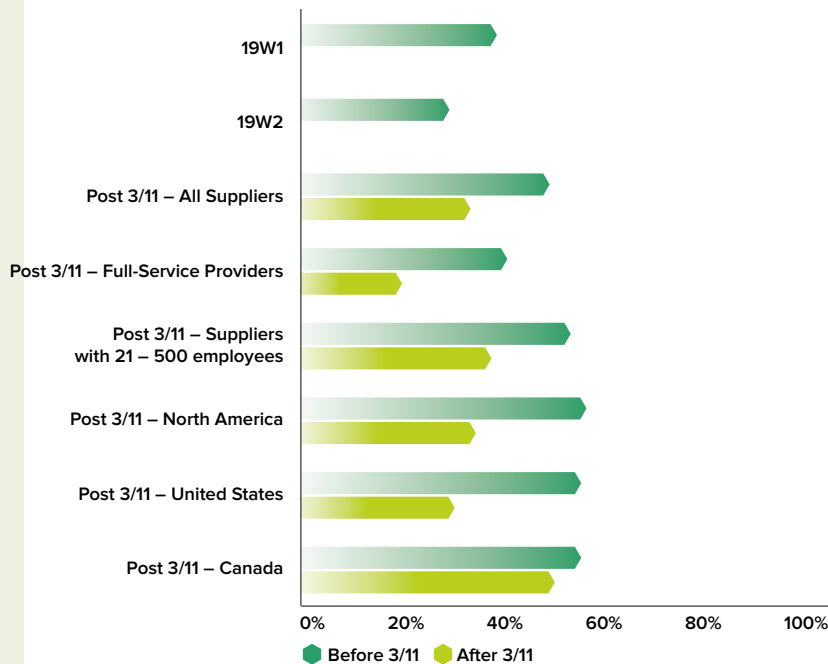


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WHAT WERE RESEARCHERS FEELING?

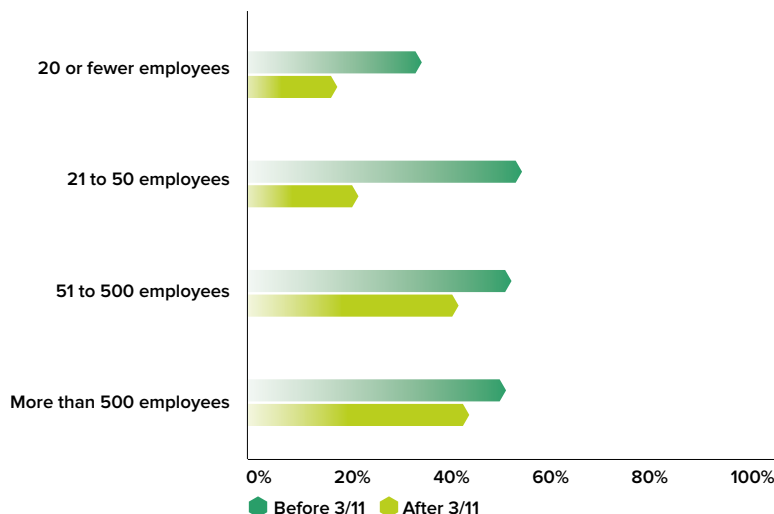
SUPPLIERS WHO ARE "VERY OPTIMISTIC" ABOUT THEIR COMPANY'S FUTURE



Prior to 3/11, the smallest Suppliers were already less optimistic about their prospects than larger Suppliers, and this concern deepened after 3/11



SUPPLIERS WHO ARE "VERY OPTIMISTIC" ABOUT THEIR COMPANY'S FUTURE BY EMPLOYEE SIZE



For Buyers, optimism about the insights role at their company did not change after 3/11, and Buyers and Suppliers maintained the same level of optimism about the industry throughout the survey period. Optimism about the future of the Supplier companies, on the other hand and on average, took a hit after 3/11.

Across Suppliers, optimism dropped, but most of the change was from "Very Optimistic" to a less optimistic response, and the post-3/11 response was only 4 points lower than 19W1 and 5 points higher than 19W2. Some Suppliers, however, cratered more than others.

As a group, Full/Field Service providers fell from a well-below average pre-3/11 "very optimistic" level to half of it: 41% to 21%. By contrast, Suppliers with 21 to 500 employees fell from 53% "very optimistic" to 37% – similar to the overall Supplier level of 19W1. North American suppliers, pre-3/11 were very "very optimistic" at 56%, and they only fell to 34% after 3/11, average for Suppliers.

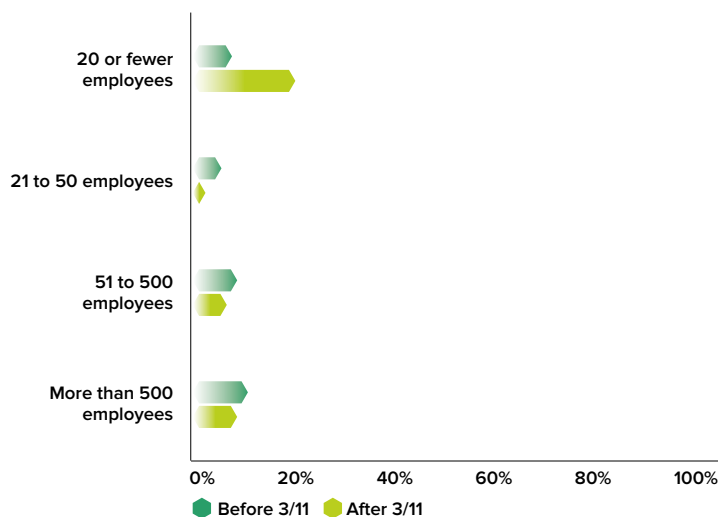
Within North America, however, Canadian Suppliers, at 55% pre-3/11, maintained a robust 50% afterwards, while the United States, possibly the only "Who knew?" country left at that point in time, followed the stock market and dropped from a rosy 56% "very optimistic" pre-3/11 to just 30% after. In global regions where the virus was already well-established, optimism was maintained post-3/11, and (directionally because of sample size) may have even increased in Asia.

On average, then, it seems that by April 6 heightened concerns about company viability/job security were most salient among Suppliers, with degree of concern varying across segments. Also, on average, the biggest shifts seemed to be among those who had been "very optimistic," although the levels of overall optimism did not change very much.

However, when we look more closely, we can find bleaker perspectives among some Supplier segments. One of the themes that runs through this pandemic is the vulnerability and unhealthy prospects for smaller companies. Prior to 3/11, the smallest Suppliers were already less optimistic about their prospects than larger Suppliers, and this concern deepened after 3/11. Initially, 35% of Suppliers with 20 or fewer employees were “very optimistic,” and this fell to just 19% after that night. Worse, 5% of them had self-classified as “very pessimistic” or “pessimistic” prior to 3/11; after that night, it tripled to 17%.

Ironically, pessimism among Suppliers with more than 20 employees dropped, on average. Perhaps some of the Suppliers that started out from a stronger position saw opportunity at the prospect of a world changing so dramatically that businesses would need significantly more help in understanding it.

SUPPLIERS WHO ARE “PESSIMISTIC” ABOUT THEIR COMPANY’S FUTURE BY EMPLOYEE SIZE



WHAT ARE RESEARCHERS CONTEMPLATING?

Much of the GRIT Business & Innovation survey asks Buyers and Suppliers about performance over the past 12 months, but some questions yield insight into strategies and plans for the future. These topics include which skills and initiatives Suppliers will emphasize to enhance their capabilities and positioning, use of automation, and approaches to innovation.

GRIT asks Suppliers about 11 potential areas of competitive differentiation and whether their strategy requires them to be best-in-class in any areas. Strategies for nine of the areas did not change post-3/11, but two did: synthesizing data from multiple areas and making multi-disciplinary recommendations. Pre-3/11, 31% of Suppliers said they wanted to be best-in-class at synthesizing data; after 3/11, it rose to 39%. Similarly, desire to be best-in-class on multi-disciplinary recommendations increased from 34% of Suppliers to 40%. In our minds, these findings fit with the themes that emerged from the text analytics, clustering around a heightened

urgency to find new ways to answer questions using whatever data may be available.

These themes are fleshed out further when the changes to responses to the automation questions are analyzed, an analysis which also highlights how insights professionals and companies are not all of one mind in how to react to the crisis. For some, interest in certain areas of automation increases post-3/11, and these areas seem consistent with the themes of acquiring and analyzing new data sources. For others, interest plummets, and this could be due to perceived costs of adopting those approaches, investments that may have been more feasible in the pre-3/11 world in which insights organizations had more time and, possibly, resources to make widespread changes to how they execute their work.

Some Suppliers had planned for certain types of automation to play a key role in the future only to de-prioritize them post-3/11. Others were under consideration before 3/11 but not afterward.

These findings fit with the themes that emerged from the text analytics, clustering around a heightened urgency to find new ways to answer questions using whatever data may be available



Segment	Automation Area Less Likely to Play “Key Role”
Buyers	Integration into larger organizational business intelligence frameworks (12% to 26%)
Suppliers	Project design (25% to 31%) Sampling (29% to 41%) Charting and infographics (29% to 36%) Analysis of image and video data (21% to 28%)
Full-Service Providers	Sampling (25% to 36%) Analysis of image and video data (17% to 28%) Attribution Analytics (13% to 24%)
21 to 500 Employees	Analysis of text data (31% to 39%) Analysis of image and video data (31% to 32%)
More than 500 Employees	Project design (24% to 34%) Sampling (29% to 52%) Integration into larger organizational business intelligence frameworks (22% to 31%) Report writing (17% to 29%) Charting and infographics (24% to 39%) Matching suppliers and buyers (9% to 16%)
North America	Sampling (28% to 39%) Analysis of image and video data (20% to 28%) Charting and infographics (26% to 34%)
Europe	Analysis of image and video data (14% to 26%)
Segment	Automation Areas Less Likely Under Consideration
Suppliers	Report writing (19% “not considering” to 25%) Charting and infographics (5% to 8%)
Segment	Automation Areas No Longer Considered “Applicable”
Full-Service Providers	Sampling (9% “not applicable” to 19%)
North America	Sampling (15% “not applicable” to 21%)

It may seem counter-intuitive that companies would de-emphasize these areas, because one might expect automation to assist in gaining more kinds of information more quickly, increasing productivity when economic pressure may trigger staff reductions, and improving the quality of insights when so much needs to be discovered. On the other hand, these insights professionals may feel that they are too far down the adoption curve to begin during a crisis, that the best way to keep the staff together is to continue to do these tasks in the same manner as before, or that the emerging issues are too complex, nuanced, or important to trust to unfamiliar automation instead of an experienced professional. As hypothesized in our *Adoption of Automation Platforms* section, insights organizations may already have doubts about automating functions that seem to require human intuition, such as infographics, charting, and report writing. Post-3/11, if insights organizations feel more committed to “keeping the band together,” COVID-19 may have severely injured these potential areas of automation.

A more conservative approach to automation may result from an apparently reduced confidence in what automation can deliver, possibly triggered by the general uncertainty about the present and the future.

Segment	Automation Statement: Completely Agree
All Professionals	Enables us to deliver projects faster (43% to 50%)
Suppliers	Allows us to deliver better quality research (48% to 55%) Will grow in adoption within our organization (37% to 44%)
500 or more employees	Enables us to deliver projects faster (39% to 58%) Allows us to deliver better quality research (22% to 33%) Gives us a competitive advantage (31% to 43%) Will grow in adoption within our organization (34% to 46%) Will grow in adoption in the insights and analytics industry (40% to 52%)
North America	Allows us to deliver better quality research (26% to 33%) Will grow in adoption within our organization (34% to 42%) Will grow in adoption in the insights and analytics industry (42% to 50%)

Why don't you *love* open-ended questions?



Relative Insight will help you transform complicated qualitative responses, into powerful insights.

1

Discover what's truly important, rather than what's most frequently mentioned

2

Analyse
language
data from
any source

3

Uncover
bias-free
insights

4

Scale your qualitative analysis

5

Bring historical
data to life

We'll show you what we mean:

Segment	Automation Area More Likely to Play “Key Role”
Tech Providers	Analysis of social media data (11% to 24%)
North America	Analysis of social media data (17% to 24%)
Segment	Automation Area Starting to Test
All Professionals	Analysis of text data (15% to 20%)
Suppliers	Online focus group/IDI moderation (9% to 15%)
Full-Service Providers	Analysis of text data (14% to 23%)
21 to 500 Employees	Online focus group/IDI moderation (8% to 17%) Analysis of text data (13% to 20%) Charting and infographics (11% to 18%)
North America	Sampling (8% to 12%) Online focus group/IDI moderation (9% to 14%)
Segment	Automation Area More Likely Under Consideration
20 employees or fewer	Analysis of text data (8% to 20% not considering)
North America	Analysis of social media data (6% to 10%)
Segment	Automation Area No Longer Considered “Not Applicable”
Data & Analytics Providers	Survey design (7% to 18% “not applicable”)
21 to 500 employees	Online focus group/IDI moderation (18% to 25%) Analysis of social media data (20% to 27%) Matching contract “talent” to projects (34% to 42%)

Despite these examples of reduced confidence and de-prioritization, many are continuing as planned, while others have made automation a higher priority, have started to test out these approaches, or come to realize that automation is relevant to them. Consistent with the themes from the text analytics, areas of increased interest include online qualitative and text and social media analytics.

Approaches to innovation also seem to have become more conservative. While the emphasis on developing an innovative focus is unchanged, several innovation-related activities have become less prominent after 3/11.

A more conservative approach to automation may result from an apparently reduced confidence in what automation can deliver, possibly triggered by the general uncertainty about the present and the future



Segment	Innovation Initiatives Less Likely to Execute
Suppliers	Aggressively acquires the newest equipment (13% to 24%) Collaborates with expertise from businesses (52% to 65%) Has a staff dedicated to trying and/or developing new ways of doing things (60% to 74%) Has a formal, documented program for supporting innovation (25% to 38%) Maintains a separate, dedicated budget for innovation (38% to 47%) Quickly adopts new analytical tools (48% to 62%)
21 to 500 employees	Aggressively acquires the newest equipment (14% to 24%) Collaborates with expertise from businesses (50% to 67%)
500 or more employees	Has a staff dedicated to trying and/or developing new ways of doing things (66% to 81%)
North America	Aggressively acquires the newest equipment (13% to 22%) Collaborates with expertise from businesses (52% to 63%) Has a staff dedicated to trying and/or developing new ways of doing things (59% to 71%) Has a formal, documented program for supporting innovation (27% to 37%) Quickly adopts new analytical tools (43% to 57%)

HOW WILL COVID-19 AFFECT BUSINESS?

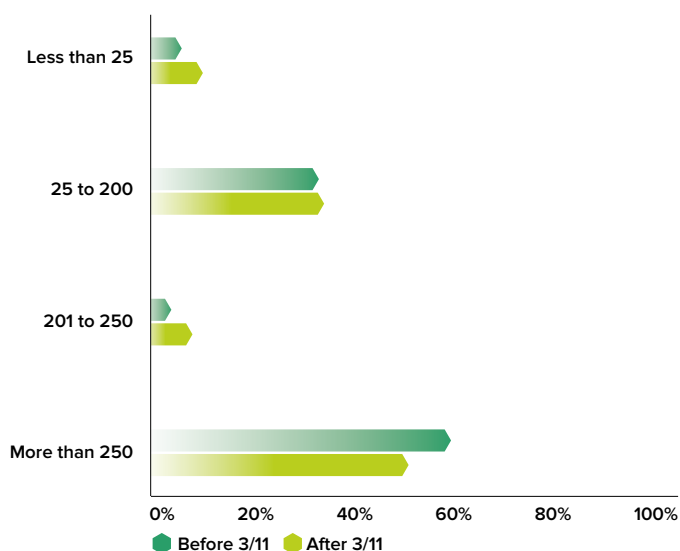
The GRIT metrics related to budget, revenue, and staff size trends are asked in relation to the past year, so we would not expect any differences unless something dramatic happened while the survey was in the field. Most of these metrics were stable, although, overall, a slowdown in staff hiring was suggested; the percentage who said staff had “increased significantly” dropped from 32% pre-3/11 to 26% afterward.

There are also reports of smaller annual research budgets and lower project volumes (unlike the “trends” questions, the budget and project volume questions are asked for “annual” rather than “past 12 months”). The lower project volumes are reported by Suppliers, not Buyers, and seem to be concentrated among those who already have the largest project volumes.

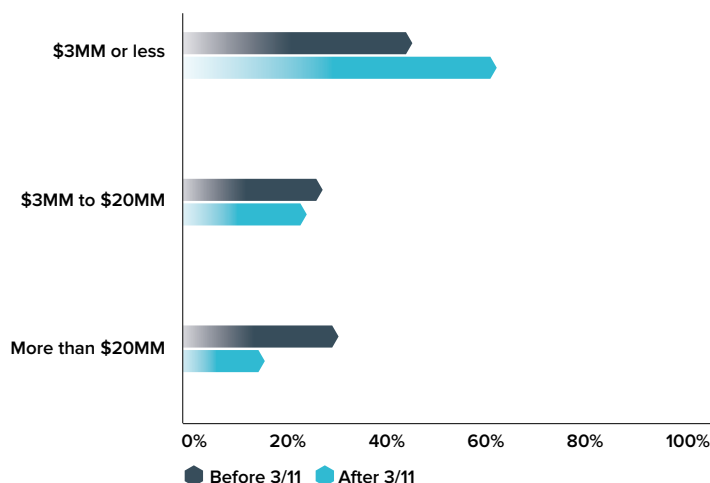
In the following segments, annual project volumes of 250 or more were less frequent after 3/11:

- Full-Service Providers: 43% to 57%
- Technology Providers: 61% to 81%
- 500 or more employees: 59% to 71%
- North America: 46% to 56%

ANNUAL RESEARCH PROJECT VOLUME (SUPPLIERS)



ANNUAL RESEARCH PROJECT BUDGET (BUYERS)



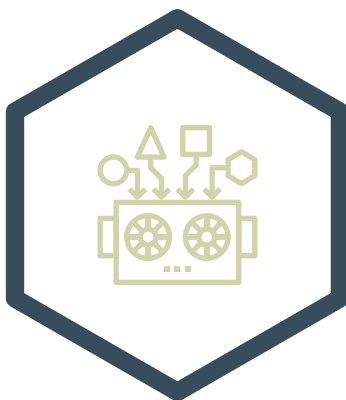
THE BIG PICTURE

While it may be a cliché to say that the only certainty during the survey period from March 11 to April 6 was uncertainty, phrases usually become clichés because they are so often true. We see evidence of uncertainty among Suppliers who are less optimistic about their company, though still optimistic. The expansion of the set of top-of-mind topics beyond automation and AI suggest a population that is trying to figure something out; the data revealing new doubts and conservatism toward automation suggests that while Automation & AI may be a popular topic, the nature of the discussion is shifting.

In particular the new discussion seems to concern how to get faster and richer data about what customers and consumers are saying, thinking, and doing. If achieving that requires a major investment or prolonged re-engineering, insights professionals may default to the tools that are more familiar to them – for example, adopting online qual may be more immediately feasible (and comfortable) than starting up the text analytics or social media learning curves.

The “new discussion”, however, is not necessarily a universal one: while some professionals may be actively looking into how to get more kinds of data more quickly, others may be more concerned about taking conservative measures to manage cash flow and preserve staff. Where some professionals see an opportunity to expand their methodological and market share footprints, others are surely closer to survival mode.

Buyers seem to foresee budget reductions, at least in the largest budgets, and Suppliers, at least the high-volume ones, anticipate smaller volumes in the near future. As with everything related to the COVID-19 pandemic, the outcomes will ultimately depend on the choices made by individual actors, and we can see a variety of types of decisions and strategies under consideration via the GRIT data. However, we don’t know whether the March 11 to April 6 snapshot represents the front of the curve, the back of it, or its flattened top. Despite all this uncertainty, we can rest assured that the fall wave of GRIT will help to answer these questions.



The new discussion seems to concern how to get faster and richer data about what customers and consumers are saying, thinking, and doing. If achieving that requires a major investment or prolonged re-engineering, insights professionals may default to the tools that are more familiar to them



WHY COVID-19 WAS THE WAKE-UP CALL MARKET RESEARCH NEEDED

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Market research is not as innovative as we think it is. I know – that’s quite the statement to make in a publication highlighting the industry’s most innovative companies. Think about it: Market Research barely cracks US News’ Top 50 Best Jobs. You probably ‘fell’ into your first market research job; I know I did, starting as a social media intern at Ipsos before finding out what market research really was and falling in love with it. For an industry that prides itself on using cutting edge technology and methodologies, the talent entering the workforce seems less than convinced.

We are at an inflection point as an industry. COVID-19 has a silver lining: an opportunity to rethink the future of market research. While this pandemic has impacted the way we work and the business questions we ask, it has also forced us to move the industry forward toward true innovation.

Phone → Online → ???

Consider the biggest social media and tech companies today. Most have seen major growth during COVID-19 lockdowns: YouTube, TikTok, Zoom, etc. All of these technologies leverage video as a mode of communication and expression. What is our industry doing to keep up with the evolution of human communication?

Our world is becoming video-centric. The traditional manner of reaching consumers will struggle to keep up with some of the fastest-growing cohorts, like Gen Z, who are almost exclusively communicating through new forms of media. We need to innovate to reach consumers and communicate with them in the same ways they communicate with each other. This evolution also fits with the behavioral and observational research goals the industry has been pursuing for the past decade.

Moving Beyond Traditional Methodologies

If innovation means ‘reinventing the wheel’, then we are failing as an industry. To truly understand consumer and shopper behavior and uncover powerful insights, we need to take bigger risks. New methodologies, not just iterations on the old, must be at the heart of our innovation efforts to truly move the industry towards meaningful advancement.

Industry-altering innovation must accomplish two things: provide better insights while maintaining a robust, quantitative scale. Recent innovations in the industry (video dashboards, augmented reality, neuroscience) have gotten us halfway there, but their biggest limitation has been scalability. I’m proud of NAILBITER’s quantitative videometric approach that marries observational research and scalability, but there is still much work to be done.

Place Your Bets and Take a Risk

COVID-19 has given market research a shock to the system we desperately needed, and we now have two options before us: sit back and wait or lean in and lead the charge. How do we lean in?

For manufacturers:

- Put survey-less methodologies at the core of your research strategies and challenge your organization to rethink how they engage with consumers and shoppers
- Build bridges between your internal functions (consumer and shopper insights, category management, marketing, etc.) as well as your external partners
- Take more risks: dedicate 50% of your research budget to your big bets and view risk of failure as an opportunity to learn

For Suppliers:

- Invest in methodologies that are less reliant on surveys as the sole source of data
- Rethink how you engage with consumers and shoppers – adapt your methods to your respondents!
- Challenge your clients to be uncomfortable and take the vital steps towards meaningful innovation

Through years of lackluster innovation, the quality and power of insights has diminished. Now is the time to lean in, use this period of uncertainty as a catalyst for real change, and reclaim market research’s mantle as an essential function in top-performing businesses. Let’s not let this opportunity for real innovation go to waste.



FINAL THOUGHTS


2020. What a weird, crazy, unique, odd, disruptive, spooky, peculiar, and unsettling year, for our personal lives, our work life, and our businesses.

This year is having significant impact on our industry, from the basics of revenue to digitization to the business questions that we are trying to answer. With every problem, there is an opportunity (I really don't want to sound like one of those inspirational posters, but I do believe that is true).

For most of us, revenues and budgets are down. And we are trying to answer bigger questions with fewer resources. What does all this mean for our industry? For the most part, it means that the trends that have guided this industry over the past several years are accelerating.

When things stabilize on the other side of the turmoil that we are experiencing today, consumers will be different in noticeable ways, just as we are today. There is a shift in how we buy the things we need. There is a shift in what those needs really are. There is a shift in how we think about value. There is a shift in our own personal values. There are several direct outcomes of this. Foundational work, like attitude and usages studies or segmentation studies, will have to be redone as consumers have changed dramatically, opening the door to large, important work.

Another possible outcome is that some of the norms we've created for years may become irrelevant, or of less importance, because of the changing value equation, product distribution, and our changing expectations of brands. This may bring new players into a market that has long been dominated by just a few.



Budgets and safety have combined to make big strides in accelerating the adoption of "newer" tools. DIY and automated platforms can save money. Online qualitative methods that some have been hesitant to try are quickly becoming ubiquitous. Communities allow for closeness to our customers while providing speed to answers. AI and Machine Learning are making our current data manageable and making historical information more relevant.

These dynamics of big important questions and more cost-effective approaches are combining to make the distinction between consulting and findings more pronounced. There are times when findings are critical, particularly for testing and tracking. As brands look for answers on how to adapt to the new consumer and business landscape, those insight professionals that have a consulting mindset will be in demand.

This point in time is also putting an exclamation point on the value the insights industry brings to business. As businesses continue to adapt, the insights professionals are the ones that many are looking to for help in understanding the changing consumer, business models, communication strategy, and many other important issues. My expectation is that we will see revenues and budgets start to increase and grow larger than would have been possible without the disruption we've seen. My expectation is that the impact of the insights industry will do the same. This is our time to shine!



GREGG ARCHIBALD
Managing Partner,
Gen2 Advisors

APPENDIX

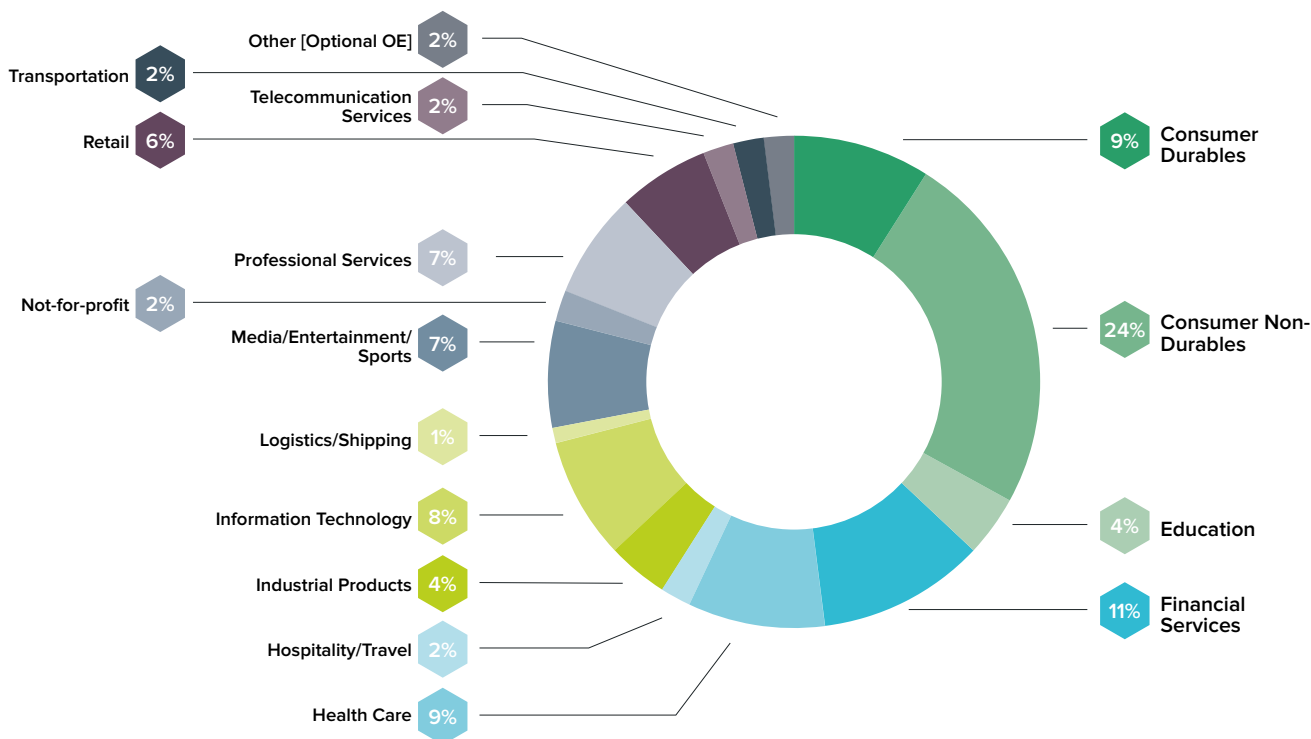
METHODOLOGY AND SAMPLE

GRIT BUYER RESPONDENTS BY VERTICAL

Looking only at self-identified insights Buyers, 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. Prior to the most recent GRIT wave, it was common for 10% or more to classify their vertical as “other.” In 19W2, we revised and expanded

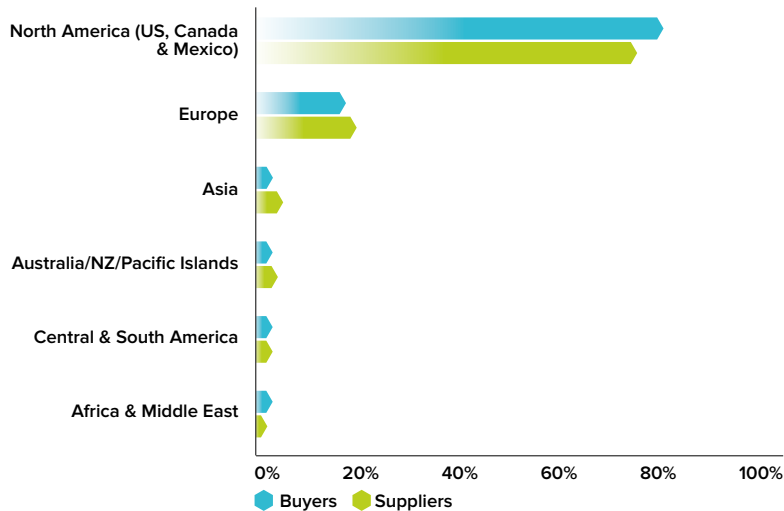
the response choices which has greatly reduced the need for buyers to select “other.” We also review all the verbatim responses provided by those who select “other” to determine if we can classify them into a pre-defined list, or, if we need to revise the list of verticals again.

BUYER VERTICAL



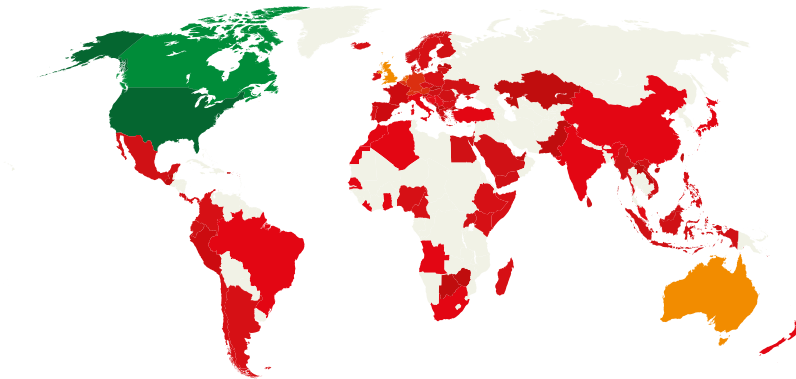
GRIT PARTICIPATION BY REGION

GRIT RESPONDENTS BY REGION: BUYER VS. SUPPLIER



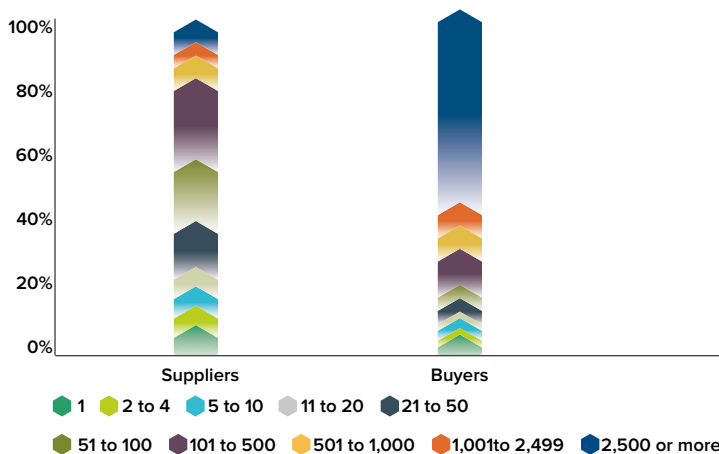
Regional sample sizes remained relatively consistent, with some variance within each region. As previously noted, North American respondents comprised a net of 72% of the sample (up from 67% in 19W1), with Europe at 18% (down from 20% in 19W1), Asia at 4% (down from 7% in 19W1), and the rest of the world making up the balance. These percentages are generally in line with previous waves.

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



GRIT SAMPLE BY SIZE OF ORGANIZATION

OVERALL COMPANY SIZE: BUYER VS. SUPPLIER



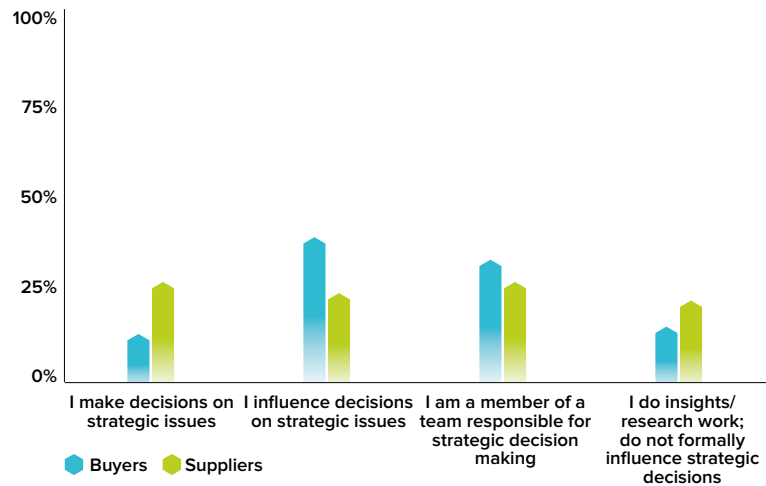
GRIT respondents generally fall into three categories of employee size with each representing roughly one-third of the sample: small organizations (under 50 people), 27%; mid-sized organizations (51 to 500 people), 43%; and large organizations (over 501 employees), 30%. This wave of GRIT saw an increase in mid-size affiliated respondents. Of course, the largest representation of large companies was among the Buyer segment.

GRIT RESPONDENT SENIORITY

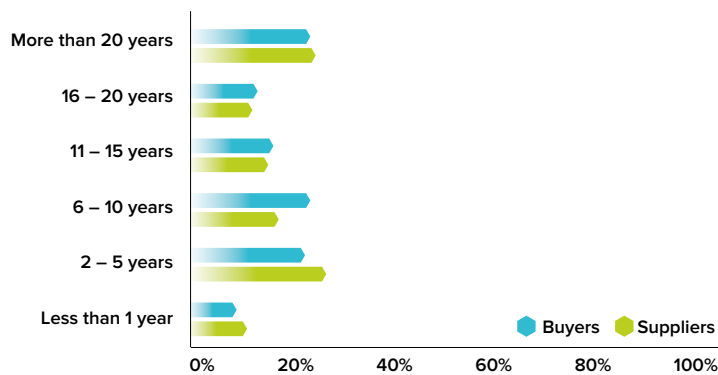
The GRIT sample is comprised of largely senior level research professionals. 52% of GRIT respondents identify themselves as key decision makes/influencers on strategic issues within their organizations.

Unsurprisingly with such a large contingent of decision makers, 48% of respondents have worked within the insights & analytics industry for over ten years, with 23% for over twenty years.

STRATEGIC DECISION MAKING ROLE: BUYER VS. SUPPLIER



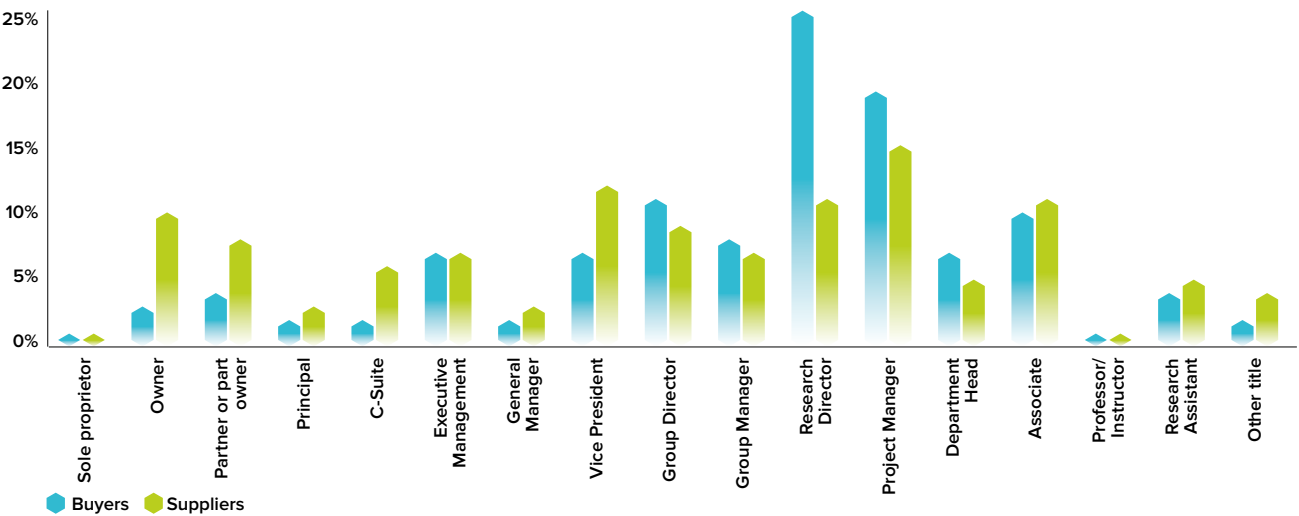
LENGTH OF TIME WORKING IN INSIGHTS: BUYER VS. SUPPLIER



GRIT RESPONDENT TITLES

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

TITLES: BUYER VS. SUPPLIER



APPENDIX

GRITSCOPE INDEX

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

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

Company Name	Kingdom
Deckchair Data	Analyserv
Foreseeable Futures Group LLC	Analyserv
Numerious	Analyserv
Rexer Analytics	Analyserv
SKIM	Analyserv
American Asphalt Paving	Analytica
Focus Consumer Healthcare	Analytica
Beehive Research	Analytool
Big Sofa Technologies	Analytool
Dapresy	Analytool
eye square	Analytool
Infotools	Analytool
LivingLens	Analytool
OfficeReports	Analytool
Voxpopme	Analytool
Brand-Building.com	Brandstrategia
GfK	Brandstrategia
Hall & Partners	Brandstrategia
The Branding Clinic	Brandstrategia
The FameWorks	Brandstrategia
Anheuser-Busch	Cxia
Capital One	Cxia
Danone	Cxia
Eli Lilly	Cxia

Company Name	Kingdom
Estee Lauder Companies	Cxia
Expedia Group	Cxia
Ferrero	Cxia
Harry's	Cxia
Hertz	Cxia
Nissan motor	Cxia
Novartis	Cxia
PepsiCo	Cxia
PetSmart Inc	Cxia
Procter & Gamble	Cxia
UnitedHealthcare	Cxia
Bellomy Market Intelligence	Cxiaconsult
Customer Care Measurement & Consulting (CCMC)	Cxiaconsult
Omnicom Precision Marketing Group	Cxiaconsult
Potentiate	Cxiaconsult
The Planning Practice	Cxiaconsult
Azure Knowledge Corporation	Datania
Dynata	Datania
Nailbiter Market Research	Datania
RIWI	Datania
Syno International	Datania
AOC Marketing Research	Fieldservicia
CRC Research	Fieldservicia

Company Name	Kingdom
House of Marketing Research	Fieldservicia
Isobar	Fieldservicia
L&E Research	Fieldservicia
Various Views Research	Fieldservicia
Blue Yonder Research	Fullservicia
Burke	Fullservicia
De La Riva Group	Fullservicia
Drucker Frontier	Fullservicia
Escalent	Fullservicia
Explorer Research	Fullservicia
Fifth Dimension Research & Consulting	Fullservicia
Hanover Research	Fullservicia
Happy Thinking People	Fullservicia
Illuminas	Fullservicia
InsightsNow	Fullservicia
InSites Consulting	Fullservicia
M/A/R/C Research	Fullservicia
Morning Consult	Fullservicia
Nielsen	Fullservicia
Phoenix Marketing International	Fullservicia
System1 Research	Fullservicia
TRC	Fullservicia
Walnut Unlimited	Fullservicia
Abbott	Hybridorea
Aflac	Hybridorea
Amazon	Hybridorea
Campbell's Soup Company	Hybridorea
Constellation Brands	Hybridorea
Del Taco	Hybridorea
Fidelity Investments	Hybridorea
General Mills	Hybridorea

Company Name	Kingdom
Kellogg Company	Hybridorea
Kia Motors America	Hybridorea
McDonald's	Hybridorea
Merck	Hybridorea
Molson Coors	Hybridorea
Mondelez International	Hybridorea
QDOBA Mexican Eats	Hybridorea
Sage	Hybridorea
Stanley Black & Decker	Hybridorea
Unilever	Hybridorea
Haystack International	Innovatia
PRS IN VIVO	Innovatia
Smart Design	Innovatia
StandPoint	Innovatia
Arcos Dorados	Internalia
LinkedIn	Internalia
Panera	Internalia
United Methodist Communications	Internalia
Verizon	Internalia
Visit Orlando	Internalia
Blue Focus Marketing	Marcomia
CBD Marketing	Marcomia
Fasmentor LLC	Marcomia
Synomia	Marcomia
Triggerpoint	Marcomia
BEESY	Neuroland
Mindlab International	Neuroland
Neurons Inc	Neuroland
Sentient Decision Science	Neuroland
Forrester	New Secondaria
Strateagile	New Secondaria

Company Name	Kingdom
20I20 Research	Qualitoolia
Discuss.io	Qualitoolia
FlexMR	Qualitoolia
Fuel Cycle	Qualitoolia
iTracks	Qualitoolia
My-Take	Qualitoolia
Recollective	Qualitoolia
AYTM	Quantitoolia
Confirmit	Quantitoolia
Delvinia	Quantitoolia
quantilope	Quantitoolia
Rival Technologies	Quantitoolia
Survata	Quantitoolia
Vision Critical	Quantitoolia
Zappi	Quantitoolia
Clear Insights Group	Quantservia
Dig Insights	Quantservia
Logit Group	Quantservia
Medallia	Quantservia
Borderless Access pvt ltd	Samplania
Cint	Samplania
EMI Research Solutions	Samplania
Lucid	Samplania
Toluna	Samplania
Vypr Validation Technologies	Samplania
WebMD Medscape market research	Samplania
Advanced Simulations	Specios
Buzzback	Specios
CRG Global Inc	Specios
Infomine Healthcare Research	Specios
Inspira Research	Specios

Company Name	Kingdom
IntelliQ Health Insights, LLC	Specios
MDI	Specios
Spiceworks Ziff Davis B2B	Specios
Bacardi	Strategia
Banner Health	Strategia
Carlsberg	Strategia
Disney	Strategia
Estee Lauder Companies	Strategia
Flowers Foods	Strategia
Genentech	Strategia
Lyft	Strategia
Mars/Effem	Strategia
Mutual of Omaha	Strategia
RBC	Strategia
The Clorox Company	Strategia
The Coca-Cola Company	Strategia
travelers	Strategia
ZEISS	Strategia
Alter Agents	Strategiaconsult
BVA GROUP	Strategiaconsult
Catalyx Marketing Ltd	Strategiaconsult
Chief Outsiders	Strategiaconsult
Decision Analyst	Strategiaconsult
ENGINE Insights	Strategiaconsult
Grey Matter Research	Strategiaconsult
Heart+Mind Strategies	Strategiaconsult
Hotspex	Strategiaconsult
Kantar	Strategiaconsult
LRW	Strategiaconsult
Maru / Matchbox	Strategiaconsult
McKinsey & Co	Strategiaconsult

Company Name	Kingdom
Narrative Health	Strategiaconsult
PROVOKERS	Strategiaconsult
Radius GMR	Strategiaconsult
Reach3 Insights	Strategiaconsult
Shapiro + Raj	Strategiaconsult
Sklar Wilton & Associates	Strategiaconsult
The Planning Shop	Strategiaconsult
W5	Strategiaconsult
1Q	The Free Cities of Niche Protectorates
AMC Global	The Free Cities of Niche Protectorates
Antedote	The Free Cities of Niche Protectorates
C Space	The Free Cities of Niche Protectorates
Campus Sonar	The Free Cities of Niche Protectorates
Conifer Research	The Free Cities of Niche Protectorates
DISQO	The Free Cities of Niche Protectorates
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Gongos, Inc.	The Free Cities of Niche Protectorates

Company Name	Kingdom
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Vividata	The Free Cities of Niche Protectorates
Wlzer	The Free Cities of Niche Protectorates
Coregrafix	Unstructured Territories
DDM	Unstructured Territories
Demiecelik	Unstructured Territories
LCL	Unstructured Territories
MLL	Unstructured Territories
Phi Power Communications	Unstructured Territories

APPENDIX

DATA CLEANING

To ensure the quality of the GRIT data overall and the fairness of the GRIT Top 50 and GRIT Top 25, a set of flags has been developed and applied, and these evolve with each wave. Each flag carries a different level of severity from “instant death” to “mild symptoms,” and each respondent is considered case-by-case according to their set of flags. Although our team is foaming at the mouth to share details on all the ways we check the data, unfortunately, we have to curb that rabid dog. We did not endure seemingly endless hours of painstaking design, aggravating data review, and iterative assessments with the objective in mind of publishing the definitive Dummies Guide to Cheating on GRIT.

First and foremost, we deeply, deeply appreciate the time and effort participants invest in completing the GRIT survey, and we also understand that two different participants may be equally invested but have different styles of answering. So, we take an “innocent until proven guilty” mindset and look at as much detail as possible before making a decision to remove a survey.

If we feel the preponderance of evidence indicates that the respondent was not paying enough attention, attempted to manipulate results, or was not qualified to answer these questions, we pass a “guilty” judgment. We do not take this responsibility lightly, feeling the equal weight of fairness to people who volunteer their time and thoughts while participating in the survey and fairness to GRIT readers who don’t want to be confused and frustrated when reading the report.

So, while we are committed to transparency, that commitment does not extend so far as to leave the front door of the house unlocked with a note that says “door is unlocked” while we road trip to San Diego. However, we would like to share some of our approach....as obliquely as possible. Some of the flags involved include:

- Standard data cleaning flags, such as straightlining or speed of completion
- Contradictory responses
- Efforts to bring more attention to certain companies, brands, or issues beyond what the survey asks
- Responses and patterns that suggest they are not insights professionals
- Patterns across different surveys suggesting conspiracies or multiple surveys from the same individual
- Juvenile or profanity-laced responses or verbal attacks on individuals

In some cases, a flag may be glaring enough to call for immediate removal, but, in most cases, we consider the entire context before taking action.

In addition to the survey level, we also look at the response level and make adjustments as needed. For example, in the current survey, there are a lot of questions where company names are entered, and they are not always entered accurately. As detailed in the GRIT Top 50 Most Innovative Suppliers section, we read each one and standardize the spelling. In some cases, such as companies unfamiliar to us or entries that are ambiguous, we have to do further research to determine which company was intended.

Another step we take at the response level concerns the myriad “Other (specify)” entries. If a verbatim indicates that they fit our definition of a response choice on the pre-defined list, we will recode it. Sometimes, a respondent will use a verbatim to request a change to the answer to another question, and, in other cases, the response may have a ripple effect requiring several questions to be recoded so that the respondent can be represented as they intended.

All told, we removed hundreds of cases that we felt did not meet our quality standards. We hope this data cleaning discussion communicates the strong sense of the rigor and seriousness with which we approach it. Again, we apologize for skimping on detail, but if we reveal much more, our staff will likely walk out as fast as if we had been protecting hate speech.

ACKNOWLEDGEMENTS

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Idea Highway

Research and Production

AYTM – Ask Your Target Market
Deckchair Data
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Infotools
Insights Association
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OdinAnswers
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KnowledgeHound

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