



GreenBook
GRIT REPORT



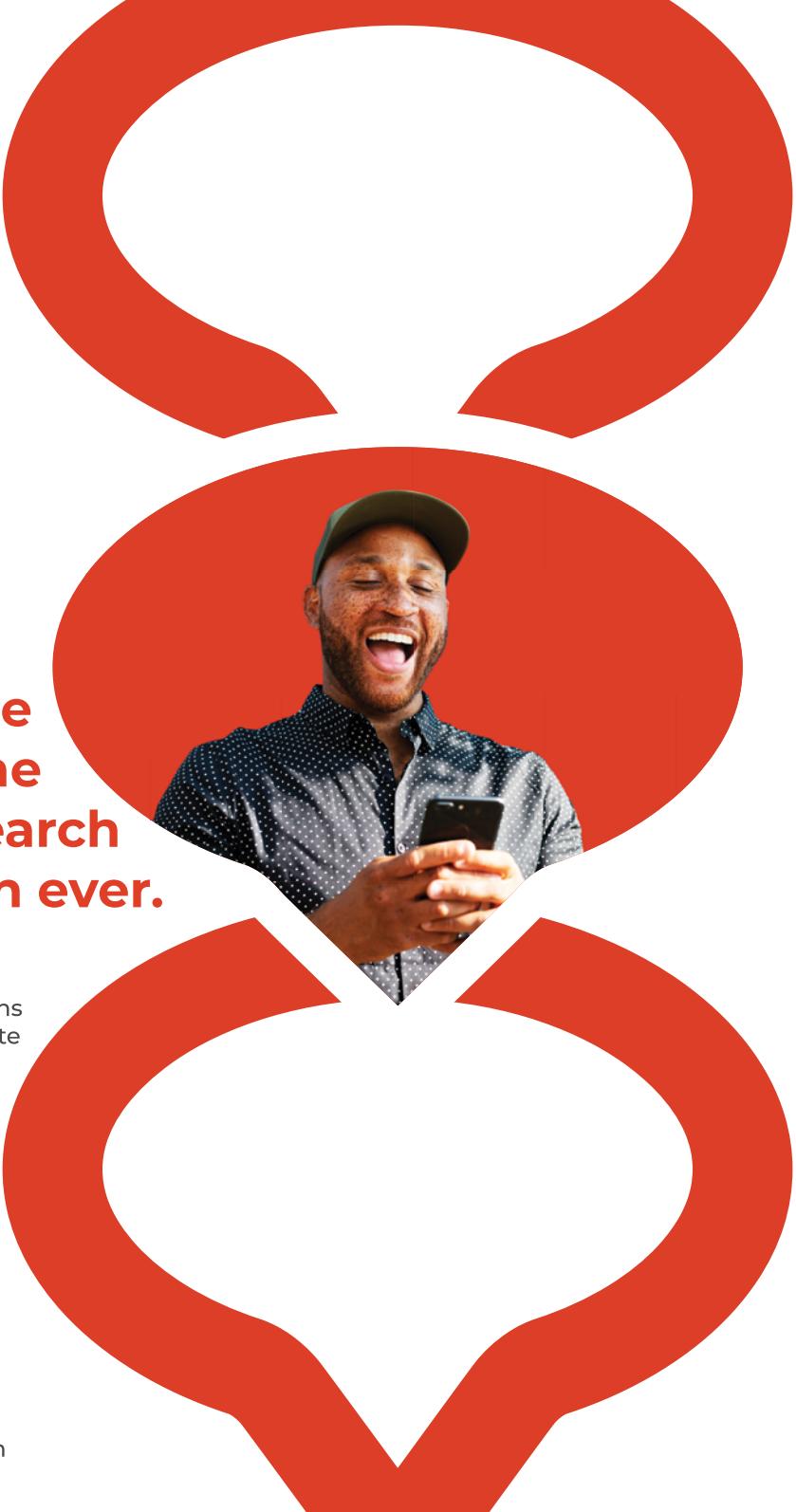
2022 **BUSINESS & INNOVATION GRIT REPORT**



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FOREWORD

Welcome to the 31st edition of the GreenBook Research Industry Trends Report using data collected in the spring of 2022. This edition is the Business & Innovation Report wherein we focus on understanding the changing dynamics of the macro drivers of the industry, as well as the role that innovation (including the companies most identified as innovative) plays in that evolution.

You'll notice some changes in both the format and the form factor of the report. We've been striving to increase the readability and accessibility of GRIT while maintaining our commitment to delivering the depth of data and insights that is the hallmark of the GRIT report series. In pursuit of that, we keep innovating, and for this edition, we took a "web-first" approach. Our thinking was that this would allow readers to navigate within the report more easily, create smaller and more digestible sections, allow more search and sharing, and in general improve the user experience.

However, we also recognize that some readers (like me!) still prefer a more traditional magazine-type format, so we will also make this PDF version available. The .pdf version contains about 60% of the full online report and may seem choppy or incomplete at times. If you read a portion of this version and feel like there is something missing, you can access the full report online to fill in the blanks.

We'll look forward to hearing from you on whether or not we achieved our goal of increasing overall usability while maintaining depth and quality.

All that said, what's in this report? In true GRIT fashion we tackled many topics that we believe are important to the industry such as Industry Structure, Organizational Success Factors, the Evolving Insights Audience, Industry

Benchmarking, Sample Quality, Employment Trends, Business Outlook, Unmet Needs, Adoption of Automation, as well as the ever-popular Innovation Strategy, GRIT 50 Most Innovative Suppliers and GRIT 25 Most Innovative Buyers rankings. No matter your role or experience level, there is sure to be something of importance to you in this report.

What did we learn? Well, we hate spoilers as much as anyone else, so to find that out you'll need to read the report! However, we can tell you that the pace of change continues unabated and that more is likely in store in the future across every aspect of the industry. From staffing to sample and industry use cases to structure, every indication is that the insights and analytics industry continues to evolve rapidly. To learn the nature of those changes you'll just have to dive into this edition, and you can use the Executive Summary for inspiration if you need to figure out where to start!

Although we continue to insource much of GRIT production (the vast majority of the design and analysis is now done only by the GreenBook team), GRIT continues to be a "coalition of the willing" and our commentary providers, sample partners, advertisers, and especially our research partners make it all possible. Special thanks go out to Idea Highway, aytm, Canvs AI, Gen2 Advisors, Infotools, Displayr, and Yabble. Without their generous contribution of time, energy, and expertise we simply wouldn't be able to do this.

Enjoy!

LEONARD F. MURPHY

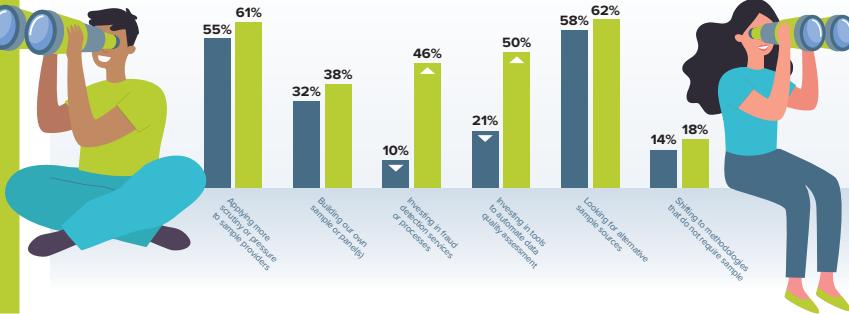
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A handwritten signature in black ink that reads "Leonard F. Murphy".

EXECUTIVE SUMMARY

SAMPLE QUALITY AND AVAILABILITY



FOCUS ON INNOVATION



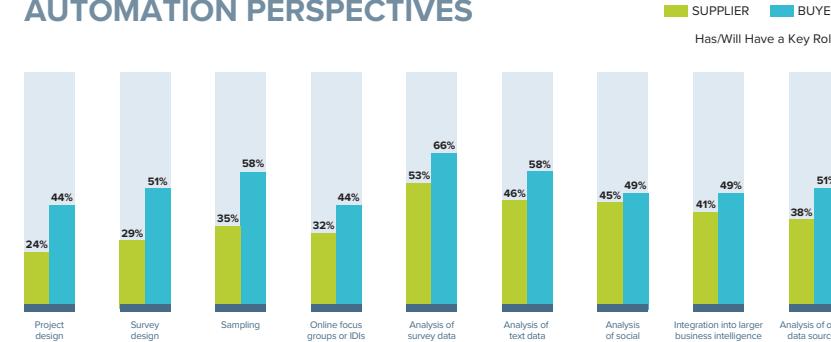
LEADER BOARD OF THE SUPPLIERS



Sample quality and supply has been a big topic in the insights industry for quite awhile now and broadly recognized as an issue of concern. We explore multiple dimensions of the issue in this edition of GRIT, but ultimately, we need solutions and both buyers and suppliers are looking at a range of measures, with the majority of both groups looking for alternative sample sources from the existing panel ecosystem followed closely by applying more scrutiny to current providers. This is a warning shot and an opportunity for new models to emerge.

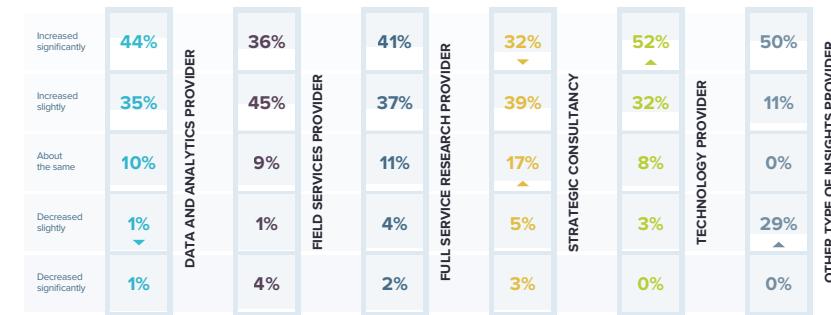
How are insights professionals ensuring they maintain a focus on innovation? Buyers give a slight edge to focus more on access to experts, while suppliers unsurprisingly prioritize access to tools. When diving into detailed tactics both say that internal knowledge sharing events/meetings, followed by staff mentoring are most critical to an innovation focus, with collaboration tools, memberships in professional organizations, and clear policies as being least important. In the era of the virtualization of work it is heartening to see that knowledge sharing is most important, but we suspect technology to enable that will become more critical in the future.

AUTOMATION PERSPECTIVES



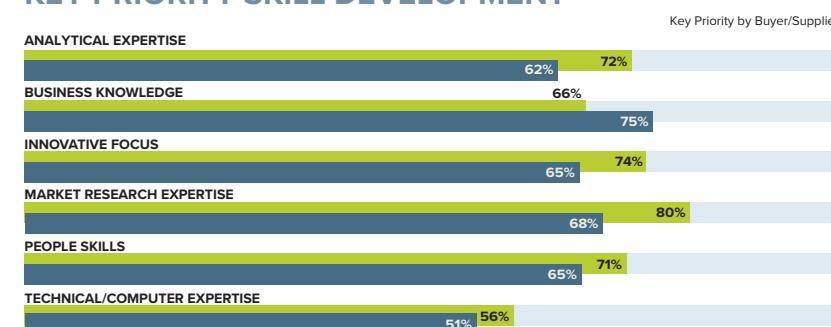
Automation continues to be an area the insights industry is optimistic about, with the most emphasis being on data-focused improvements such as analysis of multiple data types. However, suppliers expect a key role in the entire research process including design, sampling and data collection. Assuming that "what can be automated, will be automated" is a truism, adoption of automation across the industry continues to be a safe bet.

SUPPLIER REVENUE TREND



The majority of suppliers across all GRIT segments report revenue growth with a net plurality claiming significant growth. However, self-described technology providers continue to lead the pack with the highest growth rates, followed by data and analytics providers. However, full and field service and more specialized companies also report very healthy revenue increases, painting a picture of an industry that is booming as of early 2022.

KEY PRIORITY SKILL DEVELOPMENT



Both buyers and suppliers exhibit strong alignment in the general set of skills their organizations are focused on developing; with market research expertise the clear priority for suppliers and business knowledge the same for buyers. This may seem like a "well, duh!" finding, but in past waves of GRIT priorities have seemed to be a bit of a moving target. It seems the industry is recognizing what skills are necessary for insights organizational success and are focusing on ensuring they have them regardless of what side of the table they sit on.

LEADER BOARD OF THE BUYERS



The "Leader Board" of the suppliers most closely associated with the brand attribute of innovation remains largely stable, although some jockeying for rank amongst the leaders is present, most notably Dynata assuming the number one position, reflective of their marketing discipline, omnipresence, and consistent M&A activity.

On the buyer side there is significant change, primarily driven by the emergence of consulting and advisory companies that are also prodigious buyers of research now being more closely associated within the minds of GRIT respondents as innovative buyers. This is particularly interesting since in previous waves these companies were most often classified as suppliers, so a shift is occurring in market perception (and positioning) for those companies.

DESIGN, METHODOLOGY, AND SAMPLE

The GRIT Business & Innovation Report aims to provide comprehensive and actionable guidance for professionals working in insights, research, and analytics. This section provides context for you to get the most of this report.

THE ESSENCE OF GRIT

Thank you for making the GRIT Report the most comprehensive and actionable guide for insights and analytics professionals.

That's how we greet people as they enter the GRIT survey. Those simple words guide the design and execution of the GRIT process, but also mask the sophistication that has evolved over many years of producing the now-biannual reports. As our industry evolves and we learn more about it, the GRIT process adapts to its expanding scope while remaining true to our ideals of delivering comprehensive and actionable information. For example, although the "GRIT" name has endured since its inception, its literal meaning has had to evolve with the industry it tracks: the "GreenBook Research Industry Trends" report looks beyond research in order to comprehensively document and track the insights and analytics industry.

To provide industry professionals with the most comprehensive and actionable information, the GRIT process balances several design principles:

- Research should follow the evolution of the industry rather than assumptions about the evolution of the industry.
- Understanding the health of the industry requires understanding the perspective of those who spend money on insights as well as those who earn money from it.
- Topics must be tracked over time; snapshots are interesting but lack the context that makes them meaningful.
- Reporting is not actionable if it is not credible, and it is not credible if the process is not transparent.
- GRIT should provide reliable and relevant facts, and it should also raise questions and stimulate conversation.

Here are some highlights that provide context for how to think about and understand the report.

In other words, recruiting is driven by current relationships within the industry, not by who we think is in the industry.



DATA COLLECTION FOLLOWS THE INDUSTRY

The GRIT Report is based on analysis of data collected from April 15 through May 18, 2022, via an online survey of professionals who work in one or more areas of research, analytics, and insights. Participants are recruited via a variety of methods, including GDPR-compliant opt-in email lists and various social media channels. GreenBook's efforts are supplemented by GRIT partners who invite members of their networks, and anyone who receives an invitation can invite members of their network to take the survey. In other words, the recruiting is driven by current relationships within the industry rather than by preconceived ideas of who we *think* is in the industry, and this enables the research to adapt to emerging industry trends.

Within the survey, it is necessary to provide some structure in order to design questions and serve them appropriately. The GRIT survey has two major but overlapping paths: one for “buyers” and one for “suppliers.” (There are also paths for industry participants who do not fall into either category, and these tend to be minor.) What GRIT calls “buyers” are also known as “clients” or “brands;” these are people who participate in insights work within a company or organization that does not exist primarily to offer insights services to others outside their organization. A supplier company or organization, on the other hand, exists primarily to offer insights work and services to other external organizations. Topics and perspectives differ within each of these two major segments, so some of the survey must differ across them. Based on responses to questions early in the survey, participants self-select into one path or another.

Although our approach is designed to cast a broad net across the insights industry, it includes safeguards to ensure that respondents actually participate in it. Despite very minimal requirements, hundreds failed to qualify out of

thousands who entered the survey, and hundreds more were removed based on more than a dozen flags that we evaluate. You can read more about this process in the Data Cleaning appendix.

MORE THAN 2,500 PARTICIPANTS

After rigorous data cleaning, the current GRIT analysis is based on 2,701 completed surveys segmented into three distinct populations: buyers ($n = 402$), suppliers ($n = 2,275$), and others ($n = 24$). These represent populations of insights professionals, not populations of companies. When you see a result from the data, you should think of it as representative of the experiences of individual insights professionals who identify as buyers or suppliers according to our definitions, not as a proportion of buyer companies or supplier companies.

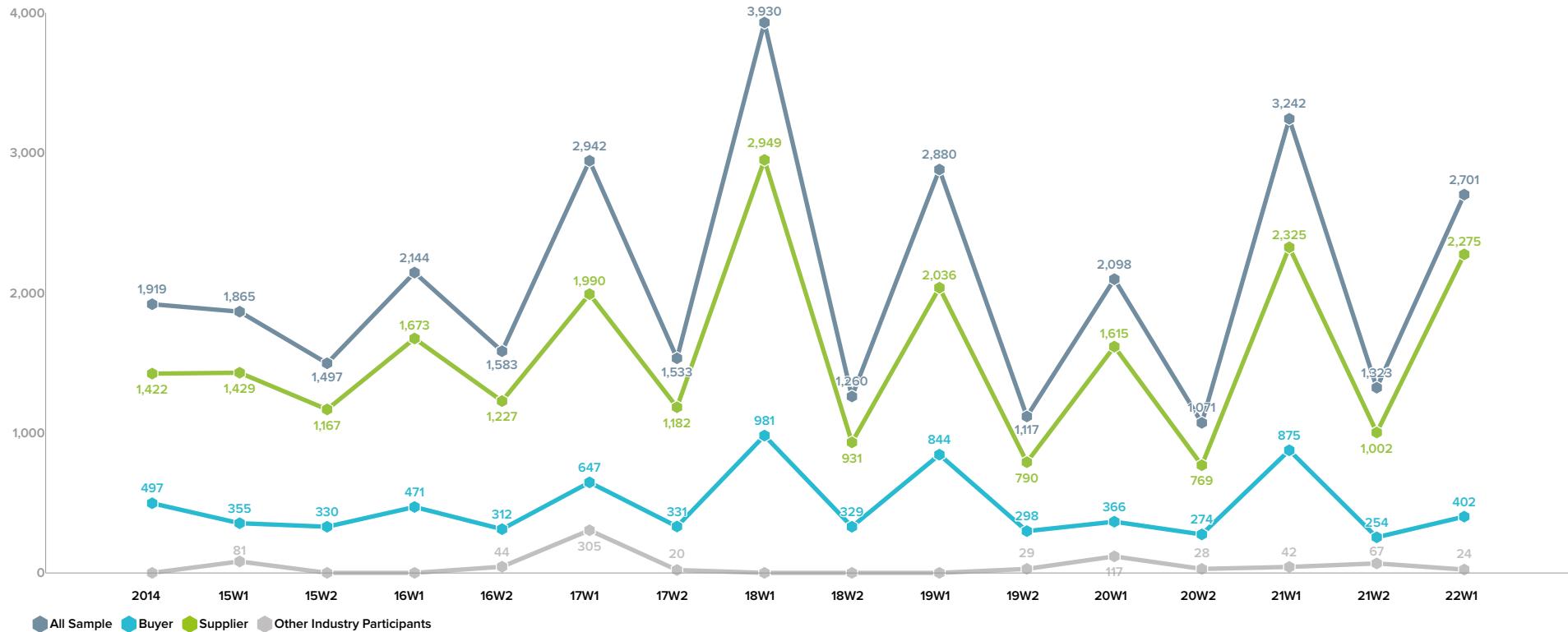
Except as an indication of overall participation, the total sample size is irrelevant because almost every analysis in this report is segmented by buyer and supplier populations or by sub-segments of them. For two reasons, aggregating across these segments does not make sense. First, there is no defensible way to determine what the proportion of “buyer” professionals should be relative to “supplier” professionals. Second, generally speaking, it is not very useful to know aggregate results across buyers and suppliers because they have different business models and objectives and aggregating them washes out important differences. After all, if you knowingly mix hot water with cold, is it right to report that water is characteristically tepid?

Over the years, sample sizes for buyers collected in the fall range from about 250 to 350, while in the spring they range from over 350 to just under 1,000. For suppliers, spring waves have yielded from about 1,600 surveys to nearly 3,000, while fall waves range between about 760 and 1,200. These fluctuations do not represent industry trends per se because they are likely due to process circumstances, such as limitations on recruiting resources, rather than changes in the market. As far as the GRIT report is concerned, these variations mainly impact the granularity of the analysis. We can always report on trends within buyer and supplier segments, but we can drill down deeper when the sample is larger. The proportion of buyers versus suppliers doesn’t matter because we don’t aggregate them.

As far as GRIT is concerned, these variations mainly impact the granularity of the analysis.



GRIT SAMPLE SIZE TREND YEAR-ON-YEAR



Within the report, we always give the sample sizes that apply to each chart and table, except in the few cases when space does not allow for it. Sample sizes may deviate from the totals reported in this section due to a few factors.

First, some questions in the survey would not apply to certain types of people and are not asked of them. For example, if someone indicated that they do not have a formal innovation program, they were not asked the follow up question about who runs the program. If they are on the buyer path, they are not asked

about the revenue they earned from selling services or other supplier-specific questions. Second, in order to manage the average survey length, non-core sections were randomly assigned to qualified participants and not asked of others. For example, the Industry Benchmarking section was randomly assigned to 50% of participants, the Innovation section to 60%, and so on. Also, in some analyses the sample sizes appear smaller because we exclude people who answered "don't know" in order to understand the distribution of people who do know. The resulting sample sizes are documented throughout the report.

in order to manage the average survey length, non-core sections were randomly assigned to qualified participants and not asked of others.



PARTICIPANT WEIGHTING ADJUSTS FOR REPRESENTATIVENESS

Recruitment to the GRIT survey is mainly driven by networking with active industry participants, not by a strict, pre-determined sampling plan. This enables the survey population to reflect the industry as it evolves, although it runs the risks of attracting people who do not participate in the industry or skewing the sample in unanticipated ways. We address the former risk via light screening and heavy flagging, and we address the latter by weighting participants.

Devising a weighting scheme is tricky because, in a trends report for a dynamic industry, the topics we measure are expected to change. This makes it easy to choose target weights that would completely defeat the purpose of looking at trends because they could make something that changed look the same as it did before, and that flattening would ripple through the rest of the data (ok – if they were flat, they wouldn't "ripple," but that's also the point).

To minimize the risk of undermining the measurement of trends, we choose target variables that would not be expected to change due to industry forces but that could vary due to differences in the data collection process across waves. The net effect is to stabilize the sample, resulting in greater resolution regarding industry-driven trends and minimization of artifacts. Although one of our principles is transparency, we do not publish details of the weighting scheme because we think the risk of someone using it to "game the system" is greater than the risk of alienating the audience by not sharing it.

All the results in this report are weighted except for the GRIT 50 list of suppliers and the GRIT 25 list of clients.

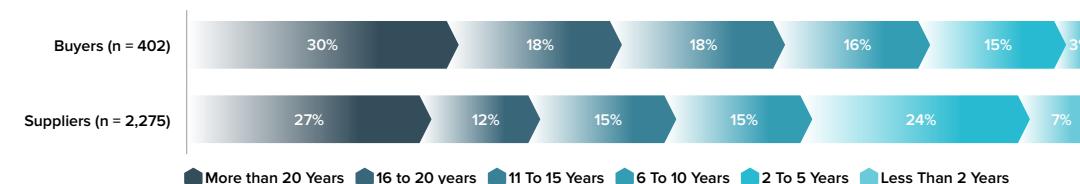
EXPERIENCED INSIGHTS PROFESSIONALS DRIVE GRIT RESULTS

The GRIT sample is always very experienced, and this wave is no exception. Most buyers and suppliers have more than 10 years of experience working in insights, analytics, or research, and fewer than 10% in each have 2 years or fewer (results are weighted). Nearly three-fourths of buyer and nearly two-thirds of supplier participants make or influence strategic decisions, while fewer than 20% have no formal influence. Among buyer participants, nearly 20% are in some kind of executive role, and another 56% direct or manage a function or staff. Among suppliers, 45% are in executive management and another 25% direct or manage a function or staff. The perspectives in the GRIT Report are strongly influenced by those who know best and balanced by those who bring a fresh outlook.

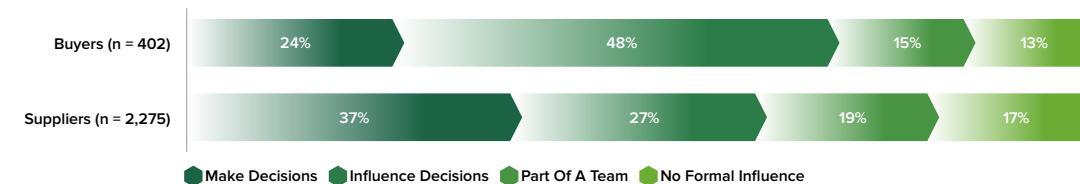
Perspectives in the GRIT report are strongly influenced by those who know best, balanced by those who bring a fresh outlook.



YEARS IN ROLE RELATED TO INSIGHTS, ANALYTICS, OR RESEARCH



ROLE IN STRATEGIC DECISIONS



Because of our unique data collection approach, we use a rigorous cleaning process once field is completed to ensure we capture the views of active, engaged insights professionals. We drop surveys that are partially complete and delete ones that are clearly poor quality or just plain fake. We remove duplicates, surveys that show a distinct lack of true effort or excess of 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.

We apply more than a dozen flags, and the bar is low for setting them. However, out of respect and appreciation for the people who make a sincere 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, or which may be outliers. Additional details can be found in the Data Cleaning appendix.

It is important that each reader can “see themselves” in the report so it can be actionable.



“SEE YOURSELF” VIA GRANULAR REPORTING

The GRIT analysis and reporting explore very granular breakdowns of each topic because we know that aggregation can cancel out important differences, even though larger n’s have greater “eye appeal” than smaller ones. It is important to us that each reader can “see themselves” in the report because that is what makes it actionable. For example, the recently released GRIT Industry Benchmarking Report not only segments the data by buyer and supplier, but by number of insights professionals within buyers and by professional focus and company size within suppliers. A full service supplier with more than 500 employees has a very different business model and path to success than a technology supplier with fewer than 20 employees.

We can be as granular as the data allow, but we don’t necessarily impose our own judgement of what the data “allow.” Sometimes, we may report results which are based on sample sizes that might make you uncomfortable, but we tell you the sample sizes so you can decide for yourself. We tend to err on the side of reporting more granularity because, for our purposes, hypotheses play a different role than facts play. GRIT aims to provide a fact-base for the industry, but also to stimulate ideas and discussion about its possibilities. By detailing the sample composition and sizes, we give you the tools to decide for yourself what is fact and what is hypothesis.

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

GRIT aims to provide a fact-base for the industry, but also to stimulate ideas and discussion about its possibilities.

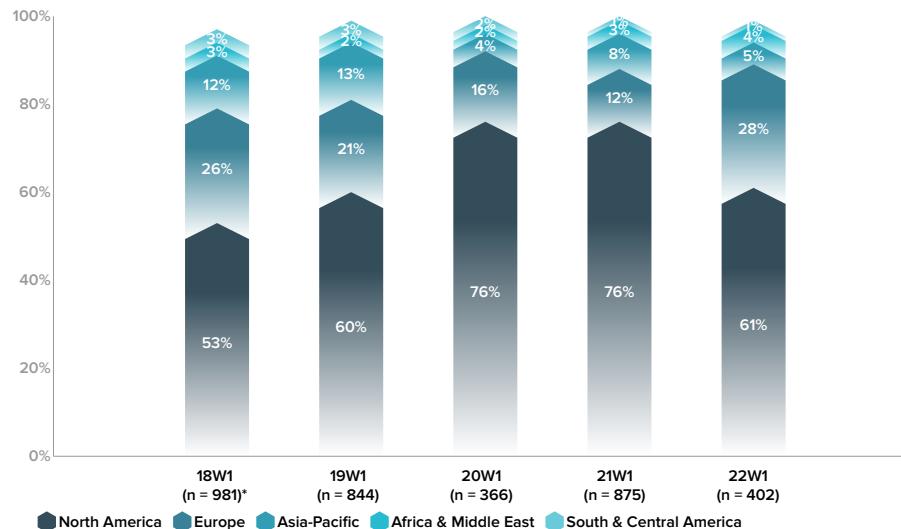


GRIT SAMPLE SUPPORTS ANALYSIS BY GLOBAL REGION

The GRIT process enables us to understand differences across global regions. From wave to wave, the proportions of each region within buyer and supplier segments have differed. While this is likely driven by wave-specific idiosyncrasies in the data collection process, some of it may be driven by changes in the industry, such as suppliers extending operations to new (for them) regions.

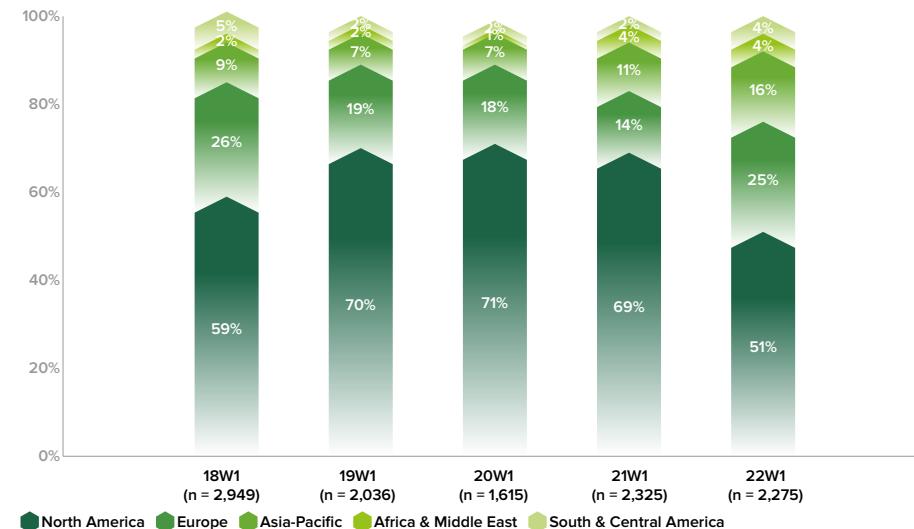
When you see results that are aggregated across regions in the report, understand them to include 61% from North America, 28% from Europe, 5% from Asia-Pacific, etc. among buyers, and 51%, 25%, 16%, etc. respectively among suppliers. Most sections include a sub-section which breaks out results by global region so you can see what drives the overall results and understand differences.

PARTICIPATION ACROSS GLOBAL REGIONS: LAST FIVE SPRING GRIT WAVES (BUYER)



Global region assignments are based on the location where the participant took the survey. Each participant is coded by that country, and the countries are aggregated into global regions. Over the years, some of these aggregations may have changed due to evolving understanding of regional relationships and the conventions used to categorize countries. In GRIT, North America includes Canada, Mexico, and the United States; Europe includes the UK.

PARTICIPATION ACROSS GLOBAL REGIONS: LAST FIVE SPRING GRIT WAVES (SUPPLIER)



Over the years, some of these may have changed due to evolving understanding of regional relationships and conventions used to categorize countries.



THE BIG PICTURE

The 2022 GRIT Business & Innovation Report provides you with comprehensive and actionable insights regarding industry trends. We always position these insights as “highly directional” versus “scientifically precise;” after all, this is the “GreenBook Research Industry Trends Report” not the “GreenBook Certified Financial Audit of the Insights Industry.” Understanding the sample composition and noting the sample sizes in each table and chart empower you to make your own assessments of trends, to separate fact from hypothesis, and decide which are meaningful for you. GRIT research follows the industry, and as the industry continues to transform and the definitions of key stakeholder groups expand, we will keep a keen eye out for opportunities to ensure the GRIT sample universe adapts to the entire industry.



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INDUSTRY STRUCTURE

HOW ARE BUYER ROLES AND SUPPLIER SEGMENTS EVOLVING?

Corporate insights staffs seem to be continuing a transformation from bastions of strategic insights and customer-centricity to the main sources of them, disseminating strategic insights and promoting customer-centricity throughout a corporate-wide network. After a pandemic-driven period of retrenchment, suppliers are expanding their portfolios of services while sharpening their positioning.

OVERVIEW

As the industry carousel continues its perpetual spin, as suppliers jump on and fall off, strategic insights and customer-focus seem to have grown deeper roots within buyer corporate cultures and supplier service portfolios have exploded.

GRIT segments insights suppliers into five “big bucket” categories according to the service area that provides their highest revenue total: full service research, field services, strategic consulting, technology, and data and analytics. In 2020, at the onset of the pandemic, suppliers, on average, claimed nearly one (0.9) significant revenue source in addition to their core source. By 21W1, a year into the pandemic, 40% of these complementary revenue sources had disappeared. After another year, however, complementary revenue sources have come most of the way back to pre-pandemic levels (0.8 revenue sources in addition to the core service).

At the same time, the number of specific services in the average supplier's portfolio has grown from 5.4 to 8.6, excluding services added to GRIT since 21W1. If we include the full list of services measured in 22W1, the average supplier portfolio is now a veritable cornucopia, averaging 11.5 different services. We believe that the pandemic forced more suppliers into collaborative working relationships with other types of suppliers, accelerating a cross-pollination of services and enhancing service portfolios via ongoing partnerships, mergers and acquisitions, and adoption of new capabilities enabled by technology.

Similarly, we believe that cross-pollination across insights groups, related functional areas, and their audiences may be breaking down silos and improving the flow of insights throughout buyer organizations. Increased exposure to analytics and access to DIY technology may be enabling some insights groups to focus on improving the volume and quality of insights available to their organizations by taking on more defined roles as their colleagues take on more responsibility for customer-centricity and breathing new life into insights.

We'll state the cases for these hypotheses in this section, but we believe that other sections in this report, such as Evolving Insights Audience and Industry Benchmarking, strengthen these arguments, too.

BUYER PERSPECTIVE

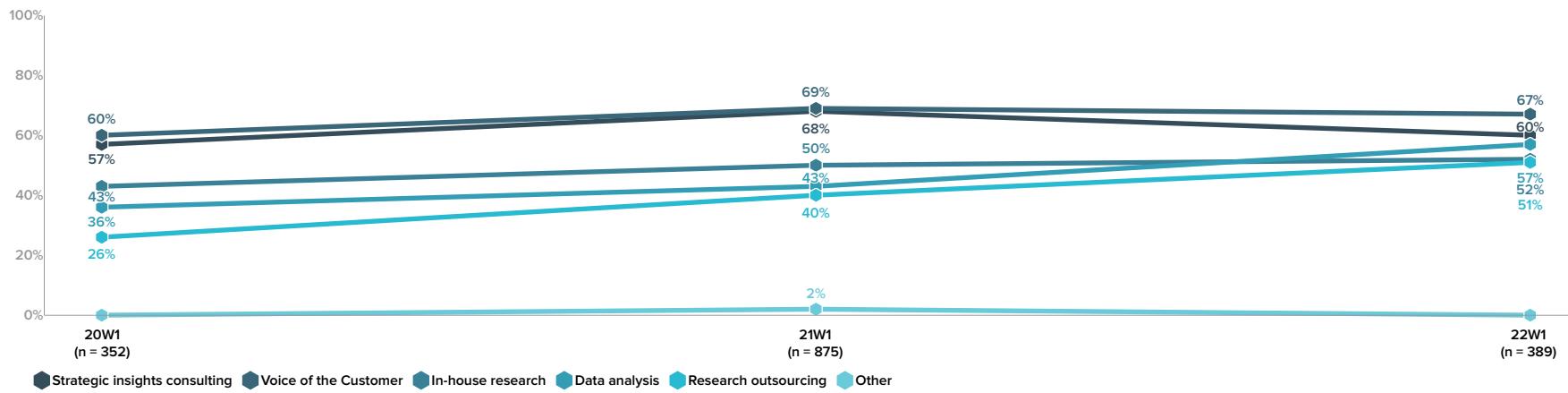
If a corporate insights professional's colleagues in other functional areas have already adopted a customer-focused mindset and eagerly anticipate receiving and developing new insights, the insights professional can expend less energy trying to win them over and more energy discovering new insights and new ways to discover them. If the entire organization is hungry for insights and knows how to use them, your expertise in identifying insights becomes more valued and your understanding of the business context increases via your network of like-minded colleagues.

Most GRIT buyer participants say that insights professionals at their company or organization play significant roles as strategic insights consultants (60%) and Voice of the Customer (VoC, 67%), but the percentage who say it is their most important role has declined over time. As a significant role, strategic insights consulting has grown, directionally, over the past two years, up 3% from 57% in 20W1. VoC has grown more, up 7% from 60% in 20W1. Two years ago, 77% said their insights professionals performed at least one of these two roles, and now 84% say they perform these. If anything, these roles have grown in importance for insights staffs.

Most buyers say insights professionals play significant roles as strategic consultants and VoC, but the percentage who say it is their most important role has declined.



ALL INSIGHTS PROFESSIONAL ROLES: GRIT WAVE (BUYER)



Although more participants say the roles are significant compared to 20W1, fewer say they are the most important role that insights professionals play. Since 20W1, the percentage who say that strategic insights consulting is the primary role has dropped from 37% to 30% while the percentage who say VoC is most important has dropped from

40% to 27%. These trends may have begun even earlier as strategic consulting was a primary role for 44% in 19W1 and VoC was primary for 39%. As two of these waves were measured before the pandemic hit, the declines cannot be attributed to it.

Although more participants say the roles are significant compared to 20W1, fewer say they are the most important role that insights professionals play.



PRIMARY ROLE OF INSIGHTS PROFESSIONALS: GRIT WAVE (BUYER)

	19W1 (n = 543)	20W1 (n = 221)	21W1 (n = 338)	Difference (21W1 – 19W1)	22W1 (n = 389)	Difference (22W1 – 21W1)
Strategic insights consulting	44%	37%	33%	-11%	30%	-3%
Voice of the Customer	39%	40%	30%	-9%	27%	-3%
In-house research	6%	14%	20%	14%	20%	0%
Data analysis	6%	5%	10%	4%	13%	3%
Research outsourcing	3%	2%	7%	3%	9%	2%
Other	2%	2%	2%	< 1%	< 1%	1%

Prior to 22W1, "hybrid of services" was offered as an option. For comparison to 22W1, it has been removed from 19W1, 20W1, and 21W1.

At the same time as the strategic insights consulting and VoC roles have become somewhat more significant but much less defining, other roles have increased in both ways. Among GRIT buyer participants, data analysis has increased as a significant role from 36% in 20W1 to 57% now, and it has doubled as a primary role from 5% to 10%. From 19W1 to 20W1, data analysis as a primary role fell negligibly from 6% to 5%, and its rapid rise began during the pandemic (in 19W1, GRIT did not ask about other significant roles). The cross-pollination we mentioned earlier might be an influence, for example if buyers realized that analytics departments should be merged with insights or if data analysts in other functional areas now call themselves insights professionals.

On a different front, in-house research grew as a significant role from 43% in 20W1 to 52% currently, and it grew as a primary role from 14% in 20W1 to 20% a year later and remains at 20% now. In 19W1, only 6% mentioned it as a primary role, meaning that, prior to the start of the pandemic, it had already doubled. Therefore, we can't suggest the pandemic is the primary driver of this trend. Veteran GRIT readers might assume we are about to say that automation is driving this surge, and, yet we find no evidence from this wave or from 21W1 that automation is more important to them than to any other buyer segment (see Adoption of Automation section). While DIY tools may have partially enabled this surge, they do not completely explain it.

Research outsourcing also grew as a significant role, from 26% at the onset of the pandemic in 20W1 to 51% now, and it grew four-fold as a primary role from just 2% in 20W1 to its current 9%. Not surprisingly, this segment is the one most likely to say that they increased insights outsourcing to external suppliers over the past year (38%) compared to other segments (26%).

What do we make of these trends? Two general roles, strategic insights consulting and VoC, have maintained or increased their overall significance even though fewer GRIT participants describe them as the most important role for insights professionals. Each of the more specific roles, data analysis, in-house research, and outsourcing, have increased in overall significance and as primary roles. Are buyer companies and organizations placing less value on insights and customer-centricity?

GRIT doesn't think so. In the Business Outlook section [*spoiler alert*] we'll reveal that 46% of buyer participants said their spending on research projects increased over the past twelve months, the highest percentage recorded by GRIT since...ever. You have to back to 16W2 to find a wave in which the percentage of budget increases is within 10% of the current wave. In that wave, the percentage of increases was 45%, the third straight year it topped 40% and fourth of five to eclipse that mark. Budget decreases are at 15% of buyer participants, the lowest since 15W2 reported 13%. If buyers are losing faith in insights work or customer-centricity, they sure do seem to be spending a lot of money on them.

Strategic insights consulting and VoC are very significant roles for insights professionals, they're just less likely to be the most important role than they once were. This means that either these roles have gone somewhere else, or they have been redistributed across the "network." Through what we've perhaps glibly referred to as "cross-pollination," buyers might expect the heavy users of insights work and its frequent collaborators, such as marketing, product development, R&D, and CX/UX to fly the banners of strategic insights consulting and VoC, especially within their functional areas. If so, the colleague "network" may have become the insights and customer focus "computer," at least for many buyers.

As the strategic consulting and VoC roles have become somewhat more significant but much less defining, other roles have increased in both ways.



Research outsourcing nearly doubled as a significant role and grew four-fold as a primary role since 20W1.



Aside from their primary role, most strategic insights consultants also function as VoC, analyze data, and outsource research. Most VoC also perform strategic consulting and analyze data, but fewer of them function as research outsourcers. Like strategic insights consultants and VoC, at least half of in-house researchers also have roles as VoC and data analysts, but they are much less likely to function as strategic consultants. Data analysts and research outsourcers, on the other hand, are much more specialized. Although, on average, they also play multiple roles, there is less consensus regarding secondary roles as no role accounts for at least half of either group.

These differences suggest that most buyers who act primarily as strategic consultants have in-house data analytics capabilities but are somewhat more likely to outsource research than to have researchers on staff. Most VoC on the other hand, also have data analysts on staff, but have no clear preference for conducting in-house research or outsourcing it.

In-house researchers are equally likely to have data analysts on staff as not, and nearly half of them (45%) outsource some of their research activities. It's not clear whether we should expect fewer of them to be outsourcers because they conduct research for themselves, or if we should expect all of them to be outsourcers because it seems unlikely that most of them could meet all their needs for field services using only in-house staff. They are much more likely to function as VoC than as strategic consultants, and this suggests that an insights group defined by in-house research is likely to be considered as experts on customers but not on deriving implications from the research. This latter task may be left to their internal sponsors.

To close our discussion of the buyer perspective on industry structure, here are thumbnail sketches of each segment:

SEGMENT	REPRESENTATIVE CHARACTERISTICS
Strategic consultant	<ul style="list-style-type: none"> Largest company size (median: 10,000 – 24,999 employees) Most insights professionals (median: 5 to 9) Most likely to be part of an insights group (69%)
Voice of the Customer	<ul style="list-style-type: none"> Second largest company size (median: 5,000 – 9,999 employees) Most likely to conduct research that includes qualitative (63% of projects)
In-house researcher	<ul style="list-style-type: none"> Third largest company size (median: 5,000 – 9,999 employees) Fewest insights professionals (median: 20 to 29)
Data analyst	<ul style="list-style-type: none"> Smallest company size (median: 2,500 – 4,999 employees; tied with research outsourcer) Least likely to be part on an insights group (40%) Conduct the fewest projects (median: 25 to 50 per year; tied with research outsourcer) Least likely to conduct research that includes qualitative (48% of projects)
Research outsourcer	<ul style="list-style-type: none"> Smallest company size (median: 1,001 – 2,499 employees; tied with data analyst) Conduct the fewest projects (median: 25 to 50 per year; tied with data analyst)

Most who act primarily as consultants have in-house data analytics capabilities, but are somewhat more likely to outsource than to have researchers on staff.



SUPPLIER PERSPECTIVE

On the eve of the pandemic, the technology provider segment reached its all-time high, representing 21% of all GRIT participants. In the very next wave, however, they set a more dubious record, plunging to 9% of GRIT participants, marking the segment's first foray into single-digits since we began measuring it three waves earlier. The following wave, one year into the pandemic, they had climbed back to their historical average of 15%, and in this wave they seem to be closing in on a new all-time high, reaching 18%. The pandemic hit them hard, but the segment bounced back quickly.

Our hypothesis was that many of them were not well known going into the pandemic, and this made it difficult for them to get new business and overcome buyer inertia to changing how they conduct their work. At the same time, industry-wide uncertainty led to budget cuts that made it more difficult to retain current business. In previous waves, technology participants consistently talked about the need to grow their reputation and improve marketing and business development, or, if they had been experiencing a revenue increase, they might cite the role that their growing reputation had played in their recent success. In GRIT wave after GRIT wave, however, buyers consistently ranked relationship as a key criterion when selecting suppliers, well above reputation, and this was difficult barrier for many technology suppliers to hurdle.

The stars soon began to realign for technology providers as buyers implemented new models for insights work, which substantially reduced their inertia to change. The marketing challenges that technology providers had faced during normal times diminished because buyers were now actively looking for them and, for the first time, prioritizing reputation and innovation alongside relationship when choosing insights partners.

While some buyers took more work in-house, others ramped up their use of external suppliers. Either because of staff reductions or the overall spike in new challenges to face, many insights groups needed to spend more time working on the business and less time working in the business. We believe that a common model was to hire a full service research provider as a sort of general contractor who could bring in expertise as needed. As a result, the marketing challenges for technology providers diminished because they could sell to a few suppliers who managed a high volume of work rather than expend energy trying to identify buyer targets, convince them to change their work process, and sell them on their particular solution. Full service research providers could more effectively market and sell their projects to end customers and pull specialist suppliers along with them.

Maybe these hypotheses are not enough to convince you that technology providers deserve to be the lead story for the supplier perspective of the Industry Structure section. Consider the following, then: for the first time, GRIT asked suppliers about which suppliers they work with, and most participants in each of the “big bucket” segments say they work with technology providers regularly. No other type of provider can make that claim. Even if buyers are not all-in on DIY tools, they are probably receiving deliverables that are more timely, cost-effective, and/or accurate because of them.

Parallel to what we saw with buyer roles, generalist suppliers continue to lose ground to specialists as a percentage of GRIT participants. In 20W2, the generalists accounted for 73% of GRIT participants; since then, the specialists have grown from 27% to 44% of the industry.

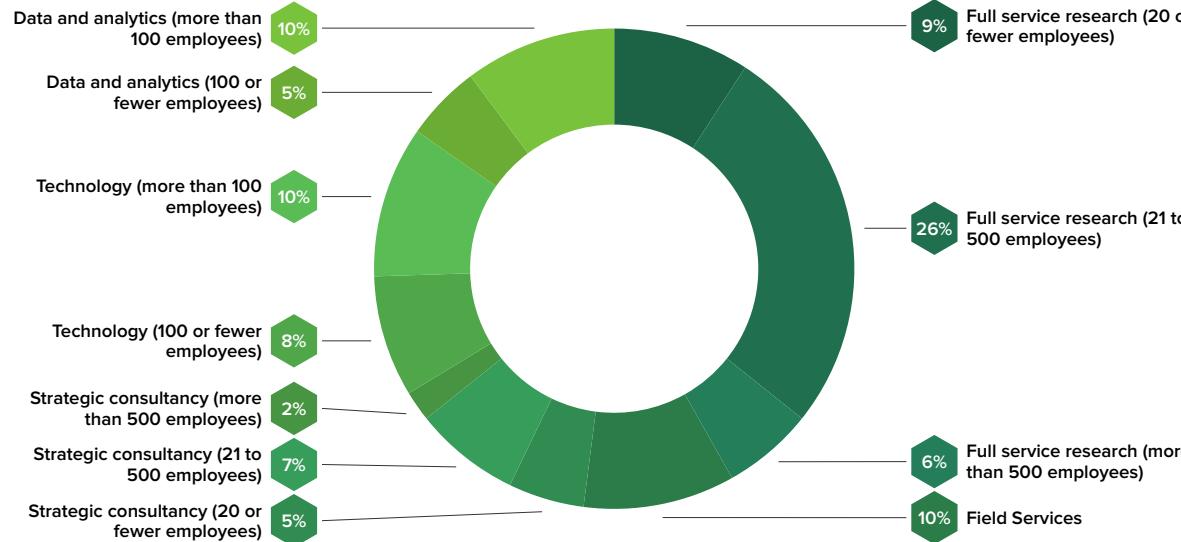
For the first time, GRIT asked suppliers which suppliers they work with, and most in each segment say they work with technology providers regularly.



Many of them were not well known going into the pandemic, making it difficult to get new business and overcome buyer inertia to change.

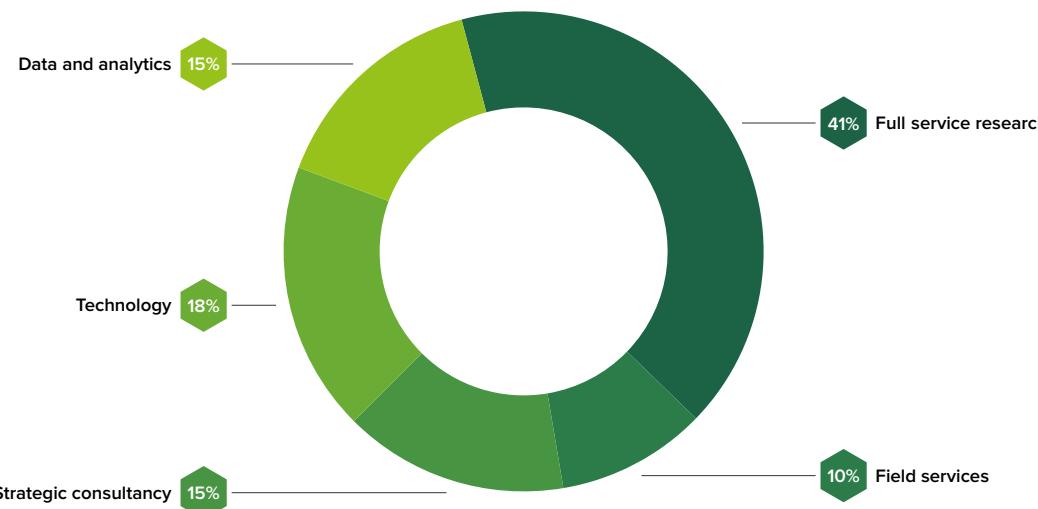


PROFESSIONAL FOCUS/HIGHEST REVENUE (SUPPLIER)

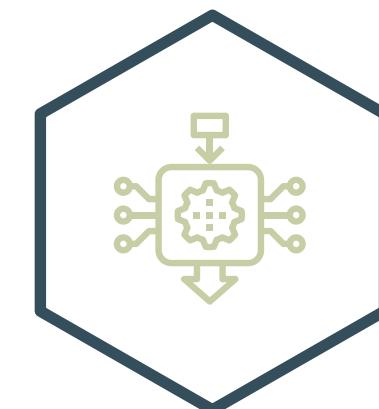


PROFESSIONAL FOCUS/HIGHEST REVENUE, CATEGORY LEVEL: GRIT WAVE (SUPPLIER)

	Average size	20W2 (n = 766)	21W1 (n = 2,325)	21W2 (n = 1,002)	22W1 (n = 2,275)
Generalists	64%	73%	65%	62%	56%
Specialists	36%	27%	35%	38%	44%
Deviation from average					
Generalists		+9%	+1%	-2%	-8%
Specialists		-9%	-1%	+2%	+8%



Parallel to what we saw with buyer roles, generalist suppliers continue to lose ground to specialists as a percentage of GRIT participants. Since 20W2, specialists have grown from 27% to 44% of the industry.

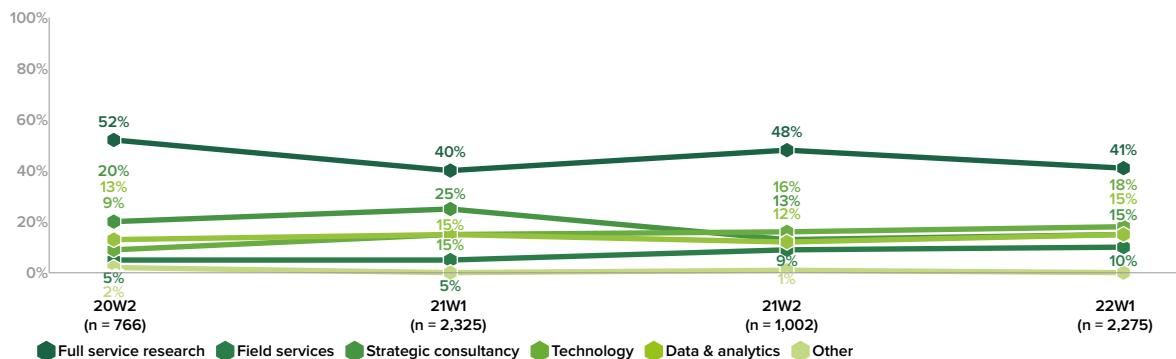


In the initial implementation of our supplier segmentation, GRIT treated field services and full service research as one segment. When we decoupled them in 20W2, 5% of participants identified field services as their biggest revenue generator, and in 21W1 it was still 5%. In the past two waves, that percentage has been double in each. During this time, GRIT has reported on the budding romance between field services and data and analytics, the apparent courtship of technology by field services, and how this love triangle began to resolve itself into a happy state of bigamy. Faced with the twin evils of a global pandemic that became judgment day for data collection as we knew it and a sample quality crisis that continues to demand immediate attention, some have found salvation by applying analytics and automation to field services challenges.

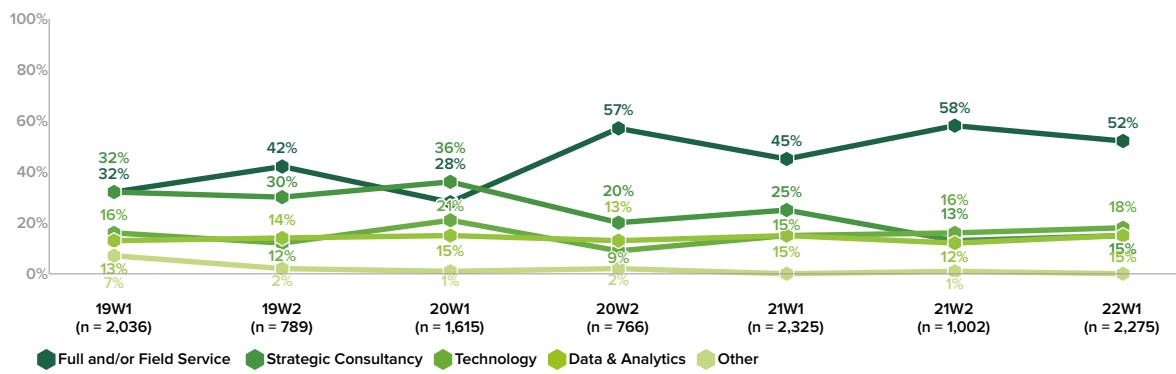
The strategic consultancy segment has gone in the opposite direction. It peaked at 36% at the onset of the pandemic before collapsing to 20% by the next wave. Despite a brief uptick in 21W1, it seems to have reached an equilibrium in the mid-teens, at least for the time being. GRIT hypothesizes once again that the surge in the full service research segment is related to this decline. There has always been overlap across the two segments as full service providers have tried to reposition themselves as strategy consultants in order to upsell their clients while strategic consultancies have tried to expand their end-to-end offerings to claim more of the revenue their projects generate.

Similar to all life as we knew it, that dynamic changed between spring 2020 and the fall. Those with real strategic consulting chops continued to offer those services, but the dabblers and the strugglers had to prioritize their full service offerings because that's where the money was, or what was left of it. At the same time, GRIT hypothesizes, clients had to focus their internal resources on strategy like never before, many of them turning to DIY to keep their staff employed but others increasing outsourcing to focus their time on business issues.

PROFESSIONAL FOCUS/HIGHEST REVENUE, FULL BREAKOUT: GRIT WAVE (SUPPLIER)



PROFESSIONAL FOCUS/HIGHEST REVENUE: GRIT WAVE (SUPPLIER)



This may have reduced the opportunities for insights consulting firms. As explained in the preceding buyer perspective sub-section, although strategic consulting declined as a primary corporate insights role, for most it has remained as a significant role, as has VoC. As we discuss in the Evolving Insights Audience section of this report, insights deliverables reach diverse audiences across the organization and at all levels, and when you consider the important strategic consulting and VoC roles played by corporate insights, buyers may have lost some of their appetite for buying strategic insights consulting services.

The strategic consultancy segment peaked at 36% before the pandemic, then collapsed to 20%. Despite a brief uptick in 21W1, it has reached equilibrium in the mid-teens.



Heading into the pandemic, the full service research segment was reeling, accounting for only 28% of GRIT participants, behind strategic consultancies, which accounted for 36%, and specialists, who combined for another 36%. The numbers would look worse if field services has been decoupled from full service research at that point, but “worse” only describes the segment size. Revenues across the board were increasing at the highest rates ever in GRIT, and these trends suggest that those who had been categorized as full service research in previous waves were making better money in some other ways that had become even greater sources of revenue. Same companies, new revenue streams, different segments.

Six months into the pandemic, the full service research segment enjoyed a resurgence, reaching 52%. However, the segment might not have “enjoyed” the resurgence very much as it probably resulted from suppliers losing larger revenue streams which returned full service research to its position as top breadwinner. Since then, full service research has hovered in the mid-40s%.

The toughest segment to figure might be data and analytics. At times, it seems on the verge of a decline, but generally ends up fixed in the mid-teens. The numbers look fairly stable, but they belie the state of flux that seems to characterize the segment. In recent GRIT reports, we’ve noted that many data and analytics companies seem to be exploring field services work, and the appearance of stability may be a result of similar numbers of suppliers entering and leaving the segment at any given time.

At this point in the last GRIT Business & Innovation Report, our theme was “2020: Suppliers Focus on Core Services.” In every segment, as defined by their highest revenue service area, every non-core service area declined as a significant source of revenue.

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

	Average size	19W1 %	19W2 %	20W1 %	20W2 %	21W1 %	21W2 %	22W1 %
n		2,036	789	1,615	766	2,325	1,002	2,275
Full and/or field service	45%	-13%	-3%	-17%	+12%	< 1%	+13%	+7%
Strategic consultancy	24%	+8%	+6%	+12%	-4%	< 1%	-11%	-9%
Technology	15%	+1%	-3%	+6%	-6%	< 1%	+1%	+3%
Data & analytics	14%	-1%	< 1%	+1%	-1%	+1%	-2%	+1%
Other	2%	+5%	< 1%	-1%	< 1%	-2%	-1%	-2%

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

That was then, and this is now. Nothing declined any further. In fact, 15 of the 20 service-segment pairings increased by at least 5% over 21W1:

- Full service research increased by double digits in every segment
- Data and analytics increased by double digits among field services providers and strategic consultancies
- Data and analytics also increased by more than 5% among technology and full service research providers
- Technology increased by at least 5% in every segment
- Field services increased 6% among technology and data and analytics providers
- Strategic consulting rose 5% among technology providers.

These trends suggest that those who had been full service research in previous waves were making better money in other ways that had become even greater sources of revenue.



Underscoring the competitive pressure that data and analytics suppliers must be feeling, at least 20% in every segment draw revenue from it now, led by 37% of field service providers. Full service research is also offered by more than 20% in each segment – in fact, by nearly one-third or more in each – but that's to be expected because it is a more general service that can complement any offering. Technology is offered by nearly one-third of field services (32%) and data and analytics providers (30%), and strategic consulting is offered by nearly one-quarter or more of full service research (30%) and data and analytics providers (24%).

Only field services stands apart as an “all-in” specialty, meaning you’re either in it to win it or you’re outta there. Of all the supplier segments, only data and analytics approaches the 20% mark for also offering field services, at 18%. It’s relatively rare for a supplier to have field services as a secondary revenue source, and that reinforces its standing as a unique, standalone segment.

Going a layer deeper than GRIT’s five “big bucket” segments, supplier participants told us which specific service was most important to their positioning, and only six were named by more than 2%:

- Full service research (23%)
- Strategy/strategic insights (12%)
- Online quantitative data collection platform (8%)
- Sampling (5%)
- Online qualitative data collection platform (3%)
- Online communities (3%)

In addition, 15% said that more than one was equally important, and sixteen other services were named as “most important” by about 1% or more. When we peel back the simplistic “generalist/specialist” layer and then the “big bucket” layer, we see a diverse set of suppliers with very different formulas for success.

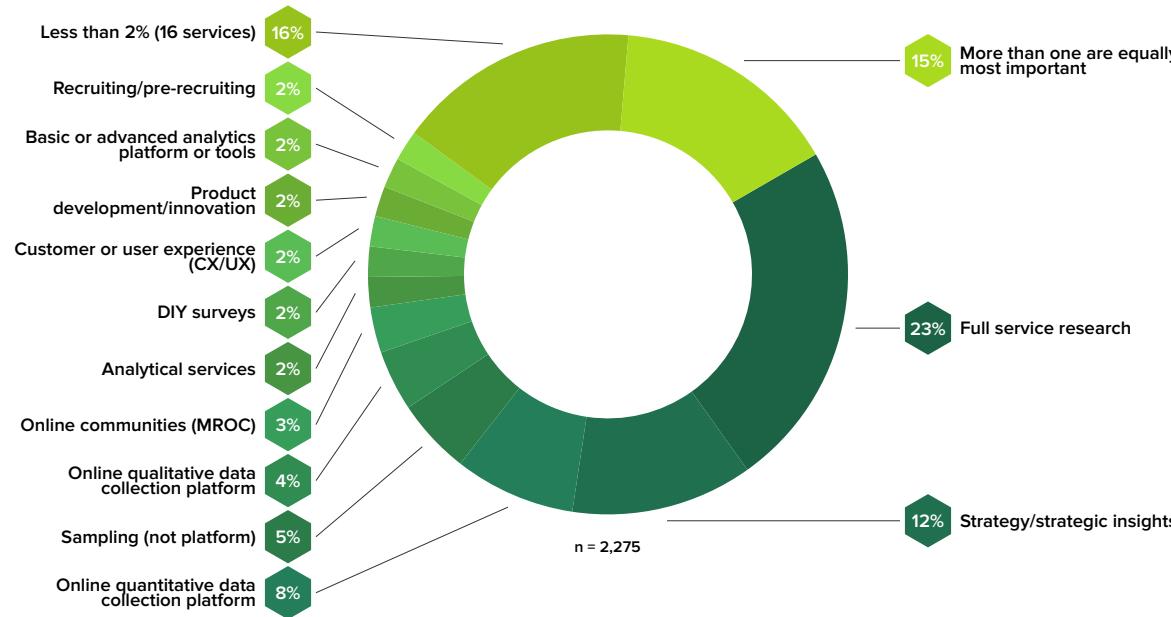
Only field services stands apart as an “all-in” specialty.



ALL SOURCES OF REVENUE, 22W1 VS. 21W1: PROFESSIONAL FOCUS

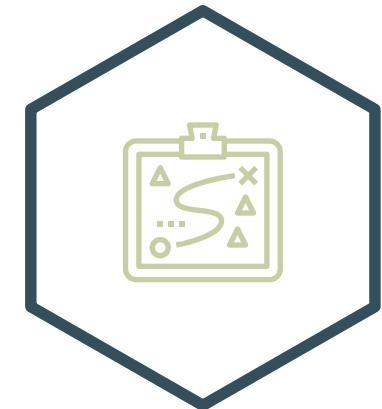
	22W1 Source of Highest Revenue					Difference 22W1 – 21W1				
	Full service research	Field services	Strategic consulting	Technology	Data & analytics	Full service research	Field services	Strategic consulting	Technology	Data & analytics
n	910	234	293	429	404	—	+17%	+12%	+11%	+11%
Full service research	100%	36%	32%	28%	35%	—	+17%	+12%	+11%	+11%
Field services	13%	100%	6%	12%	18%	+3%	—	+3%	+6%	+6%
Strategic consulting	30%	12%	100%	16%	24%	-1%	+3%	—	+5%	+3%
Technology	14%	32%	12%	100%	30%	+5%	+8%	+8%	—	+10%
Data and analytics	29%	37%	23%	31%	100%	+7%	+17%	+12%	+9%	—
Average number offered	1.9	2.2	1.7	1.9	2.1					
<i>Italics indicate the primary service offering, which is always 100%.</i>						<i>Red highlighting indicates secondary services that are not as significant in 22W1.</i>				
<i>Green highlighting indicates secondary services offered by 20% or more of the supplier type.</i>										

SERVICE OFFERING MOST IMPORTANT TO POSITIONING (SUPPLIER)



As usual, full service research is the dominant service (23%), but not nearly as much as last year when more than one-third said it was most important to their positioning. Also as usual, the percentage of participants who claimed full service research as their most important offering does not begin to approach the percentage who said it was their highest revenue “big bucket” service (41%). Although it is sometimes convenient to think of “full service research” as a general category, it is composed of suppliers who are not necessarily alike and may have very different service portfolios. What they have in common is a preference for potential buyers to know they can manage a project end-to-end.

As full service research lost about one-third of its base, strategy/strategic insights lost one-quarter of its base since 21W1 and nearly one-third since 20W1.



As full service research lost about one-third of its base, strategy/strategic insights, the second leading primary offering, lost one-quarter of its base since 21W1 and nearly one-third since 20W1. Another catch-all category, “more than one are equally important,” has also lost one-third of its base since 20W1. Suppliers seem to be shying away from generalizations and honing more targeted identities. More supplier identities seem to be forming around offerings a level deeper than the “big bucket” layer, and this may be a product of the increased need to stand out during the hyper-competitive months of the pandemic.

SERVICE OFFERING MOST IMPORTANT TO POSITIONING: GRIT WAVE (SUPPLIER)

	20W1	21W1	22W1	Difference 22W1 – 21W1
n	1,615	2,325	2,275	
Full service research	29%	35%	23%	-12%
Strategy/strategic insights	19%	16%	12%	-4%
Online quantitative data collection platform	5%	6%	8%	+2%
Sampling	N/A	N/A	5%	N/A
Online qualitative data collection platform	4%	5%	4%	< 1%
Online communities (MROC)	N/A	N/A	3%	N/A
Analytical services	1%	2%	2%	+1%
DIY surveys	N/A	N/A	2%	N/A
Product development/innovation	< 1%	0%	2%	+1%
Customer or user experience (CX/UX)	1%	1%	2%	+1%
Basic or advanced analytics platform or tools	3%	3%	2%	-1%
Recruiting/pre-recruiting	N/A	N/A	2%	N/A
Data services	2%	2%	1%	-1%
Moderating/interviewing	N/A	N/A	1%	N/A
Brand management/strategy	2%	2%	1%	< 1%
Quantitative data collection (offline)	3%	3%	1%	-2%
Platform or tool for collection or analysis of unstructured data	3%	1%	1%	< 1%
DIY sample access	3%	3%	1%	-2%
Industry-focused research	2%	1%	1%	< 1%
Marketing communications/advertising/PR	1%	2%	1%	-1%
Qualitative data collection (offline)	1%	1%	1%	-1%
Research/analysis based on unstructured data	N/A	N/A	1%	N/A
Syndicated data and/or reports	N/A	N/A	1%	N/A
Applied neuroscience/biometrics	N/A	N/A	< 1%	N/A
Platform or tools for nonconscious or passive measurement	1%	1%	< 1%	< 1%
Secondary research	< 1%	< 1%	< 1%	< 1%
Other research services	< 1%	1%	1%	< 1%
Other consulting services	N/A	N/A	1%	N/A
More than one are equally most important	22%	14%	15%	1%

This list of services has evolved over time, and direct comparisons may be inexact or impossible. These changes are explained in an information box in this section. Blue shading indicates consulting services, gray indicates technology, orange indicates offline field services, and unshaded indicates research services.

Since 21W1, the percentage of full service research suppliers who say it is also their most important service for positioning dropped 19%.



Across the “big bucket” supplier segments as defined by highest revenue, the services that are most important to positioning are not equally distributed and change over time. For example, 41% of GRIT participants say that full service research is their highest revenue “big bucket” service, and 47% of them say it is also the service that is most important to their positioning. In other words, most of them have a positioning in mind that is more specific than full service research, but this was not the case a year ago when 66% said full service research was most important. Across the other “big bucket” segments, it reaches 11% among field services providers and less than 10% among each of the others, supporting the idea that positioning is related to the “big bucket” umbrella, but not completely determined by it.

Since 21W1, the percentage of full service research suppliers who say it is also their most important service for positioning dropped 19%. Full service research positioning also dropped 18% within data and analytics providers and 7% within strategic consultancies. In the full service research segment, no single service makes up for the change in positioning, but the “biggest” increases are strategy/strategic insights (+3%), online quantitative data collection platform (+2%), access to sample and/or recruiting (+2%), and “hybrid” positioning (+2%). In other words, no single trend accounts for the drop, except in the sense that current suppliers are less likely to believe that “full service research” is the best choice to build their positioning around.

Among those who make the most money from field services, two offerings became much less prominent in positioning, and these are not surprising given the conditions caused by the pandemic: offline quantitative (-19%) and offline qualitative data collection (-7%). Instead, online quantitative data collection platform (+8%), access to sample and/or recruiting (+4%), and others, such as product development/innovation consulting (+2%), rose in

Many Brands Have Learned How To Thrive In Uncertain Times. Is Yours One Of Them?

Looming economic uncertainty requires brands to take a gut check and reevaluate their innovation and marketing strategies. We believe there are **3 keys to thriving** when clouds gather:

- 1 Dig deep to understand people better.**
As people's needs and emotions are changing rapidly, don't alienate your audience by relying on outdated insights.
- 2 Demonstrate empathy.**
Use the deeper insights to build more empathy into your innovation and communication - going through and coming out of the storm.
- 3 Don't stop investing.**
Trust history - it's been proven time and time again that brands that stay the course - or even double-down - during recessionary times come out winning.

GutCheck helps brands understand people's needs, personalities, and emotions in the context of their current, real life experiences, so you can get closer, get real, and get ahead.

Discover our unique Agile Human Experience Intelligence framework today, and see how GutCheck can help your brand thrive. Visit us at gutcheckit.com/GRIT



importance. It seems that faced with challenges to offline data collection and sample quality, successful field services providers have capitalized on new positioning opportunities.

Those who draw the most revenue from strategic consulting have also differentiated their positioning as the two “generalist” services declined, strategy/strategic insights consulting (-9%) and full service research (-7%). Services such as analytical services (+3%) and online quantitative data collection platform (+2%) have sprung up in their place. Again, it’s not clear whether strategic consultancies have added these services to their positioning strategies or if technology and data and analytics providers have grown their revenues from strategic consulting, but the trend suggests that strategic consultancies realize they have a greater need to differentiate from competitors.

On the flip side, we see technology providers migrating their positioning away from services that are defined strictly by technology toward consulting. Services that have declined as most important to their positioning include online quantitative and qualitative data collection platforms (-9% each), basic or advanced analytics platform or tools (-8%), and full service research (-4%). Instead, more are emphasizing customer or user experience (CX/UX) consulting (+5%), product development/innovation consulting (+4%), and strategy/strategic insights consulting (+2%) plus access to sample and/or recruiting for studies (+4%) and analytical services (+3%). Whether these trends reflect technology providers adding consulting services or other types of providers leveraging technology to drive greater revenue is not clear, but once again the trend seems to be toward greater differentiation within a “big bucket” segment.

We see the same trends among data and analytics providers. Fewer are positioning themselves via full service research (-18%), offline quantitative data collection (-5%), and data services (-4%). More are positioning themselves as a hybrid (+6%) or with online quantitative (+5%) or qualitative (+3%) data collection platforms. There are also minor increases for customer or user experience (CX/UX) consulting, product development/innovation consulting, and secondary or syndicated data (+2% each). In recent GRIT reports, we’ve discussed how this segment is trying to find an identity, especially as the other segments occupy more of its territory. It looks like some of them are leveraging technology to morph into more of a field services role while others are exploring specific areas of consulting that can be enhanced with analytics.

Technology providers are migrating their positioning away from services defined strictly by technology toward consulting.



Some data and analytics providers are leveraging technology to morph into more of a field services role.



SERVICE OFFERING MOST IMPORTANT TO POSITIONING, 22W1 V. 21W1: PROFESSIONAL FOCUS (SUPPLIER)

	22W1 Source of Highest Revenue					Difference 22W1 – 21W1				
	Full service research	Field services	Strategic consulting	Technology	Data & analytics	Full service research	Field services	Strategic consulting	Technology	Data & analytics
n	910	234	293	429	404					
Full service research	47%	11%	8%	4%	6%	-19%	+1%	-7%	-4%	-18%
Strategy/strategic insights	12%	1%	40%	2%	6%	+3%	< 1%	-9%	+2%	< 1%
Online quantitative data collection platform	4%	17%	3%	11%	13%	+2%	+8%	+2%	-9%	+5%
Sampling	2%	24%	1%	3%	7%	N/A	N/A	N/A	N/A	N/A
Access to sample and/or recruit for studies*	3%	25%	1%	7%	8%	+2%	+4%	+1%	+4%	+1%
Online qualitative data collection platform	2%	4%	2%	11%	6%	< 1%	< 1%	+1%	-9%	+3%
Online communities (MROC)	2%	1%	< 1%	10%	1%	N/A	N/A	N/A	N/A	N/A
Analytical services	1%	< 1%	3%	1%	8%	< 1%	-1%	+3%	+1%	< 1%
DIY surveys	1%	2%	< 1%	6%	3%	N/A	N/A	N/A	N/A	N/A
Customer or user experience (CX/UX)	1%	0%	2%	5%	2%	< 1%	< 1%	< 1%	+5%	+2%
Product development/innovation	< 1%	2%	2%	4%	2%	< 1%	+2%	+1%	+4%	+2%
Basic or advanced analytics platform or tools	1%	< 1%	1%	5%	3%	+1%	-1%	+1%	-8%	-1%
Recruiting/pre-recruiting	1%	10%	< 1%	< 1%	< 1%	N/A	N/A	N/A	N/A	N/A
Data services	1%	2%	< 1%	1%	4%	+1%	-3%	< 1%	-2%	-4%
Moderating/interviewing	2%	< 1%	2%	< 1%	< 1%	N/A	N/A	N/A	N/A	N/A
Brand management/strategy	1%	< 1%	4%	1%	1%	< 1%	< 1%	-1%	+1%	< 1%
Platform or tool for collection or analysis of unstructured data	1%	2%	1%	4%	1%	< 1%	< 1%	+1%	+1%	-2%
Quantitative data collection (offline)	2%	4%	1%	1%	1%	+1%	-19%	< 1%	-1%	-5%
DIY sample access	1%	1%	< 1%	4%	1%	N/A	N/A	N/A	N/A	N/A
Industry-focused research	1%	0%	1%	1%	2%	N/A	N/A	N/A	N/A	N/A
Marketing communications/advertising/PR	< 1%	0%	4%	1%	2%	-1%	< 1%	-2%	+1%	+1%
Qualitative data collection (offline)	1%	3%	< 1%	1%	< 1%	< 1%	-7%	-1%	< 1%	-1%
Secondary or syndicated data*	< 1%	0%	1%	1%	3%	< 1%	< 1%	+1%	+1%	+2%

Whether these trends reflect technology providers adding consulting services or other types of providers leveraging technology to drive greater revenue is not clear.



	22W1 Source of Highest Revenue					Difference 22W1 – 21W1				
	Full service research	Field services	Strategic consulting	Technology	Data & analytics	Full service research	Field services	Strategic consulting	Technology	Data & analytics
Syndicated data and/or reports	< 1%	0%	< 1%	1%	3%	N/A	N/A	N/A	N/A	N/A
Research/analysis based on unstructured data	< 1%	1%	2%	< 1%	2%	N/A	N/A	N/A	N/A	N/A
Applied neuroscience/biometrics	< 1%	0%	2%	< 1%	0%	N/A	N/A	N/A	N/A	N/A
Platform or tools for nonconscious or passive measurement	< 1%	0%	< 1%	< 1%	< 1%	< 1%	< 1%	-2%	< 1%	< 1%
Secondary research	< 1%	0%	< 1%	0%	< 1%	N/A	N/A	N/A	N/A	N/A
Other research or consulting services	1%	0%	5%	1%	2%	-2%	< 1%	-1%	-2%	-2%
More than one are equally most important	13%	14%	12%	19%	21%	+2%	+1%	-2%	-4%	+6%

* Combines two services from 22W1 to approximate one from 21W1. Blue shading indicates consulting services, gray indicates technology, orange indicates offline field services, and unshaded indicates research services.

Turning to all services that are sold, licensed or offered to external clients beyond the one most important to positioning, we once again recall a table from the 2021 Business & Innovation Report, “ALL SERVICE OFFERINGS, 21W1 V. 20W1: PROFESSIONAL FOCUS (SUPPLIER).” In response to the pandemic, many suppliers who earned the most money from strategic consulting turned to full service research to support themselves. A similar defection occurred among data and analytics providers.

As a result of this influx, the full or field service segment saw large increases over 20W1 in analytical services (+15%), marketing communications consulting (+15%), strategic insights consulting (+14%), brand strategy consulting (+13%), and product innovation consulting (+10%). The data and analytics segment began a migration toward field services, which was not a separate “big bucket” segment in 20W1, by adding offline (+17%) and online (+15%) quantitative data collection

to their portfolios. No other segment-service combination increased by 10% or more, and only full and field service providers increased their average number of services offered appreciably, from 5.1 to 6.0.

What a difference a year makes. In 21W1, two segment-service combinations had declined while only seven increased at least 10%, all of them among full and field service and data and analytics segments. Since then, *seventy-three* segment-service combinations increased by at least 10% while none of them declined by that much. Each “big bucket” segment added at least six services, on average, led by field services providers (+9.2) and strategic consultancies (+7.8). Six services increased by at least 20% within each segment: analytical services, product development/innovation consulting, access to sample and/or recruit for studies, industry-focused research, secondary or syndicated data, and data services. The average number of services offered in each segment doubled in one year.

In response to the pandemic, many suppliers who earned the most money from strategic consulting turned to full service research to support themselves.



In pandemic-era GRIT reports, we've documented how suppliers from different "big bucket" segments have collaborated in order to provide buyers with single-source solutions or a single point of contact. New relationships formed, cross-pollinating skills and capabilities across partners. Some companies merged, some acquired other companies, and some were acquired. Some skills and capabilities were organic, and some were enabled via relationships, partnering, and sub-

contracting. Particular sets of skills and capabilities have been repackaged and positioned according to how suppliers felt they could best compete. The concept of the "generalist" faded somewhat, and a new era of more specialized service providers dawned. In this era, specialization doesn't mean that you do one thing really well; it means you offer a distinct package of capabilities with a unique value proposition.

A new era of more specialized service providers dawned.



ALL SERVICE OFFERINGS, 22W1 V. 21W1: PROFESSIONAL FOCUS (SUPPLIER)

	22W1 Source of Highest Revenue					Difference 22W1 – 21W1				
	Full service research	Field services	Strategic consulting	Technology	Data & analytics	Full service research	Field services	Strategic consulting	Technology	Data & analytics
n	910	234	293	429	404					
Full service research	93%	68%	68%	60%	53%	+3%	+40%	+11%	+21%	+4%
Strategy/strategic insights	78%	46%	89%	55%	69%	+10%	+32%	+5%	+29%	+32%
Analytical services	64%	53%	62%	53%	72%	+20%	+41%	+27%	+23%	+24%
Online quantitative data collection platform	62%	84%	52%	74%	64%	+40%	+49%	+42%	+17%	+28%
Moderating/interviewing	62%	49%	59%	37%	37%	N/A	N/A	N/A	N/A	N/A
Product development/innovation	59%	34%	66%	49%	45%	+25%	+26%	+31%	+33%	+28%
Access to sample and/or recruit for studies*	57%	92%	47%	69%	54%	+35%	+27%	+37%	+22%	+20%
Brand management/strategy	56%	35%	72%	36%	45%	+15%	+26%	+15%	+24%	+21%
Qualitative data collection (offline)	54%	55%	50%	32%	49%	+22%	+9%	+27%	+15%	+25%
Industry-focused research	53%	47%	53%	43%	49%	+37%	+39%	+42%	+32%	+34%
Quantitative data collection (offline)	52%	65%	41%	35%	48%	+11%	-5%	+16%	-5%	-7%
Basic or advanced analytics platform or tools	51%	50%	47%	60%	59%	+36%	+35%	+36%	-1%	+31%
Online qualitative data collection platform	51%	60%	48%	62%	48%	+29%	+25%	+39%	5%	+12%
Customer or user experience (CX/UX)	50%	39%	57%	39%	37%	+13%	+29%	+20%	+22%	+17%
Marketing communications/advertising/PR	48%	33%	64%	31%	36%	+12%	+21%	+15%	+20%	+16%
Sampling	43%	81%	30%	52%	47%	N/A	N/A	N/A	N/A	N/A

	22W1 Source of Highest Revenue					Difference 22W1 – 21W1				
	Full service research	Field services	Strategic consulting	Technology	Data & analytics	Full service research	Field services	Strategic consulting	Technology	Data & analytics
Secondary or syndicated data*	43%	38%	55%	29%	37%	+33%	+31%	+49%	+23%	+30%
Recruiting/pre-recruiting	42%	68%	33%	38%	27%	N/A	N/A	N/A	N/A	N/A
Data services	42%	76%	38%	47%	66%	+21%	+45%	+26%	+25%	+29%
Research/analysis based on unstructured data	38%	29%	46%	34%	36%	N/A	N/A	N/A	N/A	N/A
Secondary research	32%	27%	49%	11%	20%	N/A	N/A	N/A	N/A	N/A
Online communities (MROC)	31%	36%	26%	35%	19%	N/A	N/A	N/A	N/A	N/A
Platform or tool for collection or analysis of unstructured data	30%	37%	33%	39%	36%	+6%	+15%	+17%	-2%	+5%
DIY surveys	25%	48%	20%	60%	30%	N/A	N/A	N/A	N/A	N/A
Syndicated data and/or reports	22%	20%	21%	24%	25%	N/A	N/A	N/A	N/A	N/A
Platform or tools for nonconscious or passive measurement	18%	20%	17%	17%	8%	-4%	+10%	+1%	+3%	-1%
DIY sample access	17%	52%	11%	39%	25%	N/A	N/A	N/A	N/A	N/A
Applied neuroscience/biometrics	13%	6%	13%	9%	8%	N/A	N/A	N/A	N/A	N/A
Other research or consulting services	6%	1%	13%	6%	4%	+6%	-2%	+11%	+2%	+4%
Average number of services	13.0	13.5	12.8	11.7	11.5	+7.0	+9.2	+7.8	+6.5	+6.4

* Combines two services from 22W1 to approximate one from 21W1. Blue shading indicates consulting services, gray indicates technology, orange indicates field services, and unshaded indicates research services. Green highlighting represents increases of 10% or more, and red represents decreases of 10% or more.

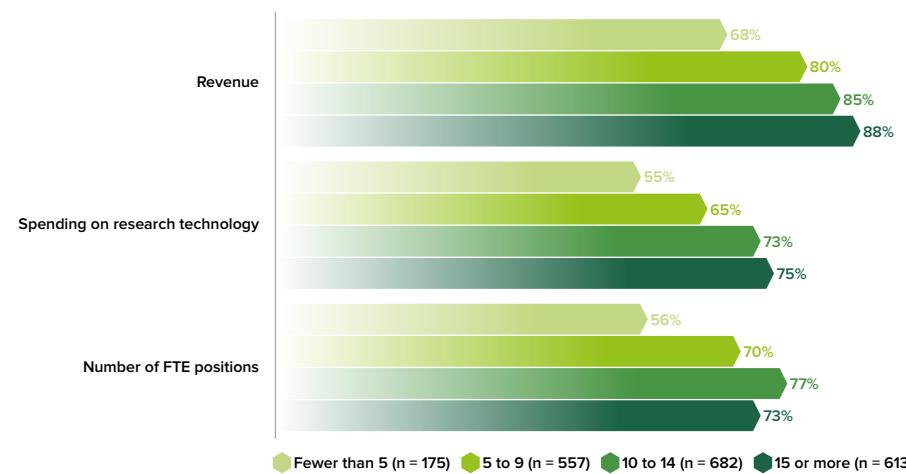
After supplier service portfolios contracted to their cores in response to the pandemic, a new Big Bang was probably inevitable. Portfolios exploded again, creating new constellations of services. GRIT supplier participants split roughly into thirds with respect to numbers of services sold, licensed, or otherwise offered to clients: 37% offer fewer than 10 services, 33% offer 10 to 14 services, and 30% offer 15 or more services. The average GRIT participant works for a supplier that offers about a dozen.

Why offer so many services? Growth. GRIT doesn't ask about total revenue (no one would tell us anyway, at least not honestly), but we ask about revenue trends. Among GRIT participants who work for suppliers who offer 15 or more services, 88% reported a revenue increase over the past 12 months versus just 68% of those working for suppliers who offer fewer than 5 services. Where more services are offered, participants are also more likely to report increases in spending on research technology. For participants, whose companies offer fewer than 5 services, only 55% reported an increase in technology spending and only 56% reported an increase in full-time equivalent positions. When 10 or more services are offered, the numbers exceed 70%.

After supplier service portfolios contracted to their cores in response to the pandemic, a new Big Bang was probably inevitable.



INCREASES IN PAST 12 MONTHS: NUMBER OF SERVICES OFFERED (SUPPLIER)



The pandemic rendered some types of insights work virtually obsolete, constrained monetary and human resources to render some types or volumes of work infeasible, and surfaced new business challenges for which insights solutions were uncharted. These challenges forced insights professionals to look outside of their comfort zones for solutions, form new relationships, and change the way they perceived their own best destinies.



THE BIG PICTURE

The insights and analytics industry continues a restructuring shaped by emerging capabilities and accelerated by unprecedented high-stakes challenges. Corporate insights professionals are refining their roles, their supplier and methodology portfolios, and, most likely, how they relate to colleagues across their companies and organizations. Suppliers are refining how they position themselves, expanding and reformulating their service portfolios, and finding their places in the industry ecosystem.

The pandemic rendered some types of insights work virtually obsolete, constrained monetary and human resources to render some types or volumes of work infeasible, and surfaced new business challenges for which insights solutions were uncharted. These challenges forced insights professionals to look outside of their comfort zones for solutions, form new relationships, and change the way they perceived their own best destinies.

In pre-pandemic days, technology providers and DIY solutions were ascendant, but barriers to adoption were significant. The pandemic changed that formula, and the barriers to adoption became the risks of standing pat. Buyers placed less emphasis on existing relationships and more on reputation and innovation. Many changed how they collaborate with external suppliers, and most external suppliers in each segment regularly worked with technology providers.

Similarly, data and analytics moved to the center stage for suppliers and buyers. Data availability and data quality problems became more acute as the demand for answers increased, creating opportunities for those with relevant skills to reposition themselves or find markets for solutions they had developed. The need to look at new kinds of data increased, bringing experts in those fields into the insights spotlight. Many suppliers of every type added data and analytics capabilities to their portfolios of services.

Perhaps most importantly, the challenges forced new relationships to be formed, resulting in cross-pollination of skills and perspectives within buyer organizations and across supplier segments. Even as more corporate insights groups took on significant roles as strategic insights consultants and VoC, more of them prioritized a more specific role. This evolution was likely enabled by the redistribution of strategic insights and VoC roles across groups such as product development, marketing, and CX/UX, plus cross-pollination with other corporate functions such as analytics.



DATA DEGRADATION FACTORING AS IT RELATES TO RESPONDENT ENGAGEMENT

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One of the bigger issues that we, as a supplier, have been focused on over the past 18 months is respondent engagement. For any of you that have participated in online research webinars or had the pleasure of attending in-person events over the past year and a bit, you have likely seen our series on data degradation as it related to respondent engagement.

The genesis of this research on research came from the occasional, yet somewhat inevitable, conversations that I was having periodically on trend data with clients. Tracking data, in some instances, was simply unreliable, or notably different wave to wave. One of the key criteria noticed in many of these conversations over the years was the placement of the question, well, in question. The issues tended to involve data collected later in the survey. Almost inevitably so.

It has been something that has pulled at me for a long time. It was clear that data collected later in a survey was less accurate, perhaps even less valuable than data collected earlier. "Why?", was the question. Of course, one could increase sample size and rotate or simply stack priorities earlier. I get that, but it doesn't answer the fundamental question of what is going on.

So, we finally decided to tackle it. And what we have found so far has been tremendous. Our process initially has been simple. Respondent engagement is the measurement. Essentially, the time a respondent puts into answering a particular question type is measured at various points in the survey. No, it's not perfect, but compelling enough to lead us somewhere.

CONTINUES ON THE NEXT PAGE

As the buyer world became more integrated and roles became more defined, new supplier relationships created complementary partnerships and new perspectives on differentiated positioning. Suppliers were less inclined than before to describe their positioning in general terms even if they made most of their money from a general service. After a period of contraction, supplier portfolios were strategically rebuilt with a new sense of purpose and destiny.

Overall, perhaps the insights mission is becoming more “networked” across buyer functional areas, and the roles of insights groups are being refined and more focused. Suppliers seem to be more networked than ever, and also refining their roles and identities. While a supplier with a gigantic service portfolio might seem like a “beast,” perhaps it is really a complex, well-oiled machine in which every unique component works in concert with the others to fulfill a greater purpose. Perhaps the industry itself is becoming such a machine. Maybe a network of machines (but not Skynet).

Among GRIT participants who work for suppliers who offer 15 or more services, 88% reported a revenue increase over the past 12 months versus just 68% of those working for suppliers who offer fewer than 5 services.



EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

Spoiler alert, the first three to five minutes, the respondent is completely engaged, answering everything from open ends to rank sorts with effort and thought. Yes, that means there is drop off later and it is significant. Respondent engagement dramatically drops off after the three to five minute range and burns down after that point. Almost a coasting effect.

And no, it's not familiarity bias. This isn't exactly a state secret, but panelists do a lot of surveys and are part of multiple panels. They probably just finished a survey right before the one they are now doing for you. They are already familiar with rank sorts and open ends. From where I sit in the research chain, it's engagement that matters.

What does this all mean to you, the researcher (or maybe the research aficionado)? Well, for one, please do consider stacking your most important data points earlier in the survey. Second, stop with the unnecessary screening questions and please, please stop with warmups. I can't count how many surveys we see where the first 2-3 minutes are taken up with unnecessary screening, ‘warm up’ or ‘gotcha’ questions wasting prime engagement time.

Third, consider removing open ends from later in the survey. Respondents are simply not putting any effort into them as our data shows and anecdotally, we feel it even lessens engagement for all questions by simply asking open ends later in a survey.

Our end game here is simple. We are working with academia (stay tuned) to construct some form of a data degradation factor that you can apply to your research and are working with our clients to help them understand this phenomenon and how it affects their data. We aren't dumping on long surveys; you hear enough about that. What we are saying is that there is a difference in data collected at various points of the survey due to engagement and here is the factor that you can apply to your analysis. We hope to get there soon!

For more, find the data degradation blog at questmindshare.com/blog and of course, I'm happy to chat and answer any questions as we continue down our road to understanding respondent engagement.



EVOLVING INSIGHTS AUDIENCE WHO COLLABORATES ON, USES, OR DECIDES ON INSIGHTS WORK?

On the eve of the pandemic, when GRIT first began tracking the breadth of the insights audience and which members engaged in selecting methodologies and partners, we found that insights work involves many functional areas within a corporation, some actively and some passively. Since the pandemic hit, we've found this to be one of the few areas that have been resistant to change.

OVERVIEW

On the eve of the pandemic in 2020, GRIT found that the audience for insights typically includes marketing, analytics, the executive team, product management, R&D, operations, finance, and the insights group. Also, up to eight functional areas could be considered to influence the selection of insights methodologies and partners. Although some particulars differ, suppliers pretty much agreed with the buyer perspective.

Then, the pandemic hit, and nothing much changed. The audience for insights didn't contract, even if resources did. The audience for insights didn't expand because it already included almost everyone. Buyers didn't replace decision-makers with some kind of financial controllers. Everything else changed, but the audience remained riveted.

In this section, we review engagement with insights across eleven functional areas and also which ones engage in the selection of insights methodologies and partners. We discuss these from the buyer perspective and from the perspective of our supplier segments.

BUYER PERSPECTIVE

The most engaged insights audience – those who develop new insights from deliverables or collaborate from the start – are clearly marketing (83%) and the insights group (81%). In addition, majorities within analytics (68%), product management (62%), R&D (57%), and the executive team (52%) also are involved in the insight generation process. Further, a majority of buyer participants say that operations (59%) is also an end user of insights, and more than one-third say finance (48%), human resources (34%), and procurement/compliance (33%) are also in the loop. Clearly, corporate insights professionals serve an audience that is broad and diverse at the same time.

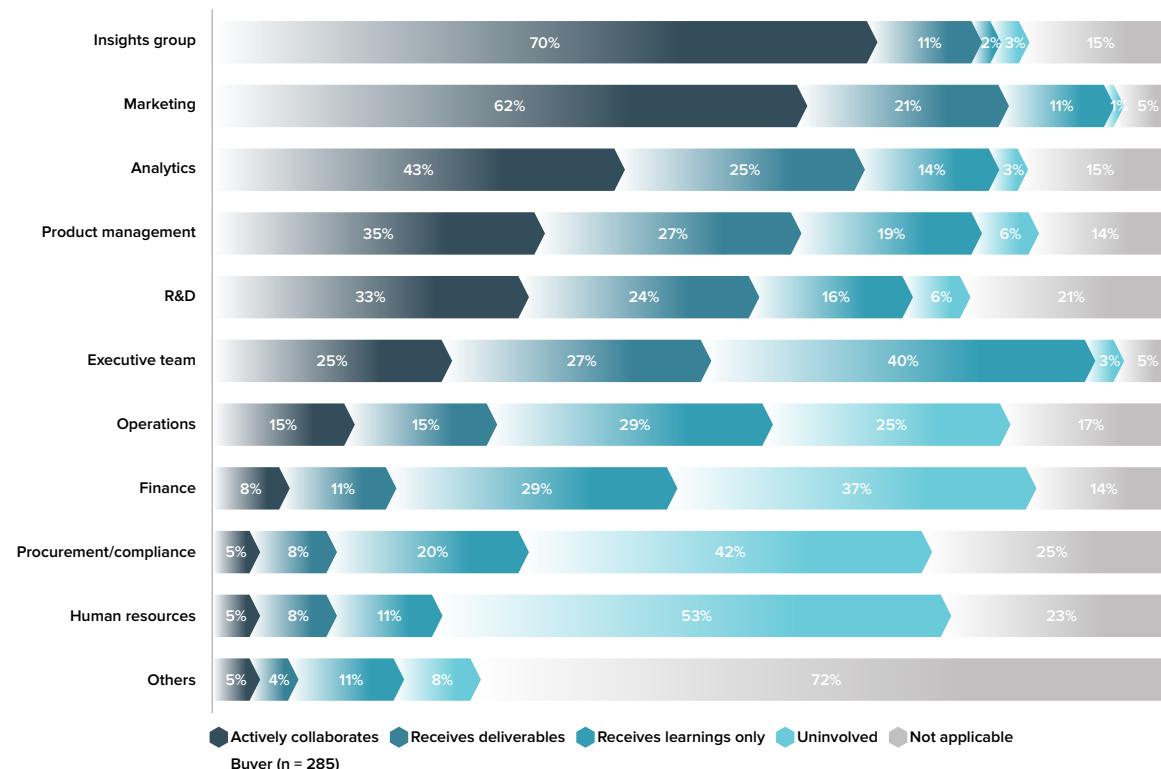
Most buyers say that an insights group (70%) or marketing (62%) – and likely both – are the main progenitors of insights, active collaborators who influence the deliverables from the start. As such, a typical supplier is likely to work with those two functions first, or at least early in the process. Still, up to 15% of buyer participants indicate that they might not have an insights group at all, and that means that the stats favor the insights group's involvement even more when they are present, but also means that some buyers have an entirely different structure in which this group is not a factor.

On average, insights deliverables have a circulation of 6.9 functional areas, and perhaps each area has a different set of needs and expectations for them. Questions that every insights professional and every insights supplier should ask are:

- What influence does each area have over the future of insights work at this company?
- How satisfied are they with our deliverables?
- How delighted could they be with them?
- How helpful could they be in advancing our cause?

Any additional questions about insights effectiveness or business outcomes are moot if you know the answers to these questions. How could any functional area be satisfied or delighted with insights deliverables if those deliverables fail to help advance its agenda?

BEST DESCRIBES ENGAGEMENT WITH INSIGHTS/DELIVERABLES (BUYER)



How could any functional area be satisfied or delighted with insights deliverables if they fail to help advance its agenda?



On average, engagement with deliverables across functional areas has not changed since we began measuring it just before the pandemic. Insights groups and marketing are still the most likely collaborators, and analytics, the executive team, product management, and R&D are good bets to take the output of a research effort and develop their own insights. Operations and, sometimes, finance are likely to be interested in the findings. If you look at the accompanying chart, finance is right on the 50% border of remaining in the "learnings" group, even though it fell out of that category in 22W1.

Overall, insights work affects many parts of a company. While we can't argue from this data that the audience is expanding, it was already very widespread when we began to measure it, and not even the pandemic has diminished its reach.

BEST DESCRIBES ENGAGEMENT WITH INSIGHTS/DELIVERABLES (BUYER)

	20W1	21W1	22W1
Insights group	N/A	Collaborator	Collaborator
Marketing	Collaborator	Collaborator	Collaborator
Analytics	Deliverables	Deliverables	Deliverables
Executive team	Deliverables	Deliverables	Deliverables
Product management	Deliverables	Deliverables	Deliverables
R&D	Deliverables	Deliverables	Deliverables
Operations	Learnings	Learnings	Learnings
Finance	Learnings	Learnings	Uninvolved
Human resources	Uninvolved	Uninvolved	Uninvolved
Procurement/compliance	Uninvolved	Uninvolved	Uninvolved

Insights group was not part of this battery in 20W1.



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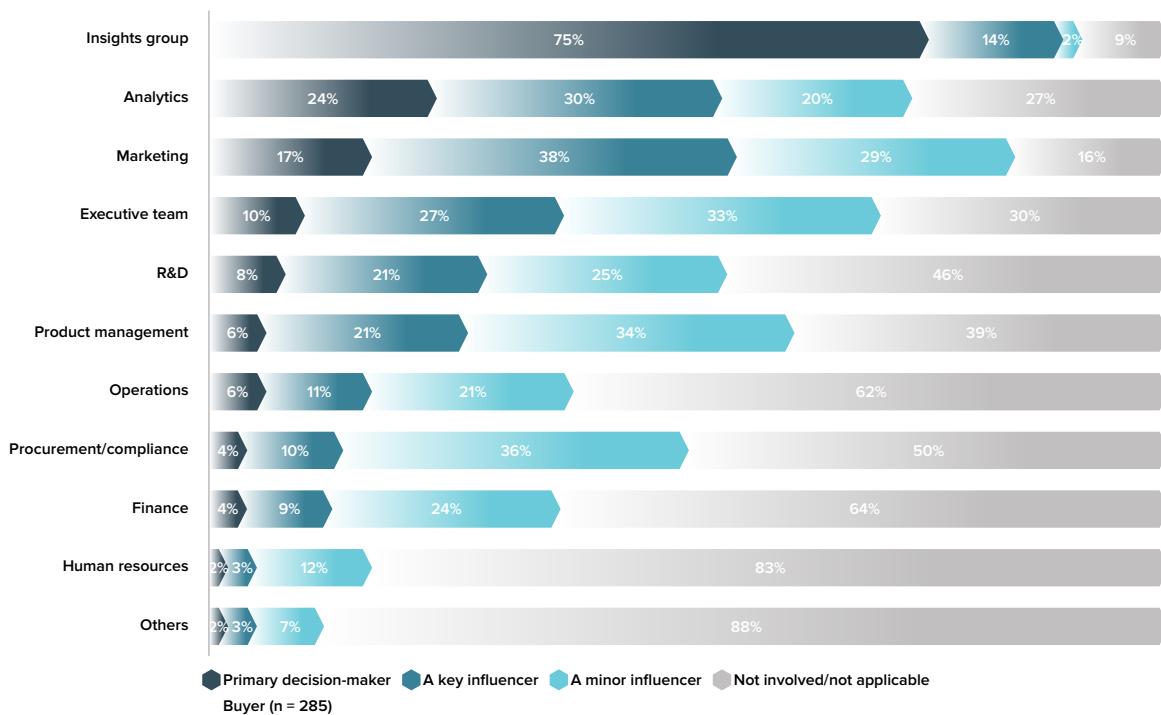
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When it comes to deciding how insights work gets done and who gets hired to do it, insights groups are basically the final judge. Three-quarters of GRIT buyer participants named them as a primary decision-maker (75%), and 89% say they are at least a key influencer. Only one-quarter say that analytics (24%) is the primary decision-maker while only 17% say the same of marketing. We suspect that analytics groups may tend to do a more unique kind of insights work that requires different inputs and processes which grants them a measure of independence from mainstream insights.

BEST DESCRIBES ROLE IN SELECTING METHODOLOGIES/PARTNERS (BUYER)



Similar to how different groups engage with insights, not much has changed regarding decision-making roles, even once the pandemic started. Unlike engagement, decision-making is more strongly concentrated within the insights group, and the strongest influence is concentrated within marketing and analytics. The executive team, product management, R&D, and procurement are perennial influencers, but to a lesser degree, on average. We believe that although their influence averages out to be “minor,” they can be very influential when they are involved.

BEST DESCRIBES ROLE IN SELECTING METHODOLOGIES/PARTNERS, 20W1 TO 22W1 (BUYER)

	20W1	21W1	22W1
Insights group	Decision-maker	Decision-maker	Decision-maker
Marketing	Key Influencer	Key Influencer	Key Influencer
Analytics	Key Influencer	Key Influencer	Key Influencer
Executive team	Minor Influencer	Minor Influencer	Minor Influencer
Product management	Minor Influencer	Minor Influencer	Minor Influencer
R&D	Minor Influencer	Minor Influencer	Minor Influencer
Procurement/compliance	Minor Influencer	Minor Influencer	Minor Influencer
Operations	Minor Influencer	Uninvolved/NA	Uninvolved/NA
Finance	Uninvolved/NA	Uninvolved/NA	Uninvolved/NA
Human resources	Uninvolved/NA	Uninvolved/NA	Uninvolved/NA
Others	Uninvolved/NA	Uninvolved/NA	Uninvolved/NA

Unlike engagement, decision-making is more strongly concentrated within the insights group, and the strongest influence is concentrated within marketing and analytics.



SUPPLIER PERSPECTIVE

The supplier view of their insights audiences differs somewhat from the buyer view and across differ supplier segments. Across full service research, strategic consulting, technology, and data and analytics, the most engaged buyers are the insights group and analytics (we do not ask suppliers to try to distinguish between those who generate insights from their deliverables versus those who actively collaborate). Technology providers and strategic consultancies have more diverse audiences. In addition to insights groups and analytics, technology providers experience more engagement from marketing and product management, and strategic consultancies experience more from marketing and the executive team.

In cases in which they are not perceived to be involved with developing insights, analytics, marketing, the executive team, and product management are at least in the audience. R&D is also a recipient of insights deliverables from suppliers, and so is operations, except from the full service research perspective. Finance, human resources, and procurement/compliance, generally speaking, are not considered part of the audience.

Field services providers are unique because they are the only segment that does not see analytics as a party that develops insights from deliverables, although they know analytics is in the audience. These providers have a unique view because they might have the least insight into how their work is actually used. Their deliverables arrive in a more raw state than would deliverables from other suppliers and would be less likely to include a report or a tool that would be shared.

BEST DESCRIBES ENGAGEMENT WITH INSIGHTS/DELIVERABLES (SUPPLIER)

	Full service research	Field services	Strategic consulting	Technology	Data & analytics
Insights group	Deliverables	Deliverables	Deliverables	Deliverables	Deliverables
Analytics	Deliverables	Learnings	Deliverables	Deliverables	Deliverables
Marketing	Learnings	Learnings	Deliverables	Deliverables	Learnings
Executive team	Learnings	Learnings	Deliverables	Learnings	Learnings
Product management	Learnings	Learnings	Learnings	Deliverables	Learnings
R&D	Learnings	Learnings	Learnings	Learnings	Learnings
Operations	Uninvolved	Learnings	Learnings	Learnings	Learnings
Finance	Uninvolved	Uninvolved	Uninvolved	Uninvolved	Uninvolved
Human resources	Uninvolved	Uninvolved	Uninvolved	Uninvolved	Uninvolved
Procurement/compliance	Uninvolved	Uninvolved	Uninvolved	Uninvolved	Uninvolved

From the perspective of full service research providers, insights groups (74%) and analytics (53%) are the most highly engaged, followed by marketing (49%), the executive team (40%), and product management (38%). Their typical audience includes these functional areas plus R&D (63%), and operations (49%) is just outside of that set.

Buyer participants in GRIT see the insights group as the consensus gatekeepers for methodologies and partners, but supplier participants see a somewhat more complicated selection process that can differ from service area to service area. The insights group is seen as the primary decision-maker for full service research, strategic consulting, and technology, but field services and data and analytics lack a consensus primary decision-maker.

The supplier view of their insights audiences differs somewhat from the buyer view and across differ supplier segments.



Perhaps full service research, strategic insights consulting, and technology projects and initiatives need to be coordinated across multiple internal groups, so it makes sense to appoint an expert to solicit input from all parties and make the best decision for the company. Perhaps field services and data and analytics projects are likely to address more tactical issues for independent functional areas that purchase these services directly. If decision-making responsibility is distributed widely across different functional areas for different projects, no functional area could be considered the typical decision-maker on average.

A similar concept applies to decision influencers. For example, the executive team is considered to be a key influencer by every supplier segment, but never the consensus decision-maker. In all likelihood, there are many situations for which they are the primary decision-maker, but there is not enough commonality across buyers to be able to characterize it as typical.

Each supplier segment considers analytics and the executive team to be typical key influencers in the selection of methodologies and partners for insights work. All segments except field services also characterize marketing as a key influencer, but field services characterizes it as minor. Human resources is typically characterized as uninvolved by every segment, but all other functional areas are typically considered to be minor influencers except in four cases.

Field services, who likely have multiple points of entry into a buyer organization, characterize product management and operations as key influencers. Technology providers characterize R&D as a key influencer, and data and analytics providers say the same about product management. GRIT buyer and supplier participants agree that human resources is not involved in selection but differ with respect to finance and operations. Buyers say these areas are not involved, but suppliers say they have minor influence.

BEST DESCRIBES ROLE IN SELECTING METHODOLOGIES/PARTNERS (SUPPLIER)

	Full service research	Field services	Strategic consulting	Technology	Data & analytics
Insights group	Decision-maker	Key Influencer	Decision-maker	Decision-maker	Key Influencer
Analytics	Key Influencer	Key Influencer	Key Influencer	Key Influencer	Key Influencer
Executive team	Key Influencer	Key Influencer	Key Influencer	Key Influencer	Key Influencer
Marketing	Key Influencer	Minor Influencer	Key Influencer	Key Influencer	Key Influencer
Product management	Minor Influencer	Key Influencer	Minor Influencer	Minor Influencer	Key Influencer
Operations	Minor Influencer	Key Influencer	Minor Influencer	Minor Influencer	Minor Influencer
R&D	Minor Influencer	Minor Influencer	Minor Influencer	Key Influencer	Minor Influencer
Finance	Minor Influencer	Minor Influencer	Minor Influencer	Minor Influencer	Minor Influencer
Procurement/compliance	Minor Influencer	Minor Influencer	Minor Influencer	Minor Influencer	Minor Influencer
Human resources	Uninvolved/NA	Uninvolved/NA	Uninvolved/NA	Uninvolved/NA	Uninvolved/NA



The executive team is considered to be a key influencer by every supplier segment, but never the consensus decision-maker. In all likelihood, there are many situations for which they are the primary decision-maker, but there is not enough commonality across buyers to be able to characterize it as typical.

THE BIG PICTURE

The pandemic changed many things, but it didn't curb the corporate-wide appetite for insights or who can influence insights methodology and partner selection. The audience for insights typically includes the insights group, marketing, analytics, the executive team, product management, R&D, and operations. The insights group and marketing typically actively collaborate throughout the process, and analytics, the executive team, product management, and R&D are typically involved in developing insights from the deliverables.

The insights group remains the primary gatekeeper for selecting methodologies and partners, and marketing and analytics continue to have a key influence. Several areas also influence these decisions, and their level of influence likely varies from buyer to buyer. Each audience member has some influence, except for operations, and procurement is the only influencer that is not also part of the typical audience.

Suppliers concur regarding who is in the insights audience, but they see a broader range of decision influencers from their vantage, adding finance and operations to the list of influencers. There are some nuances from supplier segment to supplier segment, and they suggest a hypothesis.

The pandemic changed many things, but it didn't curb the corporate-wide appetite for insights.



EXPERT COMMENTARY



DELIVERING INSIGHTS THAT DRIVE ORGANIZATION-WIDE ACTION

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While the pandemic drove insights professionals to respond to many rapid changes, one thing has remained consistent: the vast, organization-wide audience for insights.

According to the GRIT 2022 Business & Innovation Report, insights deliverables have a circulation of approximately seven functional areas. Insights and Marketing groups are typically collaborators in generating deliverables, and the executive team, Analytics, Product Management, and R&D departments are the groups that most frequently receive deliverables and use them to guide their decision-making. Additionally, Operations and sometimes Finance departments may receive learnings from insights deliverables and apply them.

The GRIT Report describes the audience for insights as broad and influential, and the authors emphasize the importance of ensuring each stakeholder group "is happy with the deliverables because dissatisfaction could have unforeseen consequences down the road."

The consequences of dissatisfaction with insights may include audience disengagement, decreased trust in future deliverables, and—most significant of all—a decrease in using insights and data to drive business decisions.

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Full service research suppliers, strategic consultancies, and technology providers see the insights group as the primary decision-maker, but field services and data and analytics suppliers see them as one of several key influencers. We suspect that multiple functional areas outside of insights, analytics, and marketing buy field and data and analytics services directly, and this has the effect of distributing primary decision-making responsibility across multiple areas, from the supplier perspective. We also suspect that multiple functional areas would like to buy technology services directly but must go through a corporate gatekeeper to ensure consistency across the organization. There is probably not as much de-centralized demand for full service research and strategic insights consulting as there is for services from the specialist segments. As a result of these factors, decision-making for full service research, strategic insights consulting, and technology are more centralized than decisions for field services and data analytics.

Regardless, the audience for insights is broad and its influence is deep. It behooves both buyer and supplier insights professionals to make sure each party is happy with the deliverables because dissatisfaction could have unforeseen consequences down the road.

The audience for insights is broad and its influence is deep. It behooves both buyers and suppliers to make sure each party is happy.



EXPERT COMMENTARY

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So how do you avoid dissatisfaction? The key is to eliminate friction for your audiences. All stakeholder groups should be able to easily access insights, understand key takeaways and next steps, and trust that the information is up to date.

At Bloomfire, we have seen our customers eliminate friction by centralizing insights in a platform that all stakeholders can access and packaging deliverables in digestible formats that their busy stakeholders can easily consume. In some cases, insights teams will tailor different key takeaways for different stakeholder groups, ensuring their audience members can quickly understand the impact on their business area and get clear recommendations and next steps.

We have also heard from some of our buyer-side customers that they have reduced friction by providing educational resources for stakeholders who don't have a background in market research or data analysis. They may lead training sessions on data literacy and market research basics or use their knowledge management platform to publish self-serve resources on insights and research topics.

Ultimately, insights professionals on both the buyer- and supplier-side must keep their different audiences in mind as they package and deliver insights—and consider that different formats and takeaways may behoove different audience segments. By speaking to each of these audiences, insights professionals can increase the influence of their work and promote organization-wide insights usage and action.



ORGANIZATIONAL SUCCESS FACTORS WHAT STRATEGIES LEAD TO SUCCESS FOR BUYERS AND SUPPLIERS?

After a pandemic-driven period of retrenchment, corporate insights professionals are emerging with more refined roles, and insights suppliers are rebuilding their service portfolios and skill sets to support new visions. Increased networking across buyers and different types of suppliers seems to have opened many eyes and many doors, and buyers and suppliers alike are reformulating their strategies for outsourcing, hiring, and automating.

OVERVIEW

As the pandemic and its consequences unfolded, GRIT described an initial retrenchment across the industry as corporate insights organizations and suppliers tried to assess their positions and chart new courses, while at the same time bailing water as quickly as possible to try to keep their ships afloat.

For many buyers, this meant hiring full service suppliers as a sort of general contractor to manage projects end-to-end and hire the necessary specialists. This would enable them to spend more time working on the business and to function more effectively with reduced and compromised staff. For many suppliers, this meant cutting back on their own services, focusing their staff on core skill sets, and collaborating with other suppliers who offered complementary capabilities.

Now, buyers and suppliers seem to have a much better sense of their own identities, capabilities, and opportunities. Buyers are balancing outsourcing, hiring, automation, and skill set priorities as they grow into their new or revised roles. Suppliers are rebuilding skill sets and service portfolios with much deliberation, partly through organic growth, partly through acquisition, and partly through partnering and acquisition. It seems as though insights organizations of all kinds have seen a light illuminating their opportunities and are following it, at least until the next world-altering crisis.

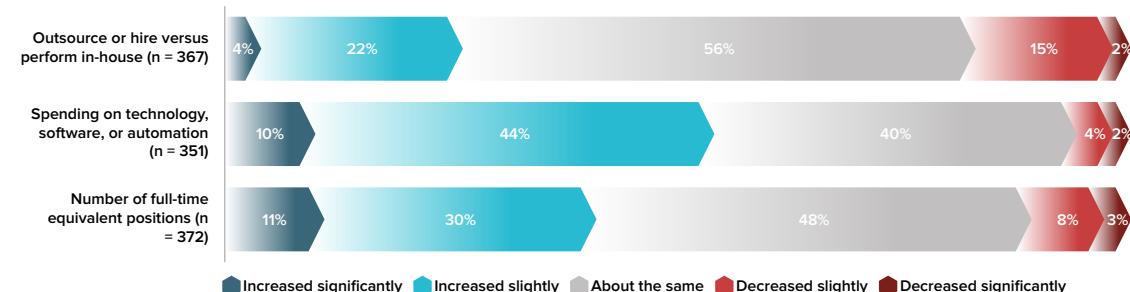
HIRING OR OUTSOURCING: BUYER PERSPECTIVE

When architecting its strategy, an insights group must not only decide what kinds of work it will do but also how that work will get done. To handle a certain amount of work, it needs to find the right balance of in-house staff, automation, and outsourced services. We can glean insight into this formula by looking at recent trends in staff size, technology spending, and outsourcing.

More GRIT buyer participants say they increased technology spending (54%), outsourcing (26%), and FTE staff (41%) in the past year than say they decreased. As we usually see, technology spending decreases (6%) pale in comparison to increases. Outsourcing also increased over the past year: in our first time asking about outsourcing trends, 26% of GRIT buyer participants report an increase compared to only 17% who report a decrease. In five of the last six GRIT waves, the number of GRIT buyer participants that reported a staff increase very nearly matched the number who reported a decrease, but increases currently outpace decreases by a wide margin (41% to 11%). While there may be cases of automation replacing staff, staff reclaiming supplier work, and supplier work offsetting staff losses, insights organizations might find success by increasing all three. (For more detail see the Employment Trends and Business Outlook sections of this report).

For example, when outsourcing to external suppliers increased, half of GRIT buyer participants also increased staff size. When it decreased, only 34% increased staff size. Conversely, decreases in staff size were more than four times as likely when outsourcing decreased than when it increased. If anything, greater outsourcing is more strongly related to increasing staff size than it is to reducing it. It is also related to greater tech spending as 68% of those who increased outsourcing also increased tech spend.

TRENDS IN OUTSOURCING, TECH SPEND, AND STAFF SIZE (BUYER)



When outsourcing to external suppliers increased, half of GRIT buyer participants also increased staff size.



TRENDS IN TECH SPEND AND STAFF SIZE: OUTSOURCING TREND (BUYER)

	Increased	About same	Decreased
Spending on technology, software, or automation	(n = 96)	(n = 194)	(n = 55)
Increased	68%	49%	48%
Stayed about the same	28%	46%	39%
Decreased	4%	5%	14%
Number of full-time equivalent positions	(n = 96)	(n = 208)	(n = 55)
Increased	50%	40%	34%
Stayed about the same	46%	49%	47%
Decreased	4%	11%	19%

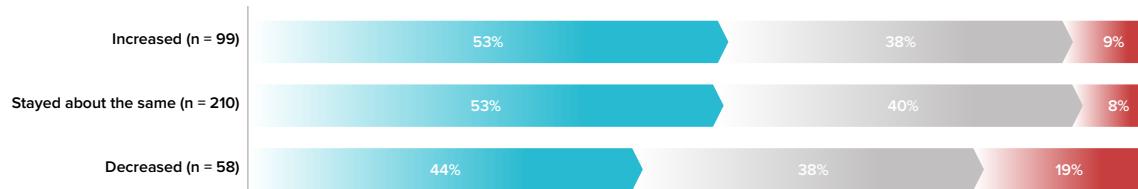
We suspect that it is the condition of insights groups to have more projects that *should* get done than projects that *can* get done, and that it is the destiny of successful insights groups to see this gap continually widen. When we look at the most successful insights organizations, we see support for this view. Most insights groups that increase outsourcing also exceed their goals (53%) while fewer who decrease outsourcing do so (44%). Only 9% of those who increased outsourcing fell short of their goals while 19% of those who decreased fell short.

When staff size increases, 55% exceed goals compared to only 38% of those who decrease staff, and twice as many (18%) who decreased staff size fell short of goals compared to those who increased it (9%). Similar relationships hold true for technology spending, but so few buyers decrease tech spending that it is difficult to make the same comparison.

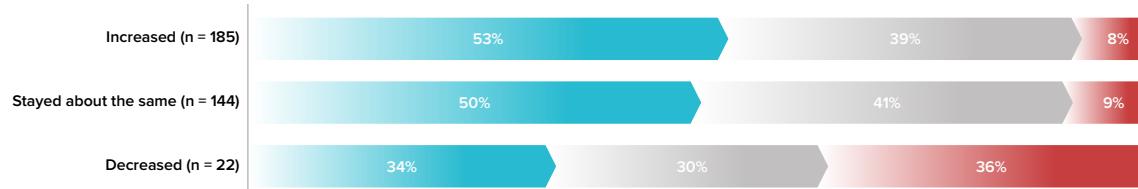
Of course, this is a chicken-and-egg problem because success could lead to more spending rather than result from increased investment, but that also might be the point. Generally speaking, if buyers have the money to spend, they will aggressively attack their project backlogs by hiring more people to do certain tasks, by outsourcing to suppliers to better leverage their staff, and by automating processes to increase their throughput. This can lead to greater success for the insights group, leading to greater confidence and investment, and greater success for the business, leading to growth and new areas to explore. Chicken-egg-chicken-and so on.

PERFORMANCE V. GOALS: TRENDS IN OUTSOURCING, TECH SPEND, AND STAFF SIZE (BUYER)

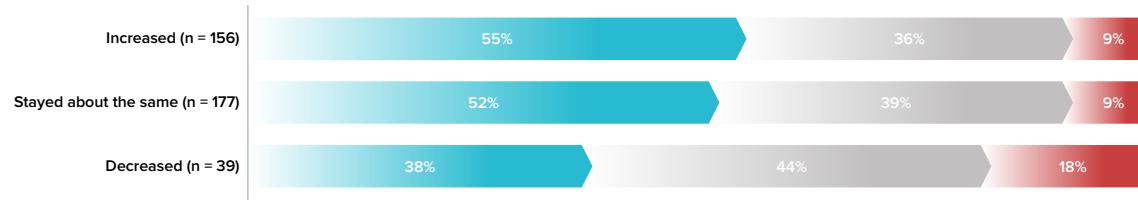
Outsource or hire versus perform in-house



Spending on technology, software, or automation



Number of full-time equivalent positions



◆ Exceeded goals ◇ Met goals ■ Fell short of goals

A successful outsourcing strategy depends on the portfolio of suppliers you work with: who is in it and how often you work with them. In every insights solar system, buyers are the star, go-to suppliers are like planets that orbit with regularity, and occasional suppliers are like meteors, drawn by gravity from time to time but with positive instead of negative impact. For each of our “big bucket” supplier types plus qualitative researchers, GRIT asks buyers which they work with regularly, occasionally, rarely, or never.

Technology dipped in the first year of the pandemic, but has been coming back steadily since.



The trends in regular use of supplier types follows the trends of supplier segment sizes discussed in the Industry Structure section of this report. Full and/or field service (they were combined in 20W1) soared in 21W1 and strategic consultancies plunged as many suppliers formerly classified as strategic consultancies likely saw their revenue opportunities shift more decisively to full service research. Technology dipped in the first year of the pandemic as buyers retrenched while they figured out strategy, but has been coming back steadily since. Data and analytics have dropped since 20W1, possibly due to competitive pressure from buyers who turned to in-house services as the pandemic unfolded plus full service research suppliers that added these capabilities.

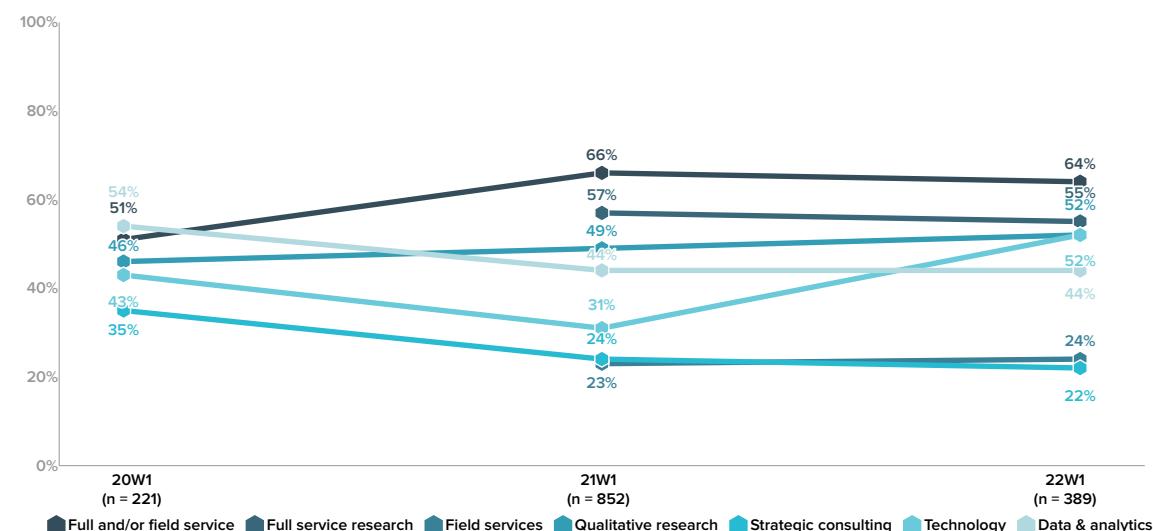
Qualitative researchers, which is not one of the “big bucket” segments we track in-depth, have risen somewhat in terms of regular use. At the same time as the pandemic made it nearly impossible to conduct in-person work, it also made it more necessary to conduct focus groups and IDIs because a new set of unprecedented marketing issues emerged which lacked even the beginnings of a playbook.

Even though regular use of some types increased and others dropped, overall usage was pretty much the same for each type. Field services increased, as did qualitative research, ultimately, and technology, after a dive. If GRIT had not combined field services with full service research in 20W1, the latter might have looked similar to how it looks today. The decline in the number of strategic consultancy participants parallels the decline in buyers who work with them regularly, but aggregate usage has not changed.

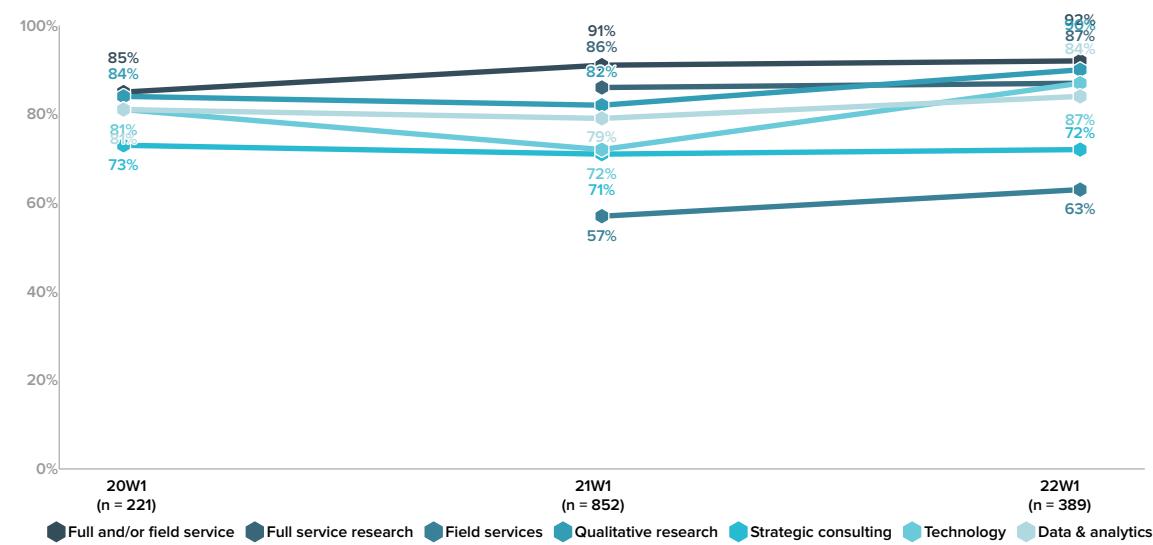
The decline in the number of strategic consultancy participants parallels the decline in buyers who work with them regularly.



REGULARLY WORK WITH TYPE OF SUPPLIER: GRIT WAVE (BUYER)



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



HIRING OR OUTSOURCING: SUPPLIER PERSPECTIVE

Success drives spending, supplier revenue equates to success, and suppliers who don't earn revenue don't last through very many waves of GRIT. Aside from the first GRIT wave of the pandemic when practically everyone suffered but many persevered, suppliers who increase revenue always far outnumber those who report decreases. Consequently, if revenue is growing in every segment, technology spending and staff size increases will far outpace decreases in each. As a general dynamic, it seems that when a supplier's business surges, they turn to outsourcing to meet the demand. If the surge becomes permanent, they hire more, outsource less, and continue to invest in technology.

Perhaps unsurprisingly, technology spend increases are strongest in the technology and data and analytics segments where significant increases are reported by 39% and 34% of GRIT participants, respectively. It's weakest among strategy consultancies where only 15% report significant increases, but overall increases still outnumber decreases 56% to 5% in that segment.

Reports of significant increases in FTE staff size are highest in technology (54%), data and analytics (45%), and full service research (40%), and lowest in field services (34%) and strategy consultancies (28%). Despite differences across segments, the weakest ratio of staff size increases to decreases was the 61% to 7% reported by strategic consultancy participants. Across segments, spending on technology and staff is strong, and this supports the idea that the two will only be in conflict when the backlog of insights projects has been eliminated. In other words, never.

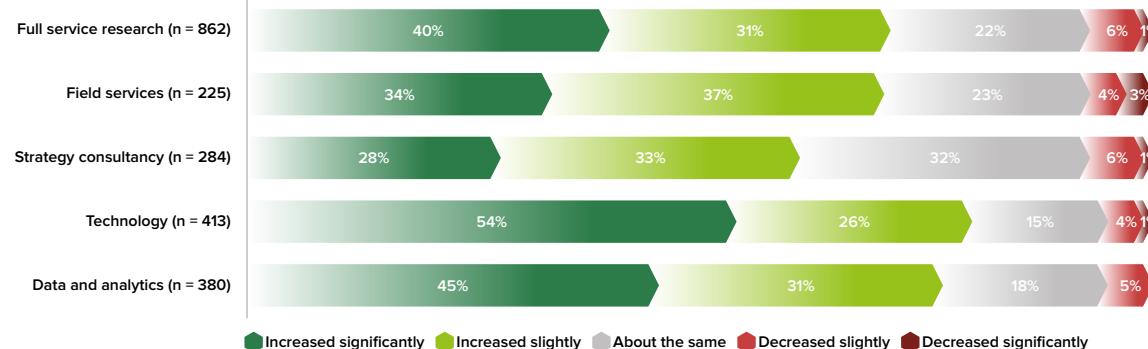
TRENDS IN TECHNOLOGY SPENDING: PROFESSIONAL FOCUS (SUPPLIER)



Reports of significant increases in FTE staff size are highest in technology, data and analytics, and full service research.



TRENDS IN STAFF SIZE: PROFESSIONAL FOCUS (SUPPLIER)

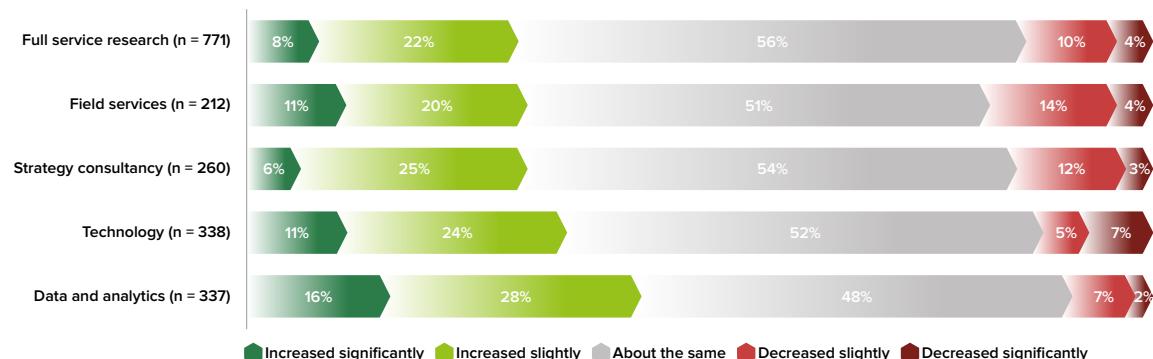


Trends in outsourcing to other suppliers show increases outnumbering decreases in every segment, though each segment is best characterized as unchanged. The strongest increases are among two specialist segments, technology (35%) and data and analytics (44%) providers, among whom outsourcing decreased by only 12% and 9% respectively. As specialist segments may not typically be involved from end to end on projects, their service lines tend to be narrower, and this means they would have to outsource in order to augment their offerings or conduct research for themselves.

The other specialist segment, field services, has a weaker ratio of increases (31%) to decreases (28%), which looks more similar to the generalist segments, full service research (30% to 14%) and strategic consultancies (31% to 15%). Field services may be more of a true niche than either technology or data and analytics and have less grand designs on expansion into other segments, and the same may be true of strategic consultancies, a segment that has recently contracted to its core.

We might expect full service research providers to weigh in more heavily on the side of increased outsourcing, but a couple of factors may work against that idea. First, full service research providers likely were already doing a high level of outsourcing in order to complete their end-to-end offerings, so they may be doing more of it than other segments even without increasing it. Second, the largest full service research providers likely realize that the services they outsource most frequently might be more cost-effective and profitable if they took them in-house instead of paying someone else to do them and either acquired this expertise or developed it themselves. Nonetheless, full service suppliers overall seem to be increasing their outsourcing just not as much as other segments.

TRENDS IN OUTSOURCING TO EXTERNAL SUPPLIERS: PROFESSIONAL FOCUS (SUPPLIER)



Trends in outsourcing to other suppliers show increases outnumbering decreases in every segment.



However, when outsourcing increases, the percentage of participants who pay for the majority of insights-related tools and services drops from 30% to 26% for full service research, from 29% to 24% for field services, from 23% to 13% for technology, and from 30% to 23% for data and analytics. The steeper drops for two specialist supplier types, technology and data, and analytics, might suggest that outsourcing results from winning projects that are outside their more limited scope of expertise. Although we also consider field services providers to be specialists, we suspect that their drop is not as steep because they may not be as inclined to sell projects that are as far removed from their core expertise. Full service providers probably already have a high degree of outsourcing, so increases in outsourcing would not change the percentage of pass-through as much as for others.

For strategic consultancy participants, the percentage who pay for most of their services and tools themselves does not change when outsourcing increases, but it is also the lowest percentage of any supplier type in either case. This suggests that there are more opportunities for full service research, field services, technology, and data and analytics providers to buy insights-related services and tools than as pure investments in their own capabilities than there are for strategic consultancies. If so, it is consistent with the idea that the contraction of the strategic consultancy segment since the start of the pandemic is related to an exodus of research providers, and those remaining do not need to invest as much in insights-related tools and services unless there is a client to cover the expense.

Full service providers probably already have a high degree of outsourcing, so increases would not change the percentage of pass-through as much as for others.



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PASS-THROUGH EXPENSES: OUTSOURCING TRENDS (SUPPLIER)

	Increased	Did not increase
Full service research	(n = 230)	(n = 477)
All or most passed-through	64%	56%
About half and half	9%	14%
All or most out of own budget	26%	30%
Field services	(n = 70)	(n = 127)
All or most passed-through	63%	57%
About half and half	13%	14%
All or most out of own budget	24%	29%
Strategic consultancy	(n = 87)	(n = 165)
All or most passed-through	60%	70%
About half and half	21%	11%
All or most out of own budget	19%	19%
Technology	(n = 108)	(n = 177)
All or most passed-through	78%	69%
About half and half	9%	7%
All or most out of own budget	13%	23%
Data and analytics	(n = 143)	(n = 150)
All or most passed-through	66%	57%
About half and half	11%	13%
All or most out of own budget	23%	30%

For the first time, GRIT asked suppliers how often they work with each supplier type. We do not distinguish between partnerships, outsourcing on behalf of clients, hiring them for their own work, or being hired for someone else's because that would likely take an entire survey in itself. However, we believe this simple question sheds light on the extent to which different types of suppliers interact with each other type, and also how much they work with others who perform a similar type of work.

Considering any combination of supplier types that work together, either regularly or occasionally, we find that a majority of each segment work with every other type of supplier, from a low of 52% (full service research providers working with others of their type) to a high of 92% (strategic consultancies working with technology providers).

On average, field services providers work with the most different types (4.8), and strategic consultancies (4.6) work with nearly as many. It seems likely that many more suppliers need to collect data than can afford to source 100% of it in-house, and strategic consultancies are least likely to have any of the other segment's resources in-house. These situations contribute to field services providers being the universal insights donorâ€'or supplier.

Perhaps surprisingly, the percentage of participants in each segment who work with qualitative research providers only ranges within a narrow band from 68% (technology) to 79% (strategic consultancy, field services). Perhaps every business that has customers, regardless of what that business is, realizes that they need to talk with some of them from time to time.

Even within a specialist segment, offerings are different enough to make collaboration fruitful.



Field services (72%) are the segment most likely to work with strategic consultancies, followed by other strategic consultancies (66%), data and analytics (65%), and technology providers (63%). Full service research providers (57%) are least likely to work with strategic consultancies, and many of them provide their own strategic insights consulting as a service.

In each segment, at least 85% work with technology providers, and at least 74% work with data and analytics providers at least occasionally. About 80% of strategic consultancies (82%), other data and analytics providers (81%), field service providers (80%), and technology providers (79%) work with data and analytics providers. Full service research suppliers, many of whom offer data and analytics services, are somewhat less likely to work with them (74%).

The least likely pairings are generalists with generalists. Only 18% of participants from full service research providers work regularly with strategic consultancies, and only 33% of participants from strategic consultancies work regularly with full service research providers. It makes sense that the most significant pairings include at least one specialist. Even within a specialist segment, offerings are different enough to make collaboration fruitful.

We can see that there is a lot of cross-pollination, as we termed it in the Industry Structure section, across suppliers and supplier types. It should be no surprise, then, that we see so many suppliers within each type offering more services associated with specialists and fewer associating themselves with general services.

REGULARLY OR OCCASIONALLY WORK WITH TYPE OF SUPPLIER: PROFESSIONAL FOCUS (SUPPLIER)

	Full service research (n = 910)	Field services (n = 234)	Strategic consulting (n = 293)	Technology (n = 429)	Data & analytics (n = 404)
Full service research	52%	78%	58%	62%	70%
Field services	88%	87%	85%	73%	74%
Qualitative research	74%	79%	79%	68%	74%
Strategic consultancy	57%	72%	66%	63%	65%
Technology	89%	85%	92%	88%	88%
Data and analytics	74%	80%	82%	79%	81%
Average number work with regularly or occasionally	4.3	4.8	4.6	4.3	4.5

It makes sense that the most significant pairings include at least one specialist. Even within a specialist segment, offerings are different enough to make collaboration fruitful.



REGULARLY WORK WITH TYPE OF SUPPLIER: PROFESSIONAL FOCUS (SUPPLIER)

	Full service research (n = 910)	Field services (n = 234)	Strategic consulting (n = 293)	Technology (n = 429)	Data & analytics (n = 404)
Full service research	34%	50%	33%	32%	32%
Field services	67%	65%	56%	37%	45%
Qualitative research	41%	42%	45%	38%	34%
Strategic consultancy	17%	33%	30%	23%	27%
Technology	58%	52%	60%	70%	59%
Data and analytics	36%	38%	41%	42%	54%
Average number work with regularly	2.5	2.8	2.7	2.4	2.5

SUPPLIER STRATEGIES

To understand supplier strategies, GRIT presents a list of eleven strategies and initiatives and asks suppliers how well they need to perform on each to achieve success in 2022. We ask whether they need to be best-in-class, competitive with other leaders, merely competent, or if how they perform doesn't matter to them.

The median responses are summarized by the “big bucket” segment in the accompanying table. Suppliers of every type say that to be successful in 2022, they must be best-in-class in understanding clients’ goals and strategies and having the trust of the ultimate client decision-makers. In every segment except field services, suppliers need to be best-in-class in communicating insights effectively and analyzing data powerfully in order to be successful.

If this is true, then either a lot of suppliers will fail because everyone can’t be “best-in-class” or you must consider these to be table stakes because all your competitors are doubling down on them. It also means that you need to pick some other way to differentiate yourself because these are either taken or neutered.

The most interesting insight is that each specialist type needs to be best-in-class at collecting data efficiently while the generalists merely need to be competitive with the leaders. OK, maybe it’s a stretch to label this “interesting” or “insightful” because it mostly confirms what we might expect of each segment.

In every segment except field services, suppliers need to be best-in-class in communicating insights effectively and analyzing data powerfully.



HOW CRITICAL TO YOUR 2022 SUCCESS: PROFESSIONAL FOCUS (SUPPLIER)

	Full service research (n = 910)	Field services (n = 234)	Strategic consulting (n = 293)	Technology (n = 429)	Data & analytics (n = 404)
Understanding client's goals and strategies	Best-in-Class	Best-in-Class	Best-in-Class	Best-in-Class	Best-in-Class
Having the trust of the ultimate client decision-maker	Best-in-Class	Best-in-Class	Best-in-Class	Best-in-Class	Best-in-Class
Communicating insights effectively	Best-in-Class	Competitive	Best-in-Class	Best-in-Class	Best-in-Class
Analyzing data powerfully	Best-in-Class	Competitive	Best-in-Class	Best-in-Class	Best-in-Class
Collecting data efficiently	Competitive	Best-in-Class	Competitive	Best-in-Class	Best-in-Class
Assessing likely success of recommendations	Competitive	Competitive	Competitive	Competitive	Competitive
Analyzing multiple data streams	Competitive	Competitive	Competitive	Competitive	Competitive
Using new types of data	Competitive	Competitive	Competitive	Competitive	Competitive
Synthesizing data from multiple sources	Competitive	Competitive	Competitive	Competitive	Competitive
Making multi-disciplinary recommendations	Competitive	Competent	Competitive	Competitive	Competitive
Conducting meta-analysis	Competent	Competent	Competitive	Competitive	Competitive

In each segment, most say they need to be best-in-class at having the trust of the ultimate client decision-maker.



If we look at the actual percentages of participants in each segment who said they need to be best-in-class, the results look less monolithic. Even though most of them say they need to be best-in-class with respect to understanding clients' goals and strategies, specialists in field services, technology, and data and analytics are less likely than generalists to say it. Similarly and intuitively, although most technology and data and analytics participants say they need to be best-in-class in communicating insights effectively, fewer believe it than in either of the generalist segments, while only a minority of field services providers believe they need to be best-in-class. In each segment, most participants say they need to be best-in-class at having the trust of the ultimate client decision-maker, and this is true for a higher percentage of strategic consultancy participants than for others.

Similar to communicating effectively, a majority in each segment say they need to be best-in-class at analyzing data powerfully, but, unlike the areas we've already discussed, full service research, strategic consultancy, technology, or data and analytics are indistinguishable from each other. As far as collecting data efficiently, an activity that is currently under a microscope (see the Sample Quality section), field services (67%) and technology (60%) participants are most likely to say they need to be best-in-class, while those in full service research (42%) and strategic consulting (27%) are less likely. It may or may not be concerning that only 53% of data and analytics participants say they need to be best-in-class on this, given how many of them are adding data collection services, but it probably is concerning that the percentage of field services participants saying this is only 67%, given the low bar for saying you need to be "best-in-class," how central it is to their business, and the increasing importance of this issue.

Further down the list of initiatives, generalists are more likely than specialists to say they need to be best-in-class at making multi-disciplinary recommendations, although it's only one-third of each (33% full service research, 34% strategic consultancy). Technology and data and analytics participants are somewhat more likely than others to say they need to be "best-in-class" at using new types of data (again, about one-third each). Data and analytics participants are more likely than others to say they need to be best-in-class at analyzing multiple data streams (31%), just ahead of technology providers (28%).

Generalists are more likely than specialists to say they need to be best-in-class at making multi-disciplinary recommendations.



BEST-IN-CLASS IS CRITICAL TO YOUR 2022 SUCCESS: PROFESSIONAL FOCUS (SUPPLIER)

	Full service research (n = 910)	Field services (n = 234)	Strategic consulting (n = 293)	Technology (n = 429)	Data & analytics (n = 404)
Understanding client's goals and strategies	75%	64%	71%	61%	65%
Communicating insights effectively	71%	30%	75%	59%	59%
Having the trust of the ultimate client decision-maker	61%	56%	69%	60%	55%
Analyzing data powerfully	58%	29%	54%	58%	61%
Collecting data efficiently	42%	67%	27%	60%	53%
Assessing likely success of recommendations	37%	29%	43%	32%	35%
Making multi-disciplinary recommendations	33%	17%	34%	25%	28%
Using new types of data	24%	28%	20%	33%	31%
Synthesizing data from multiple sources	23%	20%	29%	26%	31%
Analyzing multiple data streams	23%	18%	23%	28%	31%
Conducting meta-analysis	18%	14%	20%	17%	22%
Average number of best-in-class initiatives	4.7	3.7	4.6	4.6	4.7

SKILL DEVELOPMENT: BUYER PERSPECTIVE

Since 20W1, GRIT has asked insights professionals which skills their organizations emphasize as key priorities, secondary priorities, or do not consider to be priorities. When we first asked buyers, the top priority for those who are involved in decision-making was clearly business knowledge (75% key priority), followed by innovative focus (68%). After those two, people skills (62%) and analytical expertise (61%) were in the next tier, and technical/computer expertise was last (28%).

The following year, we added market research expertise to the list. We were one year into the pandemic, and business knowledge stayed on top (68%), while technical/computer expertise remained at the bottom (24%). Innovative focus remained in the second tier (57%), but people skills moved up with it (61%). Analytical expertise (49%) and market research expertise (48%) occupied the middle. Each skill declined by at least 1%, and analytical expertise and innovative focus dropped by more than 10%. Our hypothesis is that pressure due to the crisis created more focus and specialization, so buyers emphasized core skills like business knowledge and people skills while many delegated analytics and innovation to suppliers.

The crisis created more focus and specialization, so buyers emphasized core skills while many delegated analytics and innovation to suppliers.



From 21W1 to now, nothing changed substantially. Market research expertise picked up 4% to 52%, technical/computer expertise ticked up to 27%, but everything else fell slightly. People skills fell the most, but not by too much (6%), to 55%. Overall, the song remains the same: business knowledge is the highest priority for buyer insights professionals who are involved in decisions, and people skills, innovative focus, market research expertise, and analytical expertise are in the middle, each around 50%.

KEY PRIORITY FOR SKILL DEVELOPMENT: GRIT WAVE (BUYER, INVOLVED IN STRATEGIC DECISIONS)

	20W1 (n = 110)	21W1 (n = 509)	22W1 (n = 319)	Diff. 22W1 – 20W1
Business knowledge	75%	70%	68%	-7%
People skills	62%	61%	55%	-7%
Innovative focus	68%	57%	54%	-14%
Market research expertise		48%	52%	N/A
Analytical expertise	61%	49%	48%	-13%
Technical/computer expertise	28%	21%	24%	-4%

The song remains the same: business knowledge is the highest priority for buyer insights professionals.



SKILL DEVELOPMENT: SUPPLIER PERSPECTIVE

Supplier decision influencers in each segment seem to be fanatical about skill development. Most participants in each segment emphasize market research expertise, people skills, innovative focus, and business knowledge. For all except field services, most participants prioritize analytical expertise. Most technology providers say that technical/computer expertise is a point of emphasis, and nearly half of field services and data and analytics participants agree.

Among full service research providers, market research expertise is the top priority (81%) followed by analytical expertise (71%). People skills (63%), innovative focus (63%), and business knowledge (60%) are in the next tier. For field services participants, people skills (65%), innovative focus (64%), and market research expertise (63%) jointly lead the priority skills. Strategic consultancies seem to place similar amounts of emphasis on all but technical/computer expertise, with market research expertise (75%) leading the pack and people skills (60%) providing the lower boundary for this tight-knit group.

Technology participants are the only segment in which each skill is emphasized by a majority and in which more than 70% prioritize three skills: people skills (75%), innovative focus (75%), and market research expertise (72%). In the third specialist segment, data and analytics, the cluster of top three priorities includes innovative focus (73%), market research expertise (71%), and analytical expertise (67%). It's interesting to note that for those focused on a data analyst

role in a buyer organization, analytical expertise is a no-doubt top priority to emphasize in development. For data and analytics supplier participants, it's one of three that are emphasized. Innovative focus and market research expertise are important in order to ensure that solutions are differentiated and relevant, and analytical expertise may be less of an emphasis than for buyer data analysts because they may have more expertise, to begin with.

KEY PRIORITY FOR SKILL DEVELOPMENT: PROFESSIONAL FOCUS (SUPPLIER, INVOLVED IN STRATEGIC DECISIONS)

	Full service research (n = 665)	Field services (n = 169)	Strategic consulting (n = 242)	Technology (n = 334)	Data & analytics (n = 265)
Market research expertise	81%	63%	75%	72%	71%
Analytical expertise	71%	37%	68%	58%	67%
People skills	63%	65%	60%	75%	61%
Innovative focus	63%	64%	66%	75%	73%
Business knowledge	60%	54%	67%	62%	58%
Technical/computer expertise	36%	47%	34%	60%	49%

Technology is the only segment in which more than 70% prioritize three skills: people skills, innovative focus, and market research expertise.



THE BIG PICTURE

The pandemic forced everyone in the insights world to step back and reassess which capabilities were core to their survival, which were not, and what new capabilities would be needed in order to overcome new challenges. They had to choose which were needed in-house, which could be outsourced, and forge new strategies to get their work done. Buyers had to understand what kinds of insights work they would need to focus on, and suppliers had to figure out which capabilities and scope of services would give them the best chance of standing out from the crowd with the best opportunity to get enough work.

During this period of retrenchment and reassessment, new relationships were formed and more insights organizations on both the buyer and supplier sides were exposed to new capabilities and ways of operating. Now, these organizations are rebuilding their capabilities in alignment with the new identities they created, informed by the new experiences they had.

For corporate insights professionals, successful work leads to increased demand for work, and increases in capacity to handle work lead to greater throughput with which to attempt to reduce a virtually endless backlog of potential projects. Each organization may define its roles differently, and consequently, each may have a unique formula to determine which skills need to be in-house, which should be available on demand, and how to balance human and technical resources to optimize its model. As long as a backlog exists, outsourcing, hiring, and automation work in harmony rather than at one another's expense.

EXPERT COMMENTARY



PUT PEOPLE FIRST: INVEST IN SKILL DEVELOPMENT FOR GROWTH

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Technology dominated this year's GRIT report, but if you skimmed over "skills emphasized for staff development," you might miss that the leaders in tech provided clear insights into emerging survival strategies with their responses.

In the technology segment, more than 70 percent of leaders say they prioritize innovation and expertise by investing in skill development. Can you say the same of your business or the businesses you serve?

There is zero doubt we have an insatiable desire to up-level our staff, but does that desire for skill development correlate to action?

Few businesses can afford to pay mere lip service to investing in skill development around "market research expertise" and "innovative focus." Tech is leading the charge, but market researchers who hope to survive what's next in business had better upskill the teams that are meant to carry their businesses through the impending recession.

When assessing trends to determine our future, I look at how we got here.

CONTINUES ON THE NEXT PAGE

For suppliers, similar dynamics are at work. When revenue increases, tech investment, outsourcing, and hiring tend to follow, though the dynamic is not always the same across supplier types. Often, outsourcing may be used to handle a surge in business, and hiring may replace it if the surge is sustained long enough.

For corporate insights professionals, business knowledge comes closer than any other to being a universally needed skill. Market research expertise is also considered to be foundational, but priorities for other skills tend to follow how organizations define their internal missions.

For most types of insights suppliers, several skills are high priorities to develop. The pandemic forced them to reduce their service portfolios and skill priorities down to their cores, but also to network with other suppliers with different skill sets. The combination of paring down while experiencing more variety has put them in a position to redefine themselves, build out new service portfolios, and acquire and develop new skills. From what we've seen in this section and the Industry Structure section, the post-pandemic build-out is very strategic and deliberate and will result in a new breed of suppliers with broad, yet well-defined, service portfolios.

The post-pandemic build-out is very strategic and deliberate, and will result in a new breed of suppliers with broad, yet well-defined, service portfolios.



EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

Three Trends in Market Research Supplier Firms that Led to Flawed Practices

- Most MR firms grew up quickly from small businesses to massive teams.
- We've had a tendency to be Jane-and-Jack of all trades, serving a wide variety of customer needs and hiring generalists.
- We've been largely project-based, making it difficult for our teams to come up for air and spend time on skill development.

While these trends got us here today, they are not sustainable with the recent explosion of tools and technology. Instead, business leaders need to employ strategies that allow them to be agile and innovative for what's next.

Emerging Strategies for Innovative Leaders (in Market Research and Beyond)

- Invest in your specialists; give subject matter experts time to build their skills meaningfully and share with the broader team.
- Focus your business, and you can focus your teams. It's difficult to develop unique skills when serving too broad a customer base.
- Be disciplined about giving your teams space to learn and grow. Invest real money in training and create a safe place to make mistakes.

Your people are your greatest asset, and, as a business leader, you need to question if you are making the right level of investment in training and developing your teams for the future skills they need to carry your business through hard times. Investing in your staff is more than an employee retention tactic, it is a survival strategy.



MEETING PROJECT GOALS

WHY DO PROJECTS EXCEED OR FALL SHORT OF OBJECTIVES AND DOES IT MATTER?

No one accepts work, resources, and compensation with the intention of falling short of the stated objectives. But does anyone accept that proposition with the intention of exceeding them? Some projects meet goals, some exceed them, and some fall short, and there are drivers and repercussions associated with each of these outcomes.

OVERVIEW

In a perfect world, every insights project would meet all its stated objectives or, better yet, exceed them. Right?

Maybe not. Consider this statement from an owner of a field services agency who has more than 20 years' experience in insights:

We rarely have projects that would exceed the needs as this would mean doing extra work opposite to the task.

For some kinds of projects, perhaps tracking projects are an example, exceeding objectives could result in collateral damage: higher costs, missed deadlines, convoluted reports, insights that can't be used because the bandwidth for absorbing them isn't there, etc. The stakeholder may have no use for getting more than what they asked for, or perhaps the stated objectives already cover all the possibilities. A large insights organization may execute a lot of these low-ceiling projects, which would effectively limit the percentage of projects that could exceed stated objectives.

On the other side, it's difficult to make excuses for projects that don't meet the stated objectives, but there still might be exceptions. Some projects might be aspirational and undertaken with acknowledgement of the risk that they may not work out. Such projects might use experimental approaches, or they might try to tackle issues which turn out to have no satisfactory solution. The project may have more objectives than can be supported by the work, objectives may be misstated, or work plans may be misaligned with the objectives. In such

cases, failure to meet objectives may be excusable if the project was a known gamble or understandable if due to a failure in specification rather than a failure of execution.

With this context in mind, GRIT explores what it means when projects meet, exceed, or do not meet their stated objectives.

Achieving a higher rate of projects that exceed objectives is an important driver of overall success while a lower rate risks falling short of goals.

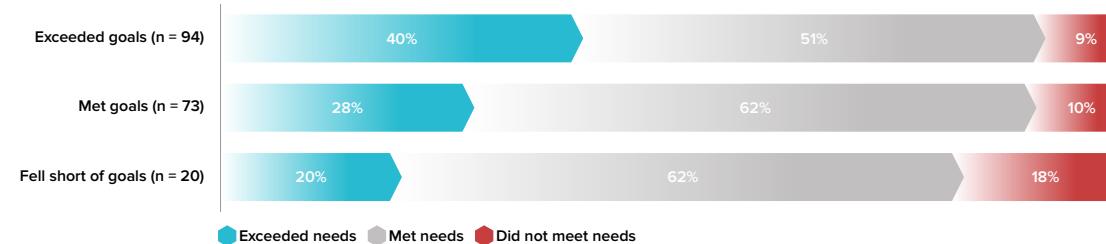


BUYER PERSPECTIVE

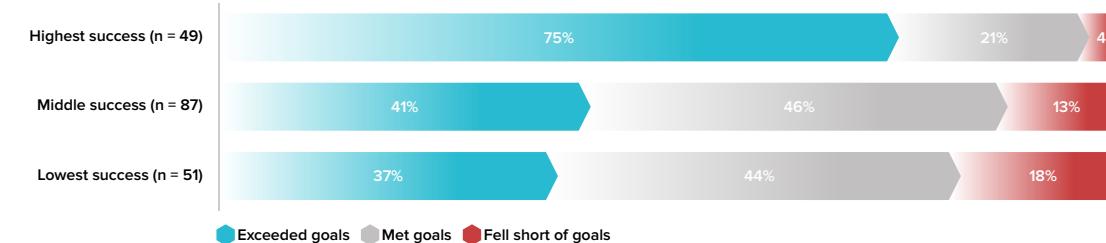
Among buyers, project success is a driver of overall insights success. Insights organizations that exceed their goals report that an average of 40% of their projects deliver beyond the stated objectives, but much lower percentages are reported by those who met their goals (28%) or who fell short of them (20%). Few buyers fell short of their goals, but, directionally, they have twice as many projects that do not meet the stated objectives (18%) as those who met (10%) or exceeded (9%) their goals.

Looking from another perspective by categorizing buyers into highest, middle, and lowest success (see information box), the highest success segment is twice as likely to exceed their overall goals (75%) as the lowest success group (37%), which is not much different from the middle group (41%). Those in the lowest success group are four times more likely to fall short of their overall goals (18%) than those in the highest success group (4%). If we can assume causality, achieving a higher rate of projects that exceed objectives is an important driver of overall success while a lower rate risks falling short of goals.

PROJECT PERFORMANCE VERSUS BRIEF, AVERAGE PERCENTAGE OF PROJECTS: PERFORMANCE AGAINST GOALS (BUYER)



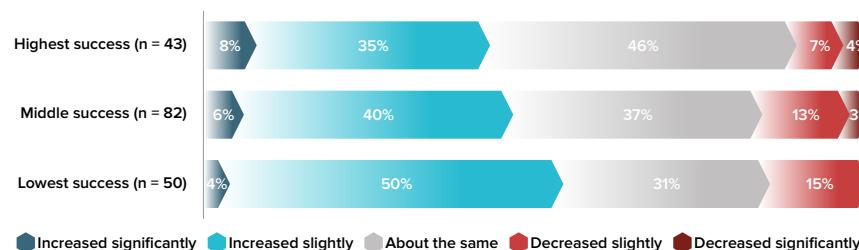
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: PROJECT PERFORMANCE (BUYER)



Of course, we can't assume causality, although we can't rule it out either. It could be that insights organizations that exceed their goals are better at managing insights projects, or maybe they are just better at managing expectations. It could also be that the more successful organizations have very basic business challenges or simpler projects, making it easier to surpass objectives. We'll keep these in mind as we continue our deep dive, but it seems as though exceeding project objectives is good for business.

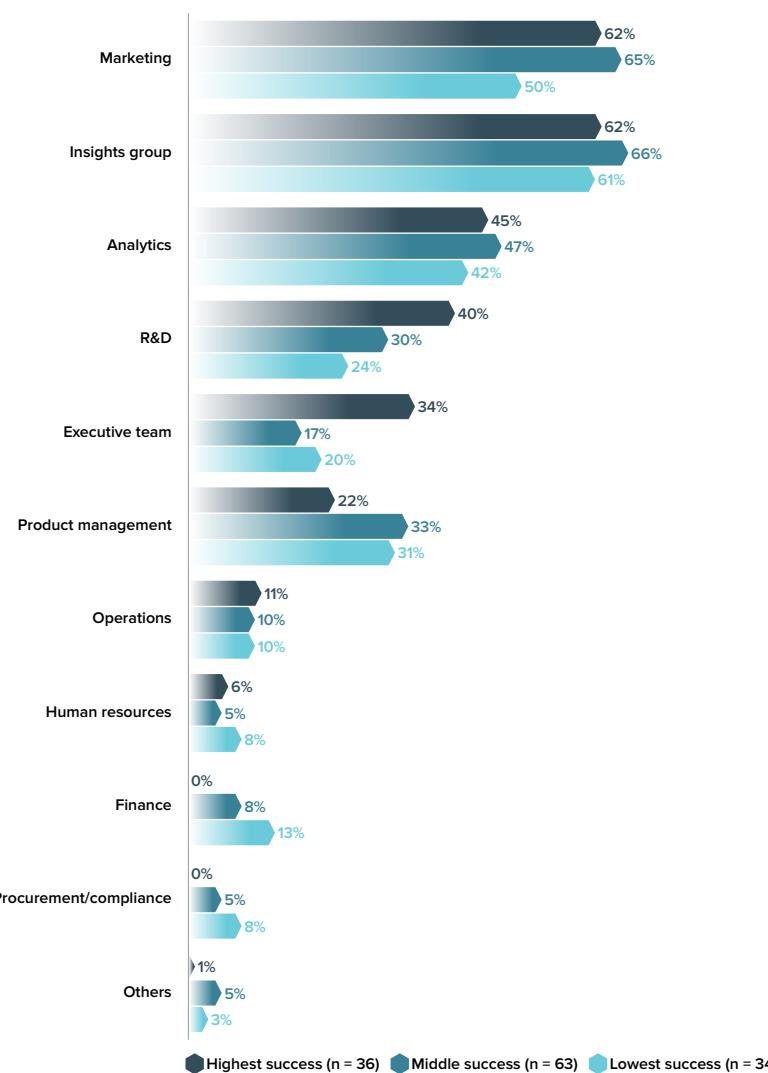
Exceeding objectives is not necessarily good for research budgets, however. Those in the lowest success group are more likely to experience budget increases (54%) than those in the highest (43%) and middle success (46%) groups. It could be that corporate management recognizes that the lowest success group needs more resources and provides them. It could also be that they are from larger companies with more projects and riskier project portfolios. For this reason, perhaps a certain percentage of projects are fated to fall short of objectives, but budgets increase because, as larger companies, they face more challenges and need to continue to invest in insights to meet them.

ANNUAL RESEARCH PROJECT SPENDING TRENDS: PROJECT PERFORMANCE (BUYER)



Each group mentions an average of just under three functional areas that actively collaborate on insight work. The highest success group is more likely to say that R&D (40%) or an executive team (34%) actively collaborate. They

ACTIVELY COLLABORATES ON INSIGHTS/DELIVERABLES: PROJECT PERFORMANCE (BUYER)



are less likely than the other two groups to say product management actively collaborates (22%). They are also less likely to name finance or procurement/compliance (0% each), although no group mentions either one very often.

Exceeding objectives is not necessarily good for research budgets, however.



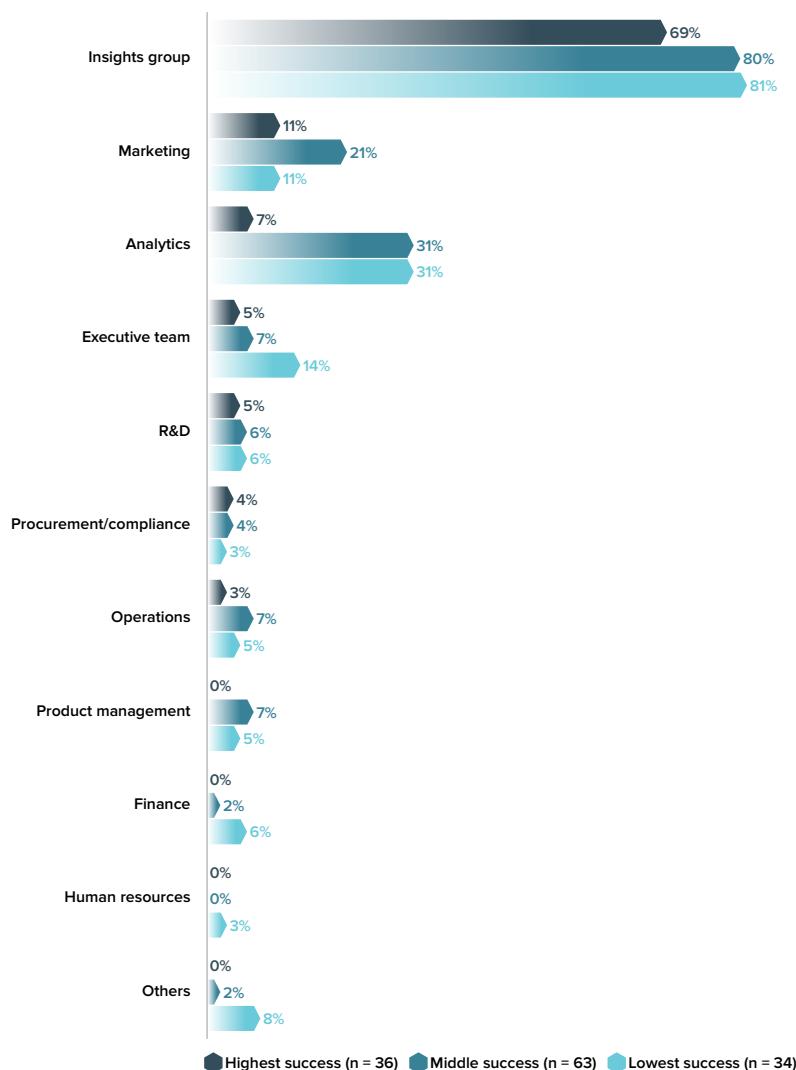
Although the number of active collaborators is the same across groups, the middle and lowest success groups have more primary decision-makers involved (1.7) in the selection of methodologies and partners than does the highest group (1.0). The largest gaps between the lowest and highest success groups are for the insights group (+12% lowest group) and analytics (+24% lowest group).

Considering decision influencers as well, the number involved doubles for the middle (3.4) and lowest success groups (3.6) and more than doubles for the highest success group (2.6) though still behind the other two. Decisions in the lowest success group are more likely than those in the highest to involve R&D (+19%), product management (+18%), marketing (+14%), operations (+12%), finance (+11%), and analytics (+11%). Compared to the middle success group, the decision team for the lowest success group is somewhat more likely to include R&D (+8%) and operations (+7%) and somewhat less likely to include an insights group (-8%) and procurement/compliance (-9%).

Decisions in the lowest success group are more likely than those in the highest to involve R&D, product management, marketing, operations, finance, and analytics.



PRIMARY DECISION-MAKER IN SELECTING METHODOLOGIES/PARTNERS: PROJECT PERFORMANCE (BUYER)



Although the number of collaborators is the same, the middle and lowest success groups have more primary decision-makers involved in the selection of methodologies and partners.

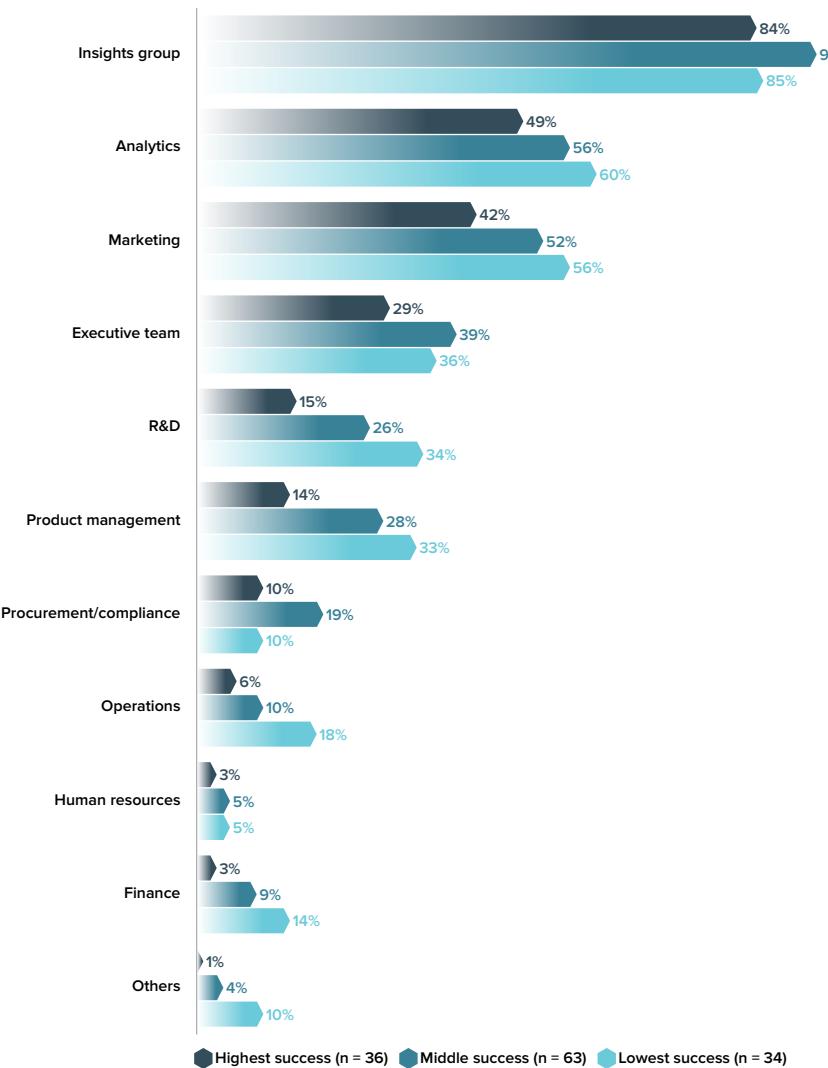


Complexity seems to influence the level of project success experienced by insights professionals, but it is not the only significant factor. Greater complexity is suggested by bigger companies with larger insights staffs, higher project volume, and larger research project budgets, and is more characteristic of the lowest success group than the highest. The middle success group is somewhere in between, possibly closer to the lowest success group than the highest.

Greater complexity is also suggested by the greater numbers of parties involved in selecting methodologies and partners that characterizes the middle and lowest success groups. Once the selections are made, however, the number of active collaborators involved in insights work does not differ across groups. One hypothesis that emerges is that as organizational complexity increases, more parties have to have a say in how the work gets done and who does it, and this committee approach leads to more projects being defined with unrealistic objectives and sub-optimal work plans. Once the project is set in motion, however, the size of the “committee” does not play an adverse role in project success.

It's also possible that larger organizations simply have more complex business issues that require more complex projects, and some of those are going to fall short regardless of what happens. The selection of methodologies and partners has more departments involved simply because larger companies have more departments to serve, but it doesn't cause projects to fall short of objectives. We know that one hypothesis does not explain all the tendencies we've identified, and we can also see that some complex organizations have high success rates and some less complex ones have low rates. Complexity is only one piece of the puzzle.

PRIMARY DECISION-MAKER/KEY INFLUENCER IN SELECTING METHODOLOGIES/PARTNERS: PROJECT PERFORMANCE (BUYER)



Complexity seems to influence the level of project success experienced by insights professionals, but it is not the only significant factor.



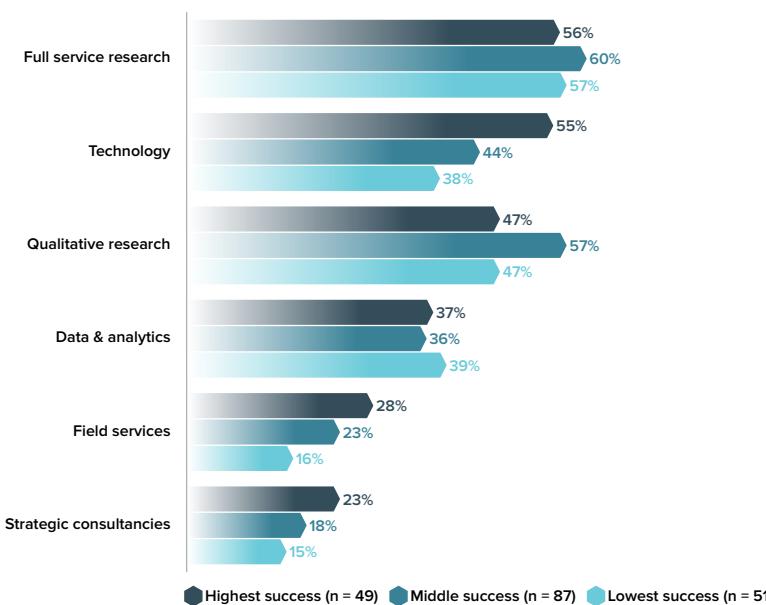
Their choice of which supplier types to work with also relates to their level of success. In each project success segment, most GRIT participants regularly work with full service research suppliers. However, most participants in the highest success group regularly work with technology providers (55%) compared to less than half of those in the middle (44%) and lowest success groups (38%).

In the highest success group, 60% increased technology spending and 9% decreased it; in the lowest success group, 58% increased and 7% decreased. Although their technology spending trends are nearly identical, their interest across different automation solutions is not.

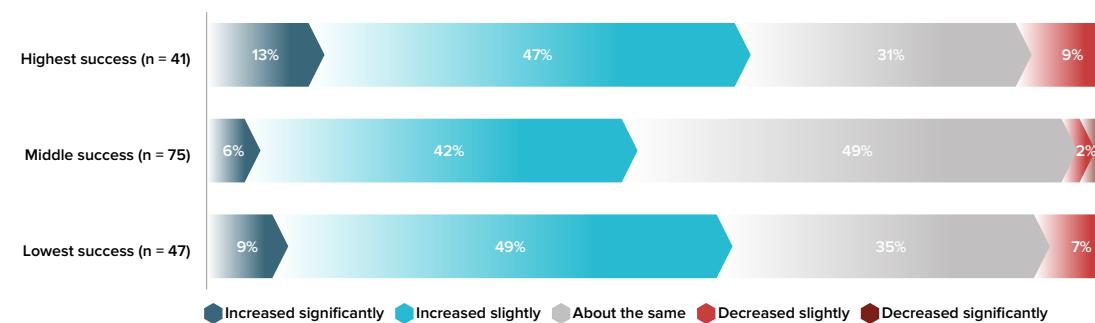


Although the highest and lowest success groups differ with respect to how regularly they use technology providers, they do not differ with respect to their trends in insights-related technology spend. In the highest success group, 60% increased technology spending and 9% decreased it; in the lowest success group, 58% increased and 7% decreased. Although their technology spending trends are nearly identical, their interest across different automation solutions is not.

REGULARLY WORK WITH TYPE OF SUPPLIER: PROJECT PERFORMANCE (BUYER)



TECHNOLOGY SPENDING TREND: PROJECT PERFORMANCE (BUYER)



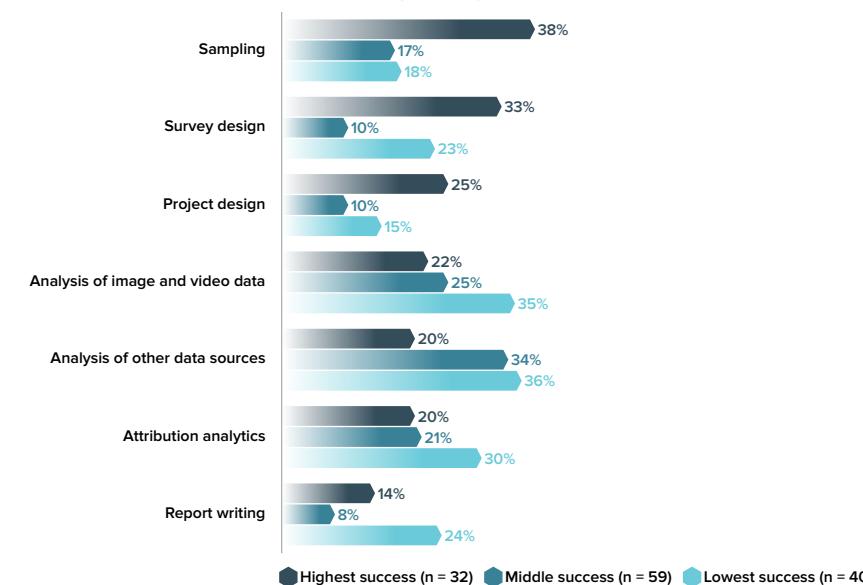
Participants in the highest success group are more likely to be interested in automation that has practical, near-term benefits: sampling (+20%), survey design (+10%), and project design (+10%). Those in the lowest success group are more likely to be interested in automation solutions that may be less established, have a steep learning curve, or produce results that may not be black-and-white. Analysis of image and video data (+13%), analysis of “other” data sources (+16%), attribution analytics (+10%), and even report writing (+24%) may not always produce results that are clear and unambiguous, especially if the users are still learning them. By contrast, it may be immediately obvious whether sampling, project design, and survey design accomplished what they needed to accomplish. Once again, those in the lowest success group may be dealing with greater complexity and taking on calculated risks, at least for some projects in their portfolios.

The project success groups also prioritize skill development differently. The highest success group puts the most emphasis on business knowledge (67% key priority). It’s second for the lowest success group, but for a much smaller percentage (54%). The largest gap, however, is for market research expertise, which is a key priority for 59% of the highest success group and only 42% of the lowest.

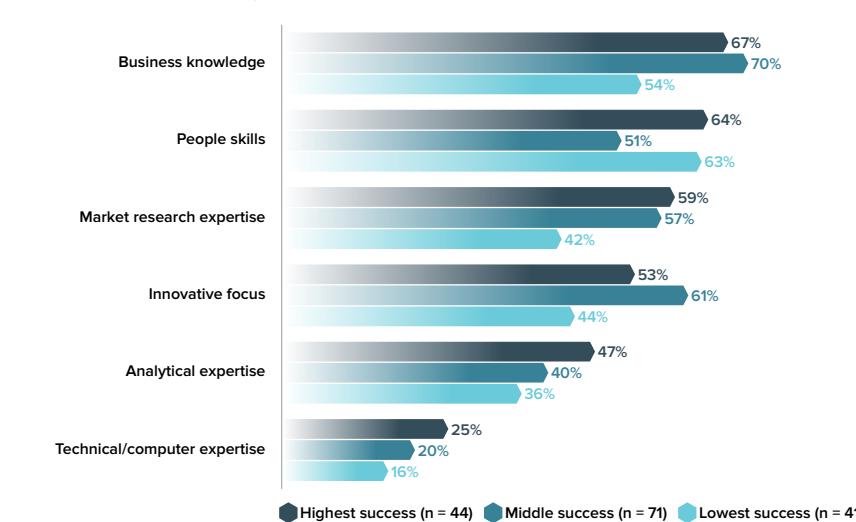
The largest gap, however, is for market research expertise, which is a key priority for 59% of the highest success group and only 42% of the lowest.



AUTOMATION HAS OR WILL HAVE A KEY ROLE, LARGEST DIFFERENCES BETWEEN HIGHEST AND LOWEST SUCCESS: PROJECT PERFORMANCE (BUYER)



SKILL DEVELOPMENT EMPHASIS: PROJECT PERFORMANCE (BUYER, INVOLVED IN STRATEGIC DECISIONS)



SUPPLIER PERSPECTIVE

As among buyer participants, project success is related to overall success. For suppliers who exceeded their overall goals, 51% of projects exceeded the business objectives, and the percentage drops to about 40% for those who merely met goals (40%) and those who fell short (38%). However, project success does not always have the same implications for each supplier segment, and how project success is accomplished can vary by segment.

In each supplier segment, at least 72% of the highest project success group exceeded their overall goals, and the gap between the highest and lowest success groups is at least 17% (among data and analytics) in each. The gap is widest in the field services (31%) and technology (37%) segments.

Across supplier segments, the gap between the highest and middle success groups regarding exceeding overall goals is widest for data and analytics (+23%) and narrowest for full service research (+9%). In the strategic consultancy segment, the gap is +22%; among field services, +17%; and among technology, +13%. The narrower gaps for full service research and technology are due to the higher proportions of the middle groups that exceeded their overall goals (70% for full service research and 69% for technology). In each of the other three segments, the middle group never rises above 57%.

Across supplier segments, the gap between the highest and middle success groups regarding exceeding overall goals is widest for data and analytics and narrowest for full service research.



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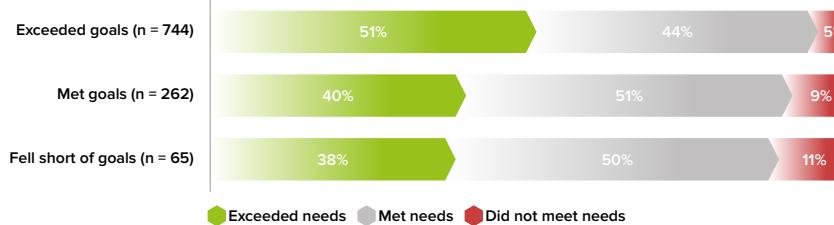
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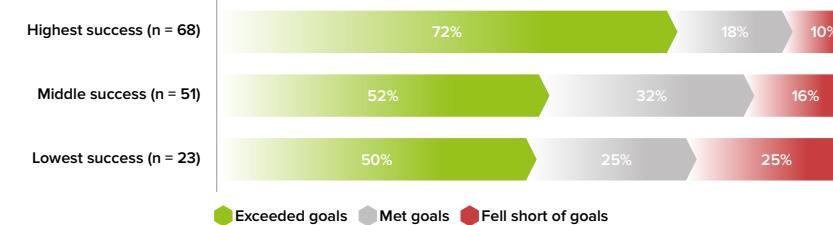
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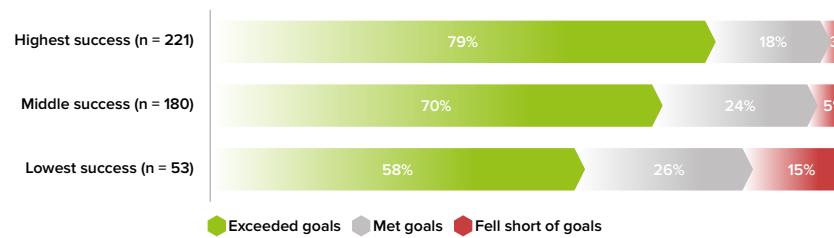
**PROJECT PERFORMANCE VERSUS BRIEF, AVERAGE PERCENTAGE OF PROJECTS:
PERFORMANCE AGAINST GOALS (SUPPLIER)**



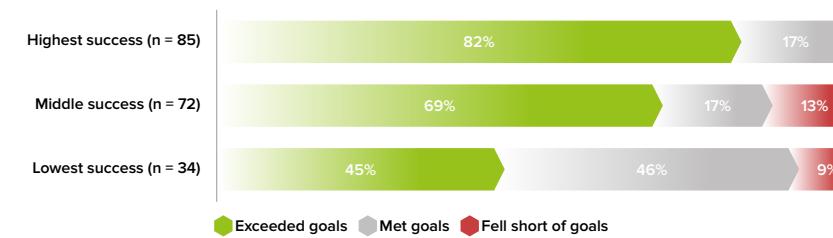
**PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: PROJECT
PERFORMANCE (STRATEGIC CONSULTANCY)**



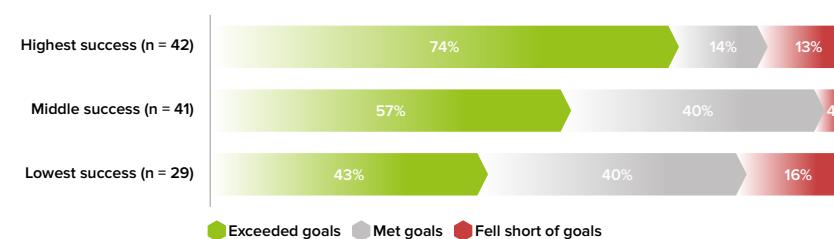
**PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS:
PROJECT PERFORMANCE (FULL SERVICE RESEARCH)**



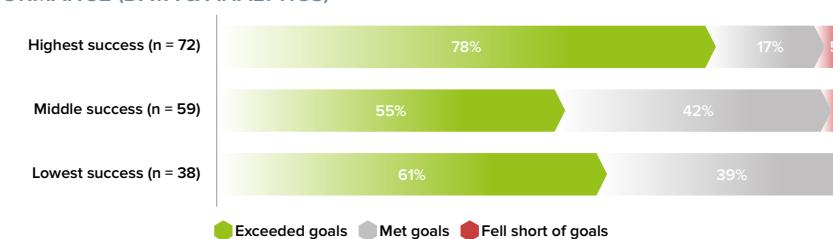
**PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: PROJECT
PERFORMANCE (TECHNOLOGY)**



**PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS:
PROJECT PERFORMANCE (FIELD SERVICES)**



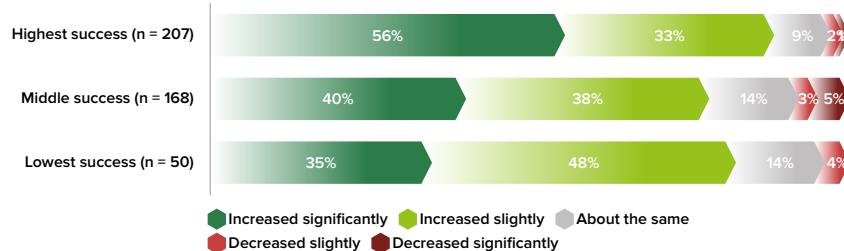
**PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: PROJECT
PERFORMANCE (DATA & ANALYTICS)**



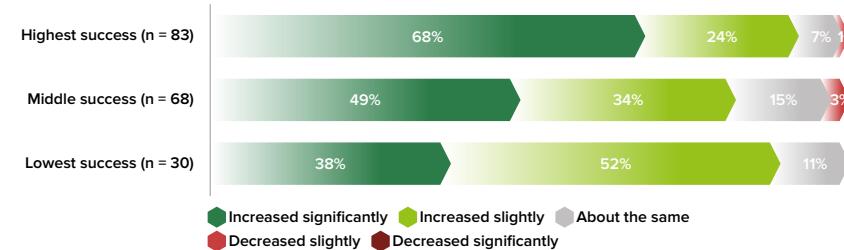
For suppliers, increasing revenue is usually tantamount to exceeding goals.

Among full service research, 56% increased revenue significantly in the highest success group compared to just 35% of the lowest, and among technology, the gap is 68% to 38%. In the data and analytics segment, 49% of the highest project success group significantly increased revenue compared to 40% of the lowest, and all increases summed together favor the highest group, 89% to 74%. The gaps are less pronounced in the other two segments.

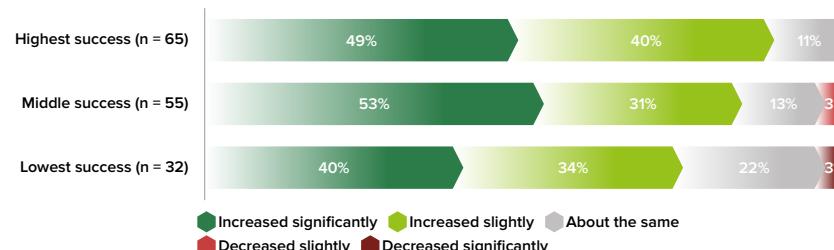
REVENUE TRENDS: PROJECT PERFORMANCE (FULL SERVICE RESEARCH)



REVENUE TRENDS: PROJECT PERFORMANCE (TECHNOLOGY)



REVENUE TRENDS: PROJECT PERFORMANCE (DATA & ANALYTICS)



Among full service research, 56% increased revenue significantly in the highest success group compared to just 35% of the lowest, and among technology, the gap is 68% to 38%.



In field services, the gap between the highest project success group and the lowest is only 4% regarding significantly increasing revenue, but it's 90% to 79% for all increases. Among strategic consultancies, the lowest success group increased revenue significantly (39%) more often than the highest success group (35%), and they tie at 77% for all increases.

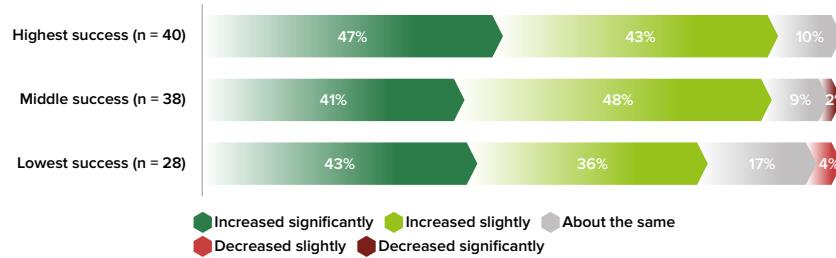
GRIT hypothesizes that each of these segments has a somewhat unique story. The kinds of projects that field services providers execute probably have few opportunities to exceed objectives, and their performance against objectives is probably the most measurable of any supplier segment. In the context of challenges such as the sample quality crisis, field services have a thin line between exceeding objectives and missing them, plus a clear view of which side of it they are on.

In field services, the gap between the highest project success group and lowest is only 4% regarding significantly increasing revenue, but it's 90% to 79% for all increases.

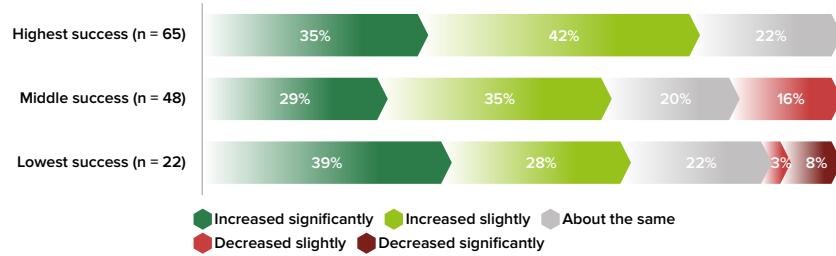


If field services providers have the most measurable criteria for success, strategic consultancies probably have the least. Their objectives may be phrased in more qualitative terms, making it more difficult to compare outcomes definitively. The timelines for projects and for the results to be implemented and have an impact can be longer than for other kinds of work, so there may not be as clear a link between where the work started and where it ended up. The relationship between project success and revenue may be less direct for strategic consultancies than it is in other segments.

REVENUE TRENDS: PROJECT PERFORMANCE (FIELD SERVICES)

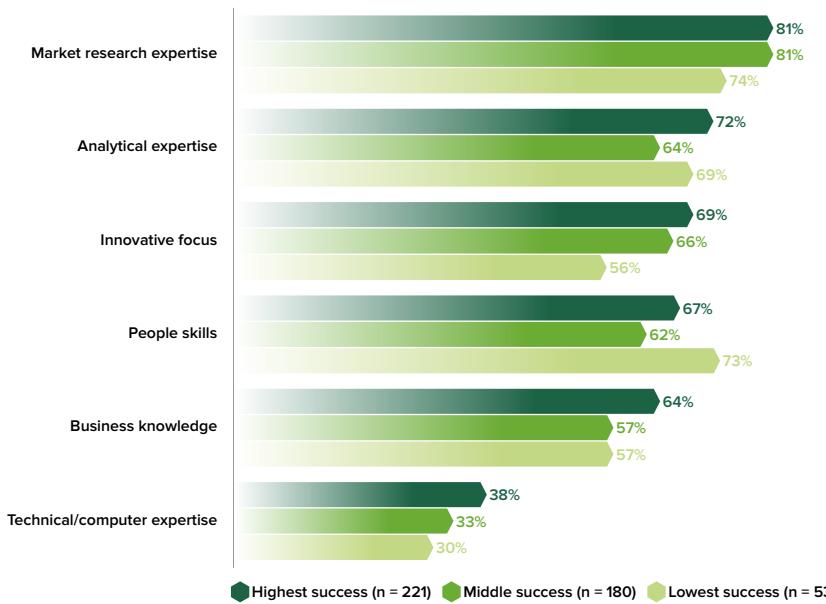


REVENUE TRENDS: PROJECT PERFORMANCE (STRATEGIC CONSULTANCY)



In the full service segment, the highest project success group is more likely than the lowest to emphasize developing innovative focus (+13%) in its staff. In the field services segment, they are more likely to emphasize people skills (+17%), business knowledge (+17%), and analytical expertise (+10%). The highest project success group in the strategic consultancy segment is more likely to emphasize market research expertise (+14%), analytical expertise (+19%), and business knowledge (+10%), while those in the lowest group are more likely to emphasize computer and technical expertise (+19%).

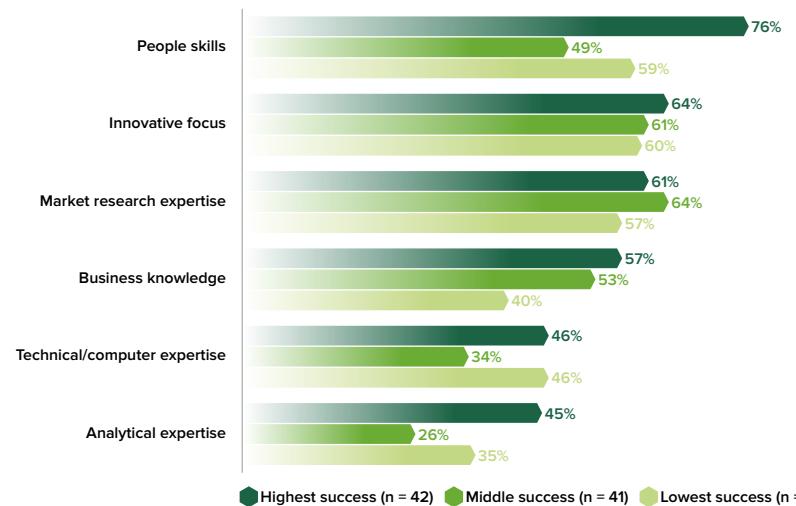
SKILL DEVELOPMENT EMPHASIS: PROJECT PERFORMANCE (FULL SERVICE RESEARCH, INVOLVED IN STRATEGIC DECISIONS)



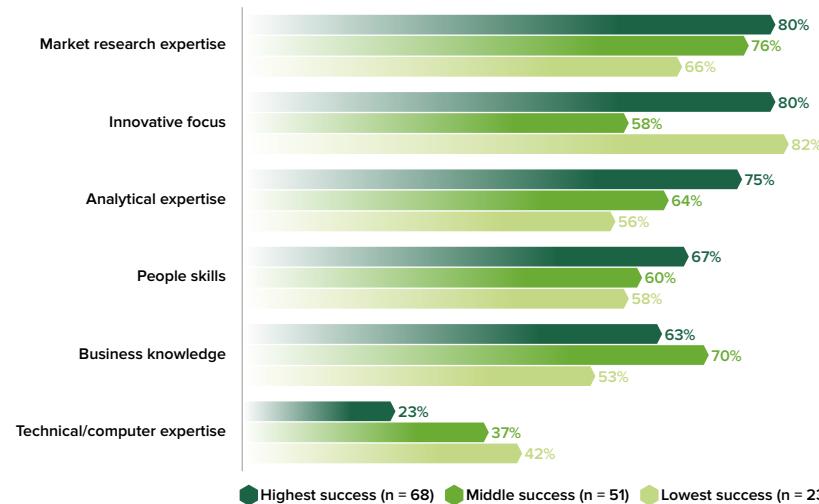
The highest project success group in the strategic consultancy segment is more likely to emphasize market research expertise.



SKILL DEVELOPMENT EMPHASIS: PROJECT PERFORMANCE (FIELD SERVICES, INVOLVED IN STRATEGIC DECISIONS)



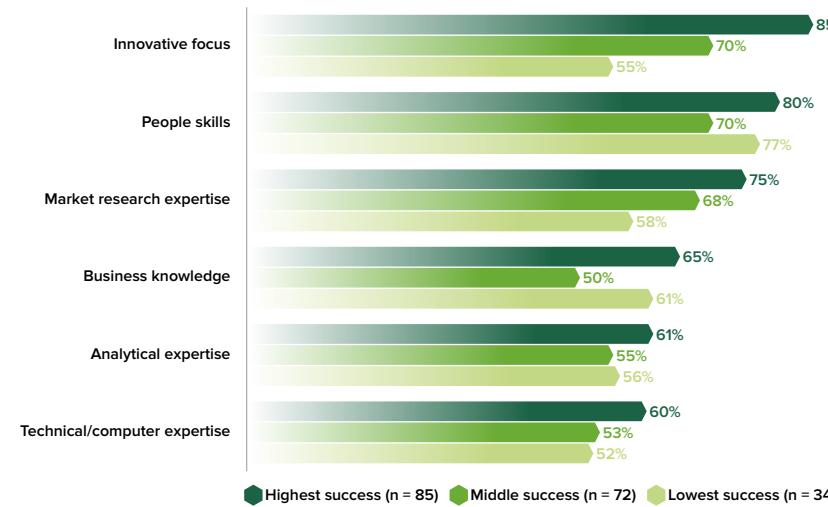
SKILL DEVELOPMENT EMPHASIS: PROJECT PERFORMANCE (STRATEGIC CONSULTANCY, INVOLVED IN STRATEGIC DECISIONS)



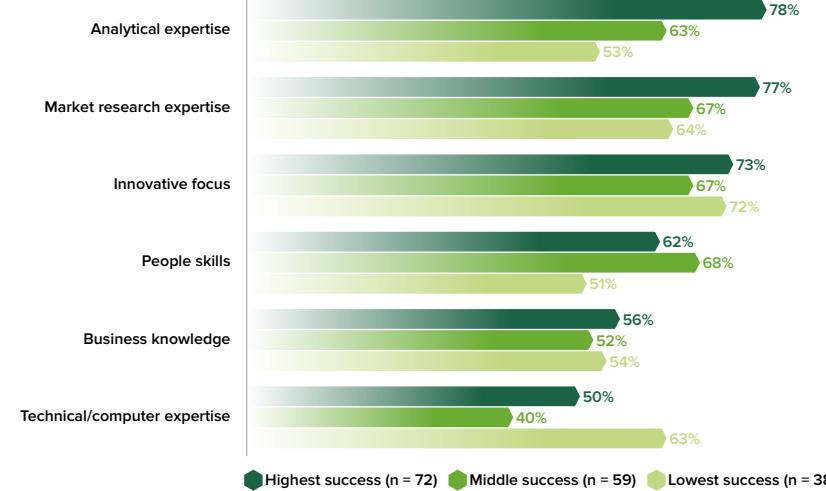
In the technology segment, the highest project success group is more likely than the lowest to prioritize innovative focus (+30%) and market research expertise (+17%) in staff development.

In the data and analytics segment, the highest success group emphasizes developing analytical expertise (+25%), market research expertise (+13%), and people skills (+11%). Those in the lowest group are more likely to prioritize developing computer and technical expertise (+13%).

SKILL DEVELOPMENT EMPHASIS: PROJECT PERFORMANCE (TECHNOLOGY, INVOLVED IN STRATEGIC DECISIONS)



SKILL DEVELOPMENT EMPHASIS: PROJECT PERFORMANCE (DATA & ANALYTICS, INVOLVED IN STRATEGIC DECISIONS)



In the technology segment, the highest project success group is more likely than the lowest to prioritize innovative focus.



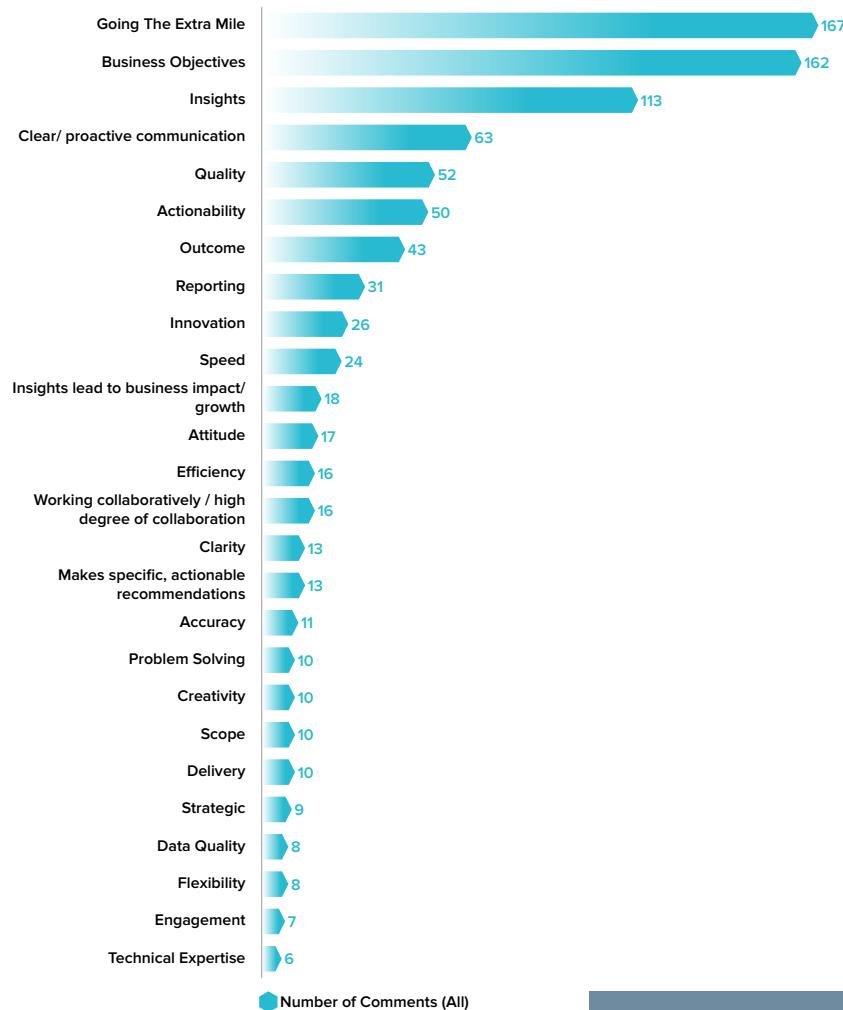
THE DIFFERENCE-MAKERS

GRIT asks participants to explain what makes the difference between a project that exceeds the needs outlined in the project brief or statement of work and one that does not meet those needs. By far the top two difference-makers are going the extra mile (or miles) and demonstrating a deep understanding of the business objectives and true client needs throughout the project. After those two, but well ahead of the rest, is that it delivers insights that are high quality, unique, and/or beyond what was required or expected.

The first tier can be thought of as partnership: going the extra mile means that the people running the project have as much invested in its success as you do, and deep understanding of business issues means that they share your mindset and know what it means to act on your behalf. The second tier represents the whole point of the endeavor: to come up with new learnings. However, partnership is a first-tier concept because it makes the difference between new learnings that merely check a box and insights that are really special.

After those three, the next tier consists of clear and proactive communication, quality of the work, actionability of results, and meaningful outcomes. The fourth tier includes reporting, innovation, and speed. Other minor themes include impact on the business, attitude, efficiency, and collaboration.

CHARACTERISTICS OF JOB THAT EXCEEDS NEEDS, NUMBER OF COMMENTS (ALL)



By far the top two difference-makers are going the extra mile (or miles) and demonstrating a deep understanding of the business objectives and true client needs.



The next tier consists of clear and proactive communication, quality of the work, actionability of results, and meaningful outcomes.



The idea of going the extra mile relates to the position of the last mile marker and the effort the research team is willing to make to get there. The team needs to understand minimum expectations and be willing and able to surpass them. If the team understands the client's needs, their efforts will take them in the right direction, past the marker instead of alongside of it or behind it, without being told what to do.

The other part of partnership more directly depends on understanding what the client needs, specifically as it regards business needs. Understanding client service needs may drive "going the extra mile," but understanding the larger business needs drives the overall impact of the work. "Going the extra mile" relates more to the partnership experience, and "business objectives" relates more to the partnership mission.

The idea behind the third tier, insights, is strongly driven by the ability to identify additional insights beyond those explicitly mentioned in the project brief. The ability to do this depends on how well the research team acts as a partner. If they understand the business and the objectives, they will be able to recognize opportunities that someone with less understanding would not be able to see. If they are motivated, they will make the effort to dig them out and report them.

Below the third tier, themes start to emphasize nuances of ideas expressed in the first two tiers of themes. "Quality" refers mainly to the quality of the insights, but also to the quality of the service. "Actionability" refers to whether the insights themselves can be acted upon and to whether they actually are acted upon. Further down below this fourth similar kinds of interpretations apply.



DIGITAL QUALITATIVE

Powerful Technology,
Expertise & Recruitment

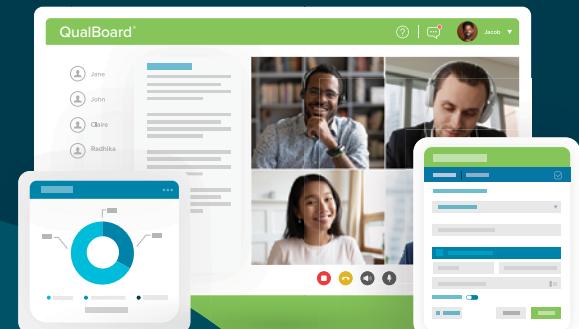
QualBoard
Online Discussions

QuantText
Hybrid Quant+Qual

Over The Shoulder
Mobile Ethnographies

QualMeeting
Virtual Focus Groups & IDIs

Usability & Eye-Tracking
Online Research Labs



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THE BIG PICTURE

It's common sense that failing to achieve objectives you have agreed to work toward will have negative repercussions, especially if it happens multiple times. It may be less obvious that exceeding agreed-upon objectives has positive repercussions. Across the insights world, organizations that consistently exceed the stated needs of project briefs are more likely to exceed their overall insights goals as well. Clearly, there is either a direct connection between consistently going the extra mile and organization success or else there is an indirect connection between the two as a result of the organization's culture and values.

Creating an environment in which insights projects consistently exceed expectations requires partnership between the research team and business stakeholders. In a partnership, all the parties understand what they need to accomplish and how they are going to accomplish it, and they are all highly motivated to do whatever it takes to "go the extra mile." Some of the hallmarks of this relationship as it relates to project success are being in the loop with senior stakeholders and keeping them in the project loop while focusing on discovering insights that will be impactful and actionable. Without enough knowledge and understanding of the business context, it is difficult to identify which insights can make a positive impact, and, without the drive to exceed stated needs, it is unlikely they will be found and reported, even if they are out there.

Clearly, there is either a direct connection between consistently going the extra mile and organization success or else there is an indirect connection as a result of the organization's culture and values.



EXPERT COMMENTARY



FEEL THE POWER OF PARTNERSHIP

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You want to exceed project expectations? Find a partner who can go the extra mile. Sure, building the right partnership with your suppliers is a critical part of meeting and exceeding project expectations, but it's not just about finding the right tech. From the buyer's perspective, success comes from finding a partner whose tools, support, and expertise empowers better research. Often these traits aren't something they'll learn over time—it's something that's built into their company culture. Here are three takeaways to consider:

Build Trust with Thoughts, Not With Transactions

A successful partnership isn't just tech-centric, it's grown from a shared passion for great research. You want to trust that your partner is building the best solutions for the budget and capabilities you've outlined. Powerful thought partnership illuminates learnings to show how initiatives can be done faster and with fewer resources.

Find a Partner Who's Committed to Understanding Your Business

Sending a broad request and getting a proposal back could be a red flag. The right partner comes with an abundance of great questions—both curious and capable enough to quickly engage in a relationship with you, understand your objectives, and become an ongoing extension of your team.

CONTINUES ON THE NEXT PAGE

However, even if the proper culture and values are in place, circumstances may conspire to thwart excellence. Business size and complexity leads to project complexity, and project complexity creates challenges to maximizing success. Practices that are characteristic of those who consistently exceed stated needs may not transfer as well to complicated projects, but there are examples of buyer insights organizations that exceed stated needs consistently even in the most complex situations.

While there are many different actions that can lead to successful project work, one that everyone can benefit from is to focus on how the project briefs and statements of work are developed in the first place. Although GRIT did not ask directly about how project briefs and statements of work are created, pieces of evidence suggest that some projects may be doomed from the get-go due to unrealistic objectives or ill-conceived plans to achieve them.

Across the insights world, organizations that consistently exceed the stated needs of project briefs are more likely to exceed their overall insights goals as well.



EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE



Tools Become Even More Powerful with Tech-Enabled Service

Seek a consultative partner that can leverage their research expertise to help you become more strategic. So whether you need advice on survey design, help producing a report, or a team to take the wheel, being tech-enabled can help you maintain momentum and keep you from feeling stuck. This not only brings more transparency into the partnership, but it leads to more seamless support, collaboration, and research consistency.

Powerful Partnerships Grow Stronger over Time

When we think about research that goes the extra mile, we need to always consider how our insights and new learnings build upon each other. It's all about developing partnerships that foster a deep understanding of your business objectives—insights that continue to develop over time and work to empower a trajectory for success that builds upon each and every initiative.



INDUSTRY BENCHMARKING

WHAT PROJECT AND MANAGEMENT BEST PRACTICES ARE MOST EFFECTIVE?

Project priorities and best practices for successful insights work continue to focus on engaging business stakeholders and delivering impactful results to them effectively. Despite widespread consensus on these priorities, some organizations are better at executing them consistently and therefore more likely to exceed their goals.

OVERVIEW

GRIT continues to track which project priorities are most important to successful insights work and which best practices are most commonly followed by insights organizations. We also look at which best practices are more common at organizations that exceed their goals than at ones that do not.

In Organizational Success Factors, we discuss how buyer insights organizations prize business knowledge above all as a skill to develop in their staffs, and here we see business outcomes leading the criteria that make for successful insights work. Beyond individual projects, buyer insights organizations strive to broaden their audience and influence to other parts of their organization.

Suppliers also prioritize the end result over the means to the end, and different project priorities emerge by segment after the main criteria are satisfied. Overall, they follow best practices that focus on growth, engagement with business stakeholders, and innovation.

We might say that the business ends justify the project and organizational means to those ends, and we'll see which of these are most common among high-performing insights organizations.

PROJECT PRIORITIES: BUYER PERSPECTIVE

For buyers, the same five criteria that were most important for insights success in 21W1 are most important now:

1. Making impactful recommendations
2. Providing results executives can act on
3. Ensuring work completely aligns with business objectives
4. Effective storytelling
5. Directly involving key business stakeholders

The top two criteria, impactful recommendations and results executives can act on, flipped positions, but the rest of the rankings within the top five are identical to last year. These two, along with aligning the work with objectives, effective storytelling, and directly involving key business stakeholders, may seem like no-brainer priorities, but they are easier said than done, and it's good to know that buyer participants are keeping their eyes on the ball.

The next five are also virtually the same as in 21W1, and the sixth criterion, having partners and suppliers who understand the business, is barely behind involving key stakeholders and effective storytelling. Considering these priorities, it should be no surprise that the skill that is most important for insights organizations to develop within their staff is business knowledge (see Organizational Success Factors).

The only notable change in the top ten is that synthesizing results from multiple data sources/types dropped from eighth to twelfth, far behind (17%) this year's number eight, generating measurable ROI (26%). It was replaced by rigorous analysis (20%), but its fall might have been more strongly driven by concise, direct reporting (29%), which moved from ninth to seventh.

**Question
everything
but your
source.**

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Outside the top ten, the only other big change in rankings concerns bringing in partners/suppliers with complementary expertise (8%), which dropped from fifteenth to twentieth. Possibly, the dominant buyer portfolio of suppliers focuses on full service research providers that have the same skills as the buyer, and they are the ones who hire the suppliers with complementary skills. Although many other criteria are much more important than this one, the change implies that significant buyer volume is driven by increases in the numbers of projects that use a familiar set of skills rather than work that requires novel skills.

At first glance, it may be surprising that maximizing value for the cost and reducing cost are not higher than eleventh and twenty-first, respectively, but it doesn't mean, for example, that reducing cost isn't important. It only means that cheap doesn't necessarily beat speed, data quality, or quality of the results. It's meaningful that maximizing value for the cost ranks much higher than reducing cost. It reinforces the fact that insights are not just a box that gets checked off; they are an important investment in future success.

Similarly, while it is important to get results as quickly as possible (fifteenth, 14%), it's much less important if the results don't meet the other criteria.

It reinforces that insights are not just a box that gets checked off; they are an important investment in future success.



PROJECT PRIORITIES FOR INSIGHTS SUCCESS, 22W1 V. 21W1 (BUYER)

	% Chosen 22W1 (n = 182)	Ranks	
		21W1	22W1
Making impactful recommendations	66%	2	1
Providing results executives can act on	66%	1	2
Ensuring work completely aligns with business objectives	53%	3	3
Effective storytelling	40%	4	4
Directly involving key business stakeholders	38%	5	5
Partners/suppliers who understand my business	37%	6	6
Concise, direct reporting	29%	9	7
Generating measurable ROI	26%	7	8
Partners/suppliers who bring unique perspectives	23%	10	9
Rigorous analysis	20%	12	10
Maximizing value for cost	19%	11	11
Synthesizing results from multiple data sources/types	17%	8	12
Applying innovative research methods	16%	14	13
Maximizing the precision of the data	16%	16	14
Getting results as quickly as possible	14%	13	15
Providing content for marketing communication	10%	18	16
Using proven methodologies	10%	17	17
Partners/suppliers who have a track record with us	9%	19	18
Partners/suppliers who have strong reputations	9%	20	19
Bringing in partners/suppliers with complementary expertise	8%	15	20
Reducing cost	6%	21	21

PROJECT PRIORITIES: SUPPLIER PERSPECTIVE

The consensus on project priorities across supplier segments mirrors their critical overall priorities discussed in Organizational Success Factors. The top three priorities for overall success are understanding the client's goals and strategies, having the trust of the ultimate client decision-maker, and communicating insights effectively. With some deviations across segments, the top five project priorities reflect these:

1. Providing results executives can act on
2. Making impactful recommendations
3. Ensuring work completely aligns with business objectives
4. Effective storytelling
5. Directly involving key business stakeholders

These also happen to be the same top five for buyers and are driven by the two generalist segments, full service research and strategic consultancies. Within the specialist segments, there are some differences.

The field services segment, in some ways an island unto itself, is the most different. They don't produce the same kinds of reports as other segments, so effective storytelling is not a high priority, but they do produce reports, and concise, direct reporting is one of their priorities.

These also happen to be the same top five for buyers and are driven by the two generalist segments, full service research and strategic consultancies. Within the specialist segments, there are some differences.



Although having the trust of the ultimate client decision-maker is one of their top three overall priorities, directly involving key business stakeholders is not a top five project priority. This is not a contradiction because, for field services providers, the ultimate client decision-maker may not be a key business stakeholder. Their decision-maker may be a project manager at a supplier, and the stakeholder may be the other supplier's responsibility, beyond their field of vision. On the other hand, this criterion is just barely outside the top five, so the business stakeholder might also be their supplier contact.

Their top five is rounded out by generating measurable ROI, which is also in the top five for technology providers. Arguably, field services and technology offerings are the most transparent to clients and have the most accessible metrics. It makes sense that they would focus on measurable ROI because, if they don't, their clients can. On the other end of the spectrum, the ROI of projects from full service research providers, strategy consultancies, and data and analytics providers might not be measurable for months or years, if at all.

Like the other two specialist segments, data and analytics providers don't consider directly involving key business stakeholders as a top five project priority. Instead, maximizing the precision of the data is in their top five, and you might consider that to be their equivalent to measurable ROI.

It makes sense they would focus on measurable ROI because, if they don't, their clients can.



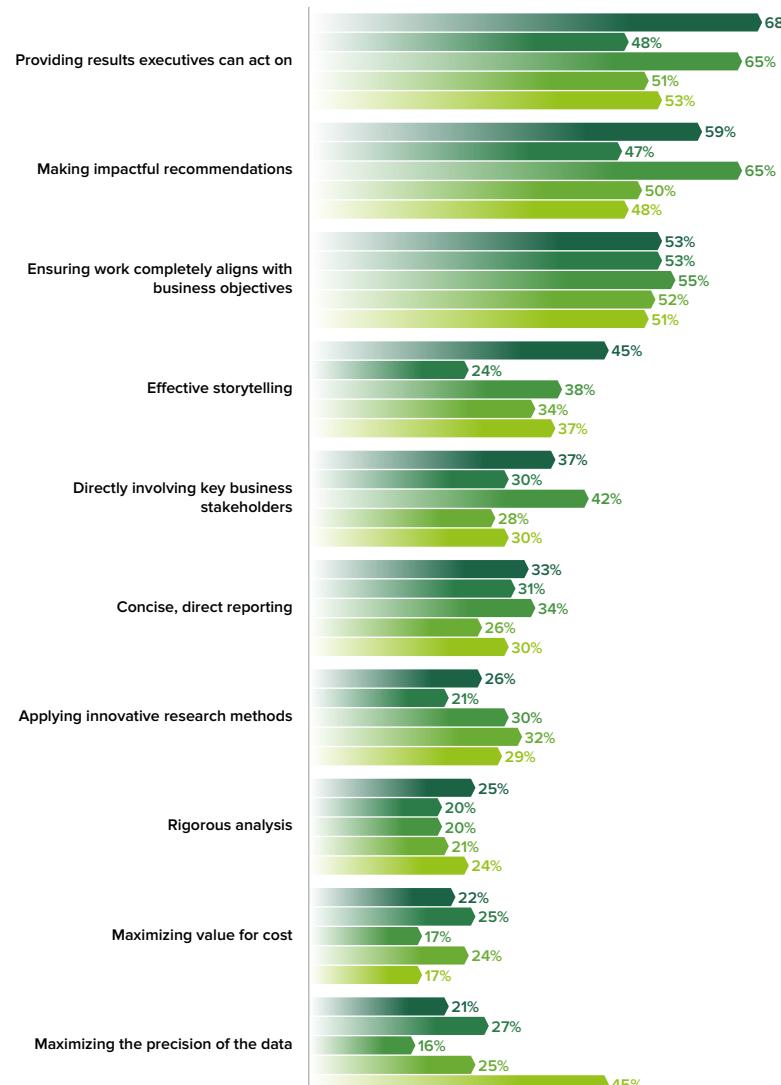
PROJECT PRIORITIES FOR INSIGHTS SUCCESS, RANKS: PROFESSIONAL FOCUS (SUPPLIER)

	Full service research (n = 454)	Field services (n = 112)	Strategic consultancy (n = 142)	Technology (n = 191)	Data and analytics (n = 169)
Providing results executives can act on	1	2	1	2	1
Making impactful recommendations	2	3	2	3	3
Ensuring work completely aligns with business objectives	3	1	3	1	2
Effective storytelling	4	10	5	4	5
Directly involving key business stakeholders	5	6	4	7	7
Concise, direct reporting	6	5	6	8	6
Applying innovative research methods	7	13	7	6	8
Rigorous analysis	8	14	10	12	10
Maximizing value for cost	9	9	11	10	13
Maximizing the precision of the data	10	7	13	9	4
Generating measurable ROI	11	4	8	5	9
Partners/suppliers who understand my business	12	16	9	13	17
Using proven methodologies	13	8	16	14	11
Partners/suppliers who bring unique perspectives	14	19	12	18	14
Getting results as quickly as possible	15	12	18	11	19
Synthesizing results from multiple data sources/types	16	18	14	16	12
Partners/suppliers who have a track record with us	17	17	21	20	15
Bringing in partners/suppliers with complementary expertise	18	11	19	15	16
Providing content for marketing communication	19	21	17	19	18
Partners/suppliers who have strong reputations	20	15	15	21	20
Reducing cost	21	20	20	17	21

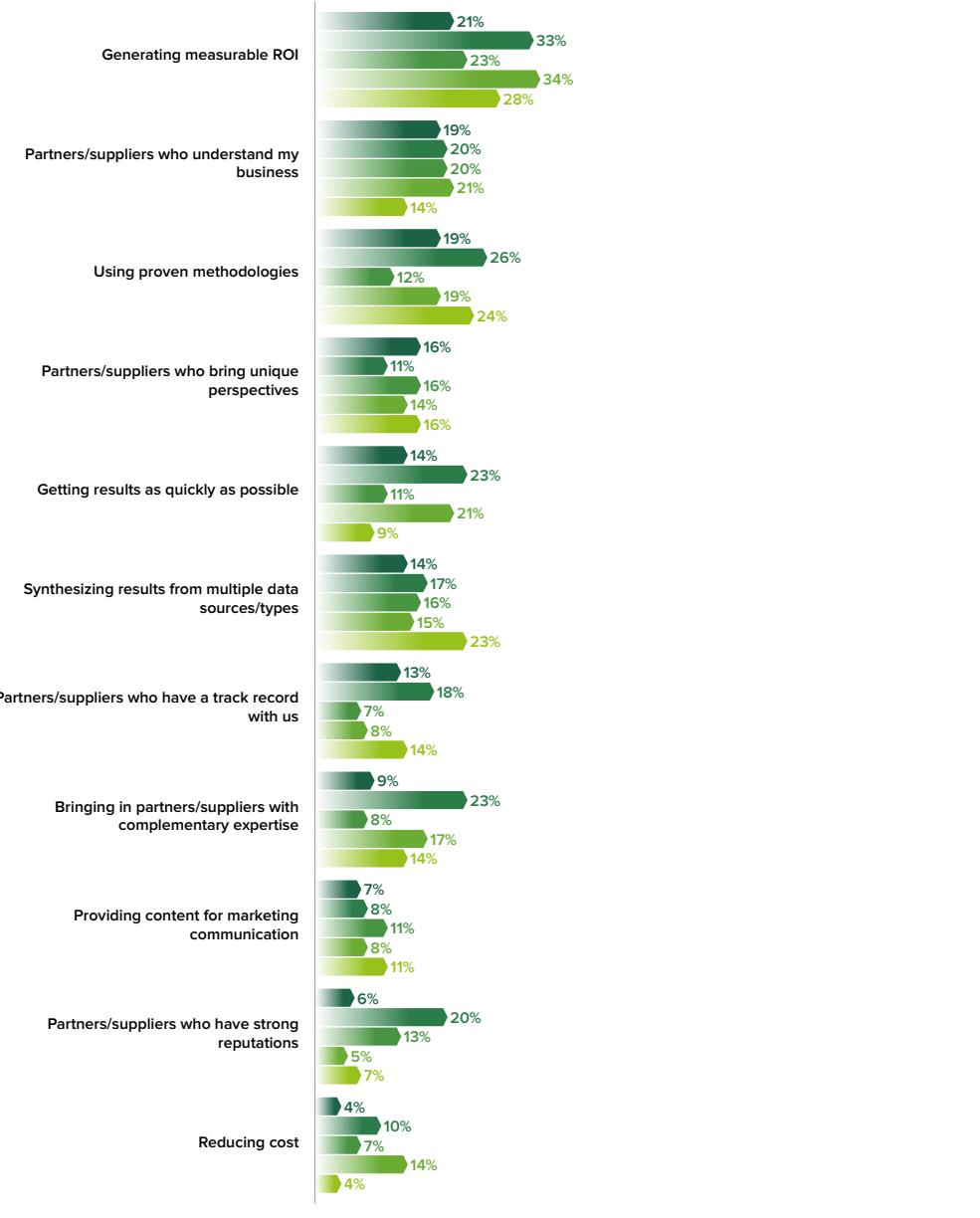
Like the other two specialist segments, data and analytics providers don't consider directly involving key business stakeholders as a top five project priority.



TOP 10 PROJECT PRIORITIES FOR INSIGHTS SUCCESS, %CHOSEN: PROFESSIONAL FOCUS (SUPPLIER)



NEXT 11 PROJECT PRIORITIES FOR INSIGHTS SUCCESS, %CHOSEN: PROFESSIONAL FOCUS (SUPPLIER)



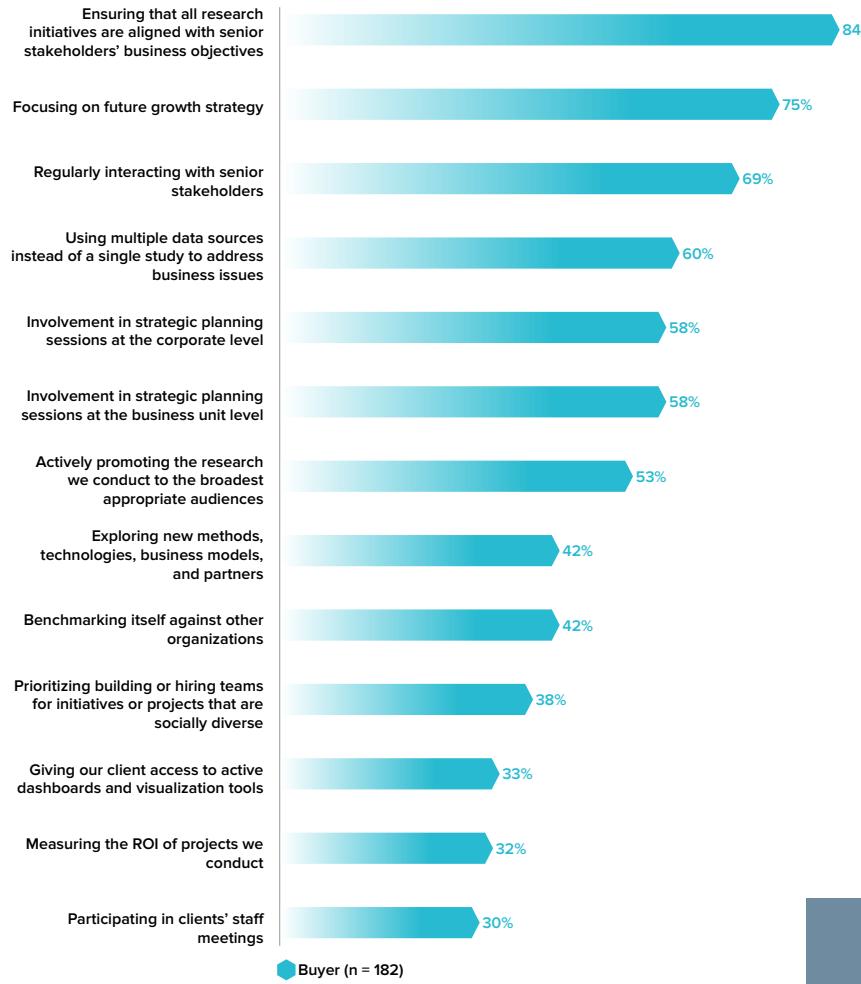
BEST PRACTICES: BUYER PERSPECTIVE

Certain practices might be considered “best practices” for insights organizations, and GRIT looks at them from two perspectives. First, the ones that are most commonly followed might be considered “best” because why else would so many follow them? Second, the ones that are done most commonly by those who are exceeding their goals might be considered “best” because they might produce demonstrable success.

Among buyers, the most common practices are ensuring that all research initiatives are aligned with senior stakeholders’ business objectives (84% “always or frequently”), focusing on future growth strategy (75%), and regularly interacting with senior stakeholders (69%). Three others are followed by a majority: using multiple data sources instead of a single study to address business issues (60%), involvement in strategic planning sessions at the corporate level (58%) and at the business unit level (58%), and actively promoting the research to the broadest appropriate audiences (53%). Six of these involve reaching out beyond the insights organization, and the seventh, using multiple data sources, involves adopting a broader perspective, too. More and more, buyers seem to be erasing the borders between insights and other functions.

Compared to 21W1, these seven have not changed much. After these seven, exploring new methods, technologies, business models, and partners fell from a majority (55%) to just 42%, and participating in clients’ staff meetings dropped to 30% from 42%. In recent reports, we have hypothesized that the pandemic caused a division of labor in which buyers left much of the responsibility for insights innovation to suppliers so they could focus on applying those innovations to their business issues.

BEST PRACTICES DONE “ALWAYS” OR “FREQUENTLY” (BUYER)



More and more, buyers seem to be erasing the borders between insights and other functions.



We hypothesized the pandemic caused a division of labor in which buyers left much of the responsibility for insights innovation to suppliers.



BEST PRACTICES DONE "ALWAYS" OR "FREQUENTLY", 22W1 V. 21W1 (BUYER)

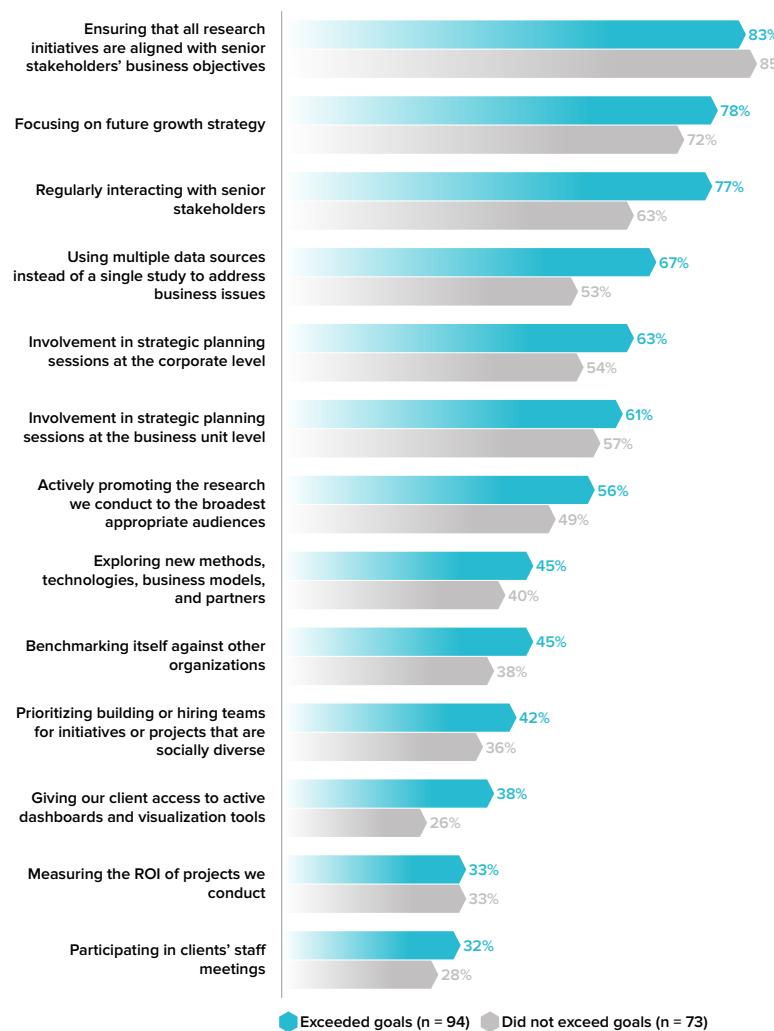
	21W1 (n = 404)	22W1 (n = 182)
Ensuring that all research initiatives are aligned with senior stakeholders' business objectives	79%	84%
Focusing on future growth strategy	79%	75%
Regularly interacting with senior stakeholders	75%	69%
Using multiple data sources instead of a single study to address business issues	66%	60%
Involvement in strategic planning sessions at the corporate level	56%	58%
Involvement in strategic planning sessions at the business unit level	62%	58%
Actively promoting the research we conduct to the broadest appropriate audiences	55%	53%
Exploring new methods, technologies, business models, and partners	55%	42%
Benchmarking itself against other organizations	41%	42%
Prioritizing building or hiring teams for initiatives or projects that are socially diverse	36%	38%
Measuring the ROI of projects we conduct	33%	33%
Giving our client access to active dashboards and visualization tools	37%	32%
Participating in clients' staff meetings	42%	30%

Looking at the gap between insights organizations that exceeded their goals versus those who didn't yields some insight into which best practices might have the most impact. The following best practices most differentiate between those who exceeded goals and those who didn't:

1. Regularly interacting with senior stakeholders (+14%)
2. Using multiple data sources instead of a single study to address business issues (+13%)
3. Giving the client access to active dashboards and visualization tools (+11%)

Of these three, only access to visualizations and dashboards is not done by a majority of buyers, so it may represent a major opportunity for the industry.

BEST PRACTICES DONE "ALWAYS" OR "FREQUENTLY": PERFORMANCE V. GOALS (BUYER)



Exceeded goals (n = 94) Did not exceed goals (n = 73)

Only access to visualizations and dashboards is not done by a majority of buyers, so it may represent a major opportunity.



BEST PRACTICES: SUPPLIER PERSPECTIVE

Five best practices “always” or “frequently” performed by most supplier participants in each segment emphasize focusing on senior stakeholders, innovation, and, most of all, growth:

1. Focusing on future growth strategy
2. Ensuring that all research initiatives are aligned with senior stakeholders’ business objectives
3. Exploring new methods, technologies, business models, and partners
4. Regularly interacting with senior stakeholders
5. Actively promoting the research to the broadest appropriate audiences

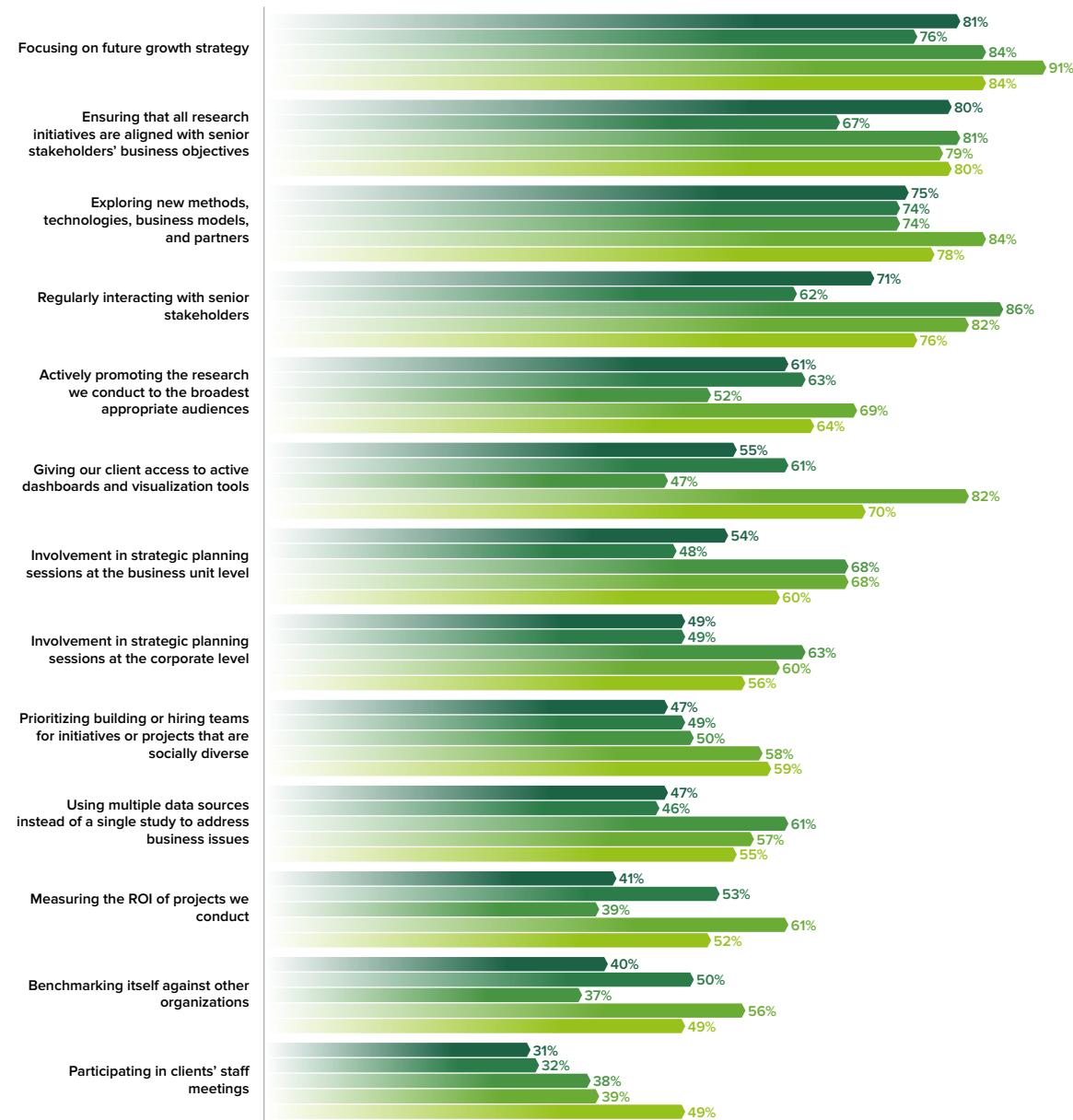
Technology providers are especially focused on future growth strategy (91%), and strategic consultancies are especially likely to regularly interact with senior stakeholders (86%). Although a majority perform them, aligning research with senior stakeholders’ objectives (67%) and regularly interacting with senior stakeholders (62%) are less likely activities among field services participants.

Except for field services, most participants in each supplier segment also provide access to visualization tools and dashboards and are involved in strategic planning at the business unit level.

Technology providers are especially likely to provide tools and dashboards (82%), as well as measure ROI of projects (61%) and benchmark themselves against other organizations (56%). Data and analytics providers are more likely than others to participate in client meetings (49%).

Technology providers are especially focused on future growth strategy, and strategic consultancies are more likely to regularly interact with senior stakeholders.

BEST PRACTICES DONE “ALWAYS” OR “FREQUENTLY”: PROFESSIONAL FOCUS (SUPPLIER)



Since 21W1, the best practices most frequently adopted by full service research providers are prioritizing social diversity (+9%), giving clients access to dashboards and visualization tools (+8%), and actively promoting their research (+7%). The only practices to decline dropped just 3%, using multiple data sources and ensuring research is aligned with senior stakeholders.

In the other generalist segment, strategic consultancies, the most adopted best practices since last year are involvement in corporate level strategic planning meetings (+11%) and prioritizing social diversity (+7%). As with full service research providers, ensuring research is aligned with senior stakeholders dropped (-7%). Benchmarking (-6%), exploring new ways to do things (-5%), and measuring ROI (-5%) are somewhat lower than 21W1.

The best practices that increased the most in field services are actively promoting the research (+32%), measuring project ROI (+23%), prioritizing social diversity (+20%), and regularly interacting with senior stakeholders (+20%).

Others also spiked up in this changing segment, and nothing declined.

Technology most often adopted measuring ROI (+13%) and involvement in corporate level strategic planning meetings (+10%). Visualization tools and dashboards stayed basically the same (-1%), but it was already at a high level.

As with project priorities, not much changed for data and analytics providers. Participating in client meetings (+8%) increased, as well as prioritizing social diversity (+7%). Giving clients access to visualization tools and dashboards (-5%) and involvement in corporate level strategic planning meetings (-4%) dropped somewhat.

BEST PRACTICES DONE “ALWAYS” OR “FREQUENTLY”, DIFFERENCE 22W1 – 22W1:
PROFESSIONAL FOCUS (SUPPLIER)

	Full service research	Field services	Strategic consultancy	Technology	Data and analytics
Focusing on future growth strategy	+3%	+9%	+3%	+2%	+3%
Ensuring that all research initiatives are aligned with senior stakeholders’ business objectives	-3%	+3%	-7%	+2%	+1%
Exploring new methods, technologies, business models, and partners	+4%	+17%	-5%	+2%	< 1%
Regularly interacting with senior stakeholders	+3%	+20%	+4%	+2%	+4%
Actively promoting the research we conduct to the broadest appropriate audiences	+7%	+32%	-4%	+3%	-3%
Giving our client access to active dashboards and visualization tools	+8%	+9%	-3%	-1%	-5%
Involvement in strategic planning sessions at the business unit level	+2%	+7%	+3%	+9%	-1%
Involvement in strategic planning sessions at the corporate level	+4%	+13%	+11%	+10%	-4%
Prioritizing building or hiring teams for initiatives or projects that are socially diverse	+9%	+20%	+7%	-2%	+7%
Using multiple data sources instead of a single study to address business issues	-3%	+14%	-2%	+8%	+2%
Measuring the ROI of projects we conduct	+5%	+23%	-5%	+13%	-2%
Benchmarking itself against other organizations	+1%	+19%	-6%	+6%	-1%
Participating in clients’ staff meetings	< 1%	+18%	+4%	+2%	+8%

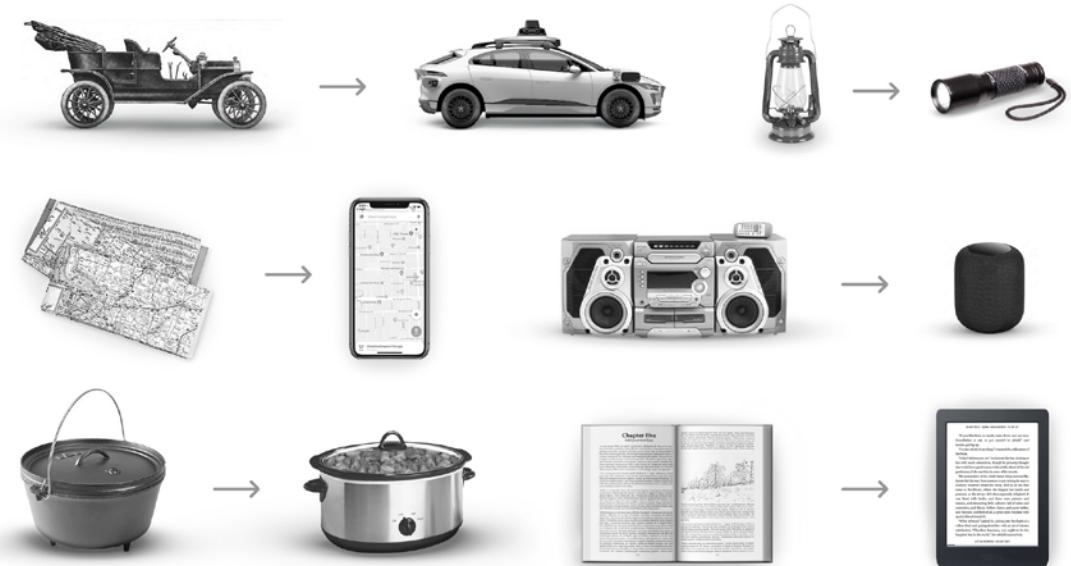
Technology most often adopted measuring ROI and involvement in corporate level strategic planning meetings.



Regarding best practice gaps that differentiate between suppliers who exceed goals and those that don't, the ones who exceed goals are generally much more active across the board, so many best practices differentiate them. The most differentiating among full service research suppliers are exploring new ways of doing things (+22%), giving access to visualization tools and dashboards (+17%), involvement in business unit level strategic planning meetings (+15%), and prioritizing social diversity (+15%). The best practices that most differentiate strategic consultancies that exceed goals from those who don't are prioritizing social diversity (+21%) and benchmarking (+19%).

For field services providers, the most differentiating best practices for those that exceed goals are prioritizing social diversity (+43%), involvement in corporate level strategic planning meetings (+37%), benchmarking (+27%), and giving access to visualization tools and dashboards (+25%). Among technology providers, they are using multiple data sources (+34%), involvement in corporate level strategic planning meetings (+28%), benchmarking (+21%), involvement in business unit level strategic planning meetings (+21%), and prioritizing social diversity (+20%). Lastly, among data and analytics providers, the most differentiating practices are using multiple data sources, (+22%), prioritizing social diversity (+21%), and ensuring research is aligned with stakeholders' business objectives (+17%).

Across supplier segments, different sets of best practices are associated with exceeding goals, but each set includes prioritizing social diversity. About half of all suppliers do this in full service research, field services, and strategic consultancies, and most do it among technology and data and analytics providers. The percentages are even higher for suppliers who exceed their goals. It's not clear whether increasing diversity directly drives performance more than performance creates additional opportunity to promote diversity.



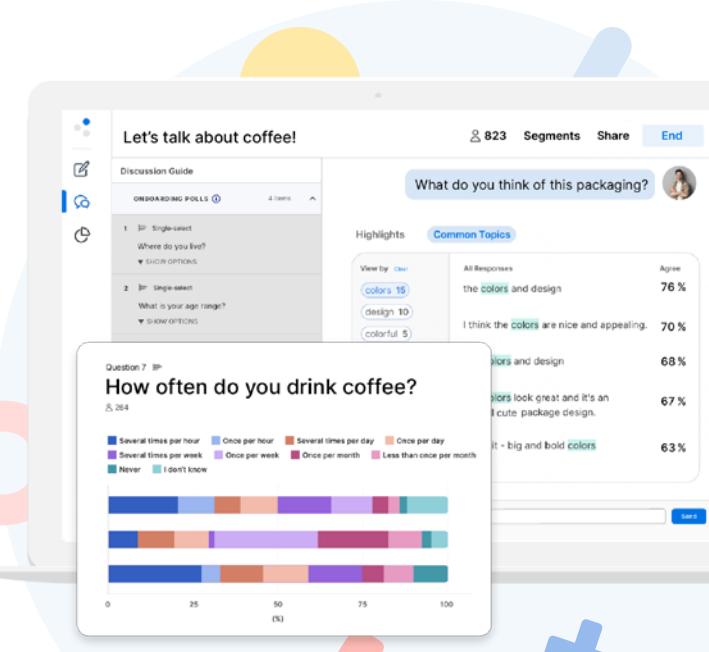
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THE BIG PICTURE

There was a time when some corporate executives perceived that their market research departments had grown into massive, powerful fiefdoms more concerned with pursuing their own agendas than with supporting corporate strategy. However, the way insights organizations describe their priorities and key behaviors now is a complete 180 from those bad old days. Insights professionals keep their focus on the business objectives, regularly engage with senior stakeholders, and prioritize business results and their effective communication when conducting their work.

Overall, the mindset of today's insights organization is to broaden horizons, both for themselves and for the organization at large. Focusing on business results gains them audience and sponsorship, and engaging with their audience and sponsors enables them to deliver insights that positively impact the business. Most insights organizations are involved in strategic planning, and that helps build relationships outside of insights while enabling them to better align their work with the overall corporate mission. Most also actively promote their work to make sure their audience and potential audiences know this, and most use multiple data sources to address business issues, a further example of broadening horizons.

The mindset of today's insights organization is to broaden horizons, both for themselves and for the organization at large.



EXPERT COMMENTARY

BUSINESS FIRST, AGAIN.



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This year's ranking of buyer priorities for research and insights underscores the imperative for any supplier who wants to remain relevant.

When looking at their own corporate function, insights and research buying organizations are prizes business knowledge as a key priority for their teams, recognizing consumer intelligence cannot be seen purely as a cost or "box to be ticked". To stay relevant, insights departments, increasingly partnering with other functions seamlessly across organizational borders, must act as an integral and growth-creating asset. It therefore becomes obvious for insights buyers – and the suppliers who serve them – that we all must anchor all efforts to the growth agenda of a brand, business unit, or wider organization.

The authors of this report describe the implications of this part of the report as "Business first, Again!" We'd argue that research's purpose, particularly for suppliers, should never have been anything else!

The industry-wide implications are clear: we can only claim value as suppliers if we innovate to influence consumer behavior in a way aligned with the growth objectives of client brands.

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The effectiveness of taking a broader perspective is reflected in the behaviors that are more characteristic of high-performing buyer insights organizations, e.g., the ones that exceed their goals. In addition to regularly interacting with senior stakeholders and using multiple data sources, these organizations are also more likely to share dashboards and visualization tools, deepening audience engagement while expanding it.

Suppliers are on board with this perspective, sharing the top project priorities and many of the same best practices. However, the best practices that are characteristic of high-performing suppliers differ from buyers' and also by segment. Although the characteristic behaviors of high-performing suppliers are segment-specific, prioritizing social diversity is the one behavior that differentiates in each segment. Although this best practice is not shared with buyer insights organizations, it might be considered one other way to broaden horizons.

The best practices characteristic of high-performing suppliers differ from buyers' and also by segment.



EXPERT COMMENTARY

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This year's GRIT Report is therefore less of a revelation to us and rather a confirmation that we at Behaviorally are on the correct path to serve clients well, now and into the future. It is why we have focused our business on helping clients achieve THE most critical moment in which marketing value is created: when a consumer chooses your product, and a purchase transaction is made. Perhaps the famous automotive innovator, Henry Ford said it best: "Nothing happens until someone sells something!"

How has this shaped our business? Our singular purpose has been building and taking to market a product stack anchored to that most important client business objective of enabling more valuable transactions. We have developed tools that identify the Benefits that motivate the consumer purchase behavior, and the Barriers that introduce friction into the path-to-purchase that can derail the transaction, at both the digital and physical retail shelf. Whether it is leveraging AI and the world's largest database of packaging metrics to derive reliable, predictive scores for in-market sales growth, mapping the opportunities across the shopper journey to influence customer behavior to our clients' advantage in retail, or applying decades of expertise and AI-based image recognition to optimize conversion at the digital shelf, this will always underpin our brand promise. It is why we are the Transaction Experts.



SAMPLE QUALITY

WHAT ARE BUYERS AND SUPPLIERS DOING ABOUT SAMPLE QUALITY?

Poor sample quality and availability are plaguing the insights industry, but not killing it. As a result, many buyers and suppliers are experiencing real problems, often on a recurring basis. To address this issue, many are increasing their efforts to acquire better sample, some are building their own, and some are investing in fraud detection and automated data quality assessment.

OVERVIEW

Anyone who has presented research to an executive team probably has had a similar experience. The first thing executives want to know is “who did you talk to?” and they have very specific ideas of whom you should have included. They are acutely aware of the market segments that provide the most revenue to the business as well as which target segments they expect to grow, and if your research misses those people or includes people they don’t care about, your presentation won’t last very long. In particular, B2B executives will want to know if you have included their major customers and prospects, and the head of business development will likely want you to violate GDPR and pass along their responses and contact information!

Anyone with a business stake in research results sooner or later cares about whom the research represents, and that means they care about sample. Whether you conduct survey research, focus groups, Big Data analysis, social media analysis, or any other kind of research that relies on data, you care about sample because the data you analyze needs to represent the population that can best answer the business or research question. If you can’t afford to conduct a census,

you need to sample the population. If the population universe includes people or data you don't care about, you need to sample the population. If the available data excludes certain people or situations – such as affluent families or people who don't post on social media – you will have to sample the population by default because a sample is all that exists.

Your sample has to be relevant, credible, and real. Nearly 100% of GRIT participants use online surveys at least occasionally, but it has become increasingly challenging to ensure the quality of the data is sufficient, particularly due to the rise of "professional respondents" who want to collect as many incentives as possible. They may pretend to be someone they are not in order to qualify, create fake identities in order to take a survey multiple times, or take so many surveys that they cannot possibly be paying attention to the questions.

The challenges are not limited to survey sampling. Social media analytics, for example, is similarly plagued: data may or may not come from real people, it might come mostly from the angriest people, and it systematically excludes certain kinds of people. Insights professionals need to be ever-vigilant regarding sample quality and availability, and they must take measures to prevent fraud and improve data quality when problems are identified. For the first time since 2018, GRIT examines the state of sample quality with brand new questions for brand new times.

The challenges are not limited to survey sampling; social media analytics is similarly plagued.



EXPERT COMMENTARY



CUSTOM RECRUITING: RESTORING TRUST IN SAMPLE QUALITY

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It's 2022, and the economy is just as uncertain as it was in the historic 2020. Enterprises are rethinking their approach to strategy and streamlining market research efforts. According to a new study conducted by NewtonX in partnership with Fortune:

- 25% of CFOs think that financial prospects are worse than three months ago
- 62% of CFOs expect their organization's market research budget to shrink or stay the same in the next twelve months

Surrounded by constant global disruptions, outdated sample methods must go. According to the 22W1 Sample Quality GRIT report, 48% of buyers made at least one poor business decision in the past six months due to sample quality or availability. How many poor decisions does it take before they lose trust in the industry?

An industry plagued by unreliable sample quality

Traditional survey panels aren't equipped to find needles in a knowledge haystack. They attempt to optimize within a broken way of working. As a result, the GRIT report found that most buyers are looking for alternative sample sources (62% of buyers in North America and 57% in Europe).

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BUYER PERSPECTIVE

To begin, GRIT asked participants to rate their perceptions of the quality of data used in various kinds of research. As these are asked for the first time, we do not have trend information, and that makes it difficult to make an absolute judgment regarding good or bad quality, but we can compare across types of research to see which generate the highest levels of confidence.

Buyers with opinions have the most confidence in data from surveys conducted by or for their company and the least confidence in data from public opinion polls. Eighty percent of buyers rate the quality of data from their surveys as “excellent” or “good,” more than double that for public opinion polls (34%). Further, only 4% rate their own survey data as “not very good” or “poor” while 21% give bottom two box ratings to public opinion polls.

Compared to their own survey data, buyers are more suspicious of data quality from surveys conducted for reports produced outside their organization with only 62% rating them as “excellent” or “good.” Confidence is nearly as high for the quality of data used for government census reports (60%), although, in theory, these do not “sample.” Big Data analysis engenders a similar level of confidence (58%) with fewer ratings of “not very good” or “poor” compared to government census reports (7% to 13%).

Data quality for social media analysis and public opinion polls fail to generate “excellent/good” ratings from a majority (35% and 34% respectively). They also have the most bottom two box ratings: 24% for social media analytics and 21% for public opinion polls. Among the other three types of research, only government census reports eclipse 10% bottom two box ratings.

EXPERT COMMENTARY

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What if we changed the sample recruitment model? What if samples didn’t draw from low cost, high fraud, stagnant panels — but rather the new paradigm of Custom Recruiting?

Custom Recruiting: the new sample paradigm

Custom Recruiting changes the game. Rather than pulling from closed panels, it scans open networks of billions of professionals across any industry imaginable. Powered by deep search technology, real time databases, and filters tailored to business needs — if you can think of it, you can use Custom Recruiting to find it. How does this impact sample?

Accuracy. Laser precision in targeting means you’re only reaching out to relevant professionals based on the exact specifications that match your business questions.

Scale. Multimillion dollar business decisions need statistically significant sample sizes — not 50, or even 500, but thousands. Finding thousands of respondents while meeting 20 different targeting quotas wasn’t previously possible — until automated, specialized searches entered the picture.

Quality. The automation fuels both the recruiting and verification processes. This yields samples that are 100% verified, with 0% fraud.

Custom Recruiting turns the traditional sample and fielding methodology on its head. In order to thrive in the new tomorrow, research firms and buyers must look beyond cost and speed — and partner to redefine sample and rebuild trust in the data.



At this point, we can say that buyers have the most confidence in their own surveys, but we can't say whether it's a case of "the devil you know" versus the "devil you don't know." Would a corporate researcher be pleased to know that "only" 20% of its audience thought the quality of their survey data was only "fair" to "poor"? That's almost as many as think it's "excellent" (21%). Does it matter?

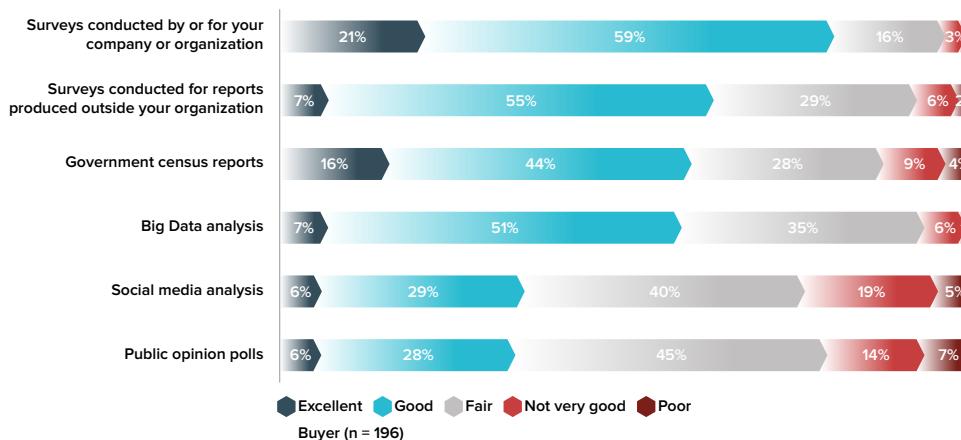
It might.

Directionally, buyers who say the quality of their survey data is "excellent" were more likely to see their research budgets increase (47%) than those who say it is "good" (44%) or "fair" (41%). More dramatic – but still directional – only 8% of the "excellents" saw budget decreases, less than half of the "goods" (19%) and "fairs" (18%). None of the "excellents" saw budgets decrease significantly, but 4% of the "goods" and 11% of the "fairs" did.

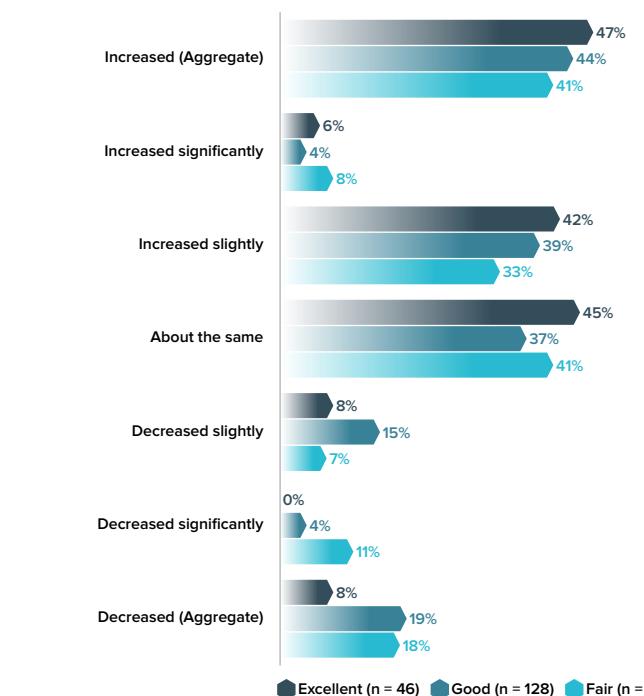
In previous reports, we've seen that great performance is not necessarily rewarded with higher budgets, but there is often a budget penalty for under-performance. We take the impact of sample quality on budget to be a hypothesis rather than a fact because these findings are only directional and we know there are many reasons why budgets may decrease, not all of them bad.

In previous reports, we've seen that great performance is not necessarily rewarded with higher budgets, but there is often a budget penalty for underperformance.

QUALITY OF DATA GENERALLY USED (BUYER)



RESEARCH SPENDING TENDENCY: DATA QUALITY OF OWN SURVEYS (BUYER)



Would a corporate researcher be pleased to know that "only" 20% of its audience thought the quality of their survey data was only "fair" to "poor"?



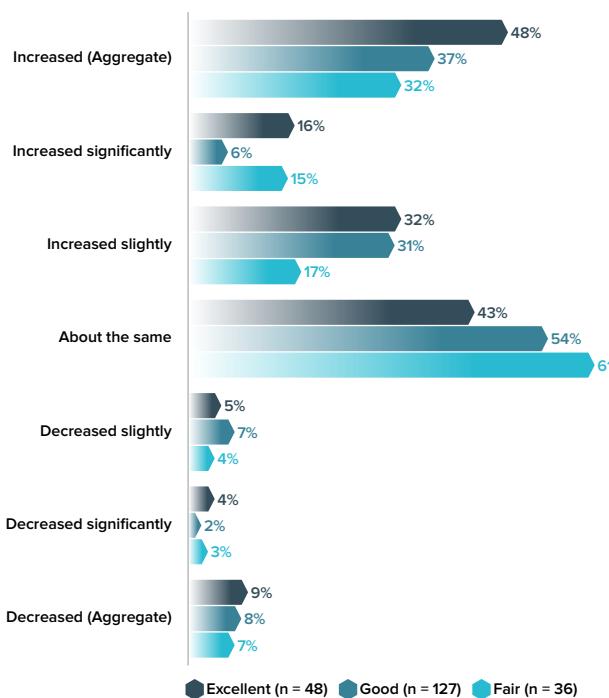
Not to belabor the point, but the relationship between sample quality and full-time employee growth appears to be stronger than the relationship to budget, but in the opposite way. Nearly half of those with “excellent” sample quality increased the number of FTEs working in insights (48%) compared to less than one-third of the “fairs” (32%) and only 37% of the “goods.” Unlike the research budget relationship, lower sample quality is not related to decreases in FTEs, but better performance is related to staff increases. Our working hypothesis is that excellent data quality may contribute to insights staff increases while lesser data quality could help trigger re-evaluation of research spending.

A vast majority (88%) of buyer insights professionals engage with sample data in some way, either directly or indirectly. Most use results of research based on sampling (67%), and most manage research projects that use sample (62%). More than one-third buy sample from providers (37%), and a handful provide sample (3%) or sample quality tools (6%) to others.

A vast majority of buyer insights professionals engage with sample data in some way, either directly or indirectly. Most use results of research based on sampling, and most manage research projects that use sample.



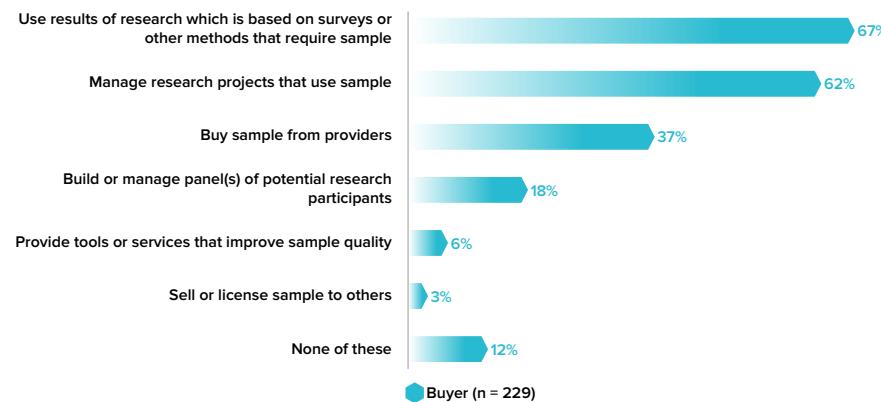
FTE TREND: DATA QUALITY OF OWN SURVEYS (BUYER)



Nearly half of those with “excellent” sample quality increased the number of FTEs working in insights.



PERSONAL INVOLVEMENT WITH SAMPLE (BUYER)



Generally, opinions of sample quality are similar across these different kinds of users, although real differences are muted because the relationships overlap, but one directional difference emerges. Those involved in panel work, providing sample quality tools, or selling sample to others ("other" in the chart) are more likely to rate the quality of survey data used outside their organization as "excellent" or "good" (73%), but more of them give that rating to their own survey data (81%).

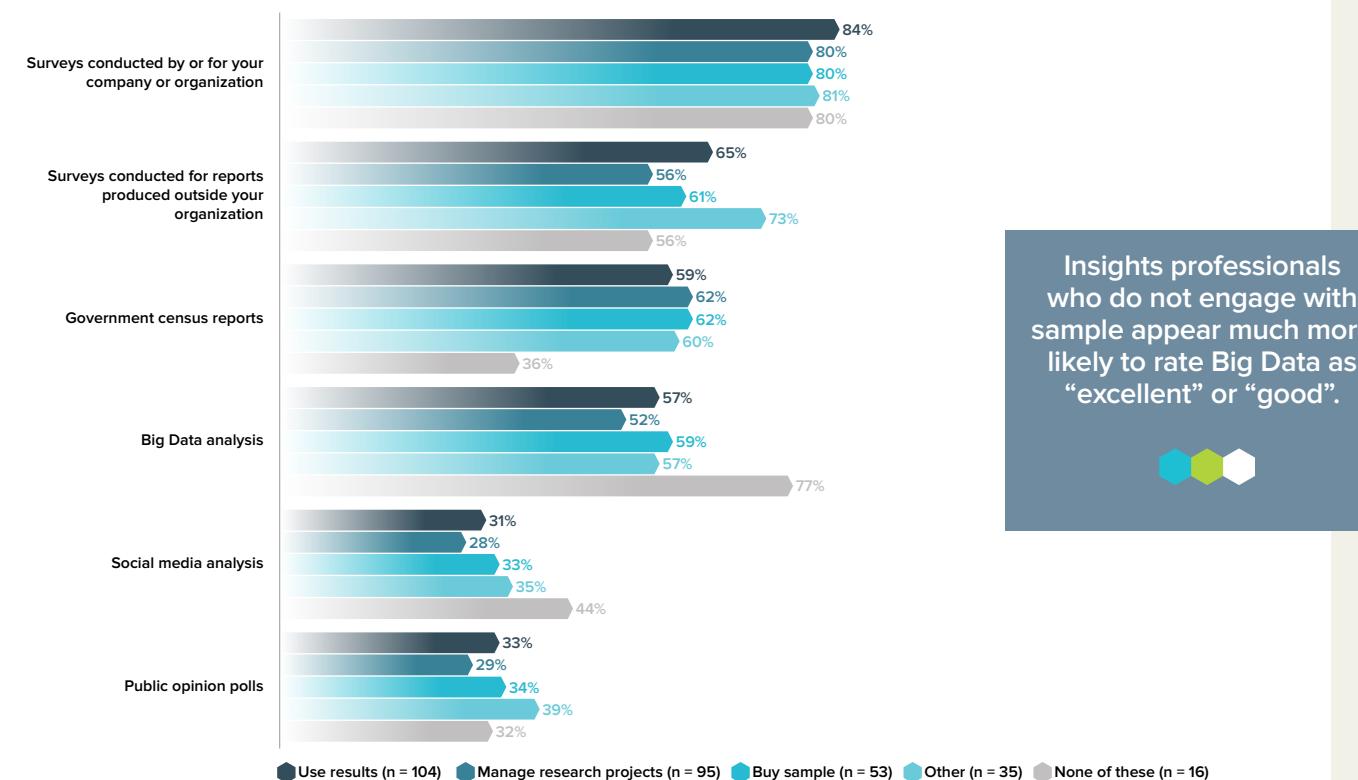
The most interesting directional finding is that insights professionals who do not engage with sample in any way appear to be much more likely to say that data used in Big Data analysis is "excellent" or "good" (77%) and somewhat more likely to say the same for data used for social media analysis (44%). They are much less confident than others in government census data (36%) and external survey data (56%). Our hypothesis is that a significant segment of insights professionals has turned away from survey research to embrace other kinds of data. Admittedly, this is a very small group among buyers, but it may indicate the advent of a future trend.

GRIT asked buyers who engage with sample in any way how frequently they experienced certain problems due to sample quality or availability in the past six months. More than half say sample issues never caused them to make a poor decision (52%), but 41% said this happened, although only less than half the time. Only 7% said sample issues resulted in a poor business decision at least half the time, but we have to ask, "what is an acceptable rate?"

More than half say sample issues never caused them to make a poor decision, but 41% said this happened, although only less than half the time.



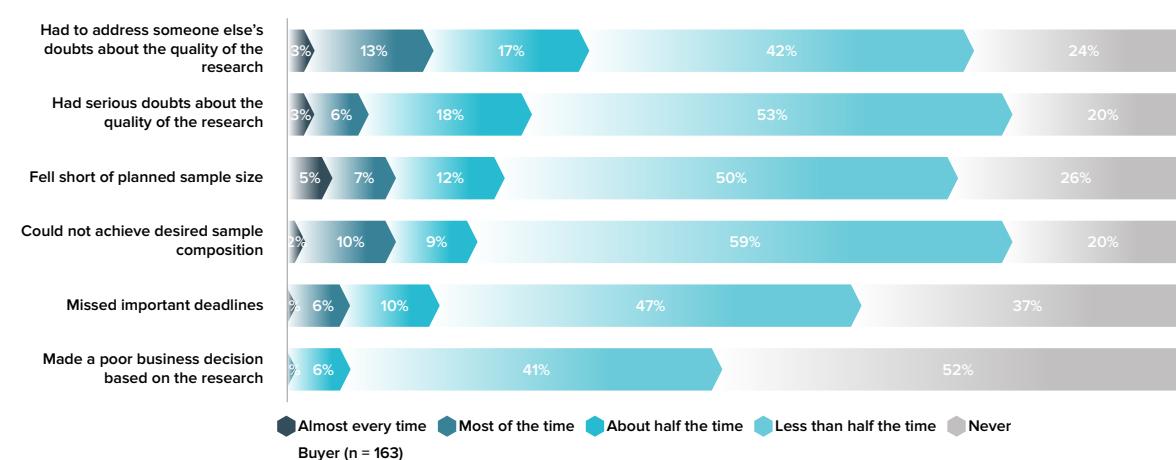
QUALITY OF DATA GENERALLY USED IS GOOD OR EXCELLENT: PERSONAL INVOLVEMENT (BUYER)



Insights professionals who do not engage with sample appear much more likely to rate Big Data as "excellent" or "good".



FREQUENCY OF SAMPLE-RELATED PROBLEM IN PAST 6 MONTHS (BUYER)

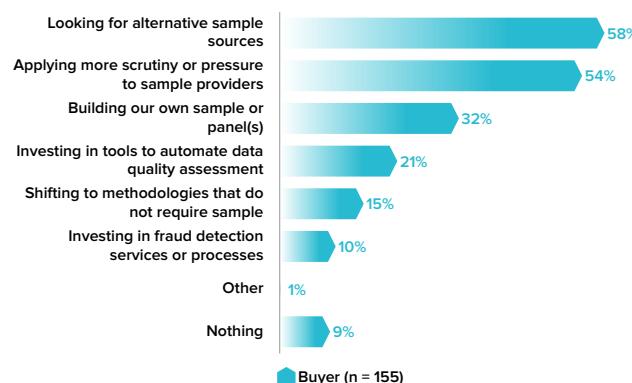


Taking the data at face value, 48% of buyers made at least one poor business decision in the past six months due to sample quality or availability. How many poor decisions do they have to make before they look for alternatives? How many buyers need to make poor decisions before word gets around and the industry loses confidence? GRIT has some clues to the answers.

The most frequent issue caused by sample quality or availability is having to address someone else's doubts about the quality of the research. One-third of buyers (33%) say they had this situation at least half the time in the past six months. While an insights professional might expect to have to address doubts from others from time to time, more than one-quarter say they had their own serious doubts about the quality of their research at least half the time (27%). Nearly as many say they fell short of the planned sample size (24%) or could not achieve their desired sample composition (21%) at least half the time. Also, 17% say they missed important deadlines due to issues with sample quality or availability at least half the time. While these numbers are not a majority, they seem large enough to cause discomfort for the industry, and 91% of buyers report experiencing at least one of these problems in the past six months.

Among buyers who experienced at least one problem related to sample quality or availability in the past six months, most are re-examining their sample sourcing, looking for alternative sources (58%) or applying more scrutiny or pressure to sample providers (54%). Nearly one-third say they are building their own sample or panels (32%). Some are trying to address sample quality issues directly via automated assessment (21%) or fraud detection investments (10%), and some are opting out altogether by shifting to methods that do not require sample (15%). It seems like most buyers have experienced problems related to sample quality or availability frequently enough to be moved to some kind of action.

STEPS TAKING TO ADDRESS SAMPLE QUALITY/AVAILABILITY (BUYER)



Most buyers have experienced problems frequently enough to be moved to some kind of action.



STEPS TAKING TO ADDRESS SAMPLE QUALITY/AVAILABILITY: EXPERIENCED PROBLEM AT LEAST HALF THE TIME IN P6M RANKED (BUYER)

	Address someone's doubts about research (n = 53)	Had serious doubts about research (n = 43)	Fell short of sample size (n = 35)	Not desired composition (n = 34)	Missed important deadlines (n = 21)
Looking for alternative sample sources	2	1	1	1	1
Applying more scrutiny or pressure to sample providers	1	2	2	2	2
Building our own sample or panel(s)	3	3	3	5	3
Shifting to methodologies that do not require sample	4	4	4	4	6
Investing in tools to automate data quality assessment	6	6	6	3	5
Investing in fraud detection services or processes	5	5	5	6	4
Other	7	7	7	7	7

On average, buyers experienced two sample-related problems at least half the time in the past six months, and more than half experienced at least four of them (59%). This overlap makes it difficult to connect specific problems to specific steps undertaken in response.

If we look those who experienced a particular problem at least half the time, some directional differences emerge. If a buyer had serious doubts, had to address someone else's doubts, missed an important deadline, or fell short of their desired sample size, their top three actions are to look for alternative sample sources, apply more scrutiny or pressure to sample providers, and build their own sample or panels. For those who did not achieve their desired sample composition, their third action is to invest in automating sample quality assessment rather than to build their own sample or panels.

Perhaps the most drastic action is to look for methods that do not require sample, which ranks no higher than fourth in each group. Still, nearly one-quarter or more in most groups are taking that step, from buyers who addressed someone else's doubt at 22% to those who fell short of their target sample size at 33%. Those who missed important deadlines are the outlier at only 12%.

On average, buyers experienced two sample-related problems at least half the time, and more than half experienced at least four of them.



EXPERT COMMENTARY



SMART AUTOMATION FOR HIGHER DATA QUALITY

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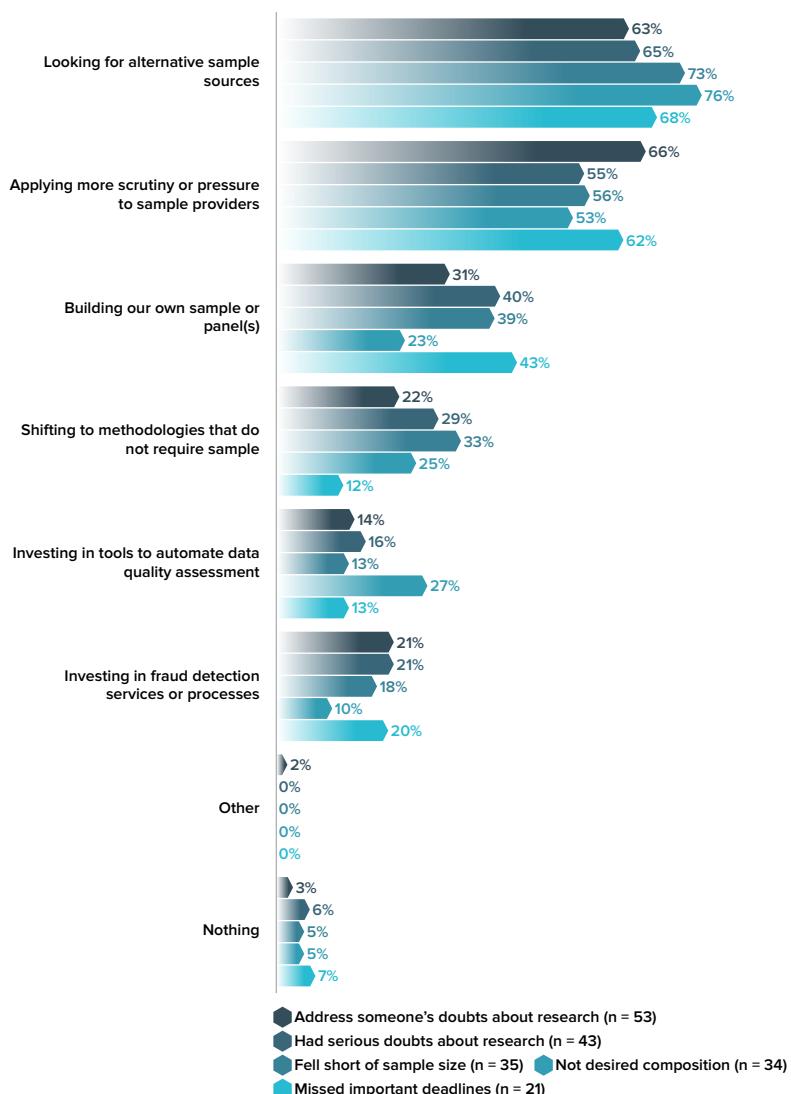
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In today's world, the reduction in time allowed between end of field, production of results and presentation to stakeholders, is often so short that any data quality issues quickly become serious business issues. Once stakeholders start to lose faith in research, all can be lost. It is no surprise that the sample supplier is judged to be at fault, and buyers go looking for alternative sample sources. Yet, creating feedback loops between sample suppliers and buyers with both parties working closely together to combat these "survey cheaters," presents a better approach to subvert this problem in the future.

Sample quality is clearly identified as a problem that has affected many people – and some of them quite often. The real problem is one of identification: not "how fast can you spot you have a problem?" – that is sometimes blindingly obvious – but "how fast can you identify the truly poor records?" and "how quickly can they be replaced?"

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STEPS TAKING TO ADDRESS SAMPLE QUALITY/AVAILABILITY: EXPERIENCED PROBLEM AT LEAST HALF THE TIME IN P6M (BUYER)



Perhaps the most drastic action is to look for methods that do not require sample, which ranks no higher than fourth in each group. Still, nearly one-quarter or more in most groups are taking that step.



EXPERT COMMENTARY

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Sometimes a cheater cohort is easily identifiable: they make little effort to disguise their cheating and give themselves away. These are the cases you can find through classic data quality traps and checks. These checks however are becoming increasingly less effective against what we might call the “smart cheater.” They know what we are looking at, and they make efforts to provide us what we need: good looking open-ends (often cut-and-paste from the internet), surveys done at a reasonable speed (by waiting at the end of the survey to click “finished”), little or no straight lining, etc. They cannot be seen by the naked eye, but they can be seen by an AI working with all its machine learning to compare the results of the cheaters with the results of the majority – for that is the one thing the cheater does not know: what is the “right” answer, and what is its distribution. And of course, the AI also finds the “lazy cheater.”

Because they work in real time, automated solutions such as QualityScore™ from Dynata’s Imperium, prevent bad cases from ever becoming a completed survey. There is therefore no knock-on effect on timing, no missed deadlines, fewer cases of planned sample sizes not being achieved, and much reduced chances of poor business decisions being made.

This is the future. This is the solution.



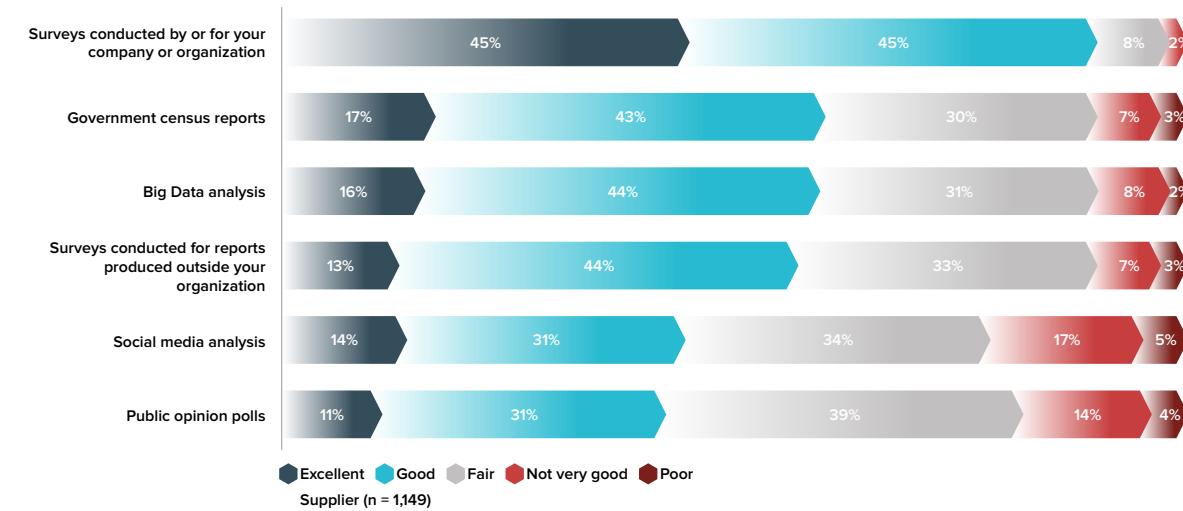
SUPPLIER PERSPECTIVE

Looking at suppliers in aggregate (we'll look at them by professional focus soon enough), opinions about the data quality in different kinds of research look a lot like the opinions of buyers. Data quality for their own surveys is much more likely to be considered "excellent" or "good" (90%) than data used in other types of research. As with buyers, the next three types hover around 60%: government census reports and Big Data analysis (60% each) and surveys conducted for other organizations (57%). Data used for social media analysis (45%) and in public opinion polls (42%) bring up the rear, but with somewhat more positive assessments than buyers gave them. The percentages of suppliers who could not form opinions are also nearly identical to the percentages of buyers.

Across supplier segments, nearly all rate the quality of their survey data to be "excellent" or "good," and this seems a bit too good to be true. If their survey data is so good, what data are buyers using? Who is conducting public opinion polls? In each segment, most also rate as "excellent" or "good" government census data, Big Data, and survey data conducted outside their organization. The quality of social media data and data used for public opinion polls are not rated as highly as the data used in other types of research.

Strategic consultancies seem to be the most skeptical of government census report data (52%), Big Data (53%), social media data (34%), and data for public opinion polls (33%) as they provide fewer "excellent" and "good" ratings than other segments. Technology providers share their relative skepticism of government census data (51%).

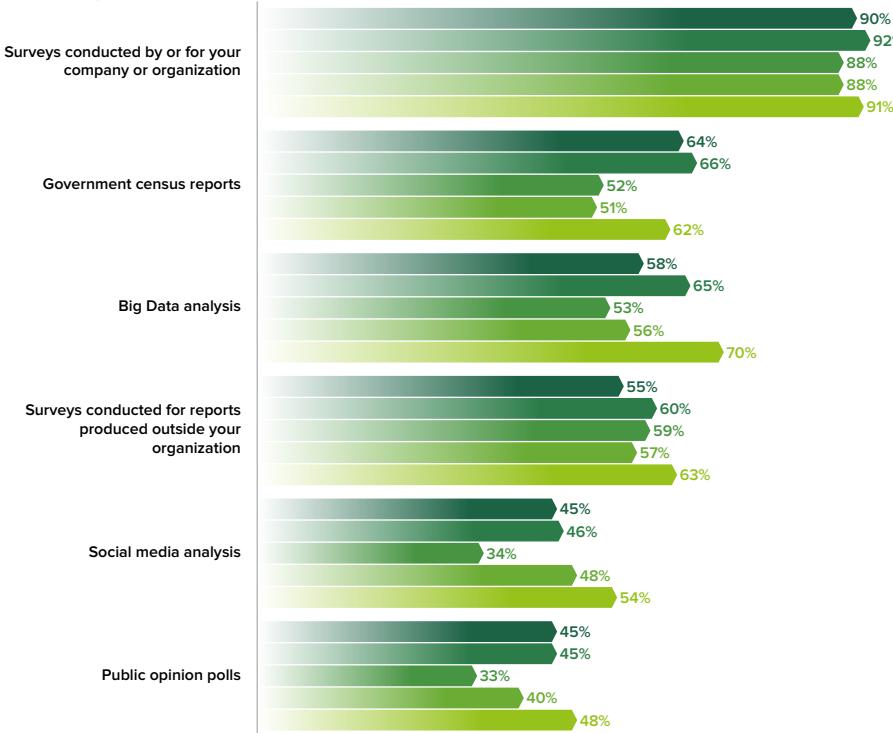
QUALITY OF DATA GENERALLY USED (SUPPLIER)



Nearly all rate the quality of their survey data to be "excellent" or "good," and this seems a bit too good to be true.

Field services providers and data and analytics providers are more enthusiastic than other segments regarding Big Data, as 65% of field services and 70% of data and analytics participants rate it as “excellent” or “good.” In past reports, we have pointed out similarities across the two supplier types, and this result may be another indication of the growing sophistication of field services providers. While data and analytics participants share an appreciation for Big Data with field service participants, they stand alone in their appreciation of social media data as the only segment in which a majority consider it to be “excellent” or “good.”

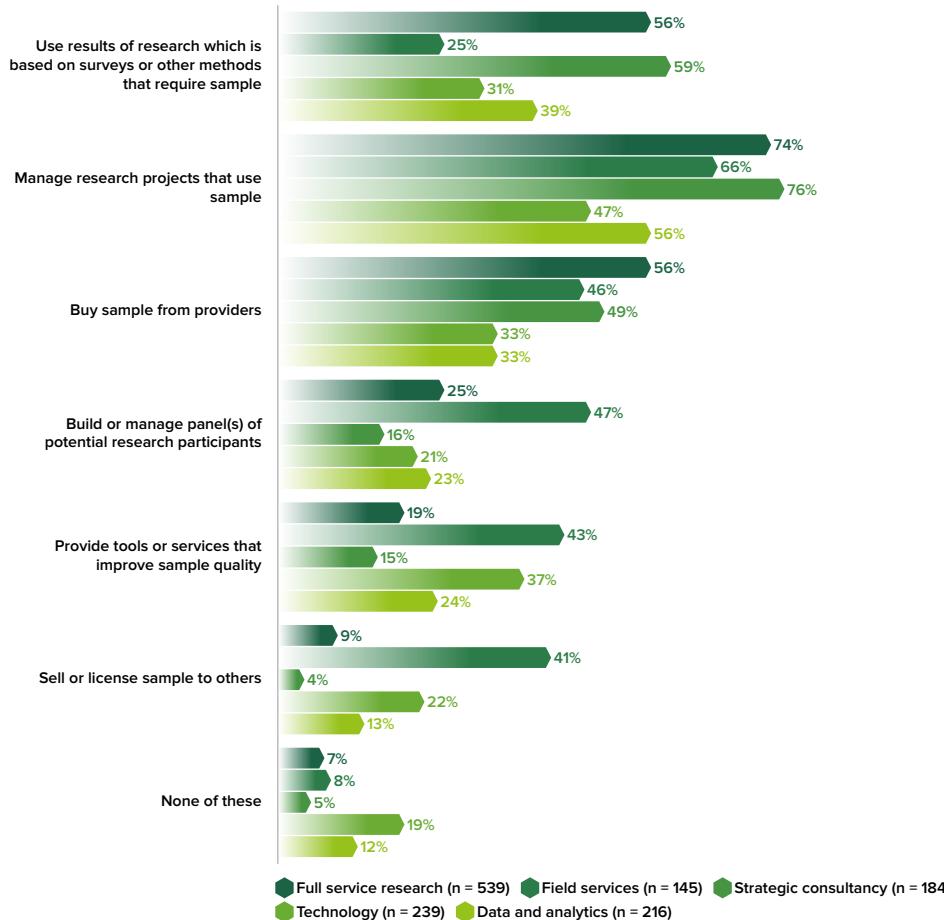
QUALITY OF DATA GENERALLY USED IS GOOD OR EXCELLENT: PROFESSIONAL FOCUS (SUPPLIER)



Full service research (n = 393) Field services (n = 118) Strategic consultancy (n = 132)
Technology (n = 181) Data and analytics (n = 210)

Typical kinds of personal involvement with sample varies across supplier professional focus segments. Most supplier participants in each professional focus segment manage research projects that use sample, from data and analytics (56%) to strategic consultants (76%). The exception is technology, in which only 47% manage such projects.

PERSONAL INVOLVEMENT WITH SAMPLE (SUPPLIER)

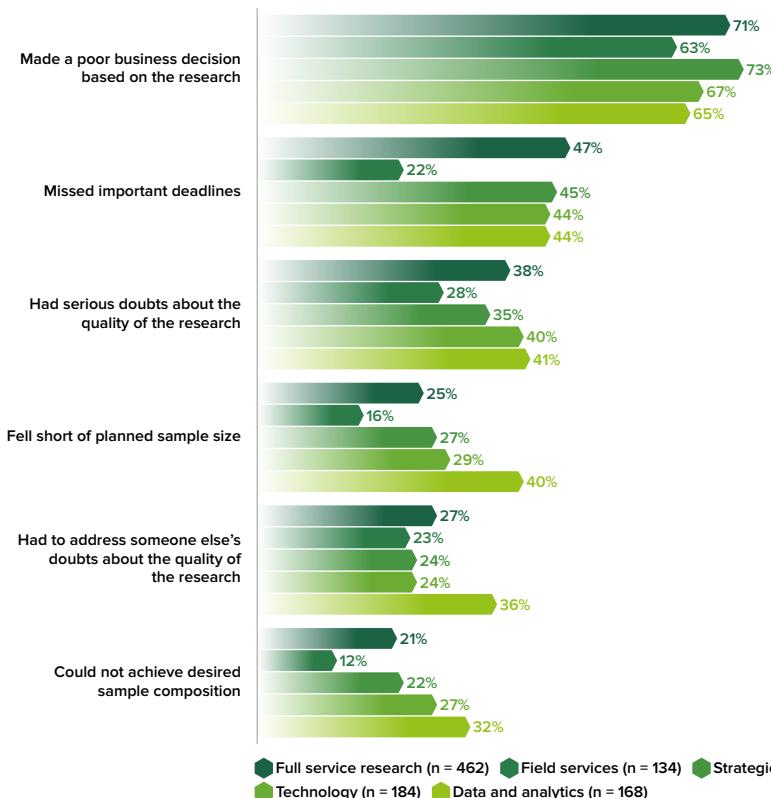


Most supplier participants in each professional focus segment manage research projects that use sample.



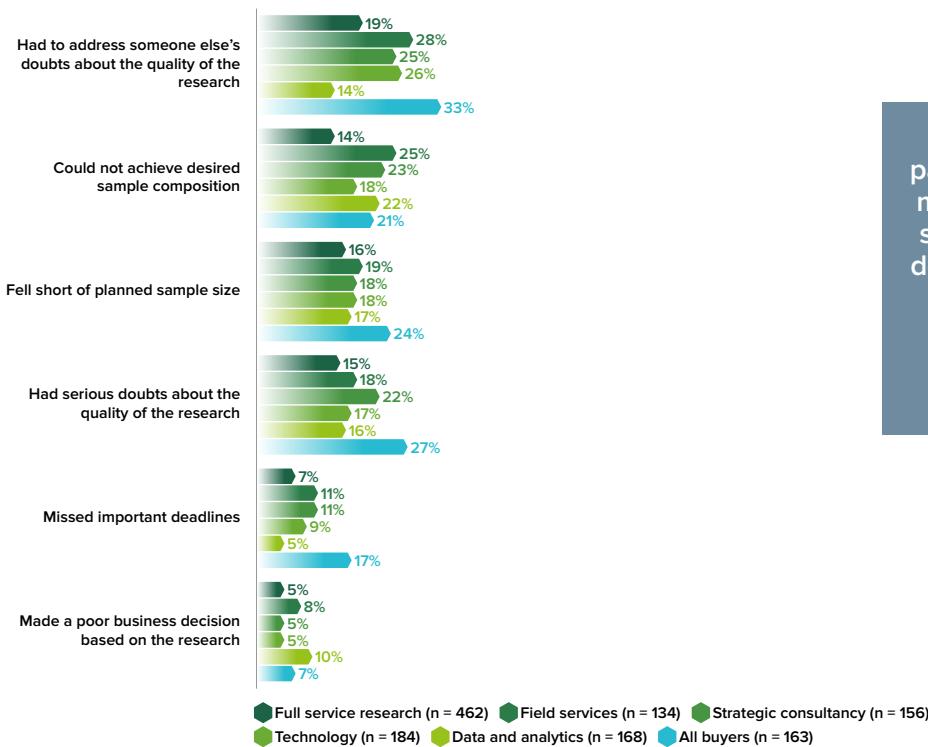
As with buyers, a majority of suppliers in each professional focus segment never had a poor business decision result from sample quality or availability in the past six months (but we don't really know if that holds true for their clients). Full service research providers (71%) and strategic consultancies (73%), who are more likely to be closer to clients throughout the project cycle, are more likely than others to have never had a poor business decision result from a sample problem.

NEVER HAD SAMPLE-RELATED PROBLEM IN PAST 6 MONTHS: PROFESSIONAL FOCUS (SUPPLIER)



Regarding sample-related problems that occurred more than half the time in the past six months, results are similar across segments with a few exceptions. About one-quarter of field services (28%), technology (26%), and strategic consultancy (25%) participants say they had to address someone else's doubts at least half the time, while the percentage is somewhat lower for full service research (19%) and data and analytics participants (14%). Full service research participants are also less likely than others to say that they could not achieve the desired sample composition at least half the time (14%). Strategic consultancy participants are somewhat more likely than others to say that they had serious doubts about the research at least half the time (22%).

SAMPLE-RELATED PROBLEM AT LEAST HALF THE TIME IN PAST 6 MONTHS: PROFESSIONAL FOCUS (SUPPLIER) AND (BUYER)



Strategic consultancy participants are somewhat more likely than others to say that they had serious doubts about the research at least half the time.



Beyond acknowledgement, suppliers in each segment are taking steps to improve sample quality, although each may be prioritizing a different path. Almost all of them (at least 98%) are doing something to address the issue (although only 90% of strategic consulting participants are taking steps). The largest segment, full service research providers, share two top three actions with buyers: look for alternative sample sources (71%) and apply more scrutiny and pressure to sample providers (69%). Unlike buyers, their third action is to invest in tools to automate data quality assessment (43%), which is followed closely by investment in fraud detection (41%).

Strategic consultancy participants are taking actions similar to full service research participants. They are focusing on alternative sample sources (61%) and more scrutiny and pressure on sample providers (63%). Their third action is to invest in fraud detection (39%), followed closely by investment in tools to automate data quality assessment (38%).

As with full service and strategic consultancies, field services participants are investing in fraud detection (76%) and tools to automate sample quality assessment (68%), though with understandably more urgency. Their third action is to build their own sample or panels (65%), which is also a top three action for buyers. Most of them are also looking for alternative sources (55%) and applying more scrutiny and pressure to their suppliers (53%). The only action not taken by the majority is to look for methodologies that do not require sample (14%).

As with full service and strategic consultancies, field services are investing in fraud detection and tools to automate sample quality assessment, though with understandably more urgency.



STEPS TAKING TO ADDRESS SAMPLE QUALITY/AVAILABILITY: PROFESSIONAL FOCUS RANKED (SUPPLIER)

	Full service research (n = 431)	Field services (n = 129)	Strategic consultancy (n = 153)	Technology (n = 164)	Data and analytics (n = 152)
Looking for alternative sample sources	1	4	2	4	3
Applying more scrutiny or pressure to sample providers	2	5	1	2	4
Investing in tools to automate data quality assessment	3	2	4	1	1
Investing in fraud detection services or processes	4	1	3	3	5
Building our own sample or panel(s)	5	3	5	5	2
Shifting to methodologies that do not require sample	6	6	6	6	6
Other	7	7	8	7	8

Most technology participants are investing in tools to automate data quality assessment (63%), applying more scrutiny and pressure to sample providers (56%), investing in fraud detection (54%), and looking for alternative sample sources (52%). Many are building their own sample or panel (40%), but very few are shifting to methodologies that do not require sample (12%). Possibly, many of them are already too invested in sample-dependent tech to make a switch even if they wanted to do so.

Most data and analytics participants are investing in tools to automate data quality assessment (58%) and half are building their own sample or panels (50%). Just under half are looking for alternative sample sources (49%), and slightly fewer are applying more scrutiny or pressure to sample providers (44%).

Most data and analytics participants are investing in tools to automate data quality assessment.



Problems due to sample quality or availability occur with disturbing frequency but are recognized by the industry and steps are being taken to address them. Some may point to the fact that the most frequently cited steps are to look for alternative sample sources or to apply more pressure to sample providers, and that these actions have little value for the industry because they assume the solutions are already out there waiting to be found.

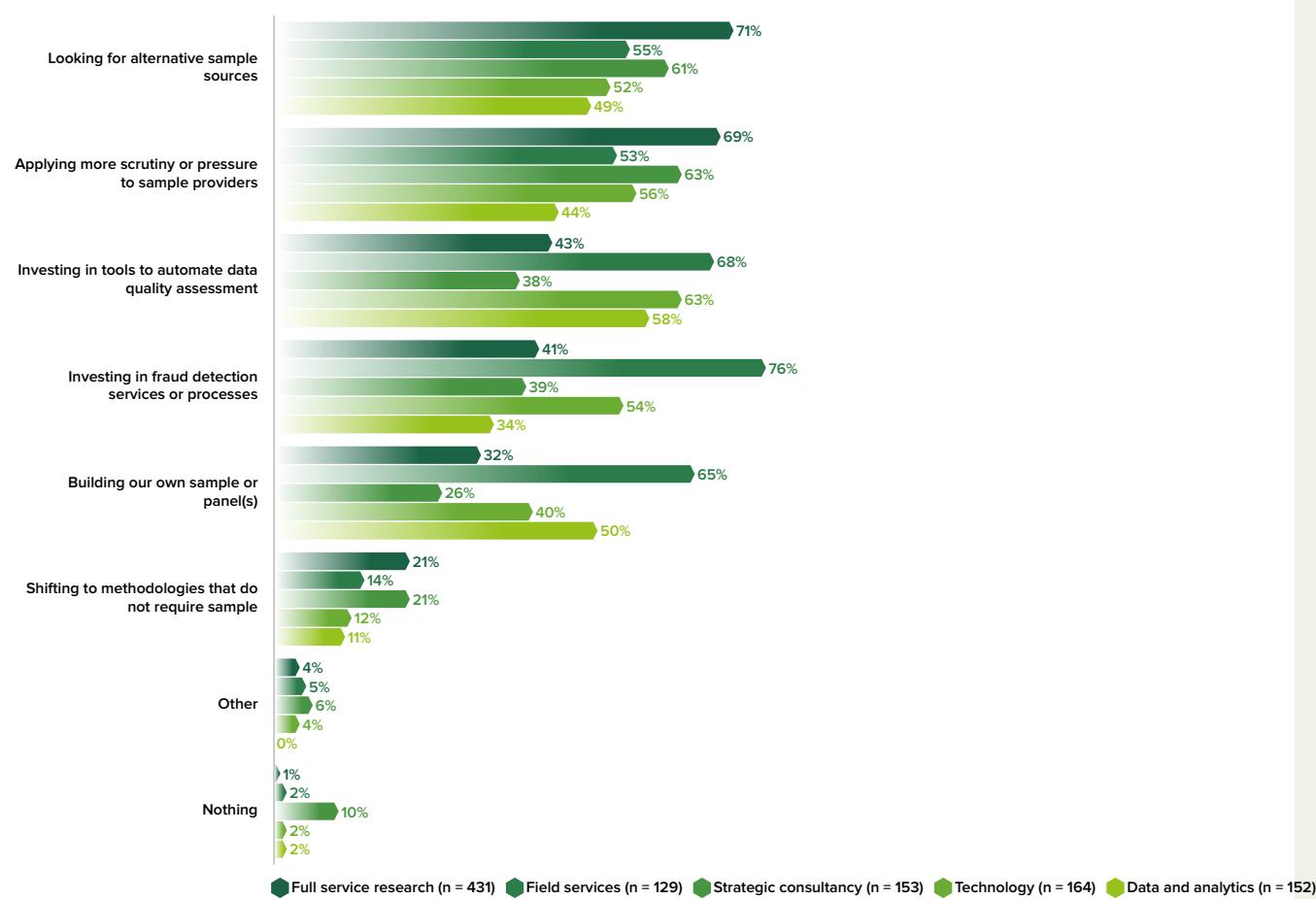
From that perspective, if the actions that produce new solutions are only taken by a minority, does that “cure” an industry plagued by bad quality sample? Do those searching for new solutions thrive while others go on life support? Or, given the degree to which buyers work with different suppliers and suppliers work with other suppliers, is there enough activity to achieve “herd immunity” against the sample quality virus?

To wrap up the supplier discussion on the same note as the discussion of buyers, when people experience multiple problems due to sample quality, it affects their ongoing perceptions of sample. Of suppliers who did not have a recurring issue due to sample quality or availability, 94% say that the quality of the data used in their surveys is “excellent or “good,” and none would call it “not very good” or “poor.” By contrast, among those who had a recurring issue, only 81% believe their survey data is “excellent” or “good,” and 5% say it is “not very good” or “poor.”

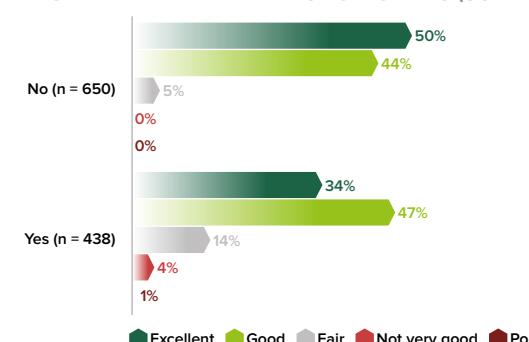
When people experience multiple problems due to sample quality, it affects their ongoing perceptions of sample.



STEPS TAKING TO ADDRESS SAMPLE QUALITY/AVAILABILITY (SUPPLIER)



QUALITY OF DATA USED IN SURVEYS CONDUCTED BY/FOR YOUR ORGANIZATION: HAD AT LEAST ONE SAMPLE-RELATED PROBLEM AT LEAST HALF THE TIME IN PAST 6 MONTHS (SUPPLIER)



THE BIG PICTURE

Poor sample quality is plaguing the insights industry, but, thankfully, it hasn't killed it. Buyers and suppliers are experiencing a variety of problems due to poor sample quality or availability *at least half the time*, but they recognize the severity of the problem and are taking steps to address it. Most everyone rates the quality of data in surveys conducted by or for their company or organization to be superior to data used in a variety of other types of research, including public opinion polls, government censuses, Big Data analytics, and social media analytics. Only a handful are looking for alternative methodologies that do not depend on sample at this point in time.

In every buyer and supplier segment, most GRIT participants are taking steps to address sample quality issues. However, most of them are looking for alternative sample sources or applying more scrutiny or pressure to sample providers, two actions that assume higher quality sample must exist somewhere but do nothing to improve the quality of sample in the industry. If more high quality sample is to be used by the industry than exists today, new innovations will be necessary.

Building their own sample or panels is a popular solution for some and might be considered innovative relative to where they are now. However, when reviewing the GRIT results on how many people are building their own sample or panel, you can't help but get the creeping feeling that this might worsen the problem. Are there enough willing, qualified participants to populate all these panels? If so, will these be the same people who are currently spending hours each day taking surveys and exacerbating the problem? Will they even be real people?

If more high quality sample is to be used by the industry than exists today, new innovations will be necessary.



EXPERT COMMENTARY



DEPENDABLE, TRANSPARENT, REPRESENTATIVE: THE “NEW NORMAL” FOR SAMPLE QUALITY

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Panel sample is what keeps the market research industry going. But as an industry, we are only as good as that sample's level of quality.

We face a wide range of challenges when it comes to sample quality. Bots, VPNs, and offshore proxy servers can compromise data quality from a technical perspective. Professional survey takers and survey farms also have a negative impact on data quality, and traditional forms of fraud detection have lost some of their effectiveness as a result.

Regardless of the method or its level of sophistication, sample fraud has never posed a greater threat to our industry, at a time where data quality is of the utmost importance to research firms and clients alike.

At Logit, we are invested in overcoming these challenges and finding ways to create better quality sample, keeping panelists motivated and invested in the process.

By implementing third-party quality tools, such as our restech partner Research Defender to deter fraudulent behavior and measure respondent engagement in real-time, inattentive, or bad-acting respondents are weeded out before they can damage survey data.

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Some buyers and suppliers are investing in fraud detection or automated assessment of sample quality, two innovations that address the root problem. These actions are not being taken by a majority, but maybe enough suppliers will succeed at this so that everyone can use such tools without having to build their own.

Finally, it is significant that buyers and suppliers are very likely to consider their own survey data to be higher quality than data used in Big Data analytics and especially higher than data used in social media analytics. Although this may not sound like conventional wisdom, data used in any analysis is likely to be a sample of a larger population and should be criticized in the same way we criticize survey data. The implication is that insights professionals who are adopting Big Data and social media analytics are not doing it because of their perceptions of data quality, and these methods are more likely to be considered as complementary to traditional research methodologies rather than as replacements for them. Big Data and social media seem to have a ways to go to achieve the quality benchmark set by survey data.

Insights professionals who are adopting Big Data and social media analytics are not doing it because of their perceptions of data quality; these methods are more likely to be considered as complementary to traditional research methodologies rather than as replacements for them.



EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

The next logical step to improve sample quality is to broaden the universe...to look beyond just traditional double opt-in panel sources. By using multi-source data marketplaces — which can include river, social media, and affiliate-based data sources — researchers can expand reach and provide better audience composition and further mitigate against single source bias.

Tapping into these differentiated sources through API connectivity creates a convenient, dependable, renewable, and more representative sample for market research studies. Not solely relying on panel sample as the single source of truth can and should be the “new normal.”

If we as an industry simply choose to not differentiate between these various sources — relying instead on API connections to bring them all together, with cutting-edge data quality tools to minimize fraud — a more robust and healthier sample source is the result.

Most clients now understand that there will always be a percentage of data that does not maximize business value — no matter how good the sample sources and quality control measures — and will plan ahead for that outcome.

In return for this understanding, it is the responsibility of our industry to build towards full and radical sample source transparency.

The sample space is rich with complexity and nuance. Embracing — and enhancing — that variety is what will give it vibrance and relevance in 2022 and beyond.



EMPLOYMENT TRENDS WHAT CHALLENGES DO EMPLOYERS FACE AND HOW ARE THEY DEALING WITH THEM?

GRIT has tracked insights staff trends since 17W2, and now, for the first time, we take a closer look at the labor market for insights and analytics. After the lows of the pandemic, staff size increases are at an all-time high, but many still face challenges getting what they need from a competitive market in which the employee may hold most of the cards.

OVERVIEW

In the 1941 film *The Maltese Falcon*, Sam Spade (Humphrey Bogart) shouts “What have you ever given me besides money? Haven’t you tried to buy my loyalty with money and nothing else?” Today’s insights professionals might be asking the same question.

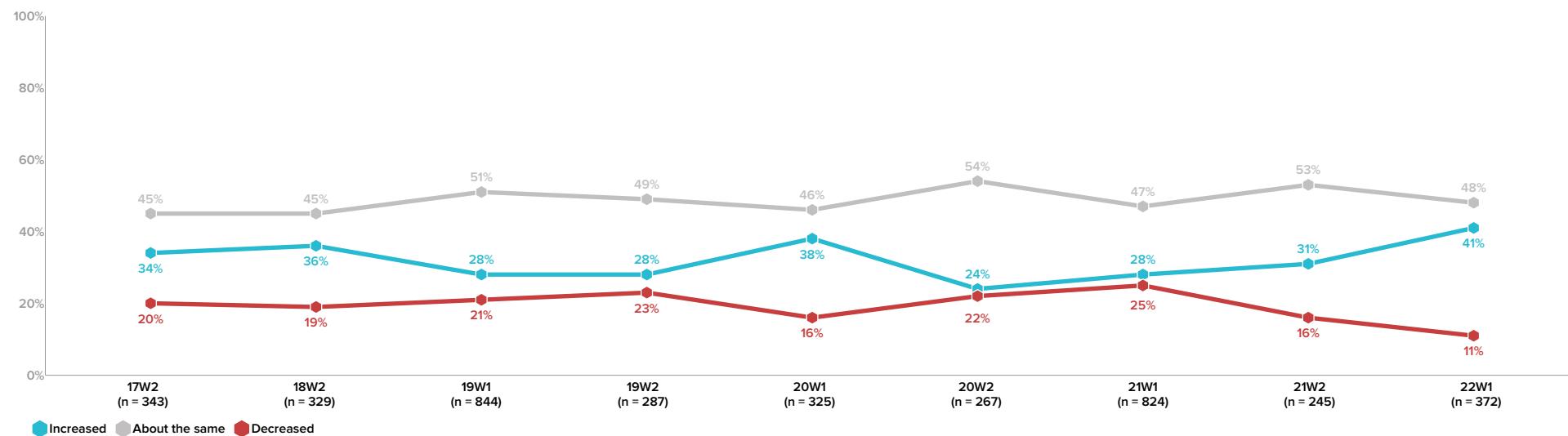
Most of them believe they would have no problem finding a well-paying position if they decided to look, and most supplier participants and nearly half of the buyers are either offering or expecting to offer increased compensation as a way to attract or retain employees. Losing employees to better compensation packages is cited as a significant factor when staff sizes decline, and more than one-third of employers expect potential hires to demand more than they want to pay.

On the other hand, staff increases are at an all-time GRIT high, and staff decreases are at an all-time low, so employers, by and large, seem to be ponying up. However, they are also offering other benefits to attract and retain staff, so perhaps money alone is not enough to win the bidding war. Employers are offering flexibility, and it seems to be a successful complement to financial incentives.

BUYER PERSPECTIVE

In 20W1, on the eve of the pandemic, GRIT recorded an all-time high for buyer participants who said full-time staff increased over the past 12 months at 38%. The percentage who decreased staff also hit an all-time low, 16%. Then the pandemic arrived and triggered all-time lows for increases and new highs for decreases.

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



The ultimate flexibility is to eschew corporate life and work as a contractor. Some insights professionals embrace that flexibility, and some employers see that as a challenge. In this section, we'll touch on that dynamic as well as other challenges and opportunities in today's insights and analytics labor market.

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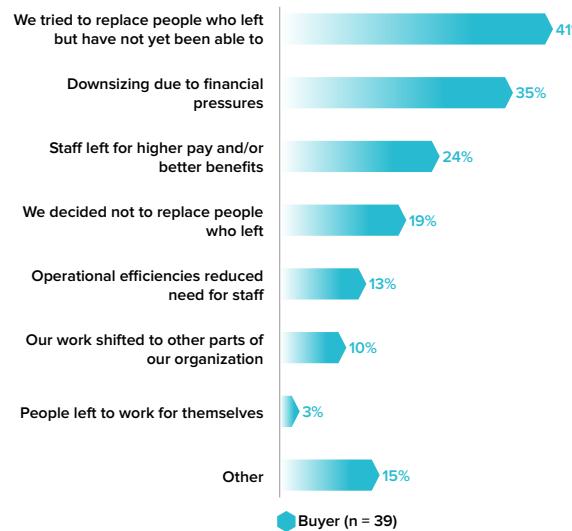


For the first time, GRIT asked those who experienced staff size decreases about the significant factors that drove it, and, unfortunately for the question but not for the industry, this coincided with the lowest-ever incidence of staff size decreases. Across the few buyer participants that answered it, the top factor is their as-yet-unsuccessful attempts to replace people who left (41%). This is followed closely by downsizing due to financial pressure (35%), then staff leaving for higher pay and/or better benefits (24%), and conscious decisions to not replace people who left (19%). With the caveat that this is a relatively small sample size, this nets out to 46% of decreases being company decisions via downsizing, shifting work, or increased efficiencies. Of those who have tried but not yet replaced staff, 47% of them also said that staff left for higher pay or better benefits, confirming that compensation is an important, but not singular, challenge for many buyers. This means more staff decreases resulted from deliberate corporate action than from an inability to replace staff that probably left voluntarily, often for a better deal.

GRIT asked buyer participants what they thought of various statements, and the response that stands out the most is that two-thirds do not agree at all that they would rather be a contractor than an employee (65%). On the other hand, 3% completely agree and 8% mostly agree, so 1 in 10 buyer participants would rather work as contractors. We don't have historical data to determine if this is a trend or, if it is a trend, which direction it is heading.

Similarly, only 13% completely or mostly agree that most skilled people would rather work as contractors, though only 44% do not agree at all. So, there is somewhat more support for the feeling that others would prefer to work as contractors than would the participant, but this does not seem tidal, at least not yet from buyers.

SIGNIFICANT FACTORS BEHIND DECREASE IN FTE POSITIONS (BUYER)



More staff decreases resulted from deliberate corporate action than from an inability to replace staff that probably left voluntarily.



The strongest agreement is that the participant would have no problem getting a well-paying position if they decided to look (55% completely or mostly agree), and this seems consistent with the finding that staff leaving for a better package was a significant factor in staff decreases.

The next strongest agreement is that potentially skilled hires would probably demand a lot more than the participant would be willing to pay (44%), and this echoes the “no problem getting a well-paying position” sentiment as underlining the magnitude of challenge to replace people.

There is even less agreement that it will be difficult to find and hire skilled people for full-time work (32%) or for paid work (29%). The last statement, that skilled people don’t want permanent positions anymore, is down in the “working as a contractor” territory we just visited, at 15%.

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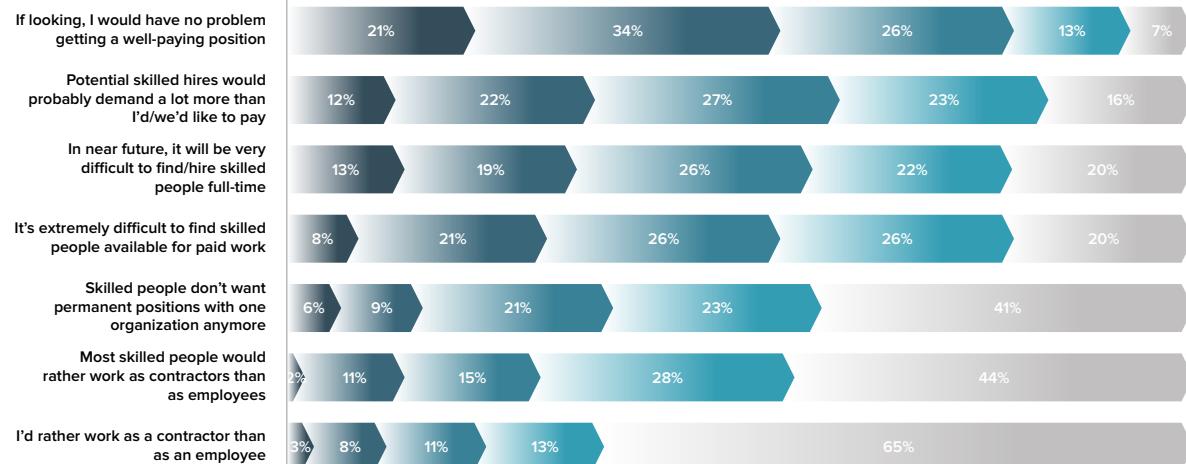


Surprisingly, these attitudes are basically the same across buyer participants with different amounts of insights experience. Whether they have less than five years' experience or more than twenty, there's no apparent trend across them. We might expect attitudes toward employment to be related to generational differences or career stages, but these aren't.

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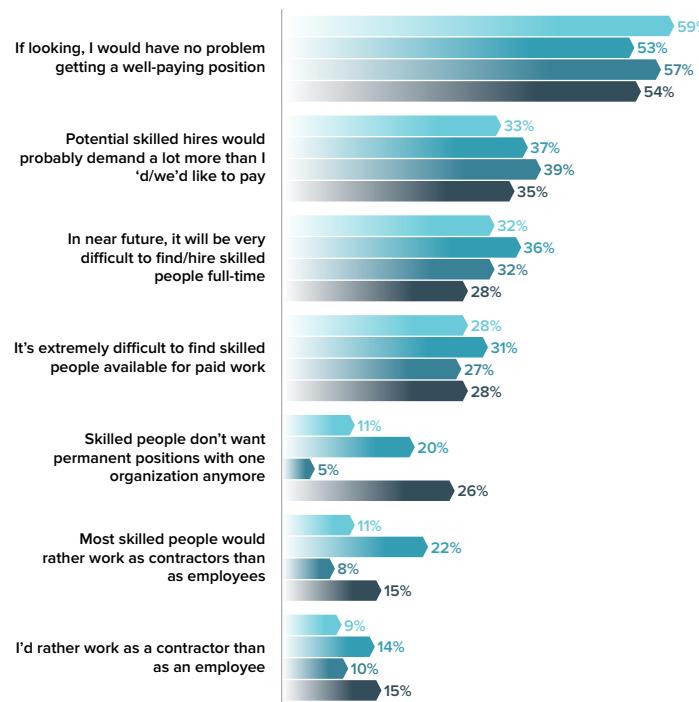


EMPLOYMENT TREND ATTITUDES (BUYER)



Agree completely Mostly agree Somewhat agree Agree a little Do not agree at all
Buyer (n = 389)

COMPLETELY/MOSTLY AGREE WITH EMPLOYMENT TREND ATTITUDES: YEARS IN INSIGHTS ROLE (BUYER)



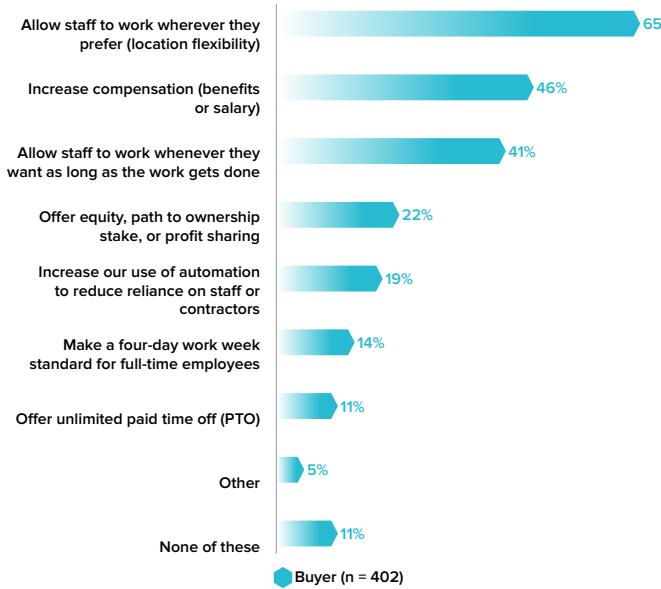
Up to 5 years (n = 72) 6 to 10 years (n = 65) 11 to 20 years (n = 142) More than 20 years (n = 123)

Surprisingly, these attitudes are the same across those with different amounts of insights experience.



GRIT also asked what steps buyer insights organizations are taking or expect to take to attract and retain employees. Two-thirds see location flexibility (65%) as an enticement that they offer or expect to offer, and nearly half are looking at increasing compensation (46%). Almost as many favor allowing staff to choose their own hours as long as the work gets done (41%). Less popular are offering equity or a path to ownership (22%), relying more on automation to reduce staff or contractors (19%), standardizing on a four-day work week (14%), and offering unlimited paid time off (11%).

CURRENT/EXPECTED PRACTICES TO RETAIN/ATTRACT EMPLOYEES (BUYER)

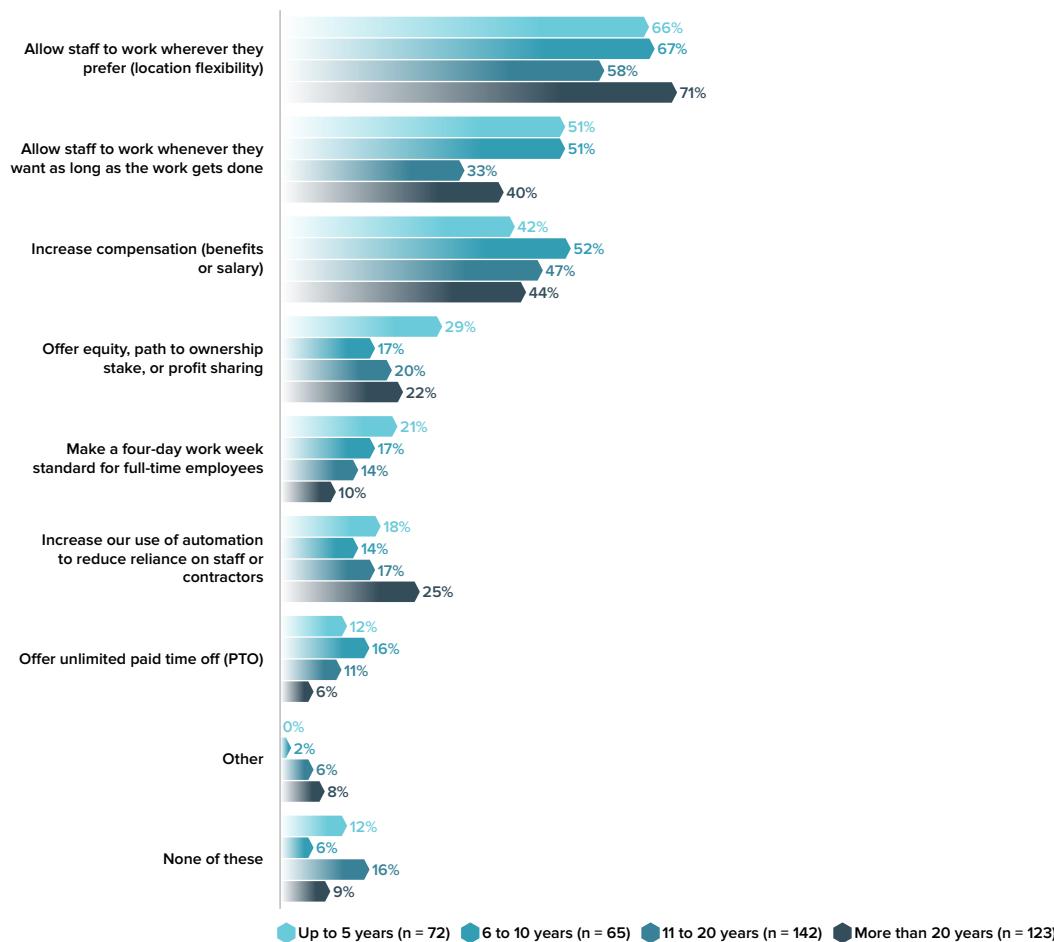


Less popular are offering equity or a path to ownership, relying more on automation to reduce staff or contractors, standardizing on a four-day work week, and offering unlimited paid time off.



Although we see that attitudes are similar across those with different numbers of years of experience, current and expected practices to attract and retain employees differ. Those with less than ten years of experience are more likely to have flex-time in their mix (51%), and those with less than five years are more likely to say that equity or path to ownership is in play (29%).

CURRENT/EXPECTED PRACTICES TO RETAIN/ATTRACT EMPLOYEES: YEARS IN INSIGHTS ROLE (BUYER)



SUPPLIER PERSPECTIVE

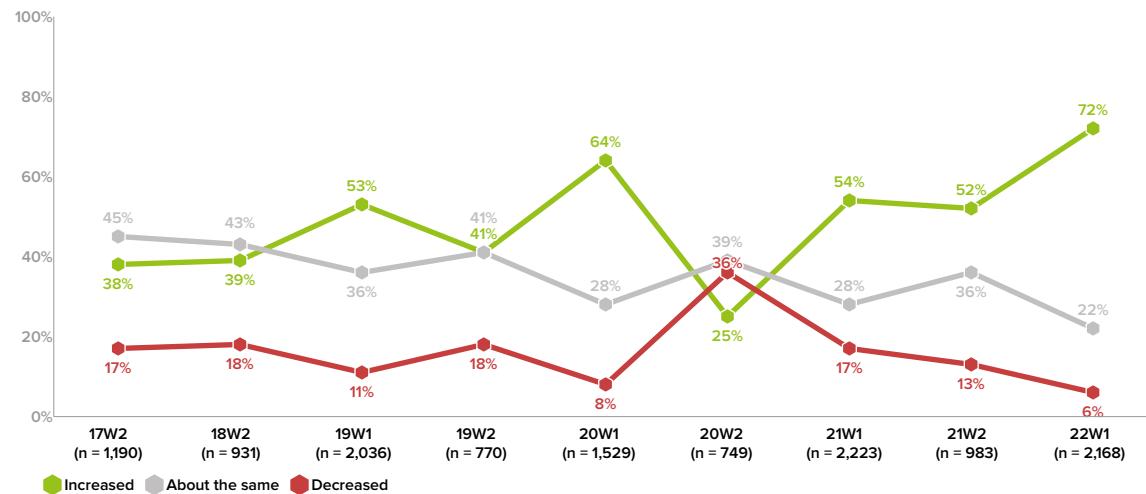
In 20W1, just before the pandemic, supplier participants registered their highest-ever percentage of staff size increases (64%) and lowest-ever percentage of staff size decreases (8%). All that changed as the pandemic brought record-low increases (25%) with record-high decreases (36%). Now, once again, we see record-high increases (72%) and record-low decreases (6%).

Each segment has a similar (small) amount of decrease. The trends in staff size follow the trends in segment size we discuss in the Industry Structure section.

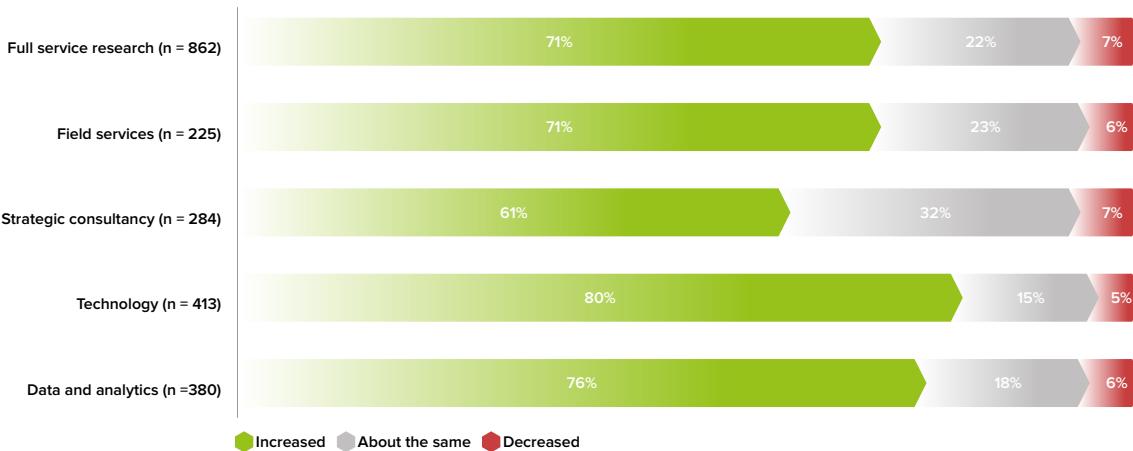


Among supplier segments, technology (80%) and data and analytics providers (76%) have the most staff size increases, but the lowest percentage is only 61% (strategic consultancy). Each segment has a similar (small) amount of decrease. The trends in staff size follow the trends in segment size we discuss in the Industry Structure section.

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



CHANGE IN NUMBER OF FULL-TIME EQUIVALENT POSITIONS: PROFESSIONAL FOCUS (SUPPLIER)

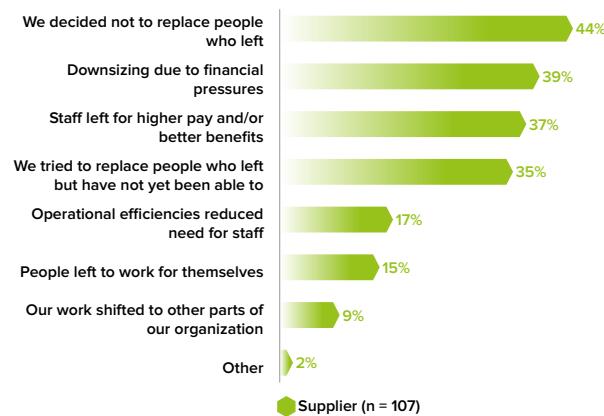


Regarding significant factors behind their staff size decreases, suppliers tell a somewhat different story than buyers tell. Although just over one-third say they tried to replace people who left but haven't yet (35%) and slightly more say that staff left for higher compensation (37%), the stronger trend seems to be employer-driven. The top factor is deciding not to replace people who left (44%) and downsizing due to financial pressures is second (39%). In all, 55% said that they either downsized, increased efficiency, or shifted work to other areas. Although 15% said that people left to work for themselves, GRIT data suggests they founded new companies more often than they became contractors. Only 2% of GRIT supplier participants work for a single-person employer, and that is lower than it was in 21W1 and 20W1.

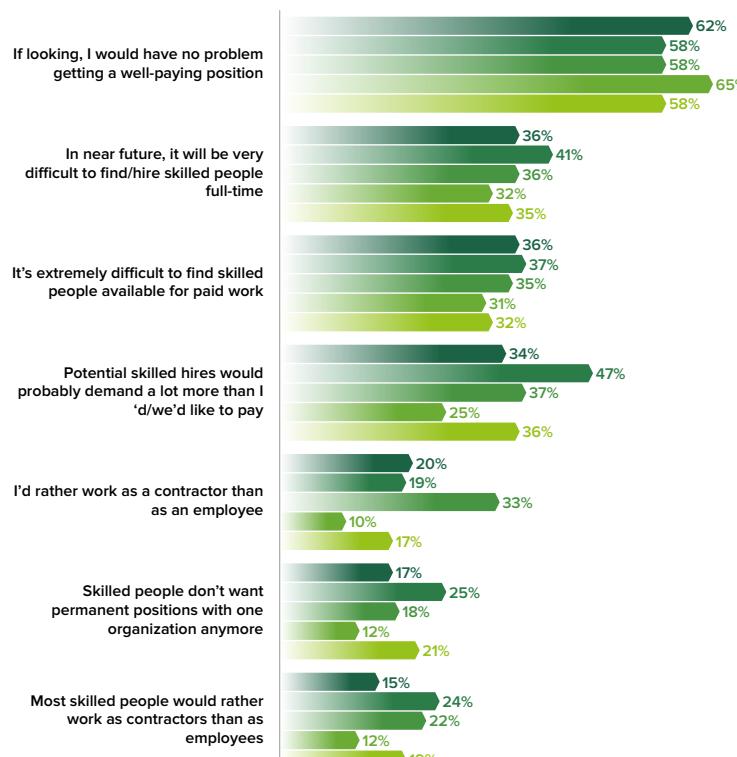
Most participants in each supplier segment believe they would have no problem getting a well-paying job if they looked, especially those with technology providers (65%). Those in field services are somewhat more likely to believe it will be difficult to find people who want to work full-time (41%) and that potential hires would demand more than they'd like to pay (47%). Those at strategy consultancies, the segment that is not seeing as many staff increases as other segments, are more likely to prefer to work as contractors (33%).

Generalizing across segments, about one-third think it will be difficult to hire skilled people full-time and/or for paid work and that potential hires would demand more than they'd like to pay. About one in five would prefer to work as a contractor, nearly twice as many as on the buyer side. About one in five also believe that most skilled people would rather work as contractors and that skilled people don't want permanent positions anymore.

SIGNIFICANT FACTORS BEHIND DECREASE IN FTE POSITIONS (SUPPLIER)



COMPLETELY/MOSTLY AGREE WITH EMPLOYMENT TREND ATTITUDES: PROFESSIONAL FOCUS (SUPPLIER)



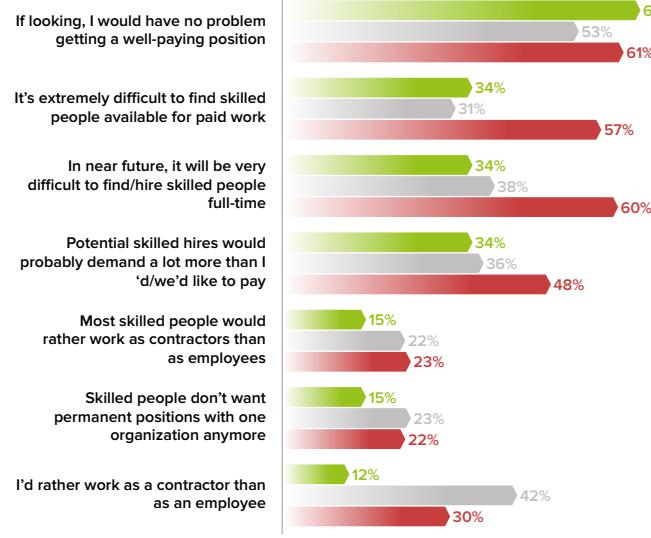
About one in five would prefer to work as a contractor, nearly twice as many as on the buyer side.



Among supplier participants, some perspectives are related to where they are in their careers. Those who have spent twenty years or more in insights are most likely to believe that it's going to be difficult to hire skilled people full-time (43%) or for paid work (41%) while those with two years' experience or less are much less likely to believe it (25% and 24%). The most experienced insights professionals are also nearly three times more likely than the newest ones to prefer to work as contractors rather than as employees (29% to 10%).

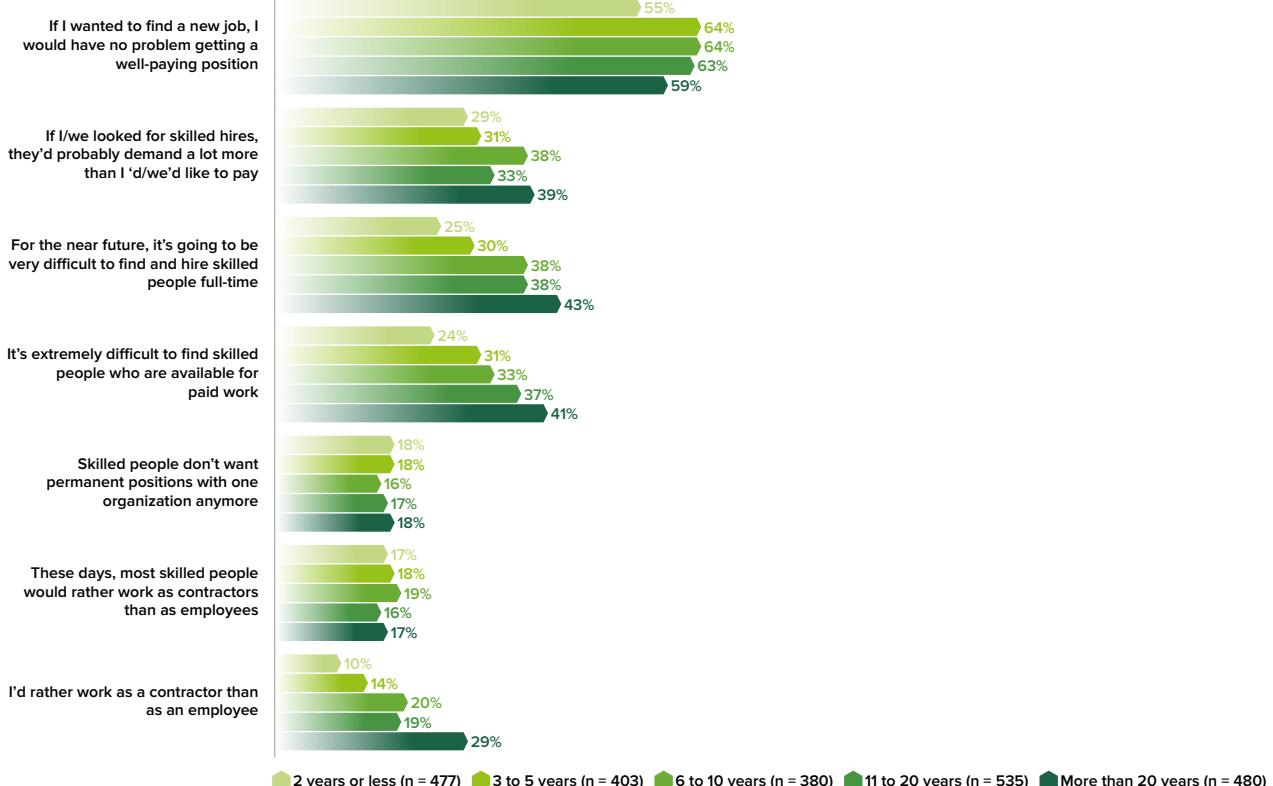
Beliefs about the insights and analytics labor market differ by recent staff size trends. Participants from suppliers that increased staff (64%), or decreased staff (61%) are more confident they could find a well-paying position if they looked. Only 53% of those suppliers who did not change staff size believe this; perhaps they have had less recent exposure to the dynamics of the labor market.

COMPLETELY/MOSTLY AGREE WITH EMPLOYMENT TREND ATTITUDES: STAFF SIZE TREND (SUPPLIER)



● Increased (n = 1,674) ● About the same (n = 387) ● Decreased (n = 107)

COMPLETELY/MOSTLY AGREE WITH EMPLOYMENT TREND ATTITUDES: YEARS IN INSIGHTS ROLE (SUPPLIER)



Those from suppliers who decreased staff are much more likely to see challenges: finding skilled people who want full-time (60%) or paid work (57%) and meeting the compensation demands of potential hires (48%). Those from suppliers that increased staff size or those that did not change agree much less with these statements.

The most experienced are also nearly three times more likely than the newest to prefer to work as contractors rather than as employees.



It's not too surprising that GRIT participants from suppliers that increased staff sizes employ different strategies to attract and retain staff than those who decreased staff, but it's also not that interesting. Those who decreased staff and are trying to hire are offset by those who have no plans to hire, so half of them might have a plan to retain staff, but not to attract them. Because of this, the gap between suppliers who increased staff size versus those whose staff size did not change is larger than it is versus suppliers who lost staff. In fact, those that did not report a staff size change are the ones least likely to say they are following any strategy to attract or retain employees (15%).

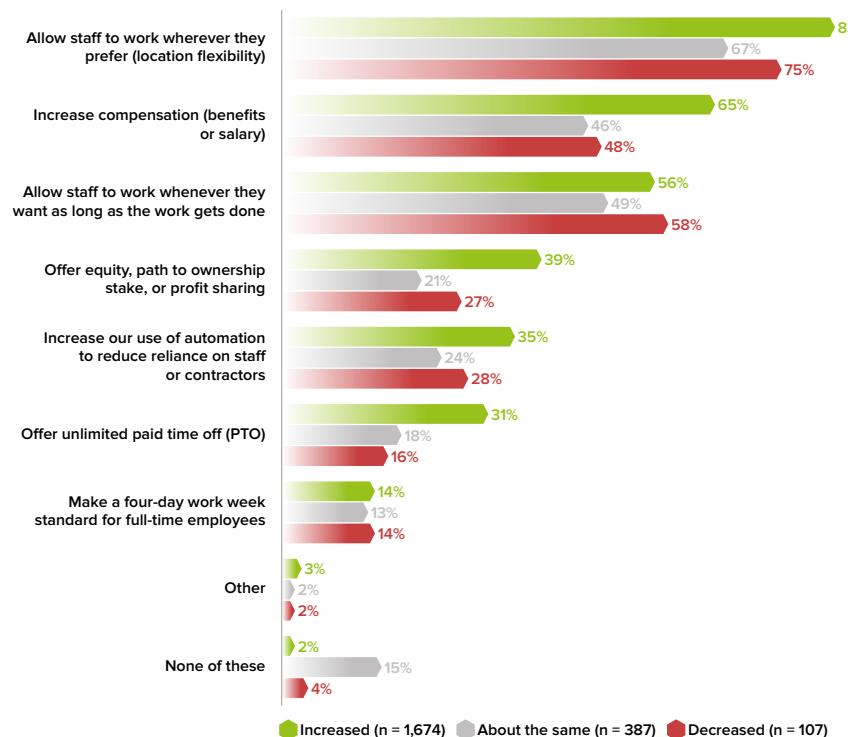
Regardless of staff size trends, most supplier participants say that location flexibility is among their strategies, and it's highest for those that increased staff (83%) and lowest among the unchanged (67%). So many suppliers offer location flexibility, and so many are backed into it by circumstance, that it doesn't seem like that much of a showstopper.

Higher compensation differentiates more (65% of those that increased, 46% for the unchanged), and this fits with staff leaving for better compensation as a significant driver of decreases and the widespread belief that it would be easy to find a well-paying position. Insights professionals are following the money, so to speak, and the money does not appear to be equally distributed across suppliers.

Another major differentiator, although not quite as popular, is equity or a path to ownership. Among participants from suppliers that increased staff, 39% offer this compared to only 21% of the unchanged. They are also more likely to offer unlimited paid time off, 31% to 18%.

Ironically, GRIT participants from suppliers that increased staff are most likely to say that they are increasing their use of automation in order to reduce reliance on staff or contractors (35%). Only 28% of participants from suppliers that decreased staff and only 24% of the unchanged said this. Perhaps this indicates that many suppliers that increased staff couldn't increase it enough to meet their labor demands. They may not have many challenges finding labor and they may have no trouble meeting the compensation demands of people they try to hire, but their cash flow might not support their ideal staff size.

CURRENT/EXPECTED PRACTICES TO RETAIN/ATTRACT EMPLOYEES: STAFF SIZE TREND (SUPPLIER)



Those that did not report a staff size change are least likely to say they are following any strategy to attract or retain employees.

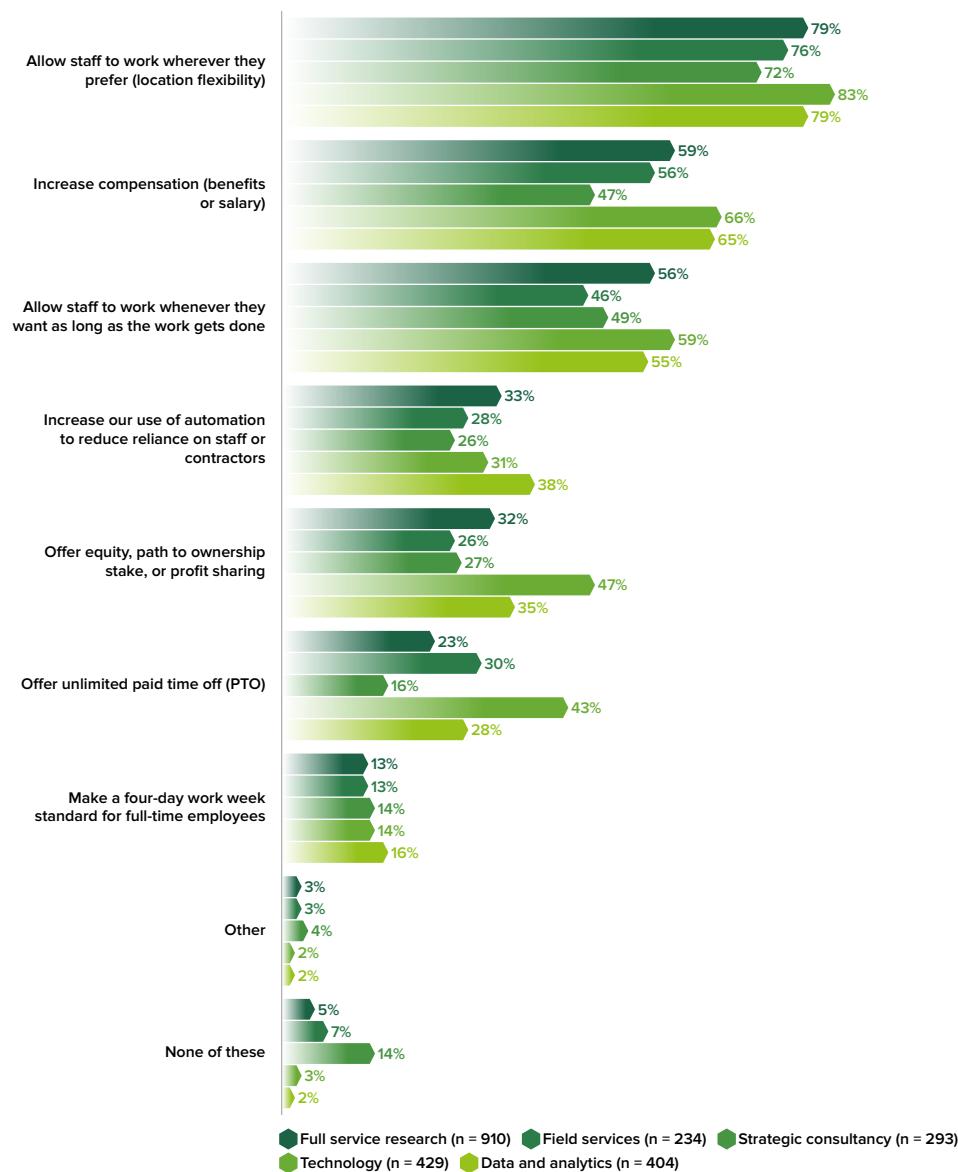


A large majority in each segment say they offer or expect to offer location flexibility as a way to attract and retain employees, and it's probably a no-brainer these days. A majority in every segment except strategic consultancy see increasing compensation as a strategy. Still, nearly half in strategic consultancy (47%) offer or expect to offer it. Most in full service research (56%), technology (59%), and data and analytics (55%), plus nearly half in field services (46%) and strategic consultancy (49%), offer or expect to offer flex-time. Technology providers are more likely than others to offer equity or ownership (47%) and unlimited paid time off (43%).

Most in full service research, technology, and data and analytics, plus nearly half in field services and strategic consultancy, offer or expect to offer flex-time. Technology providers are more likely than others to offer equity or ownership and unlimited paid time off.



CURRENT/EXPECTED PRACTICES TO RETAIN/ATTRACT EMPLOYEES: PROFESSIONAL FOCUS (SUPPLIER)



Of the strategies we tested for attracting and retaining employees, increased compensation, flex-time, and flexible location are most commonly offered by suppliers. Some participants, however, made less transactional suggestions that are more focused on creating the right employee experience. A strong

set of values, a positive and relaxed work environment, and a feeling of community each go a long way to engage current and potential employees as well as to differentiate from all the other potential employers who offer good compensation, flex-time, and flexible location.

HOW TO ATTRACT OR RETAIN EMPLOYEES: CULTURE AND ENVIRONMENT

	Position, Years in Insights
Make the office space more meaningful for today's workforce's needs, [and] embed strong culture across teams.	Head of People Strategy, more than 20 years
Positive working culture and office environment.	Associate Director, 11 to 15 years
Focus on culture and other "intangibles."	Vice President, Client Services, 11 to 15 years
Company-wide activities voted by the employees such as language courses, etc.	Marketing Coordinator, 1 to 2 years
We put a lot of effort into team building, social activities, and secondary/tertiary benefits (such as free healthy lunch, access to mindfulness programs, etc.).	Partner, more than 20 years
Many of the above things don't matter at all to young employees – what does matter is culture, environment, team bonding and community, and excellent mentorship. We have had no problems hiring or retaining staff because we have focused on developing a positive and energetic/motivating culture first and foremost.	Director, 11 to 15 years
Adequately scope the workload for each role; right now our demands are way too much for one role.	Senior Director Customer Insights, more than 20 years
Offers a supportive environment that helps employees do their jobs well, allows people to grow in the direction they are drawn to, and consciously tries to eliminate needless stress and tension in the office.	Research Director, 16 to 20 years
We already offer unlimited PTO and will be fully remote as office leases come up for renewal. We are also increasing learning & development and DE&I transparency for retention and attraction.	Principal, more than 20 years
Growing fast with, strong culture, nice people, strong core values, and setting a new standard for marketing, is exciting.	Partner, 11 to 15 years
You treat your team with honesty, respect, and empathy. Life is complex and providing compassion, and the ability to excel or just learn is something that is a must. Loyalty is not just money; loyalty is respect and value.	SVP, 16 to 20 years
Team spirit and company values.	Partner/Part Owner, 16 to 20 years
Creating a Culture of Autonomy and supporting one other at all times!	Group Director, 16 to 20 years
Offer interesting work in an engaging environment.	Owner, more than 20 years
We don't bother any of our colleagues with unnecessary meetings and reports. All KPI measurements are automatic, and we only talk when it's necessary.	Founder, 3 to 5 years
Outsourcing less technically skilled tasks/work.	Vice President, Digital Analytics, 11 to 15 years

Some, however, made less transactional suggestions that are more focused on creating the right employee experience.



Compensation, and culture are not enough, however. Employees need to feel challenged yet secure and investing in their careers accomplishes both. Whether the investment is made via formal training and education programs or via on-the-job experience, employees will invest more in you if they feel confident they are building a career that will last longer than their current position.

HOW TO ATTRACT OR RETAIN EMPLOYEES: CAREER DEVELOPMENT

	Position, Years in Insights
Increase the development of individuals' skills and career paths.	Senior Director, 16 to 20 years
Respect the expertise of the team and invest time in training the less experienced team members.	Product Owner, more than 20 years
An energetic and diverse group of colleagues to work with and learn from, [plus] growth from within.	Chief Client Officer, more than 20 years
Increase capacity in the Insights and Analytics team to allow for training, mentoring, and personal and professional development. Social Activities.	Director, more than 20 years
Most important thing is to invest in them with attention and dedication; talk about their path and development, and paint the horizon together.	Managing Director Latin America, 11 to 15 years
Competence development, positive and demanding work environment, opportunity to grow their career.	Managing Partner, more than 20 years
We have always offered flexibility in hours and workplace so that will continue. We have always paid in the top bands so will continue to do so. We have always offered benefits beyond salary, always paid bonuses, and always offered equity opportunities. Doubled down on investment in training as a huge benefit area.	Founding Partner, more than 20 years
Employee Engagement and Fun activities. Provide growth opportunities through upskilling programs.	Team Leader, 6 to 10 years
Ensure they are engaged in setting goals and planning projects, not just delivering an information ask.	Research Director, 11 to 15 years
Create better and more diverse career paths.	Managing Director, 11 to 15 years
Offer a career path that inspires and excites.	Department Head, 11 to 15 years
Mentorship and continuous learning.	Vice President, 16 to 20 years



THE TIME FOR AGILE EMPLOYEE INSIGHTS

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The GRIT report survey was fielded in early Q1 2022, a seemingly distant time in which the Great Resignation was atop every mind and employers made desperately high job offers to candidates who had multiple options. Now, as I write this in early Q3 2022, the Great Resignation has decelerated, recessionary fears are ever-present, and wage growth has moderated. Among nonfarm employees, the number of employees quitting jobs has returned to 2019 levels (source: Federal Reserve Quits Rate). The whipsaw effect is real!

Changes in employment trends, including in the insights industry (both among supplier and buyer-sides), are not new and will likely persist into the future. A recent study published in the *Sloan Management Review* found that management consulting (they don't call out market research specifically) had the highest average attrition rate of all knowledge economy jobs, with 16% attrition from Q2-Q3 2021. Looking forward, we should expect increased competition for skilled labor resources as The U.S. Bureau of Labor Statistics projects a decreased labor force participation rate in coming years, including below average growth in the pool of knowledge workers, which accounts for our employee bases.

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THE BIG PICTURE

Staff increases are at an all-time GRIT high, and staff decreases are at an all-time low. As this is GRIT's first deep dive look at employment trends, staff size trend is the only metric we can put in a historical context. That makes our Big Picture summary lean more toward the descriptive than the definitive.

For example, we know that about 10% of insights professionals on the buyer side and about 20% on the supplier side say they'd prefer to work as contractors than as employees, but we don't know in which direction it's trending or how often this preference will translate into action. We get some confirmation on the employer side because similar proportions also believe that most other professionals would rather work as contractors and that people don't want permanent positions with one organization anymore. The proportions who say it will be difficult to find people willing to work full-time are about three times higher among buyers and about twice as high for suppliers. Put that together with the outsourcing trends discussed in Organizational Success Factors, and we could be on the verge of a contractor explosion.

On the other hand, insights professionals are confident they would not have a problem finding a well-paying position, and many of them are finding these opportunities, apparently. The preference for working as a contractor is strongly skewed toward the most experienced who have already learned their trade and have established their network. Younger professionals are more likely to want the career development opportunities and sense of community they can only get through regular employment. They may expect some flexibility, but employers are offering that. Competitive compensation is critical, of course, but it's not the only consideration.

EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

Suffice it to say, changes in employment trends are endemic and pressure on insights firms to acquire and retain talent will be high. But predicting the macroeconomic conditions environment managers will be operating under in the next few months or years is a near-futile exercise. In the era of constant change, how can management teams maintain stability within their employee base?

The only sustainable method to increase stability in employee relations is for management teams to measure and act on employee insights. In other words, the same practices applied by market researchers to study customer needs ought to be adapted for employees. The intent is to act on employee insights to design incentive packages, cultures, and working environments that produce positive benefits to the business.

At Fuel Cycle, we see increased interest and adoption of employee insights communities. While employee research is not new, management teams have found that outdated models of once- or twice-a-year employee surveys are no longer sufficient to drive employee engagement. Instead, avant-garde leaders are transitioning to agile employee research. These leaders embrace frequent employee feedback and iterative approaches to building incentives and cultures that drive positive results.

There are tangible benefits to acting on employee insights. Companies with engaged employees tend to grow faster and stronger profitability than companies with less engaged employees, according to Dr. Paul Turner of Leeds University. They also tend to have longer employee tenure and better customer experiences than industry peers.

The insights industry ought to embrace agile employee insights as much as we encourage our stakeholders to do so. After all, the best way to generate confidence is to validate decisions with your key constituents.



BUSINESS OUTLOOK

HOW HEALTHY IS THE INSIGHTS INDUSTRY AND WHO IS AHEAD OF THE CURVE?

The vital signs are steady for buyers and suppliers. Insights-related technology spending, insights staff size, buyer research project spending, and supplier revenue are trending as strongly as ever, and the negative impact of the pandemic seems to be dead and buried by the survivors. Will the next chapter continue the story, or will a looming recession steal the pen away and start a new one?

OVERVIEW

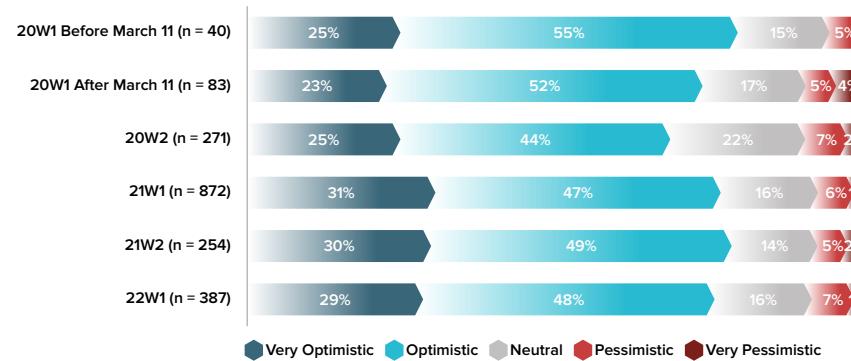
The last four GRIT reports have tracked COVID-19's impact on the insights and analytics industry, but this may be the last time. As soon as the pandemic became a nearly universally accepted reality, optimism dropped. GRIT buyer participant optimism about their jobs dropped from 80% to 69% by the end of 2020, and supplier participant optimism about their company dropped from 83% to 73% over the same period. Perhaps the only thing that prevented supplier optimism from taking a bigger fall was the industry's loss of its most distressed members.

From 21W1 until now, buyer job optimism and supplier company optimism have remained at 80% or above, and optimism about the industry is threatening to hit 90% in both camps. Most insights professionals believe they would have no problem getting a well-paying job if they wanted to look for one, and that might say as much about industry optimism as we need to hear (see Employee Trends section). It might be time to stop making extra efforts to look at everything through the COVID lens.

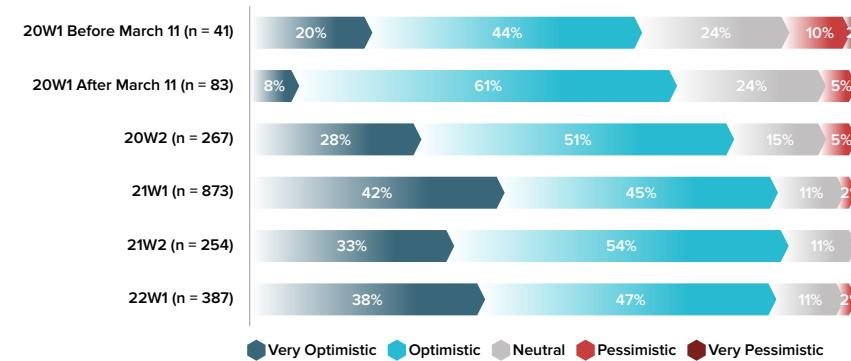
GRIT participants report a much more positive than negative impact of COVID on their businesses.



OPTIMISM ABOUT DEPARTMENT OR ROLE (BUYER)



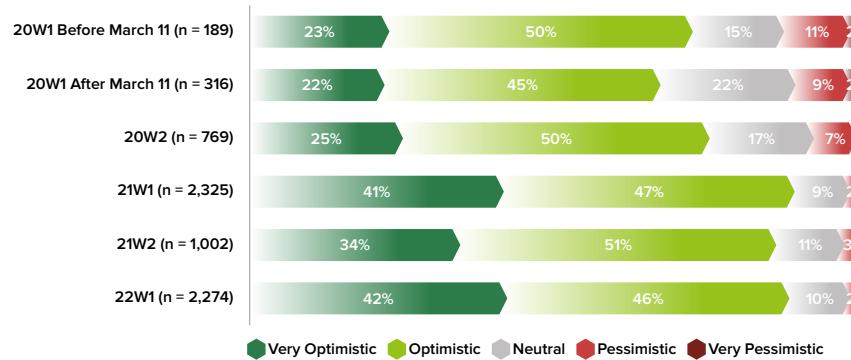
OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY (BUYER)



OPTIMISM ABOUT COMPANY (SUPPLIER)



OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY (SUPPLIER)



This sustained optimism isn't the only reason why it seems like it could be last call for special reporting on COVID-19. Throughout this section and in other sections of this report, you'll notice that several GRIT metrics rebounded once buyers and suppliers found their footing and have not backtracked since. More tellingly, GRIT participants report a much more positive than negative impact of COVID on their businesses. It's likely that some of the positive attributions are

conflated with positive results caused by stronger drivers, and that some of the celebrations should be tempered by acknowledgment of the Darwinian forces that may be partially responsible for the better-looking metrics. From our point of view, the pandemic is still a very important thread, but it's woven into the fabric now, not embroidered onto it.

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BUYER PERSPECTIVE

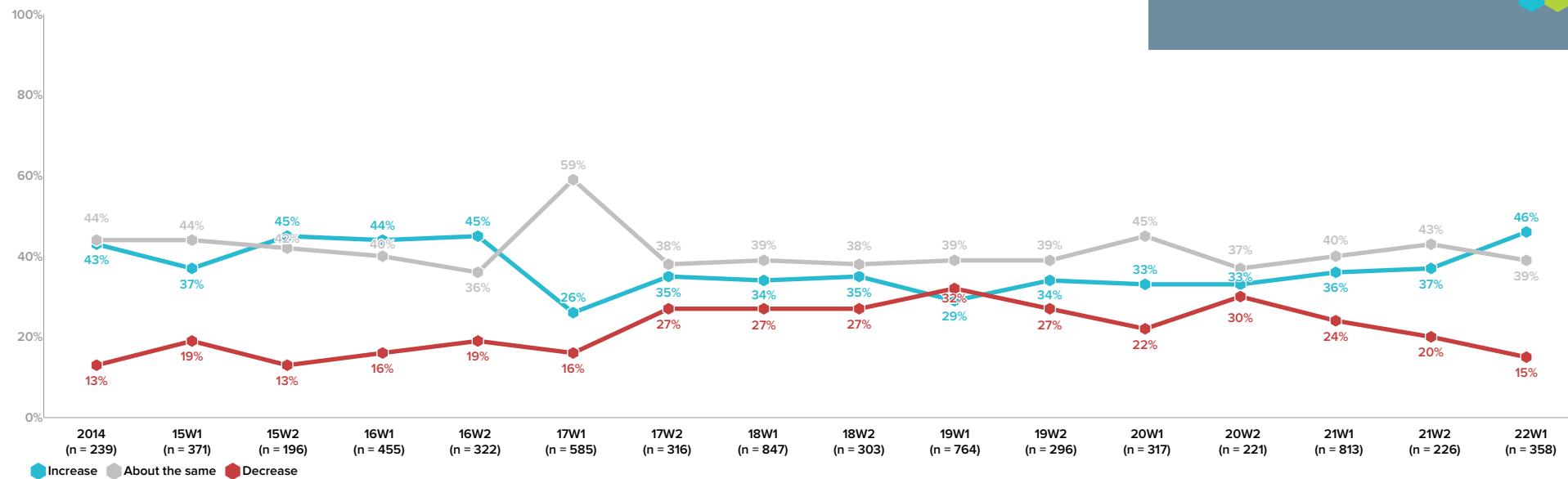
Our three key metrics for buyers – research project spending, staff size, and technology spending trends – are the strongest they've been since the pandemic struck, lending the appearance of a rising tide that lifts all the boats that managed to stay afloat.

GRIT has tracked trends in research project spending since 2014. In that time, the percentage of buyer participants reporting larger budgets than the year before increased at least 5% four times and those reporting smaller budgets increased at least 5% three times. In 17W1, after three straight waves in the mid-40%, 19% fewer buyers reported larger budgets, still a record. In the very next wave, the percentage increased by 9%. Budget trends are highly volatile: there has only been one GRIT wave in which a majority reported no change.

After the pandemic hit, an additional 8% of buyer participants reported budget decreases compared to just before it. However, there was no change in the percentage who increased their budgets because situations and strategies vary company by company, with myriad decisions resulting. Since then, results seem more predictable: as the industry recovered, the percentage with larger budgets than they had in the previous twelve months increased while the percentage with smaller budgets shrank. Perhaps these trends will continue or level off until the next destabilizing event occurs.

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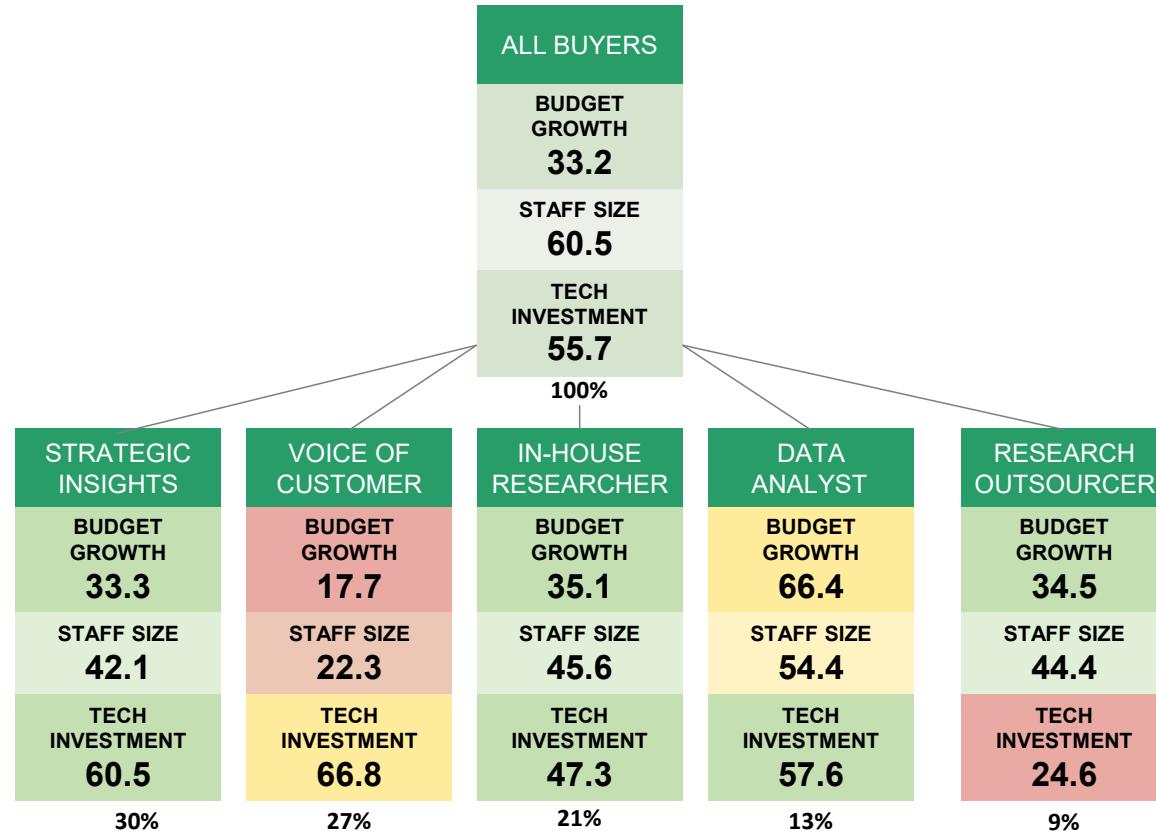
ANNUAL RESEARCH PROJECT SPENDING TENDENCY (BUYER)



Summarizing the three main Business Outlook metrics we track for buyers, research spending, insights staff size, and insights-related technology spending, each is solidly positive. Each has grown steadily over the last two years. Research project spending is always a wild card because decreases aren't always a symptom of illness for a buyer, so trends don't always reflect insights hardiness. Technology spending is generally always strong, though it can accelerate or decelerate with the times; it's accelerating now. Insights staff size is a harder dial to move because of the amount of investment and commitment it requires, but it's stronger than ever. The pandemic created a hole to climb out of, but the evolution of the roles played by buyer insights may have also advanced these metrics.

On the eve of the pandemic in 20W1, each buyer segment had double-digit positive scores for department size, and two segments, in-house researcher (41.7) and data analyst/research outsourcer (51.7) had scores higher than 40. Both were unprecedented, and neither occurred again until the present wave. Strategic insights consultants topped 40 in the last wave (42.5), too, and maybe they are the harbinger for other segments. They tend to be from larger companies and are likely to have more diverse functions, so perhaps they are most likely to start adding employees before other segments. Not only is every segment currently in double-digits, but all except Voice of the Customer (VoC) are above 40.

Research project spending is trending upward, reaching an all-time high for VoC (17.7), just missing last wave's all-time high for strategic insights consulting (33.3), and probably at all-time highs for data analysts (66.4) and research outsourcers (34.5). In past waves, GRIT combined data analysts and research outsourcers because the segments were very small, but now they are large enough to be considered independently.



Although the spending trends follow the staff size trends, they are not measuring the same investment because the spending trend focuses on research project expenses and does not include staff and other out-of-pocket costs. While they might both be driven by the same circumstances, they do not represent the same investment.

Insights-related technology spending trends are usually positive and resistant to other changes in the industry; it seems to be both a way to accelerate success and to climb out of the hole. The trend is weakest among research outsourcers, likely because they focus more on managing insights work rather than on doing it. Although the trend is the strongest it's been in each segment since the pandemic struck, VoC is the only segment that has returned to its full 20W1 level.

The pandemic created a hole to climb out of, but the evolution of the roles played by buyer insights may have also advanced these metrics.

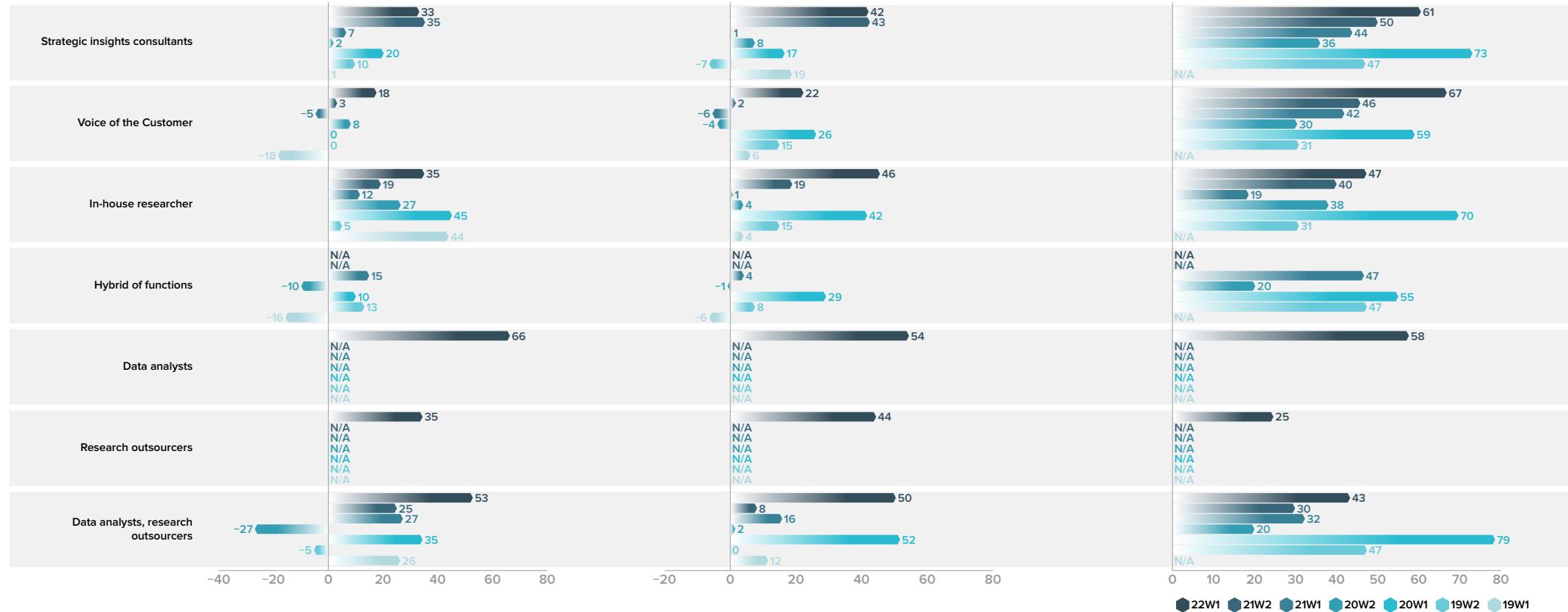


TREND INDEXES OVER P12M: PRIMARY ROLE (BUYER)

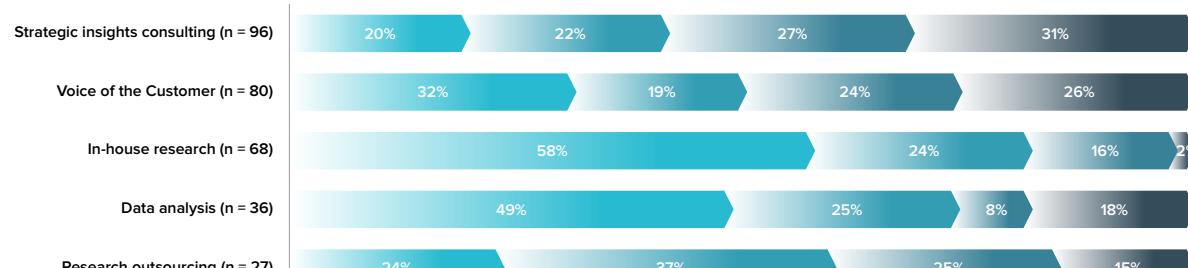
ANNUAL RESEARCH PROJECT SPENDING TREND INDEX (BUYER)

STAFF SIZE TREND INDEX (BUYER)

TECHNOLOGY SPENDING TREND INDEX (BUYER)



ANNUAL RESEARCH PROJECT BUDGET SIZE: PRIMARY ROLE (BUYER)

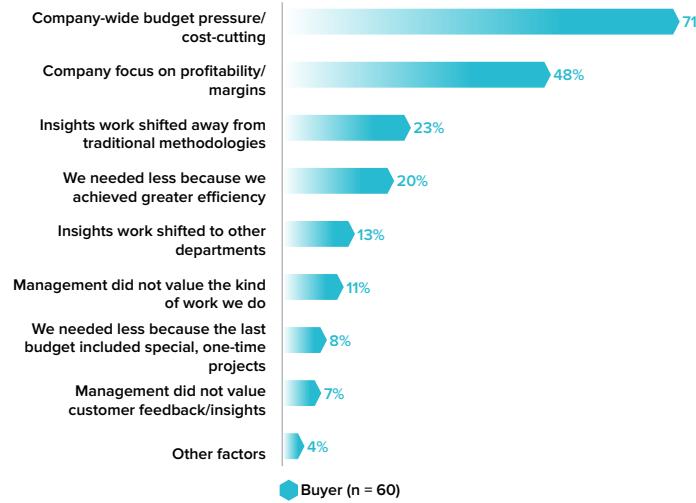


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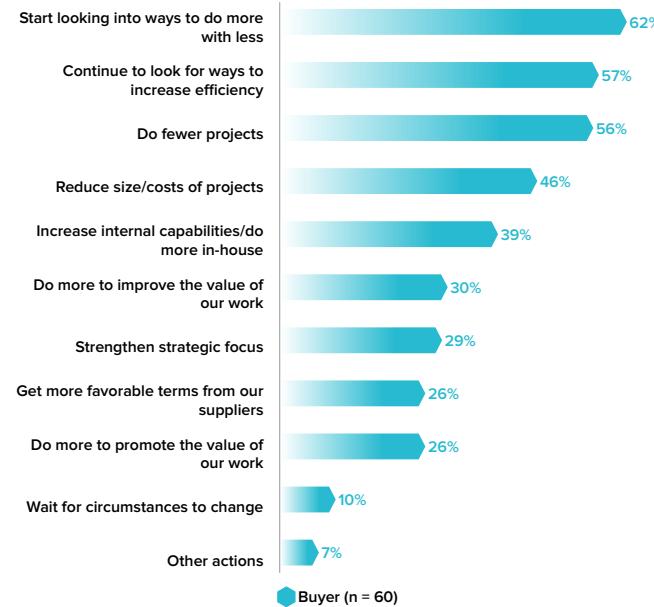
For GRIT buyer participants whose budgets decreased, most said it was due to company-wide budget pressure and cost-cutting (71%), and this is consistent with previous waves. Since we began tracking this in 20W1, it has always been cited by at least 70% of buyer participants, peaking in 20W2 (77%) and 21W1 (83%) as the pandemic settled in. Company focus on profitability and margins, consistently the second most significant factor across waves, was mentioned by nearly half (48%). After those two factors, at least one in five cited a shift away from traditional methodologies (23%) and needing less due to greater efficiency (20%) as significant factors in the budget decrease. The proportion of those shifting away from traditional methodologies is not unprecedented, but those who need less budget due to efficiency gains are now double those in each of the three preceding waves.

SIGNIFICANT FACTORS BEHIND BUDGET DECREASE (BUYER)



When asked how they would respond to the budget reduction, most buyer participants said they would start looking into ways to do more with less (62%), continue to look for ways to do more with less (57%), and do fewer projects (56%). Nearly half said they would reduce the size and costs of projects (46%), and more than one-third said they would increase internal capabilities to take more work in-house (39%). Each of these is consistent with previous waves, except the plan to do fewer projects has bounced around between 34% and 56% from wave to wave.

HOW INSIGHTS FUNCTION WILL RESPOND TO BUDGET DECREASE (BUYER)

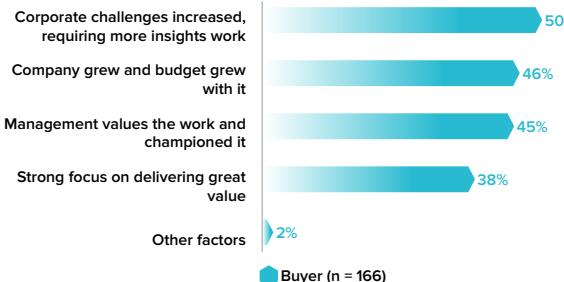


The proportion shifting away from traditional methodologies is not unprecedented, but those who need less budget due to efficiency gains are now double those in each of the three preceding waves.



As usual, the main factor behind budget enlargement is an increase in corporate challenges (50%), though normally more than 60% cite this. For the current wave, buyers more likely chose only one factor as significant, and this is probably due to the record proportion of buyer participants with larger budgets. Perhaps the growth in this metric is mainly driven by those who had one significant change. The other significant factors are budget growth tied to company growth (46%), management championing the work (45%), and having a strong focus on delivering great value (38%). It's possible that many companies experienced more growth than they had in a long while.

SIGNIFICANT FACTORS BEHIND THE BUDGET INCREASE (BUYER)



For the current wave, buyers more likely chose only one factor as significant, and this is probably due to the record proportion of buyer participants with larger budgets.

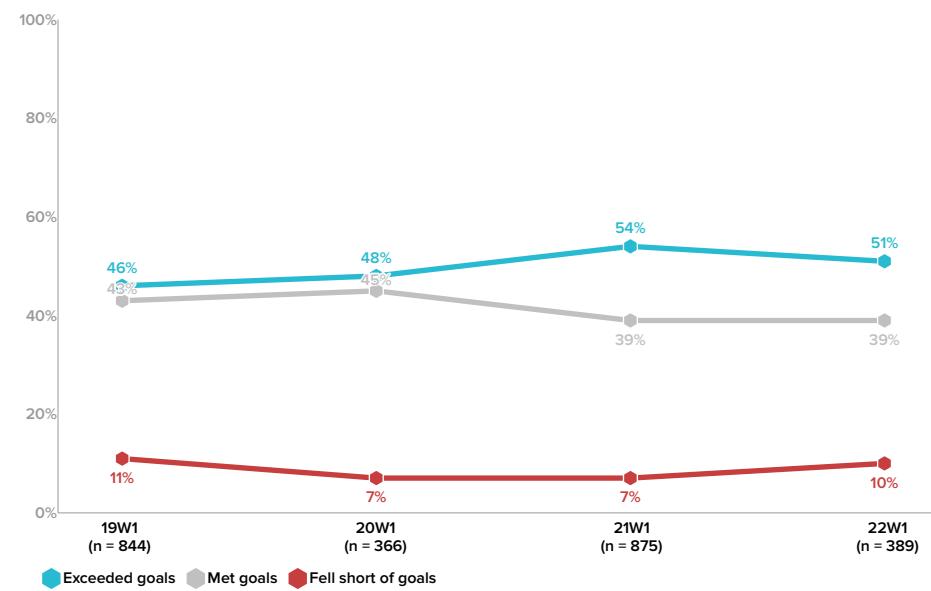


Since 19W1, GRIT has tracked perceptions of performance against research, insights and analytics goals. Prior to the pandemic, just under half of buyer participants said they exceeded goals in 19W1 (46%) and 20W1 (48%). Since then, the percentages have been on the other side of the majority line (54% in 21W1 and 51% now). The differences aren't earth-shattering and could be due to lowering the bar, if they are, in fact, significant.

As usual, the main factor behind budget enlargement is an increase in corporate challenges.



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



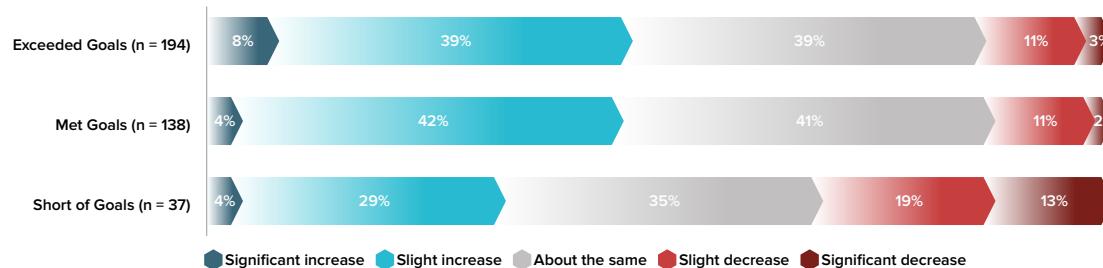
If we look at the relationship between performance and research budget trends, we see that 48% of those who said they exceeded their research, insights, and analytics goals reported a budget increase compared to 46% of those who met goals and just 33% of those who fell short of them. On the other hand, only 13% of those who exceeded or met goals reported a budget decrease while 32% of those who fell short reported one. Given this pattern, it could be that those who at least meet their goals are rewarded with budget increases while those who fall short are more likely to see decreases. In other words, there isn't a reward for exceeding goals, but there may be a penalty for falling short.

Of course, causality could go the other way: if budget increases help insights organizations to meet their goals, decreases may make it much more difficult. GRIT asks participants how their budget changed compared to the year before, so the budget decision may have been up to a year ago while performance could change right up to the time of the survey. In other words, it's likely that the budget trend predates performance, and that performance is a consequence of this decision. Most of those who experienced budget reductions attribute it to corporate-wide decisions; if true, it's less likely that their current performance had a significant impact on the research budget. Perhaps more buyers need to adjust their expectations of what their insights professionals can deliver when they make the budget decisions.

Of course, causality could go the other way: if budget increases help insights organizations to meet their goals, decreases may make it much more difficult.



PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: ANNUAL RESEARCH PROJECT BUDGET SPENDING TRENDS (BUYER)



It can be argued that performance against goals affects employee morale more than budget trends do. When goals are exceeded and budgets are increased, buyer participant optimism about their role is 87% in both cases. When budgets are decreased, optimism about their role drops to 50%, but when they fall short of goals, it drops all the way to 40%. Pessimism is negligible when budgets increase, or goals are exceeded; 2% or less in each case. When budgets decrease, it jumps to 19%, and when they fall short of goals, pessimism rises to 24%.

If it's true that budget reductions are primarily driven by corporate-wide cost-cutting, we might expect pessimism to be higher when budgets are reduced because the company as a whole might not be performing very well. However, that's not the case. The experience of falling short of goals is likely to be more recent and more personal to the insights professional, and, therefore, it would trigger more doubts about their role than a budget decision that might seem remote by comparison.

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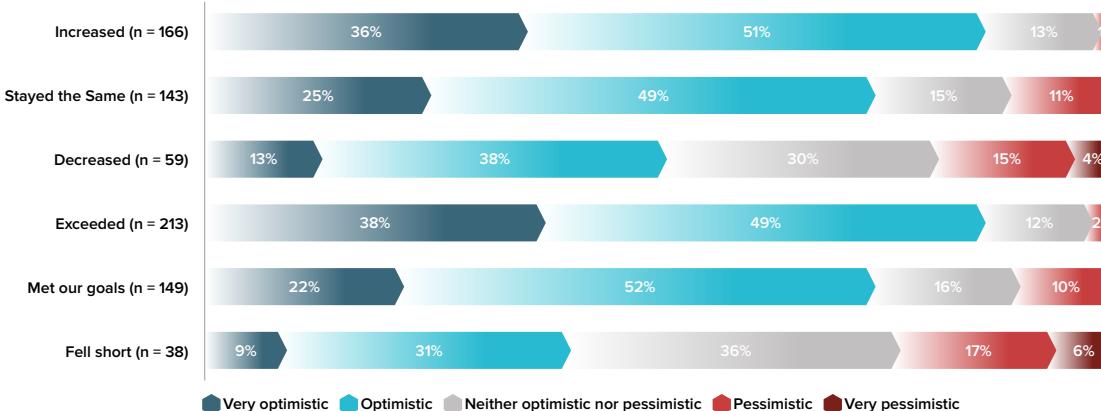


In the Employment Trends section, we discuss the high level of confidence that insights professionals have in finding a well-paying position as well as the challenges that organizations face when trying to replace them. From that perspective, it's important to manage your staff's understanding of goals and how your insights function is performing relative to them. It's also important to make certain that goals are well-aligned with what your budget will enable you to accomplish. If insights professionals have doubts about how the function is performing, that might be one more reason for them to look for that well-paying position they are sure they can find.

Since the pandemic began, GRIT has asked buyer participants whether the pandemic has had a positive, negative, or neutral impact on technology spend, overall research volume, ability to meet goals, and staff size. In 20W2, more negative impact than positive was experienced on the ability to meet goals (+17% in favor of negative) and staff size (+19% negative). The pandemic had a slightly more positive impact on technology investment (+4% positive) and overall research volume (+5% positive). Some responded to the pandemic by increasing tech spend or doing more research, while similar numbers did the opposite. Regarding goals and staff, however, the impact was decidedly more negative.

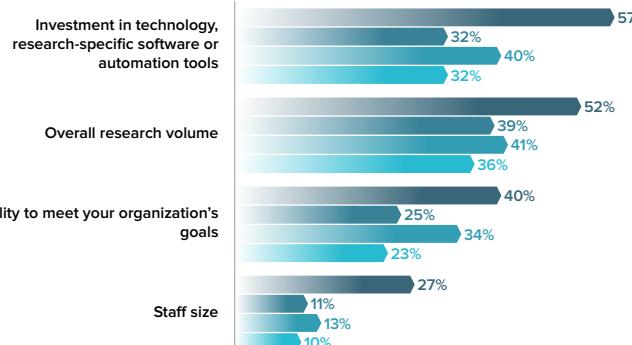
Since then, the pandemic's reported impact on each area has been clearly more positive: technology spend is +49% positive; overall research volume, +35%; ability to meet goals, +15%; and staff size, +12%. Since the base rate for increases in technology spend is usually high even without a pandemic, it's somewhat doubtful that the pandemic is still driving it. Perhaps the pandemic is considered to continue to have a positive impact because those who adapted better gained an advantage over competitors who did not, but it also may be time to retire this battery of questions.

OPTIMISM ABOUT ROLE: RESEARCH PROJECT BUDGET SIZE TREND AND PERFORMANCE AGAINST GOALS (BUYER)



IMPACT OF COVID-19: GRIT WAVE (BUYER)

Positive



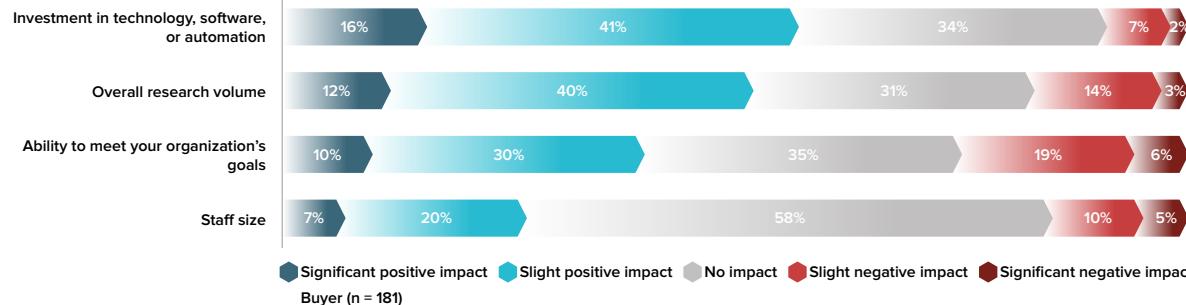
Negative



Some responded to the pandemic by increasing tech spend or doing more research, while similar numbers did the opposite.



IMPACT OF COVID-19, 22W1 (BUYER)



For the first time more than 80% of suppliers report revenue increased, and only 5% report a downturn. We might chalk these up to the Darwinian forces intensified by the pandemic, but there may be more to it than closures and acquisitions.

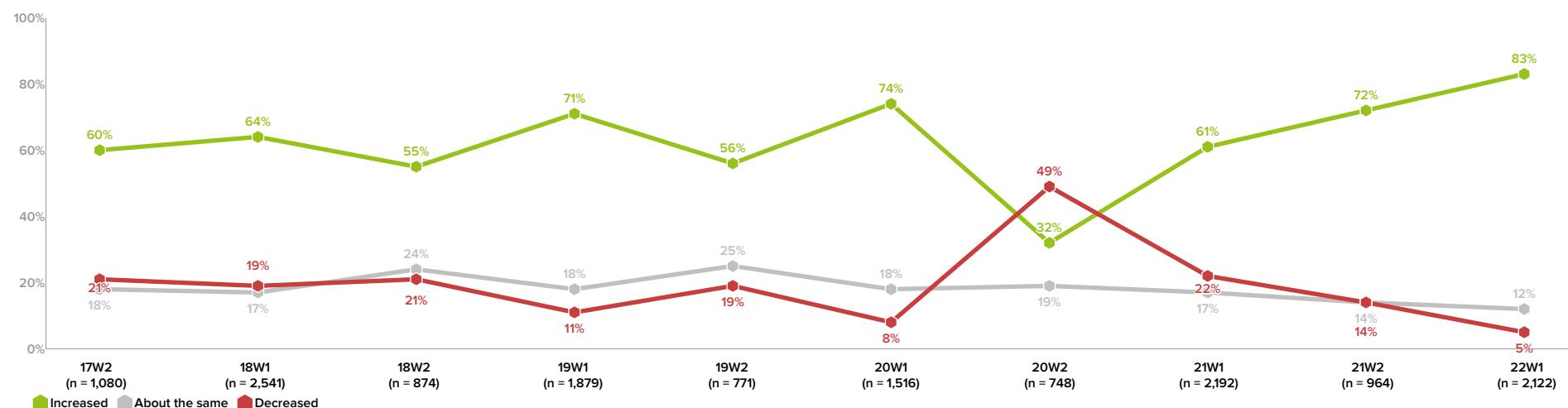


SUPPLIER PERSPECTIVE

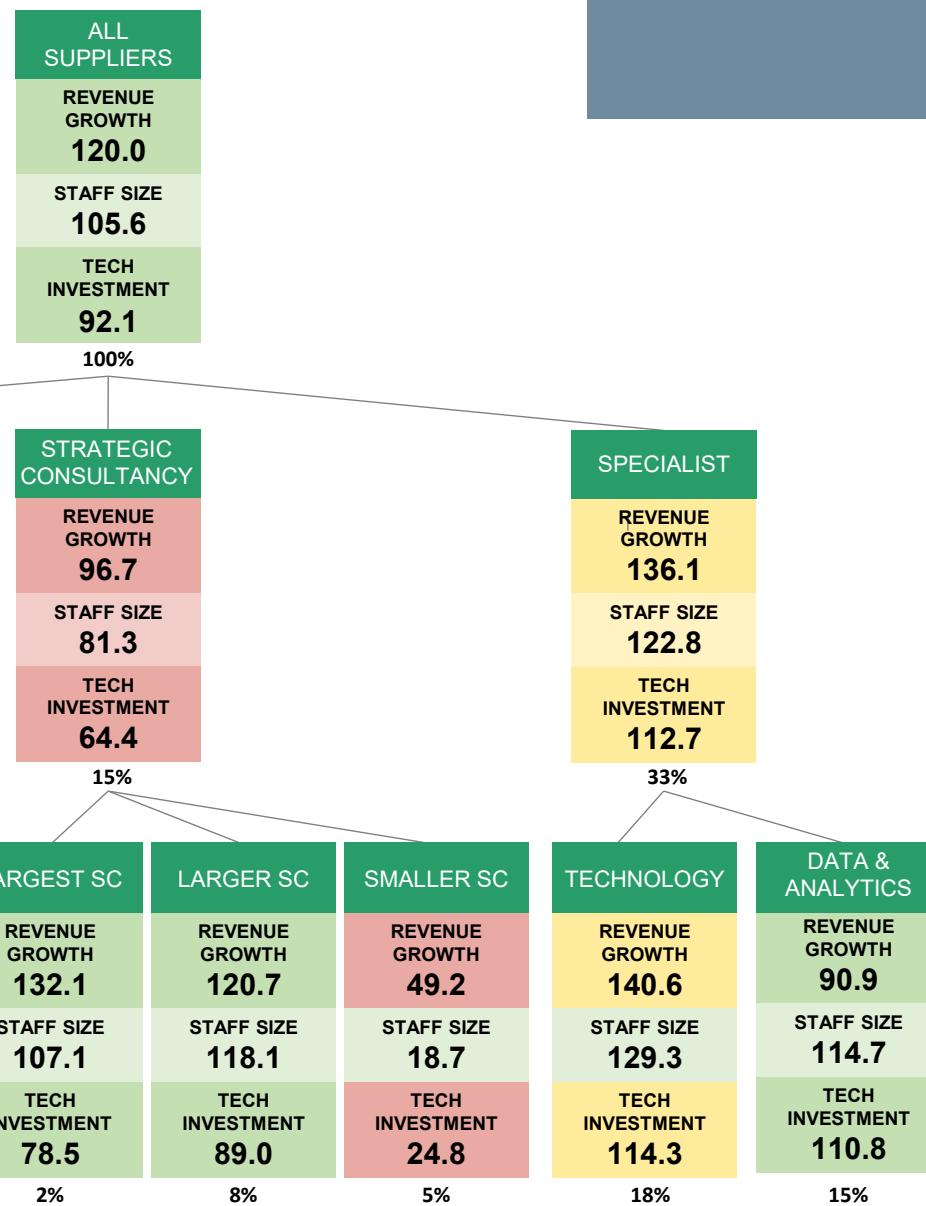
For the first time in GRIT history, more than 80% of supplier participants report that revenue increased over the last year (83%) and only 5% report a downturn. We might chalk these up to the Darwinian forces intensified by the pandemic, but there may be more to it than closures and acquisitions. On the eve of the

pandemic, revenue increases were at a then-all-time high (74%) and decreases were in the single-digits for the first time, so the gravy train was already traveling at top speed before it was mercilessly derailed.

REVENUE TREND (SUPPLIER)



The “health tree” for suppliers shows that segments we have historically referred to as “specialists,” technology and data and analytics providers, have the strongest positive trends for revenue, staff size, and technology spending while strategic consultancies have weaker, but solidly positive, trends. At a more detailed level, technology providers have the strongest revenue and technology spend trends, and larger full service research providers, those with 21 to 500 employees, have the strongest staff size trend. Smaller strategic consultancies, those with 20 or fewer employees, have the weakest trends in revenue and technology spend, while smaller full service research providers, those with 20 or fewer employees, have the weakest staff size trend.



The “health tree” for suppliers shows that segments we have historically referred to as “specialists,” technology and data and analytics providers, have the strongest positive trends for revenue, staff size, and technology spending.



In 20W1, revenue trends were as strong as ever, then significantly weakened when the pandemic hit. Full service research (-45.5), field services (-22.2), and strategic consultancies (-32.6) flipped negative, data and analytics providers dropped almost 90% to 13.9, and technology providers dropped nearly 50% to 70.6. Since then, full service research, field services, and technology providers are stronger than they were going into the pandemic, and data and analytics are almost all the way back. This is not to say that they are as healthy or financially well-off as they had been, but the revenue trends are almost as strong or stronger than they were going in.

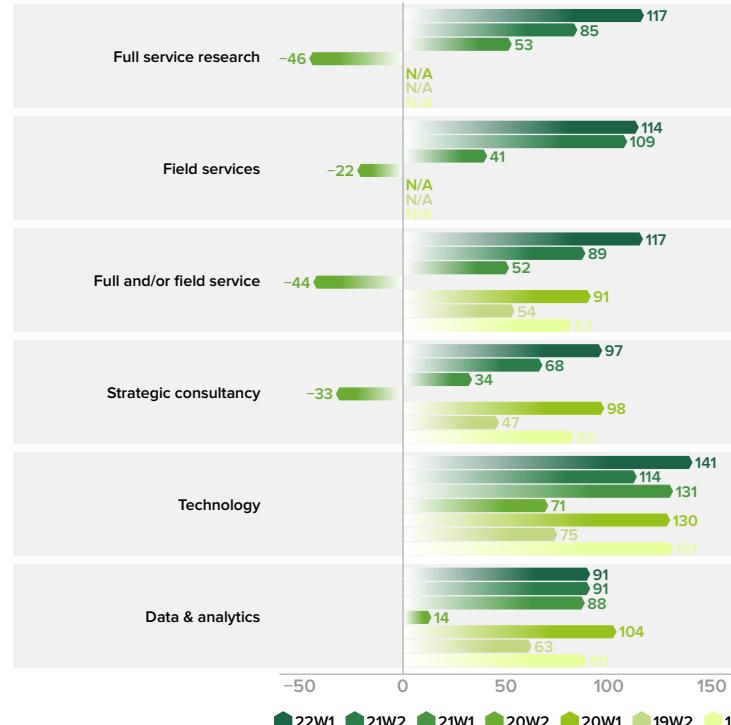
Staff size trends are very similar to revenue trends, except that the data and analytics segment is stronger now than it was going in. Technology spend trends slowed in 20W2, but none of them flipped negative. Strategic consultancies are stronger in technology spend now, but not nearly where they were entering the pandemic. Technology providers, who need to invest in technology no matter what, are almost all the way back, data and analytics are somewhat ahead of where they were, and full service research and field services must have gotten religion because they are investing like never before.

This is not to say that they are as healthy or financially well-off as they had been, but the revenue trends are almost as strong or stronger than they were going in.

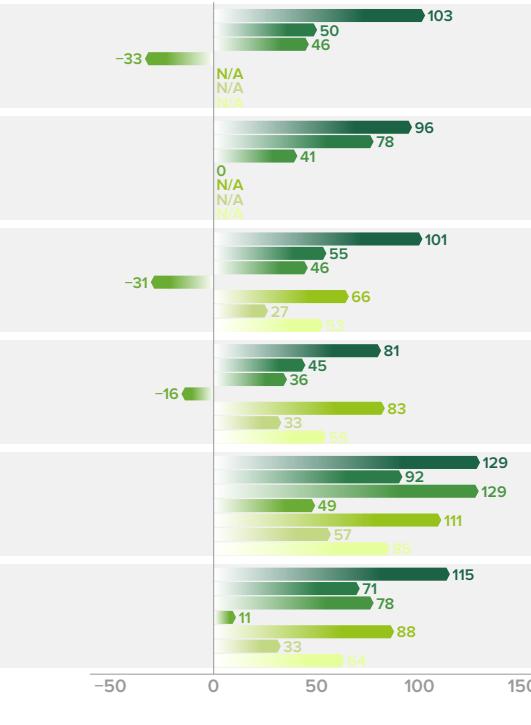


TREND INDEXES OVER P12M: PROFESSIONAL FOCUS (SUPPLIER)

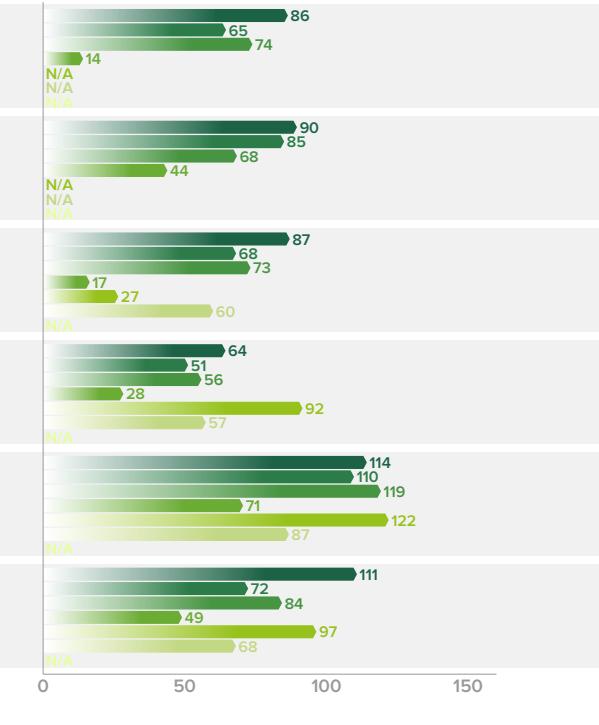
REVENUE TREND INDEX (SUPPLIER)



STAFF SIZE TREND INDEX (SUPPLIER)



TECHNOLOGY SPENDING TREND INDEX (SUPPLIER)



◆ 22W1 ◆ 21W2 ◆ 21W1 ◆ 20W2 ◆ 20W1 ◆ 19W2 ◆ 19W1

Most supplier participants name several factors as having a significant impact on revenue. At least 60% credit a strong focus on the customer experience and needs (67%), a strong focus on delivering value (62%), and the growth of their company's reputation (60%). These have been among the top three revenue drivers in each wave, except a couple of times when reputation was fourth.

Of the remaining, most cite their strong focus on innovation (58%), strong, positive leadership (53%), and an increase in client needs (53%). Nearly half also mentioned having a strong portfolio of offerings (48%). Before the pandemic, only one-third cited an increase in client needs (33%), and most credited improvements in marketing and business development efforts (51% then, 42% now). The other five factors just mentioned have been relatively stable, but we suspect that increasing client needs due to the pandemic may have changed some suppliers from hunters into hunted.

SIGNIFICANT FACTORS BEHIND THE REVENUE INCREASE (SUPPLIER)



EXPERT COMMENTARY



DOING MORE WITH LESS



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Living in times of high inflation (rates we haven't seen since the 1980s) introduces an incredibly complex time for brands. Consumers may begin reaching for cheaper alternatives, while brands themselves struggle with higher production costs.

But with crisis comes opportunity. Unlike the 1980s, brands today have the ability to consistently monitor changing needs and sentiments of their consumers and the market. However, brands are going to have to fundamentally shift their approach to market research. More specifically, they're going to have to do more, with less.

At quantilope, we work with, and have been seeing an influx of brands seeking to save resources by moving their research capabilities in-house. Shifting away from full-service agencies and towards automated technology has been a trend growing since 2020 - one that we've seen proliferate even more in 2022.

However, it's important to note that brand leaders aren't questioning the importance of consumer insights to guide business strategies. In fact, it's quite the opposite. Now more than ever, teams are expanding (or introducing for the first time) insights departments to support growth and defend competitive advantages.

CONTINUES ON THE NEXT PAGE

The most significant factors behind revenue decreases back in 20W1 were that clients' budgets decreased (49%), the economic or market conditions were not favorable (40%), and clients were taking more work in-house (38%). Of course, back then, only 8% of supplier participants reported a revenue decrease.

In the next GRIT wave, supplier decreases shot up to 49%, marking the first time that more supplier participants reported revenue decreases than increases (31%). Adverse economic and market conditions more than doubled as a significant driver (88%), it has been the top driver in each wave since, and it is still well above its pre-pandemic level (69%). Reduced client budgets went from being the top driver to being a distant second despite increasing to 65%, and only now has regressed to its pre-pandemic level (51%).

Pre-pandemic, 38% of supplier participants said that revenue decreases were driven by clients taking more work in-house, but it's only been in the mid-20% since then. Similarly, 27% said clients shifting away from traditional research drove the decrease before the pandemic, then it plunged to 10% and is now in the teens. We're pretty sure that clients were trying everything they could think of during the pandemic, including taking work in-house and looking at non-traditional ways to develop insights, so these dynamics may have only appeared to be much less significant in comparison to the overwhelming impact of external conditions.

In the next GRIT wave, supplier decreases shot up, marking the first time that more supplier participants reported revenue decreases than increases.



EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

What they are questioning is:

"Are we getting the biggest bang for our buck?"

Understanding how to drive and support efficiencies during uncertain economies is key for brand survival. Budgets don't tend to get cut when they are delivering high ROI, they tend to be re-prioritized. What this means for the insights industry is that we're going to see more organizations seeking solutions that provide more value than they cost.

In particular, we're going to see a move towards technology, automation, and self-service.

With the right partner, automation enables the same level of high-quality insights to be delivered for a fraction of the cost of traditional research agencies. It also supports a new opportunity for researchers to take more control and ownership over the insights process.

As a result, we've been seeing more clients who can deliver true cost savings benefits to their organization while transforming the role of a researcher into strategic advisor. By moving research capabilities in-house, removing middlemen and expensive agencies, brands are able to meet new budget criteria while exceeding the number of insights they're able to deliver.

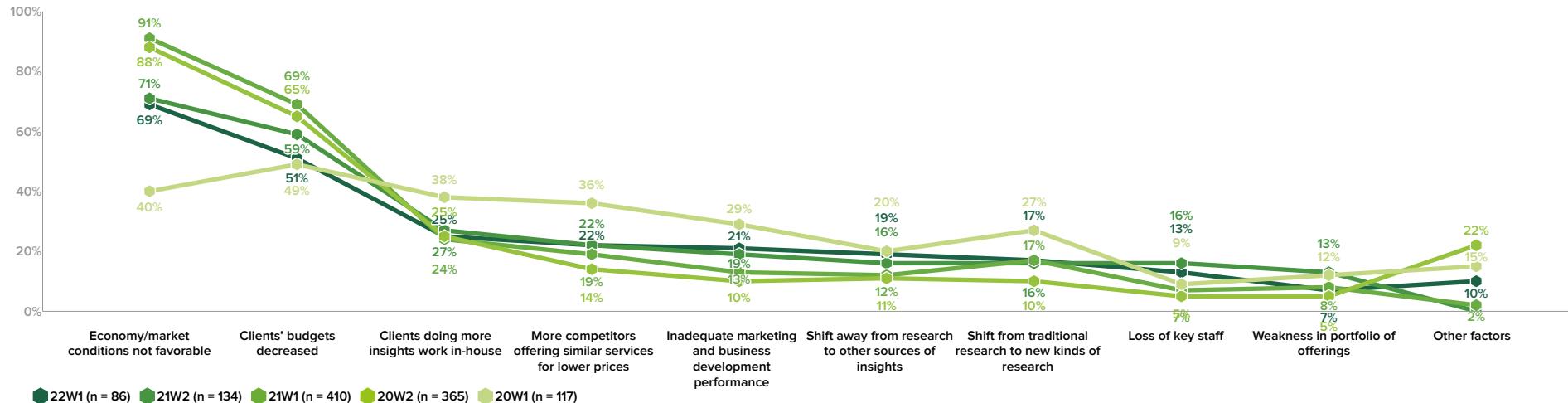
Of course, transitions like these may take time and an openness to change. But leading brands have already begun to shift. 2022 is the year of doing more, with less.



Also, 38% reported that decreases were driven by lower-cost competition pre-pandemic, but that plunged into the teens before coming as far back as 22% for the past two waves. Inadequate marketing and business development were significant drivers for 29% in 20W1, then immediately fell to 10% before rebounding somewhat to 21%. Again, these might have become less significant

in comparison to the King Kong versus Godzilla of the pandemic, e.g., monstrous economic conditions and widespread client budget cuts. Both of the heavyweights are starting to fatigue, so the middleweights may be starting to get back onto the fight card.

SIGNIFICANT FACTORS BEHIND REVENUE DECREASE (SUPPLIER)



Until recently, most supplier participants said they would respond to their revenue decrease by improving marketing and business development. It's still the top response, but only for 46% of participants, barely ahead of improving alignment with client and market needs (43%). These are closely followed by more vigorously promoting the value of their work (39%), but even this is down from a high of 56% a year ago. Improving the portfolio of offerings is a response for only 33%, down from 49% in 21W1, and only 32% will improve their strategic focus after it peaked at 51% last year. A similar amount say they are going to wait for conditions to change (32%). Now that the percentage of supplier participants with revenue reductions is only a fraction of what it was after the pandemic hit, the responses are looking more diverse within that group.

Until recently, most supplier participants said they would respond to their revenue decrease by improving marketing and business development.



HOW ORGANIZATION WILL RESPOND TO THE REVENUE DECREASE (SUPPLIER)



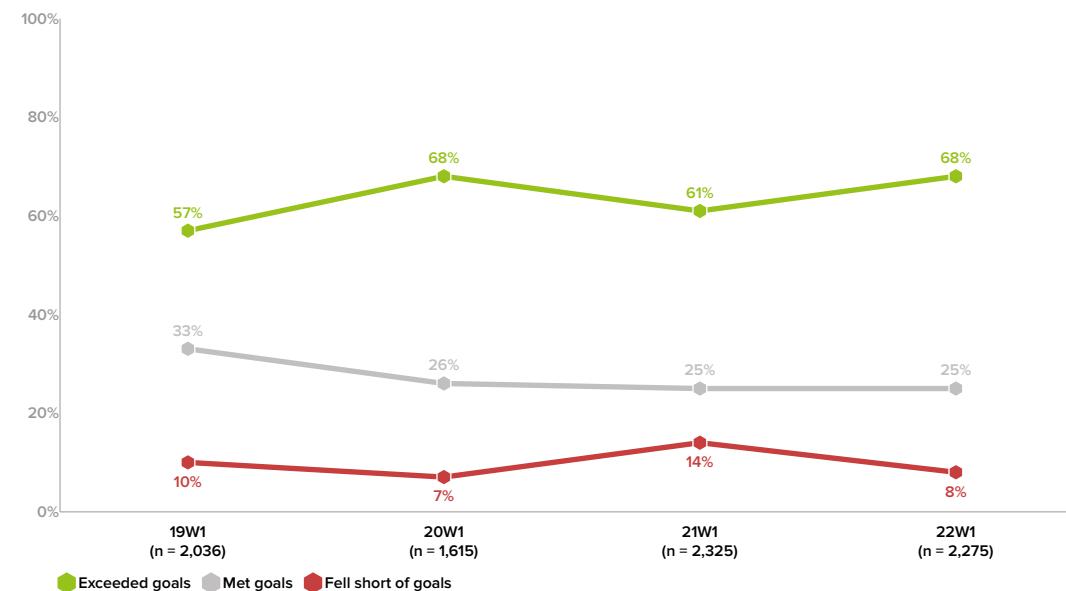
Heading into the pandemic, 68% of supplier participants reported that they exceeded their research, insights, and analytics goals while only 7% said they fell short. One year later, only 61% reported that they exceeded goals, and the number that fell short doubled to 14%. Another year later, these performance metrics are nearly identical to their pre-pandemic values.

Staff size trends are also stronger than they were heading into COVID-19, so the pandemic may be having a continuous positive impact there, too.

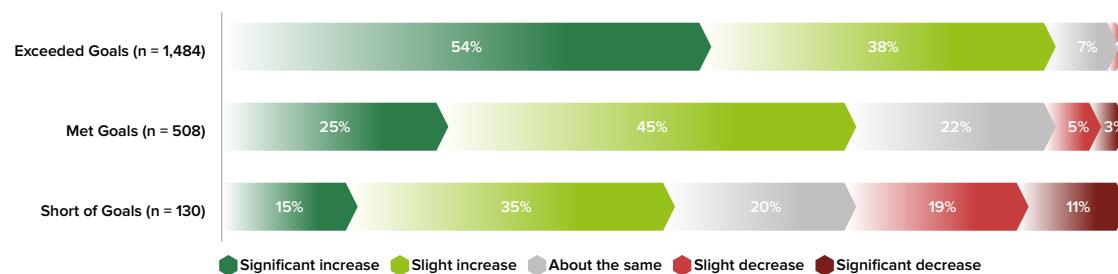


For suppliers, no matter how you look at it, meeting goals means hitting revenue targets. Among those who exceed goals, 92% report increased revenue. Of those who meet goals, only 70% report earning more revenue than in the previous year, and less than half (25%) report a significant increase compared to those who exceed goals (54%). When suppliers fall short of goals, only 50% report a revenue increase. At the other end of the spectrum, 30% of those who fall short of goals report revenue losses compared to 8% of those who meet goals and just 1% of those who exceed goals.

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



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



With respect to optimism, revenue is bit more powerful than goals. When revenue increases, optimism about the company is 94%; when goals are exceeded, it's 96%. When suppliers are perceived to fall short of goals, optimism drops to 57%. However, when suppliers lose revenue, optimism is a dismal 45%. If employees think you haven't met goals, there's some room for ambiguity about what that means for the company.

On the other hand, if they think you've lost revenue, the message is loud and clear and not good. It could mean that employees will start looking for that well-paying position that they just know is out there waiting for them. Making money is making sense; if not, it's a caution.

Similar to buyer participants but not exactly so, suppliers in 20W2 were much more likely to say that COVID-19 had an overall negative impact on technology spend (+39% favoring negative impact), ability to meet goals (+39%), ability to attract new clients (+38%), volume of client work (+19%), and staff size (+19%). Now, the impact is all more positive than negative: technology spend (+54% positive), volume of client work (+43%), ability to attract new clients (+41%), ability to meet goals (+28%), and staff size (+18%).

For suppliers, it's likely that the pandemic had a Darwinian impact that's positive for survivors across the board. Full service research and field services providers have stronger technology spend trends now than they had before the pandemic, so it's possible that the pandemic caused the acceleration instead of it happening via natural industry evolution. Staff size trends are also stronger than they were heading into COVID-19, so the pandemic may be having a continuous positive impact there, too.



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Despite these findings, between now and the next GRIT wave we'll have to decide whether this storyline is still independent enough to continue to devote survey time and report space to it, or if the industry has already moved on enough. One could argue that the ones who would have the most interesting input on this topic are no longer active in the industry.

IMPACT OF COVID-19, 22W1 (SUPPLIER)

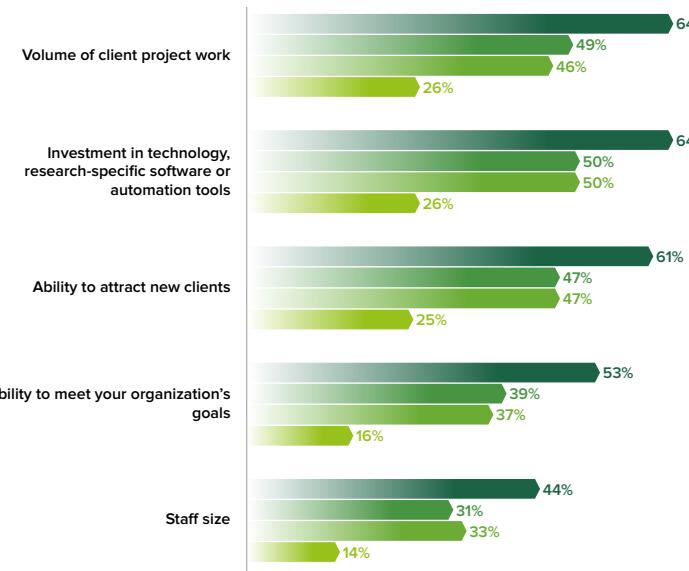


This COVID storyline may still be independent enough to continue to devote survey time and report space to it. One could argue that the ones who would have the most interesting input on this topic are no longer active in the industry.

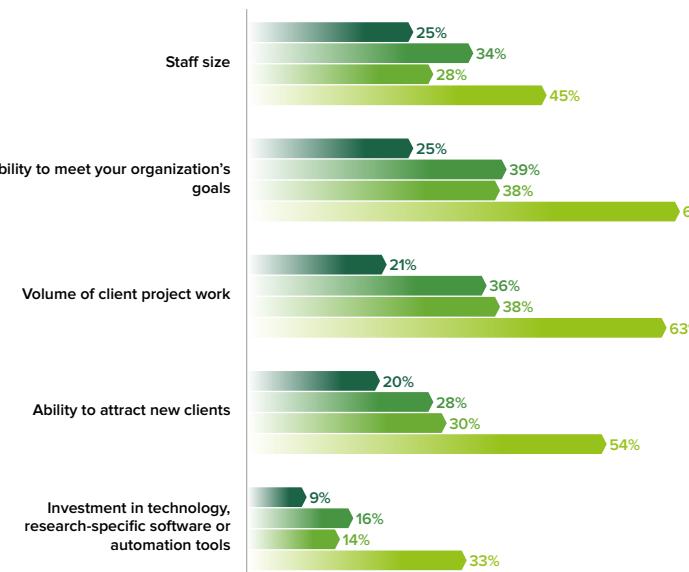


IMPACT OF COVID-19: GRIT WAVE (SUPPLIER)

Positive



Negative



22W1 (n = 1,111) 21W2 (n = 495) 21W1 (n = 1,039) 20W2 (n = 367)

If they think you've lost revenue, the message is loud and clear and not good. It could mean that employees will start looking for that well-paying position that they just know is out there.



THE BIG PICTURE

A statement of uncertain origin, “history is written by the victors,” is attributed to Winston Churchill, who certainly said it, but may not have thought of it first. Although Churchill’s sycophants may have suffered a recent loss or two, the man himself was victorious in his most famous struggle, so he can probably pencil himself in as the author if he chooses, and there wouldn’t be one thing we could do about it.

In the wake of the pandemic, the insights and analytics industry might have some victors, but it definitely has survivors, and they will write the next chapters. All the vital signs that GRIT tracks – insights-related technology spending, staff size, research project spending, and supplier revenue – are as high or higher than we’ve ever seen. In the Organizational Success Factors section, we see that automation, outsourcing, and human resources complement each other more than they seem to compete with each other. In the Employment Trends section, we see that insights professionals have a lot of confidence in their job prospects. We see most of the signs pointing in the right direction, but we don’t know how far it is to the next destination.

Just after the pandemic hit, the numbers of buyers and suppliers feeling a negative impact on areas like their ability to meet goals, staff size, and ability to attract new clients were greater than the numbers who felt it had a positive impact. Now, it’s all good: every area GRIT tracks is perceived to have felt a much more positive impact from COVID-19 than negative. We don’t know how much of this shift is due to organizations that leveraged the power of the pandemic to their advantage like a martial arts master would manipulate an opponent’s force against them and how much is due to organizations that survived simply because they were in the best position from the start.



EXPERT COMMENTARY

EMBRACING AGGREGATION: WHAT BUYERS NEED FROM SUPPLIERS TODAY

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Even though many of us are sick to death of analyzing the pandemic and its impact, the truth is that it has changed the face of market research for good. As a supplier, we are seeing buyers who are seeking new ways to find survey respondents.

In the past, sourcing respondents from a single sample or panel provider was the norm. While this approach had already begun to fall from favor pre-pandemic, recent events accelerated the need for change. We’re actually seeing a bit of desperation when it comes to finding the right respondents for studies in a fast, efficient (and feasible) manner. Because desired audiences are becoming more and more niche, in both the B2B and B2C segments, the net must be cast even wider to find respondents who meet stringent profiling criteria.

This reality is driving some of the massive merger and acquisition activity we’re seeing in market research right now, particularly on the supply side. Bringing multiple sources together, so sample comes from a wide number of places, panels, recruitment methods and more, is one of the only ways to effectively find the right audiences. Sample buyers are embracing this type of aggregation to meet quotas and feasibility requirements for their studies.

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When we see trends such as full service research and field services providers investing in insights-related technology now than did before the pandemic and crediting the pandemic for the increase, we have to believe that something has changed significantly. In the Industry Structure section, we see evidence of change in the evolving service portfolios and in how suppliers are positioning themselves as well as in how buyers are refocusing their insights staffs. In the Evolving Insights Audience and in the Industry Benchmarking sections, we see insights organizations changing how they relate to others in their organizations.

As on the eve of the pandemic, it seems like all the pieces are in place. This time, however, many are predicting a global recession instead of a global virus outbreak, and the pieces might get knocked off the table again, forcing industry players to rewrite their strategies once more. One way or another, it looks like one chapter is ending and another is beginning. The key question is, will it be written by the current authors or will a recession take the pen away and give it to someone else?

It looks like one chapter is ending and another is beginning. The key question is, will it be written by the current authors or will a recession take the pen away and give it to someone else?



EXPERT COMMENTARY

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This evolving landscape requires a deft blend of technical expertise, multi-sourcing and industry knowledge. Sample partners must deeply understand the overall ecosystem, so they know where to go to find even the most niche audiences, plus the technical savvy to find these audiences via the wide number of DIY platforms and technology solutions available today. Ultimately, this approach can reduce individual supplier bias, increase feasibility, speed up field time, and lower cost - not to mention achieving greater representativity and even diversity among respondent bases. Of course, there is always the persistent issue of data quality, which can be tricky when bringing in respondents from multiple places. A layered approach to fraud mitigation, plus expert project management, can help exponentially.

As this GRIT report indicates, the industry's "vital signs" are high when it comes to spending, revenue and staffing. This is great news for all insights professionals. But even as the pandemic winds down, and GRIT considers "retiring its battery" of pandemic-related questions, its lingering effects remain. One of those is clearly seen in the way suppliers are finding, and buyers are seeking, new methods to deliver sample supply.



UNMET NEEDS

WHAT CAN SUPPLIERS DO FOR BUYERS THAT IS NOT CURRENTLY BEING DONE?

Insights buyers and suppliers have complementary views of which important buyer needs are currently either underserved or unaddressed. Consistent with what GRIT heard last year, speed is still important, but speed alone does not make for successful insights work.

OVERVIEW

In last year's GRIT Business & Innovation Report, buyer and supplier participants agreed that faster time to insights was the industry's top unmet need. After that, buyers were looking for innovative approaches, deep understanding of business needs, and creating new use cases for insights. Suppliers thought clients needed easier implementation and findings they could trust, but were not getting them.

Once again, we have asked GRIT participants for their ideas about what clients most need that could be delivered by external suppliers, but currently is not. Although we've asked the same questions as last year, we've used a different analysis tool, so the style of the output is somewhat different. We're sure that opinions have changed, as they always do, but it may be difficult to know whether changes in the results are due to changes in the industry or changes in the how the analysis was conducted. Analysis of unstructured data can sometimes resemble a figure drawing class: the basic shape is given to the student, but the final drawing will be determined by the artist's perspective and what kinds of tools and drawing surfaces are used. In other words, the same data can produce two different results without either one being "right" or "wrong."

Unlike topics in other sections of this report, unmet needs are not directly compared to previous GRIT waves but are considered as independent snapshots of one location taken by different photographers on different days.

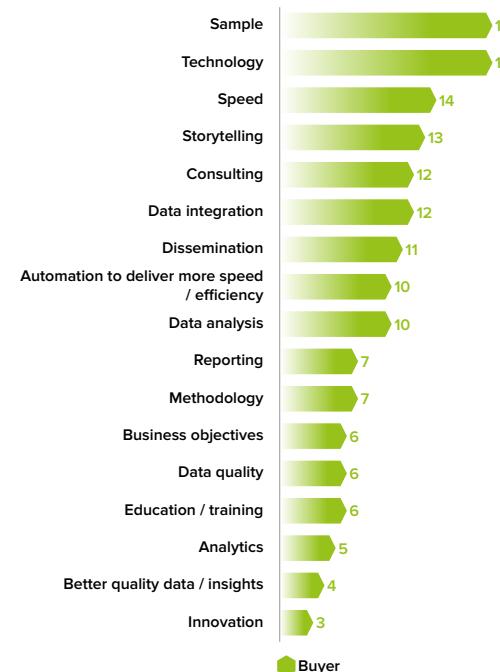
BUYER PERSPECTIVE

One year ago, getting insights as quickly as possible was a dominant concern for both buyers and suppliers. Speed is still one of the more prominent needs but may take a backseat to those related to sample and technology.

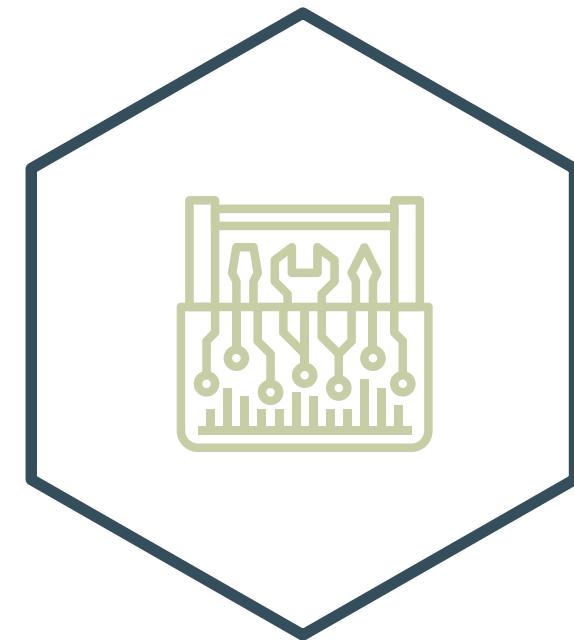
Sample needs concern availability, better targetability, and, of course, quality. Technology needs range from general needs for AI/ ML solutions to specific kinds of analytics tools to solutions for data collection. Fast data collection, fast delivery of results, and real-time access to data and reports are unmet needs related to speed.

Other frequently mentioned needs are related to storytelling, consulting, data integration, dissemination, and data analysis. Automation is similarly prominent, but represents a hybrid of technology and speed rather than a distinctly independent theme. Our analysis also identified lesser common themes related to reporting, methodology, business objectives, data quality, and education and training.

BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER (BUYER)



Speed is still a prominent need but may be taking a backseat to sample and technology. Sample needs concern availability, better targetability, and, of course, quality. Technology needs range from general needs to specific kinds of analytics tools to solutions for data collection.



In the Sample Quality section, we discuss the burgeoning crisis of confidence in research that depends on sample, but quality isn't the only unmet buyer need related to sample. One main area is finding enough targetable sample for the kinds of people they need to research. B2B sample is frequently cited as scarce, and, if B2B sample is difficult in general, then sub-segments of B2B could be close to impossible. Cut that again by country, and you've got real problems.

Even if target segments are very large, availability may still be a concern when you consider sample quality issues. A respondent who is qualified and willing to participate in research may not be desirable if their data is of questionable quality; for example, you may reject them because they've been over-surveyed or perhaps not verified.

BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER: SAMPLE (BUYER)

	Segment	Position	Years in Insights
Our biggest need is to have large, unbiased data samples. These samples help better target voters across a wide set of demographics. This need is currently being met to a satisfactory degree.	Strategic insights consulting	Local government	6 to 10 years
Deep sample sizes for multi-cultural respondents.	In-house research	Executive Research Consultant	More than 20 years
My biggest concern is sample. Customer lists are almost useless, and I am getting leery of sampling houses. Feels like the same people over and over again.	Strategic insights consulting	Senior Research Manager	More than 20 years
Sample quality and feasibility, especially among b2b respondents, continues to be a challenge. I don't hang this issue on research suppliers. Panels, suppliers, and businesses that use their services need to work together on improving the situation.	Data analysis	Vice President	16 to 20 years
We are into IT and my team has a support function for the business. Our challenge is to acquire IT sample through suppliers to generate representative results on IT subgroups, and we are mostly limited to our clients' base.	Data analysis	Research Assistant	6 to 10 years
I work in a B2B environment. We purchase samples regularly for research/VoC projects (through our partners). No one has a robust B2B panel in the U.S., let alone globally. And, with fraud becoming an ever-increasing problem, someone who figures out a high-quality, global B2B sample that fits my businesses will surely get my attention. Fraud management is critical.	Voice of the Customer	Group Director	More than 20 years
Creating larger and better samples.	Research outsourcing	Partner	3 to 5 years
Ability to provide source sample for dedicated zip codes.	In-house research	Consumer Science	6 to 10 years

Even if target segments are very large, availability may still be a concern when you consider sample quality issues. A respondent who is qualified and willing to participate in research may not be desirable if their data is of questionable quality.



Technology is a major theme because it enables – or could enable – so many specific solutions. Some buyers articulate a general need, such as more technology-enabled solutions or help with adopting them; some stress specific functionality, such as analysis of unstructured data; some focus on convenience,

such as on-demand or real-time research; and some want more research and analysis processes to be better integrated. Sometimes “automation” is mentioned specifically, but, honestly, there isn’t any technology solution that can’t be considered, in some way, to be an automation solution.

BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER: TECHNOLOGY (BUYER)

	Segment	Position	Years in Insights
Better adoption and application of key technologies such as AI, VR and Sensor-based measurement tools.	Research outsourcing	VP Analytics and Insights	More than 20 years
Automating performance data measurement in a seamless and easy to use dashboard so internal teams can use them without the Insights team having to pull the data for them.	Voice of the Customer	Project Manager	1 to 2 years
All-in-one qual and quant study hosting and cross-study analysis/storytelling.	In-house research	Partner, Research	11 to 15 years
An affordable AI powered qualitative interviewing tool that conducts interviews at scale using pre-programmed discussion guides and smart probing to provide robust learning and automated summarization/synthesis.	In-house research	Senior Director	More than 20 years
There is still no one perfect survey platform, so we make do with a few different ones depending on our particular need.	In-house research	Associate	3 to 5 years
Automation of qual on demand.	Strategic insights consulting	Research Director	More than 20 years
I've yet to find an easy AI-enabled open-end coding system that doesn't cost an arm and a leg.	Strategic insights consulting	Group Director	More than 20 years
We continue to struggle with text analytics. There are many solutions out there, but none are simple and easy to use w/o a lot of “training” of the system. I'd love for a tool to be built into Qualtrics to easily analyze our open end Qs without a lot of work from our team in coding.	In-house research	Manager, Consumer Insights	More than 20 years
Real-time competitive analysis.	Research outsourcing	Consumer Insights Manager	6 to 10 years
Blend of niche, specialized technology and true strategy consulting.	Strategic insights consulting	SVP	More than 20 years
True AI and ML products.	In-house research	Executive Management	11 to 15 years
Cutting edge technology.	Data analysis	Provincial government	6 to 10 years
Research automation.	Voice of the Customer	Research Director	More than 20 years

Sometimes “automation” is mentioned specifically, but, honestly, there isn’t any technology solution that can’t be considered, in some way, to be an automation solution.



Speed was the dominant theme last year, and it continues to be prominent now. Buyers want to get their answers as quickly as possible, and any step in the process is a candidate for acceleration. We see this theme recalled more strongly in other sections, such as Meeting Project Goals. The buyer organizations who have the highest percentages of projects that exceed stated needs prioritize

getting results quickly, so speed is part of the success formula. However, it is not clear the extent to which speed is limited by complexity, so it may not have the same priority to everyone, especially those who worry about how much it may compromise quality.

BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER: SPEED (BUYER)

	Segment	Position	Years in Insights
Always need things faster, faster, faster. Some great agencies have popped up in recent years to help with this but occasionally I worry about their quality. Ideally we find options that get us REALLY quick insights that are repeatable and reliable.	Research outsourcing	Project Manager	6 to 10 years
Speed to market.	Data analysis	Managing Brand Director	11 to 15 years
Fast / agile, intuitive fieldwork.	Voice of the Customer	Global Manager Brand Content Insights	More than 20 years
Gathering of clean data and fast analysis of it.	Research outsourcing	Project Manager	6 to 10 years
Fast, accurate polling/quick surveys.	Research outsourcing	SVP Consumer Insights	More than 20 years
High quality, quick, and easy to develop qualitative research.	Buyer	Director, Marketing Insights	6 to 10 years

Storytelling is another unmet need that is also a priority of buyers who have the most projects that exceed stated objectives. In the GRIT Insights Practice reports, storytelling always shows up as one of the most adopted skills, though some GRIT readers challenge that finding because they haven't seen widespread adoption in their own experience. It's possible that "storytelling" is a well-defined skill to some, but a vague buzzword to others, and this latter group thinks they are using it when they are not. The fact that storytelling shows up as a prominent unmet need supports this point of view.

Consulting is another prominent unmet need, and it echoes one of the most frequently mentioned needs from last year, deep understanding of business needs. Insights suppliers have unique points of view that buyers may consider to be valuable complements to their own, and better yet if they also come from a business perspective.

Data integration is another prominent unmet need. It enables insights professionals to look at issues from multiple perspectives and complement the data they typically use, resulting in more useful insights.

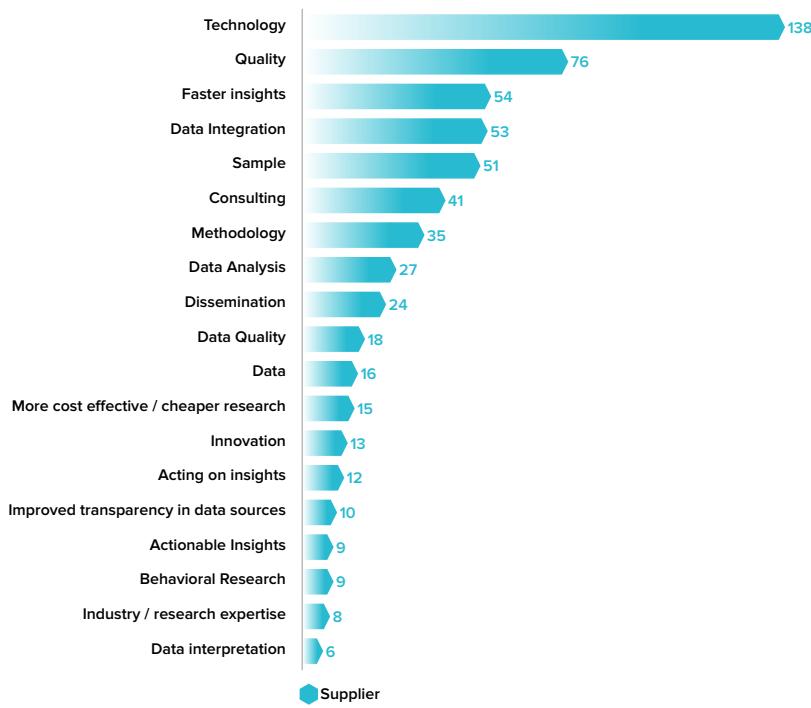
Speed is limited by complexity, so it may not have the same priority to everyone, especially those who worry about how much it may compromise quality.



SUPPLIER PERSPECTIVE

Supplier perceptions of unmet needs overlap with those of buyers, though not exactly. As among buyers, technology is at the top, though by a much wider margin and boosted, to an extent, by the enthusiasm of technology providers. Speed, data integration, sample, and consulting are prominent themes among both suppliers and buyers, but the lone theme in the second tier for suppliers, quality, did not emerge as a clear theme from GRIT's analysis of buyers.

BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER (SUPPLIER)



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Some sub-themes are also prominent on their own when split out from the major themes. Use of DIY platforms is the most prominent sub-theme and would be third overall if considered as a standalone major theme. It is followed by integration of multiple data sources and reliable/quality data. These would rank around sixth if placed on the list major themes.

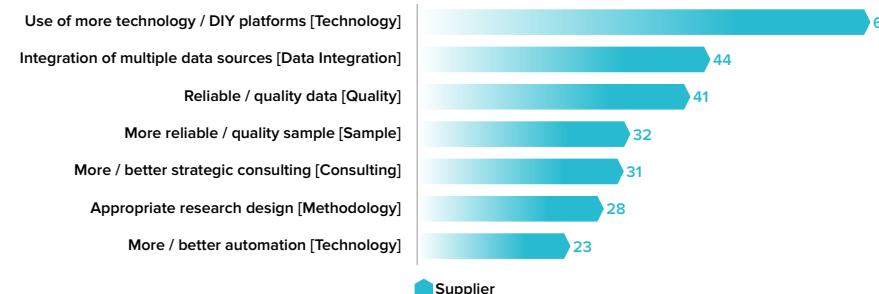
The next sub-themes seem to be nuances of more prominent themes rather than distinct, standalone needs. More reliable/quality sample is an aspect of reliable/quality data, and more/better strategic consulting and more/better automation seem to be more passionate reiterations of main themes. One sub-theme among this group stands alone better than the others: appropriate research design.

After DIY platforms and automation, technology sub-themes are less prominent and most concern analytics. Some suppliers call out unmet needs for AI/text analytics/natural language processing, real-time data analytics, and more analysis tools in general.

As among buyers, technology is at the top, though by a much wider margin and boosted, to an extent, by the enthusiasm of technology providers.

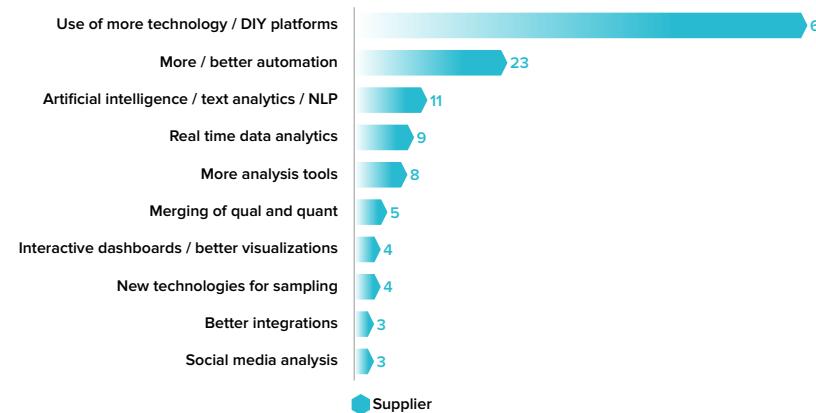


BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER, TOP SUB-THEMES (SUPPLIER)



Supplier

BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER: TECHNOLOGY (SUPPLIER)



Supplier

For supplier participants who are not in the technology segment, unmet needs can range from something as simple as helping buyers choose the right solutions to sophisticated all-in-one research platforms to fully integrated systems for

insights generation and distribution. Self-service is a salient thread, as well as automated quality control.

Unmet needs can range from helping buyers choose the right solutions to sophisticated all-in-one research platforms to fully integrated systems for insights generation and distribution.



BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER: TECHNOLOGY – DIY & AUTOMATION (NON-TECHNOLOGY SUPPLIER)

	Segment	Position	Years in Insights
Automation and AI could be an amazing asset for business insights – large volumes of data, new ways of interpreting them, all could be an immersive experience into the complex integrated systems of modern living.	Field services	Sales Director	3 to 5 years
Fully integrate external data into existing &/or evolving data sets & tools useful across teams. Visual mapping / road maps / visual dashboards that help teams achieve goals.	Supplier	Founder	More than 20 years
Real-time, self-serve dashboarding.	Full service research	Research Director	3 to 5 years
1 stop DIY integrated platform solutions.	Full service research	Group Manager	6 to 10 years
Reliable sampling integrated with DIY platforms – cleaned of bots and bad responses.	Strategic consultancy	Project Manager	3 to 5 years
Simple tools for analyzing data collected in DIY surveys.	Full service research	Partner	More than 20 years
Panel quality technology.	Data & analytics	Head of MR Operations, Americas	11 to 15 years
Enhancing product and services delivery to improve customer success and retention using technology and data science.	Full service research	Project Manager	3 to 5 years
Helping navigate the world of research technology and embed the right tools in their organization.	Supplier	Owner	More than 20 years
Updated technology, tools and resources.	Field Services	Sr. Data Analyst	6 to 10 years
Internal technology teams.	Data & analytics	Senior Analyst	3 to 5 years

Technology participants share opinions with other suppliers regarding quality and helping clients choose the right solutions, but their visions are somewhat more grandiose. They believe that technology can play a bigger role in business consulting and leveraging the collective expertise of disparate parties.

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BIGGEST NEED BUYERS HAVE THAT COULD BE FILLED BY AN EXTERNAL SUPPLIER: TECHNOLOGY – DIY & AUTOMATION (TECHNOLOGY)

	Segment	Position	Years in Insights
Have the full business understanding and then help them to implement the best solutions for them. This requires a full immersion into the client category AND understanding the different technology solutions.	Technology	Group Services Director	More than 20 years
Finding quality participants and keeping bots out of studies. There are research suppliers that do this, but the technology could be better.	Technology	Marketing Manager	1 to 2 years
Easy access to the complete automation of insights generation – from methodology assessment, survey writing, panel recruiting, data collection, analysis, to report generation. Automating particular stages is done, but it's hard to automate the entire life cycle.	Technology	Associate	3 to 5 years
Partnering with large scale networks of consultants which can scale servicing on behalf of technology solutions.	Technology	CEO	6 to 10 years
Mapping insights to business recommendations using technology.	Technology	Group Director	More than 20 years
Solving the problem that many users rely on other people / SME's to answer questions vs. using the available technology.	Technology	Managing Partner	More than 20 years
More insights professionals are leaving the industry is something we are all dealing with on the client side and the research side. Technology will be a huge part of firms like ours staying ahead of the curve in the future.	Technology	Sales Strategy Manager	1 to 2 years

Supplier views on unmet needs regarding speed often refer to automation as the enabler, and some suppliers would identify the need as “speed that doesn’t compromise quality.” The comments often have a tone that implies that speed is table stakes, and, as with buyers, it is needed across the entire insights life cycle.

Although several sub-themes were identified that are related to data integration, only one really drives its prominence: integration of multiple data sources. As with the other themes, data integration can benefit from automation. Suppliers see a direct connection between integration and client business success; anecdotally, the comments we have from suppliers regarding integrating data sources seem to firmly grasp the big picture while buyer-side comments seem to reflect “the view from the weeds.” In reality, the complete opposite may be true,

but it may be worth considering whether another unmet need is for suppliers to help buyers who see the value of data integration present a convincing case for it to business stakeholders who can champion it.

“Quality” can be an elusive concept to nail down, and the most prominent sub-theme is “reliable/quality data.” Nearly all its sub-themes concern data and sample quality. As we discuss in the Sample Quality section, the industry is tottering on the edge of a crisis of confidence in the data that supports much of the insights work, but still has confidence in the need for insights work. To buttress confidence, suppliers recognize that data reliability is an important unmet need to fill, much like trustworthy findings was last year.

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The GRIT analysis also identifies “sample” as a major supplier theme, but it seems to be an offshoot of “quality.” Whereas “quality” mainly concerns data reliability, “sample” concerns reliability of a specific subset of data. Other sub-themes include availability of sample and efficiency of sampling. Of course, automation is mentioned as a solution for sample issues as well.

The next prominent supplier theme, consulting, is primarily driven by the general idea that there should be more of it, that it should be better, and, as with the other themes, that it can be enabled by technology and automation.

One of the subjects we discuss in Meeting Project Goals and other sections is the higher priority that insights organizations place on developing market research expertise in their staffs. Across buyers and in most supplier segments, an emphasis on market research expertise is a characteristic of those whose projects consistently exceed stated needs. We also hypothesize that when projects fail to meet the stated objectives, the onus may frequently be on the project specification process rather than on project execution.

Suppliers seem to agree with this hypothesis because methodology is a key theme for them, in particular that buyers have an unmet need for appropriate research designs. In the Meeting Project Goals section, we discuss how the “too many cooks” approach to selecting methodologies and partners for projects is more characteristic of projects that fail to meet stated objectives than for more successful ones. When projects are designed by research novices, suppliers have front row seats as the Grand Guignol performance unfolds and eventually have to deal with the consequences and can get scapegoated when things go awry. Many of them recognize that some buyers need help in making sure that their project designs will lead to the results they need.

EXPERT COMMENTARY



WHY EMERGING METHODS HOLD THE KEYS TO BRAND SUCCESS

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Human behavior change has accelerated rapidly over the past two years, the COVID-19 pandemic forcing adaptation, rewiring brains, and forming new habits around everything from food and entertainment to shopping and travel. While some of this may be temporary, lasting only as the impact of the pandemic, others have become deep-rooted or at least have become the building blocks for a new normal.

For marketers, this is likely the most disruptive period since the birth of e-commerce - a once-in-a-generation disordering that will have an impact which we cannot yet comprehend. Thus, there's a critical need to understand what's happening, and what it may mean for a business, products and marketing.

In my view, those that arise successfully are going to more deeply embrace “emerging methods” as a necessary complement to those that are more “established.” Traditional methods, such as surveys and questionnaires have value in providing quick snapshots but are subject to significant biases. Algorithm-based big data are great at seeing what choices are made but lack the underlying understanding of *why* decisions were made.

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THE BIG PICTURE

A year ago, insights professionals were trying to get as much work done as quickly as possible, and this extreme sense of urgency was reflected in the top unmet needs identified by both buyers and suppliers: faster time to insights.

Now, a sense of urgency is still there, but it seems to be modulated by the understanding that getting something faster that's worthless isn't any better than getting something that's cheaper and worthless. If data quality concerns are not addressed, the insights based on that data are worthless. If insights can't lead to business impact, they might as well be worthless. If a project is not well-designed, its outcomes will be worthless. And, of course, if the insights arrive too late to be acted upon, they may as well have never been developed.

Data quality, business consulting, appropriate study design, and speed are each important unmet needs that suppliers can help buyers address. Data integration is another unmet need, as is storytelling, and both help address the need for business impact. Data integration provides perspective and context, and storytelling imbeds the insights and implications in the organization at large.

A common theme across all these unmet needs is technology and automation, which is itself an unmet need, or at least an underserved one. The notion that automation increases speed and reduces costs seems to have taken hold in the industry, but now insights professionals need it to improve quality, add capabilities, and facilitate insights that can impact a business positively. Automation isn't the only way to meet these needs, but it may be the only one with the ability to impact all of them positively.

EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

More than ever, marketers must break through this rational layer to understand emotional context: what is the *reasoning* behind these stated and actual choices. What was someone feeling at every moment along the path toward a decision - and what were the true influencers of those decisions. Emerging methods like eye-tracking, facial coding and biometrics capture these nonconscious emotional responses - including attention, emotion and intensity. Given that it's estimated that more than 95% of brain processing occurs below conscious awareness, the importance of these insights cannot be understated.

The more of a person's physiology you can monitor, the deeper insights you can gather and the better you can understand the emotions behind behavior and decision-making. At iMotions, we call that multimodal: the power and ability to leverage multiple nonconscious technologies like eye-tracking, facial expression analysis, EEG and GSR, to get a comprehensive look at human behavior..

It's always inspiring to see the adoption of individual technologies grow. But as emerging methodologies solidify their place within the industry and new ones (even those that may not yet exist yet) materialize, we must continue to use this as our north star: *no single technology has a monopoly on the truth*. Individual technologies have the power to reveal certain aspects of human behavior on their own; together they are much more powerful.



ADOPTION OF AUTOMATION

WHAT CAN AUTOMATION DELIVER AND WHAT SOLUTIONS LEAD ADOPTION?

Across buyers and supplier segments, spending on insights-related technology, software, and automation continues to increase, but interest in automation for particular tasks and processes appears to be waning. On the other hand, interest with each may be intensifying as specialization increases and automation aligns with it.

OVERVIEW

GRIT tracks adoption and interest in various applications for automation as well as buyer and supplier beliefs about what benefits it can enable. Buyer participants and each supplier segment believe that automation will enable them to complete their work faster, and experience with automation confirms it. Beyond that, priority tasks and processes to automate and the expected benefits of automating them vary according to the specific roles of buyer insights professionals and supplier segments.

In the last GRIT Business & Innovation Report, we saw interest in automation spike across several tasks and processes as insights organizations scrambled to figure out the best paths forward through the pandemic. Now, it looks like directions have been chosen, roles have been assigned, and tasks and processes are better aligned with those roles. Consequently, specific tasks and processes may not be automated across as many diverse groups as they once were, but the groups that are more involved with those tasks and processes may be automating them more aggressively.

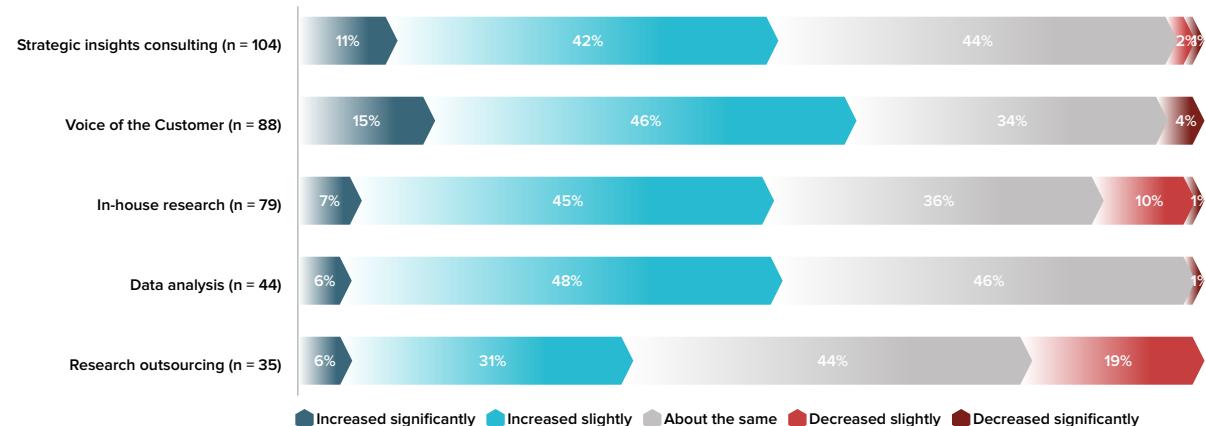
BUYER PERSPECTIVE

In the Organizational Success Factors and Business Outlook sections, we discuss how buyers continue to increase investment in insights-related software, technology, and automation as they have always done even throughout the pandemic. If we expect increases in technology investment to result in more overall adoption of specific areas of automation, buyers present us with an apparent conundrum.

During the first year of the pandemic, five areas in which automation could play a key role increased by at least 5% among buyers: analysis of social media data (+7%) and text data (+7%), charting and infographics (+6%), integration into larger business intelligence frameworks (+5%), and analysis of image and video data (+5%). Three areas decreased by at least 5%: survey design (-9%), project design (-8%), and sampling (-7%).

Since then, however, eight areas decreased by at least 5% and none increased by any amount. Analysis of social media data dropped by 12%; charting and infographics by 9%; analysis of text data by 8%; analysis of image and video data by 8%; analysis of survey data by 7%; analysis of “other” data sources by 6%; integration into larger business intelligence frameworks by 6%; and analysis of biometric/nonconscious data by 5%. The decreases erased every increase from the previous year, leaving us with the apparent conundrum of how technology spend can increase but not any area for which automation would have key role.

TECHNOLOGY SPENDING TRENDS: PRIMARY ROLE (BUYER)



The decreases erased every increase from the previous year, leaving us with the apparent conundrum of how technology spend can increase but not any area for which automation would have key role.

AUTOMATION THAT HAS A KEY ROLE: GRIT WAVE (BUYER)

	% Has a key role			Change	
	20W1 (n = 366)	21W1 (n = 626)	22W1 (n = 288)	21W1 – 20W1	22W1 – 21W1
Analysis of survey data	34%	31%	24%	-3%	-7%
Analysis of social media data	28%	35%	23%	+7%	-12%
Analysis of text data	21%	28%	20%	+7%	-8%
Charting and infographics	20%	26%	17%	+6%	-9%
Analysis of “other” data sources	24%	23%	17%	-1%	-6%
Online focus groups or IDIs	19%	17%	15%	-2%	-2%
Integration into larger business intelligence frameworks	15%	20%	14%	+5%	-6%
Sampling	22%	15%	13%	-7%	-2%
Attribution analytics	13%	17%	13%	+4%	-4%
Survey design	25%	16%	13%	-9%	-3%
Analysis of image and video data	14%	19%	11%	+5%	-8%
Project design	19%	11%	9%	-8%	-2%
Report writing	12%	12%	8%	< 1%	-4%
Analysis of biometric/nonconscious data	8%	12%	7%	+4%	-5%
Matching contract “talent” to projects	6%	5%	3%	-1%	-2%
Matching suppliers and buyers	6%	4%	3%	-2%	-1%
Average number that have a key role	2.9	2.9	2.1		

Green highlighting indicates increases of 5% or more; red highlighting indicates decreases of 5% or more. Sorted in descending order by 22W1.

Getting the semantic hypotheses out of the way first, perhaps those who considered a particular automation solution to have a “key role” last year are still using it and paying for it but don’t consider its role to be so “key” anymore. That’s possible, but it seems unlikely that this phenomenon would affect eight areas at once. Also, we define technology investment as “spending on technology, software, or automation,” so perhaps the spend increases were for software and

other technology that are not counted as automation. That’s also possible, but it would seem a more plausible explanation for why usage could flatten, not why it could decrease. If investment accelerated for technology outside of automation, it wouldn’t necessarily mean that it was taken away from existing automation solutions, so we’d expect them to continue to play key roles.

It's also possible that inflation drove the costs of existing solutions so high that some customers didn't want to pay for them anymore. Perhaps the costs were high enough that spending by the remaining customers made up for those who were lost; spending could increase while usage dropped. Unlikely, but theoretically possible.

GRIT thinks the tech spend-automation dynamic may be due, in large part, to trends we discuss in the Industry Structure section of this report. As buyer insights organizations evolve, the primary role that most defines them has become increasingly focused on particular activities rather than general missions. The most general, mission-defined roles such as strategic insights consultant and VoC have declined while activity-focused roles such as in-house researcher, data analyst, and research outsourcer have become more prominent. If different roles need different technology-based functionalities, then greater focus would lead each role to de-emphasize some while making greater use of their critical solutions. For example, instead of renewing licenses for less important solutions, they would increase licenses for their core solutions as they grow staff around them.

The first year of the pandemic was a period of learning and transition, and GRIT hypothesizes that buyer interest in various kinds of automation increased as they explored different paths out of the crisis. Figuring out "who's going to do what" was a critical issue in that exploration, and, according to the hypothesis, the roles of insights organizations were clarified and focused, as were the roles of external partners. As a result, some buyer insights professionals have less need for automation because the tasks it would support had been moved outside the organization or otherwise reassigned.

GRIT tracks "interest" in automation as the total of those who are using it today and those who expect it to play a key role in the future. Buyer participants and each supplier segment share three areas of interest in automation among their top five: analysis of survey data, analysis of text data, and charting and infographics. Charting is more or less a universal activity, and the GRIT Insights Practice Report says that over 90% of insights professionals use online surveys, so it's easy to understand why these two areas are ripe for automation in each segment. The third common area of interest, analysis of text data, is also logical because of the abundance of text in the world and the natural curiosity to understand it.

Two areas are unique among the top five for buyers, analysis of social media data and integration into larger business intelligence frameworks. Theoretically, every buyer organization has a business reason to understand social media data, but not it's not in every supplier's business model to offer it as a service. Further, because new social media data is generated continuously and because it may require a lot of context to make sense of it, buyers may prefer to do this analysis in-house. In the case of integration with a larger business intelligence framework, the average buyer is more likely than the average supplier to have one that is rich enough to be worth the integration effort.

As insights organizations evolve, the role that most defines them has become increasingly focused on particular activities rather than general missions.



Buyers and each supplier segment share three areas of interest: analysis of survey data, analysis of text data, and charting and infographics.



Because new social media data is generated continuously and may require a lot of context to make sense of it, buyers may prefer to do this analysis in-house.

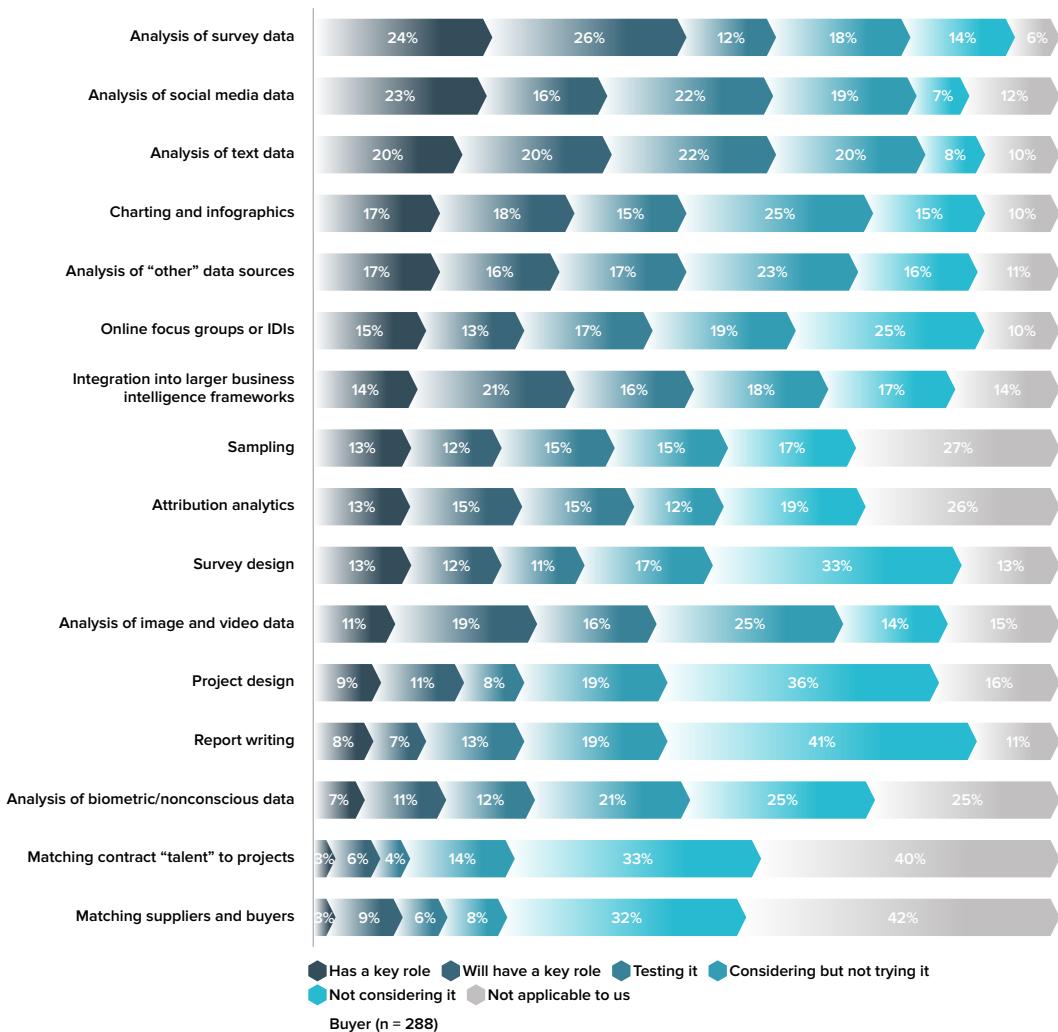


AUTOMATION HAS OR WILL HAVE A KEY ROLE, RANKED

	Buyer	Full service research	Field services	Strategic consultancy	Technology	Data and analytics
Analysis of survey data	1	1	2	1	1	1
Analysis of text data	2	3	3	3	2	5
Analysis of social media data	3					
Charting and infographics	4	2	4	2	3	2
Integration into larger business intelligence frameworks	5					
Sampling		4	1		4	3
Survey design		5	5		5	4
Analysis of image and video data				4		
Analysis of "other" data sources				5		

Substituting “interest” for “has a key role,” however, doesn’t alter the storyline for buyer insights professionals. In the first year of the pandemic, interest increased at least 5% for seven areas: attribution analytics (+11%), analysis of biometric/nonconscious data (+10%), analysis of text data (+9%), analysis of image and video data (+9%), integration into larger business intelligence frameworks (+8%), analysis of social media data (+7%), and charting and infographics (+7%). Interest declined by at least that much for survey design and project design (-6% each).

AUTOMATION ADOPTION (BUYER)



Although the overall level of interest changed substantially since 21W1, the order of interest did not.



From then until now, interest declined at least 5% across twelve areas, led by analysis of social media data (-15%), analysis of data from “other” sources (-15%), charting and infographics (-12%), attribution analytics (-11%), analysis of biometric/nonconscious data (-11%), and report writing (-11%). There are no areas for which interest increased by any amount.

Although the overall level of interest changed substantially since 21W1, the order of interest did not. Four of the top five have been the same in each wave: analysis of survey data, analysis of text data, analysis of social media data, and charting and infographics. Analysis of social media data, which was second in 20W1 and first in 21W1, dropped to third, and interest fell from a majority (54%) to below its pre-pandemic level (39%). Analysis of text data rose from fifth in 20W1 and fourth in 21W1 to second now. Fourth place has belonged to charting and infographics in each wave, although there is less overall interest now (36%) than in 20W1 (41%).

Analysis of data from “other” sources dropped to sixth after placing second in 20W1 and third in 21W1. In the two previous waves, interest was just under 50%, but now is just 35%. It was replaced in the top five by integration into larger business intelligence frameworks, which had placed seventh in 20W1 and sixth in 21W1, although interest (35%) hasn’t changed much over that time.

A couple of areas for automation have moved up in rank since 20W1: analysis of image and video data moved from twelfth to seventh and attribution analytics moved from eleventh to eighth. On the other hand, sampling fell from seventh to tenth and survey design fell from sixth to eleventh.

In summary, changing the metric doesn’t explain why the role of automation declined in several areas; we believe the change is strongly influenced by how work was reallocated internally and externally.

AUTOMATION HAS OR WILL HAVE A KEY ROLE, 20W1 TO 22W1: GRIT WAVE (BUYER)

	Has/will have a key role			Change		Rank		
	20W1 (n = 366)	21W1 (n = 626)	22W1 (n = 288)	21W1 – 20W1	22W1 – 21W1	20W1 (n = 366)	21W1 (n = 626)	22W1 (n = 288)
Analysis of survey data	50%	51%	50%	+1%	-1%	1	2	1
Analysis of text data	39%	48%	41%	+9%	-7%	5	4	2
Analysis of social media data	47%	54%	39%	+7%	-15%	2	1	3
Charting and infographics	41%	48%	36%	+7%	-12%	4	4	4
Integration into larger business intelligence frameworks	34%	42%	35%	+8%	-7%	7	6	5
Analysis of “other” data sources	47%	49%	34%	+2%	-15%	2	3	6
Analysis of image and video data	26%	35%	31%	+9%	-4%	12	8	7
Attribution analytics	28%	39%	28%	+11%	-11%	11	7	8
Online focus groups or IDIs	32%	30%	28%	-2%	-2%	9	11	9
Sampling	34%	32%	26%	-2%	-6%	7	9	10
Survey design	38%	32%	25%	-6%	-7%	6	9	11
Project design	31%	25%	20%	-6%	-5%	10	14	12
Analysis of biometric/nonconscious data	18%	28%	17%	+10%	-11%	14	12	13
Report writing	26%	26%	15%	< 1%	-11%	12	13	14
Matching suppliers and buyers	14%	15%	12%	+1%	-3%	15	15	15
Matching contract “talent” to projects	13%	15%	9%	+2%	-6%	16	15	16

Green highlighting indicates increases of 5% or more; red highlighting indicates decreases of 5% or more. Sorted in descending order by 22W1.

GRIT also asks participants for their opinions about what automation means to them, in particular regarding the benefits they believe it will deliver. We focus on those who completely and mostly agree with each statement by segment. We also look at those who say that automation plays a key role in at least one area (adopters) versus those who expect it will play a key role in the future and those who do not have such expectations. The difference between the opinions of the adopters and general opinion may represent the benefits that are discovered once they experience automation.

Considering buyer participants and each supplier segment, one benefit is universally recognized: completing projects and initiatives faster. It garners the most agreement within each segment, including among adopters, with one exception. For strategic consultancy participants who have adopted automation, it drops to second and is replaced in the top spot by access to new tools.

After completing projects faster, buyers most expect automation to enable them to do more with less and transform work processes throughout their organization. After they adopt automation, buyers are more likely to realize that it also delivers access to new tools.

COMPLETELY OR MOSTLY AGREE AUTOMATION WILL ENABLE, RANKED

	Buyer		Full service research		Field services		Strategic consultancy		Technology		Data and analytics	
	All	Adopter	All	Adopter	All	Adopter	All	Adopter	All	Adopter	All	Adopter
Complete projects and initiatives faster	1	1	1	1	1	1	1	2	1	1	1	1
Do more with less	2	2		2				3	3	3		
Transform work processes throughout our organization	3		2		2		2				2	
Gain or maintain a competitive advantage			3		3		3		2		3	
Access tools previously not available		3		3		2		1				3
Lower our costs						3				2		2

As overall buyer interest declined in the last year, so did agreement regarding automation-related statements. In 21W1, a majority completely or mostly agreed that automation would enable them to deliver projects faster (63%), do more with less (57%), transform work processes (57%), access tools not previously available (56%), and gain or maintain a competitive advantage (56%). Now, the ability to deliver projects faster is still the top-ranked statement, but only 49% completely

or mostly agree. Among those that claimed majority agreement a year ago, gaining or maintaining a competitive advantage has the least agreement today (41%). However, the overall rank order is basically the same, with the possible exception of lower costs, which dropped from third to fifth and is virtually even with gaining or maintaining a competitive advantage and accessing tools that were previously not available.

Considering buyers and each supplier segment, one benefit is universally recognized: completing projects and initiatives faster.

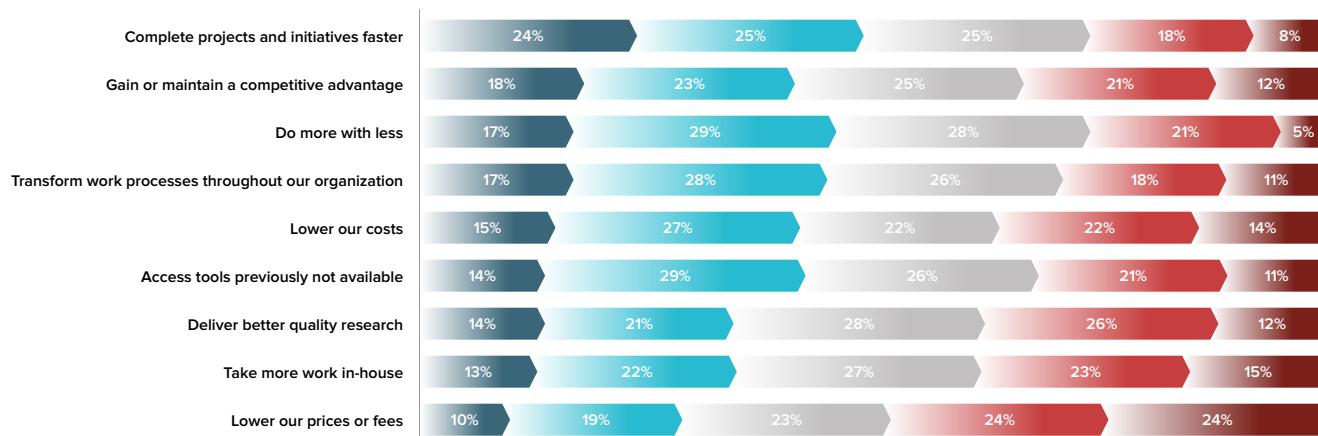


COMPLETELY OR MOSTLY AGREE AUTOMATION WILL ENABLE: GRIT WAVE (BUYER)

	% Completely/mostly agree				Rank			
	18W1 (n = 981)	20W1 (n = 366)	21W1 (n = 626)	22W1 (n = 288)	18W1 (n = 981)	20W1 (n = 366)	21W1 (n = 626)	22W1 (n = 288)
Complete projects and initiatives faster	52%	62%	63%	49%	2	1	1	1
Do more with less			57%	46%			2	2
Transform work processes throughout our organization			57%	45%			2	3
Access tools previously not available	54%	57%	56%	43%	1	2	4	4
Lower our costs	50%	53%	47%	42%	3	3	6	5
Gain or maintain a competitive advantage	39%	49%	56%	41%	5	4	4	6
Take more work in-house			42%	35%			7	7
Deliver better quality research	40%	41%	40%	35%	4	5	8	7
Lower our prices or fees			32%	29%			9	9

Rows sorted in descending order by 22W1.

WHAT AUTOMATION WILL ENABLE (BUYER)



◆ Agree completely ◆ Mostly agree ◆ Somewhat agree ◆ Agree a little ◆ Do not agree at all
Buyer (n = 288)

Unlike buyers, each supplier segment fills out their top five with sampling and survey design.



SUPPLIER PERSPECTIVE

As mentioned earlier, all buyer participants and supplier segments have the most interest in automating the analysis of survey and text data plus charting and infographics, each of which is among their top five. Unlike buyers, each supplier segment fills out their top five with sampling and survey design, except strategic consultancy, which prioritizes analysis of image and video data as well as of “other” data sources. Since the pandemic hit, strategic consultancies have focused less on full service research, and that means that they are more involved with the back end than with the front.

AUTOMATION HAS OR WILL HAVE A KEY ROLE, RANKED

	Buyer	Full service research	Field services	Strategic consultancy	Technology	Data and analytics
Analysis of survey data	1	1	2	1	1	1
Analysis of text data	2	3	3	3	2	5
Analysis of social media data	3					
Charting and infographics	4	2	4	2	3	2
Integration into larger business intelligence frameworks	5					
Sampling		4	1		4	3
Survey design		5	5		5	4
Analysis of image and video data				4		
Analysis of “other” data sources				5		



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Taken as a whole, there is not much change in interest among supplier participants across potential areas to automate. The top three areas of interest in each of the last three waves have consistently included analysis of survey data, charting and infographics, and analysis of text data. Interest in automation only dropped for analysis of social media data (-6%) and analysis of “other” data (-7%),

and nothing increased appreciably. Rankings didn’t change much, and the biggest change might have been analysis of “other” data sources from fourth in 21W1 to seventh. Project design rose from thirteenth to ninth, but it was eighth in 20W1, so the overall change is not very remarkable.

AUTOMATION HAS OR WILL HAVE A KEY ROLE, 20W1 TO 22W1: GRIT WAVE (SUPPLIER)

	Has/will have a key role			Change		Rank		
	20W1 (n = 1,615)	21W1 (n = 1,640)	22W1 (n = 1,692)	21W1 – 20W1	22W1 – 21W1	20W1 (n = 1,615)	21W1 (n = 1,640)	22W1 (n = 1,692)
Analysis of survey data	61%	62%	61%	+1%	-1%	1	1	1
Charting and infographics	54%	55%	55%	+1%	< 1%	3	3	2
Analysis of text data	54%	57%	54%	+2%	-3%	2	2	3
Sampling	49%	47%	51%	-1%	+4%	6	5	4
Survey design	51%	44%	46%	-7%	+2%	4	6	5
Analysis of image and video data	44%	44%	45%	< 1%	+1%	7	8	6
Analysis of “other” data sources	49%	50%	43%	+1%	-7%	5	4	7
Integration into larger business intelligence frameworks	40%	44%	41%	+4%	-3%	10	7	8
Project design	43%	35%	38%	-7%	+3%	8	13	9
Analysis of social media data	36%	43%	37%	+7%	-6%	12	9	10
Report writing	42%	36%	37%	-6%	+1%	9	12	11
Online focus groups or IDIs	38%	38%	37%	< 1%	-1%	11	10	12
Attribution analytics	35%	36%	35%	+2%	-1%	13	11	13
Analysis of biometric/nonconscious data	29%	30%	27%	+1%	-4%	14	14	14
Matching suppliers and buyers	22%	22%	23%	< 1%	+1%	15	15	15
Matching contract “talent” to projects	20%	19%	19%	-2%	+1%	16	16	16

Green highlighting indicates increases of 5% or more; red highlighting indicates decreases of 5% or more. Sorted in descending order of 22W1.

The top three in each of the last three waves have included analysis of survey data, charting and infographics, and analysis of text data.



In recent GRIT reports, we've noted that priorities for automation tend to cluster around analytics, and on the buyer side we've seen higher interest in automation from data analysts. Similarly, on the supplier side, we see higher interest in automation from data and analytics providers, who, of course, would be interested in automated analytics. However, we also see higher interest among those who can implement automation solutions for analytics, the technology providers. In those two segments, most GRIT participants are interested in analysis of survey data, charting and infographics, analysis of text data, sampling, survey design, and integration into larger business intelligence frameworks. In addition to data and analytics and technology providers, most field services providers are interested in automation for sampling, too.

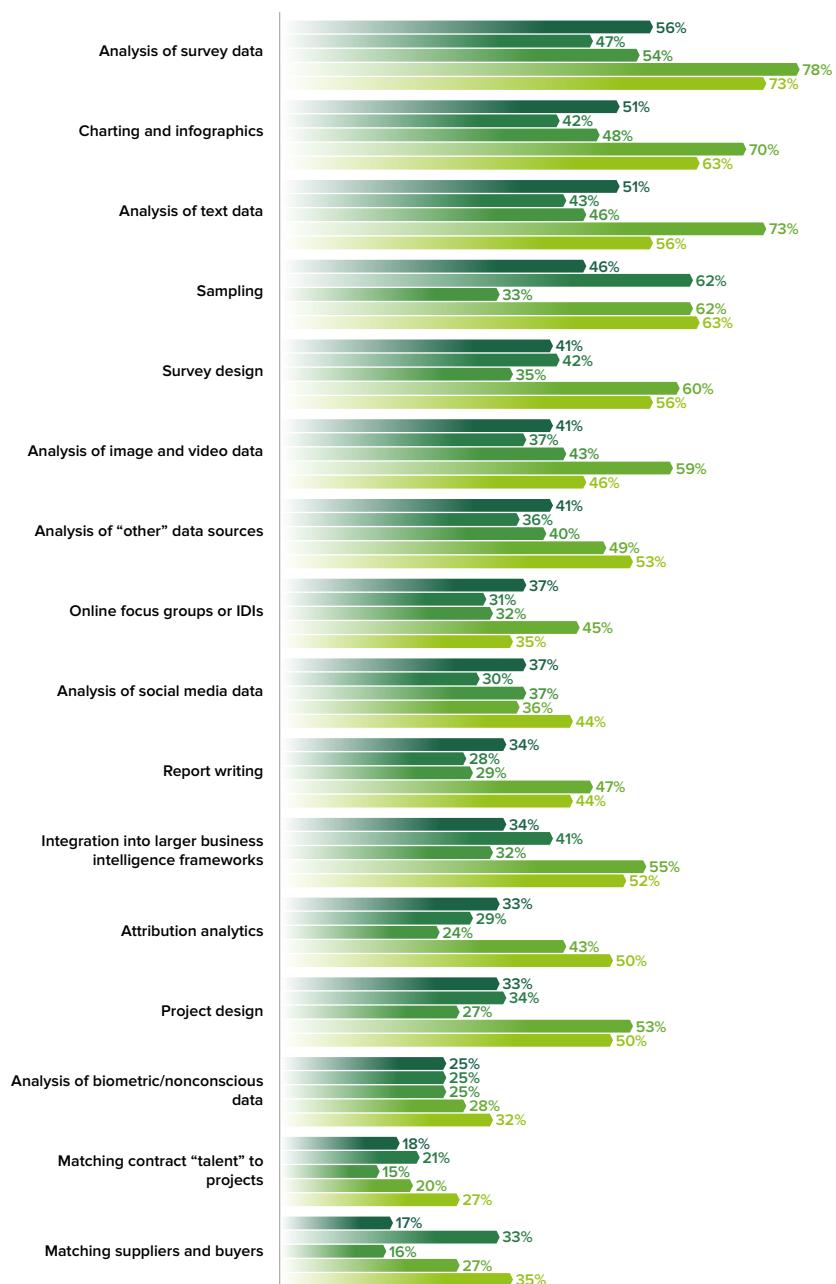
Most technology participants are interested in project design (53%), but so are half of data and analytics providers. The gap is wider for analysis of image and video data: 59% of technology providers are interested versus 46% of data and analytics. Most data and analytics providers are interested in analysis of "other" data sources (53%) while just under half of technology providers are interested (49%). About half of data and analytics participants are interested in attribution analytics (50%) as well as 43% of technology providers.

Across most areas, generalist suppliers, full service research providers and strategic consultancies, are less interested in automation than specialists.

In addition to data and analytics and technology providers, most field services providers are interested in automation for sampling, too.



AUTOMATION HAS OR WILL HAVE A KEY ROLE: PROFESSIONAL FOCUS (SUPPLIER)



Full service research (n = 680) Field services (n = 234) Strategic consultancy (n = 182)
Technology (n = 313) Data and analytics (n = 295)

Across most areas, generalist suppliers, full service research providers and strategic consultancies, are less interested in automation than specialists.



Completing projects and initiatives faster is a universal expectation of what automation can enable. For supplier participants, however, the perception of benefits differs by segment and changes with experience.

Among full service research, field services, data and analytics, and strategic consultancy participants, the general beliefs are that automation will enable them to transform work processes and gain or maintain a competitive advantage as these are among the top three benefits they expect. For technology providers, gaining or maintaining a competitive advantage is also among their top three, but transforming work processes is not, likely because they are already automated.

Neither of these benefits, however, are among the top three among adopters. Instead, full service research and strategic consultancy adopters are more likely to believe that automation enables them to do more with less and access new tools. Field services and data and analytics adopters believe it will enable them to access new tools, too, but they also believe it helps them to lower their costs.

Adopters in the technology segment also believe it enables them to lower costs as well as to do more with less, an expectation they share with the small pool of technology non-adopters.

In summary, the expectation that automation enables projects to be completed faster is universal. The general expectation across suppliers is that automation will transform work processes and enable them to gain a competitive advantage. Experience, however, reveals to generalists that it will enable them to do more with less and access new tools. To specialists who are more intimately involved with data, experience reveals that automation also enables them to access new tools plus lower their costs. Adopters among technology providers don't share the belief that it will help them to access new tools because they likely already have access. However, they share the belief with generalists that it will help them to do more with less and with specialists that it will help lower their costs.

Full service research and strategic consultancy adopters are more likely to believe that automation enables them to do more with less and access new tools.



COMPLETELY OR MOSTLY AGREE AUTOMATION WILL ENABLE, RANKED

	Buyer		Full service research		Field services		Strategic consultancy		Technology		Data and analytics	
	All	Adopter	All	Adopter	All	Adopter	All	Adopter	All	Adopter	All	Adopter
Complete projects and initiatives faster	1	1	1	1	1	1	1	2	1	1	1	1
Do more with less	2	2		2				3	3	3		
Transform work processes throughout our organization	3		2		2		2				2	
Gain or maintain a competitive advantage			3		3		3		2		3	
Access tools previously not available		3		3		2		1				3
Lower our costs						3				2		2

THE BIG PICTURE

Across the insights and analytics industry, the enduring promise of automation is that it will speed up projects and initiatives, and top-of-mind expectations are that it will help transform work processes and give suppliers a competitive advantage or help them maintain one. Those who have more experience with automation, however, realize that it gives them access to tools that were otherwise unavailable, and the most common automation experiences are with analysis of the most common kinds of data, survey and text, as well as with common tasks, such as charting and infographics.

In last year's GRIT Business & Innovation Report, we found that buyer and supplier interest levels in automation were converging around attribution analytics, analysis of biometric/nonconscious data, analysis of image and video data, analysis of text data, integration into larger business intelligence frameworks, analysis of social media data, and charting and infographics. Although interest levels for automating each of these seven areas varied across the industry, interest levels for each were evened out across buyers and suppliers. This year, however, interests are more segmented.

In retrospect, interests may have been converging last year because the pandemic created uncertainty that pushed everyone in the same direction. Since then, the division of labor within the industry that we described in 21W1 has been further refined, and interest in automation is realigning with the redistribution of tasks and processes. For example, some processes that are more intimate for buyers, such as analysis of social media data and integration with the larger business framework, are a higher priority for them than for suppliers. Tasks that may be more concentrated among suppliers, such as survey design or sampling, are higher automation priorities for them.

EXPERT COMMENTARY



LET'S GET REAL: THERE IS NO SILVER BULLET FOR CYBERFRAUD

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Data quality is and will always be at the top of researchers' mind in the insights industry. How in today's ever-evolving climate can you trust that your data is reliable? Even though this issue has grown and changed over time, it remains fundamentally the same: there will always be fraudsters looking to cash out on survey incentives.

There isn't a silver bullet for cyber fraud, and there is no way for any one company to completely solve this issue. I've spent the lion share of my career studying fraudsters, understanding their motives and tactics, and building solutions to be more proactive in catching these nefarious users. I'm deeply passionate about this topic and I strongly believe it is time for our industry to have a major wake up call.

In my testing over the years, I've seen sample providers large and small deal with this problem. It isn't a matter of if, but when you will encounter an issue with sample quality. According to Accenture, 68% of businesses today feel that their cyber security is at risk on multiple fronts, and this is expected to rise in future years as fraudsters become increasingly sophisticated. Cybersecurity Ventures, a leading security publisher recently featured in Forbes, predicts that cyberfraud will cost \$10.5 trillion globally by the end of 2025. It's a very real and material problem, not only for our industry, but many others as well.

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Although everyone appreciates automation's ability to speed things up, the other perceived benefits follow the roles associated with certain processes and tasks. Automation adopters who have a more general scope of responsibilities, such as buyers as a group, full service research providers, and strategic consultancies, are more likely to appreciate how it enables them to do more with less. Adopters who are data-oriented, such as field services and data and analytics providers, are more likely to see benefits in lowering their costs. Adopters in the technology segment appreciate benefits that are already intrinsic to their business model, such as new tools but are more likely to appreciate benefits that help them to remain competitive, such as greater productivity and lower costs.

Automation helps insights professionals to complete their work faster, but it also gives them access to new capabilities, particularly analytics. At a high level, the growth of automation will follow the growth of particular kinds of analysis, and the growth of analyses will follow the differentiation and proliferation of the roles that need to use them.

The division of labor we described in 21W1 has been further refined, and interest in automation is realigning with the redistribution of tasks and processes.



EXPERT COMMENTARY

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There are many resources available to fraudsters that explain how to start to process. There are videos on how to start a device farm and where to buy inexpensive phones. YouTubers have a ready-made bot that you can freely use and even upgrade to a more powerful version. There are tutorials outlining the blueprint of success for a survey screener; they know what the insights space routinely looks for. Another helps viewers leverage residential proxies which serve to hide their true location.

Getting started in the fraud industry is incredibly easy. You can rent a virtual datacenter for \$120 which will help you transform a single computer into 1,000 virtual computers with unique device features. You can rent a residential proxy service for \$60 to spoof your geo-location and IP address. You can leverage the AWS QA virtual device. With nominal upfront costs of \$200 or so, the return on investment is incredible. On the consumer side, a casual fraudster can make \$120,000 annually with ease. For B2B research, which is a common target due the high incentive payout, a fraudster can cash in further at \$180,000 annually.

Tackling these issues can be intimidating, but it's important that we as researchers take our power back and get ahead of these fraud innovations. There are both tactical and strategic things you can do to better position yourself and produce higher quality results.

1. Assumptions are dangerous. It is critical to scrutinize your data closely and work with partners who are transparent and open about the challenges facing our industry.
2. Fraudsters study our ecosystem closely, and they prey on predictability. Changing our tactics is key to keeping the fraudsters on their toes.
3. No one is impervious to fraud, but there are some who are more proactive than others. It is important to ask the tough questions and work with partners who will give you a transparent view when things go off track.
4. Recognize and accept that quality really exists at the participant level. There are good and bad users in every source online.

There is no such thing as perfect and there is certainly no silver bullet, but we can do so much better!



INNOVATION STRATEGY

HOW IMPORTANT IS INNOVATION AND HOW IS IT FOSTERED?

The pandemic forced a re-evaluation of roles and priorities, but innovation remains an important area of focus. The technology and data and analytics supplier segments seem to be leading the way, but insights organizations in every segment are demonstrating their commitment to it in a variety of ways.

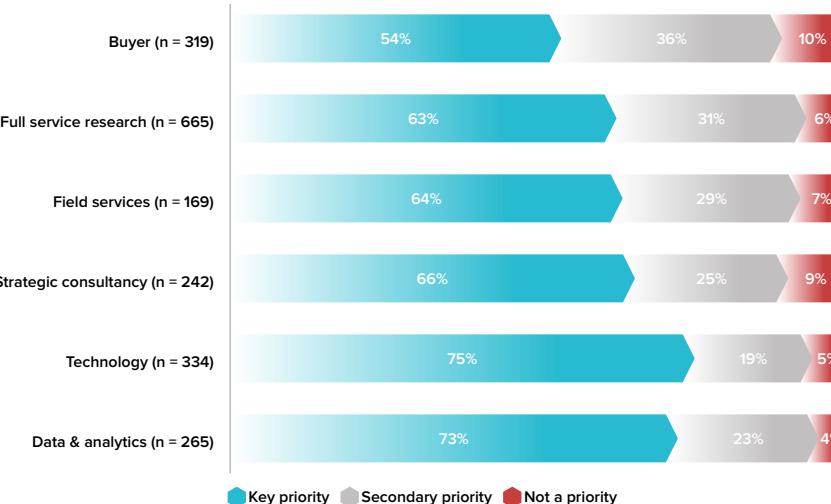
OVERVIEW

When GRIT began tracking innovation in 20W1, two-thirds of buyer participants considered innovative focus to be a key priority skill to develop in staff (68%) and the second most important after business knowledge (75%). Two years after the advent of the pandemic, innovative focus is considered to be a key priority by just over half of buyer participants (54%) and has fallen to third, part of a cluster with people skills (55%), market research expertise (52%), and analytical expertise (48%).

Supplier priorities have also shifted during the pandemic. The priority of innovative focus has increased in data and analytics, maintained its position in full service research, and declined in strategic consulting from the first priority to fourth. Among technology participants, those who consider innovative focus to be a key priority dropped 13%, but it remains their top priority at 75%, higher than in any other segment.

As the pandemic unfolded, insights organizations rebalanced their priorities to meet new challenges and pursue new strategies, and, while innovative focus may have become one of a crowd, it didn't get lost in it. Although innovation remains a key priority for most participants in every segment, its center is clearly on the supplier side, particularly among technology and data and analytics providers. Insights organizations have decided to prioritize other areas along with it, but innovation abides.

INNOVATION FOCUS DEVELOPMENT EMPHASIS: SEGMENT (INVOLVED IN STRATEGIC DECISIONS)



Although innovation remains a key priority for most participants in every segment, its center is clearly on the supplier side, particularly among technology and data and analytics providers.



EXPERT COMMENTARY



IS BIG MR ON ITS WAY TO BECOME THE NEXT BLACKBERRY?

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hat smartphone do you use? I'd be willing to bet that it isn't a Blackberry. Why is that?

The market research industry has gone through several transformations in the last 100 years, and the latest evolution is happening right in front of our eyes. During the advent of online surveys, market research was further democratized, however, it became reliant on stated responses at the expense of observing actual behaviors. Unsurprisingly, as the 2022 GRIT report highlights, data quality issues have become more acute and the need to look into more accurate, behavioral data is ever increasing. So where do we go next? My answer is simple: Scaled, Behavioral Research.

Let's talk about measuring behavior and how we can do it better. Several existing tools have been on the scene for a few years now: passive monitoring of mobile devices, static cameras, and wearable eye tracking goggles.

However, two nascent but powerful technologies are changing the game - and doing it at scale:

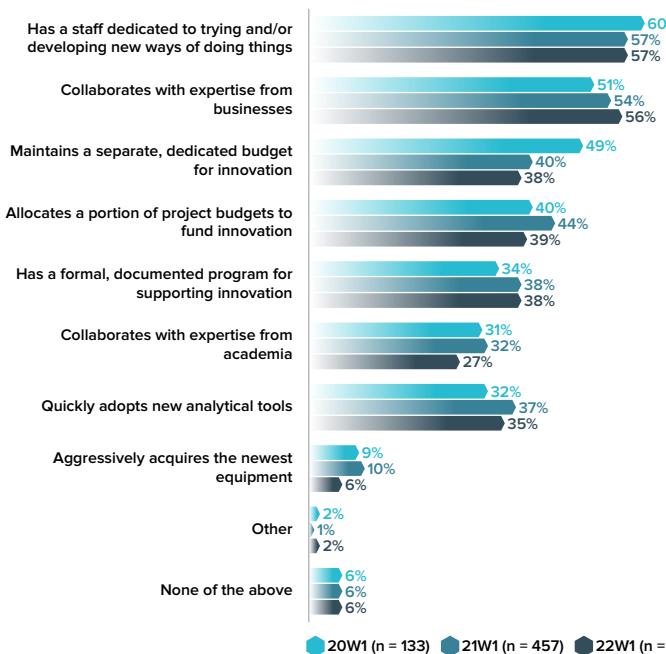
1. Video to Data
2. Augmented Reality

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BUYER PERSPECTIVE

Since 20W1, just before the pandemic, dedicating a staff to trying or developing new ways of doing things is the top way that buyer organizations invest in innovation, according to most buyer participants who say innovative focus is at least a secondary priority to develop in their staff. Most also say they invest in innovation via collaboration with business experts, and this is the second most popular approach in each wave. Maintaining a separate, dedicated budget for innovation was a clear third in 20W1, mentioned by just under half (49%), but that fell by 9% after the pandemic hit and is now in a tier with allocating a portion of project budgets (39%) and having a formal, documented innovation program (38%).

HOW ORGANIZATION INVESTS IN INNOVATION: GRIT WAVE (BUYER, INNOVATIVE FOCUS AT LEAST SECONDARY)



EXPERT COMMENTARY

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Over the last 8 years, we have been developing Videometrics by converting Video to Data at NAILBITER, focused on proving the actionability of the insights we bring to our clients. Not only does video analyzed at quant scale provide scalable, behavioral insights, but it also allows us to further innovate. By integrating Augmented reality into the product offering, we're marrying the power of video observation with the flexibility of the virtual world, optimizing new offerings in real time through crystal clear 3D visualization.

Let's revisit Blackberry. There's a reason there isn't one in your pocket right now - they didn't accept the urgency to innovate in a world rapidly changing through new technology, shifting consumer needs and behaviors.

So why are so many big market research firms not rushing towards new behavioral tools, like Videometrics? Many firms, though recognizing the value of being the next Apple, are more scared of becoming the next Blackberry. Additionally, with more agencies being acquired by private equity, the next few years will likely be focused on value extraction and less on Innovation and R&D.

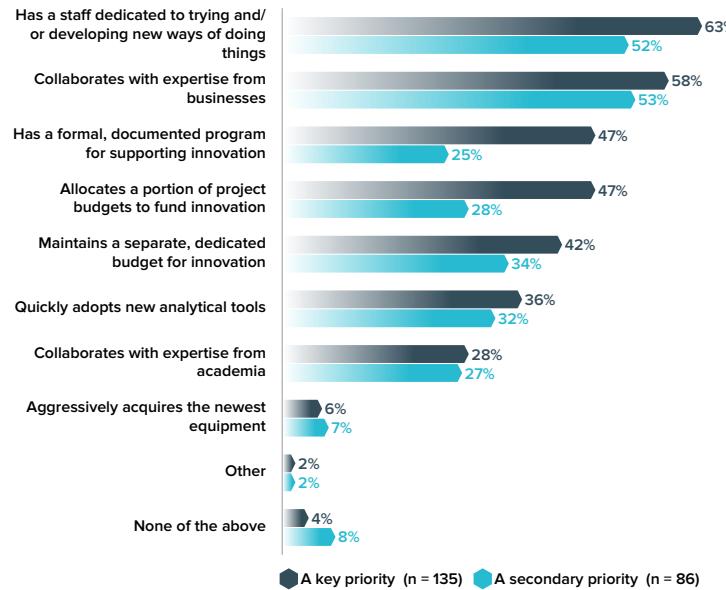
The industry is at a crossroad, with innovation of new technologies for insight collection down one road, and the continued decline of legacy tools down the other. Each of us has a choice: embrace change and develop better ways of collecting behavioral data or become the next Blackberry.

Which road do you choose?



Even though most buyers who consider innovation to be at least a secondary priority say they dedicate staff to it, those who say it is a key priority are even more likely to do it (+11%). They are more likely to further demonstrate their commitment to innovation by documenting a formal program for it (+22%) and allocating money to it from project budgets (+19%).

HOW ORGANIZATION INVESTS IN INNOVATION: INNOVATION SKILL PRIORITY (BUYER, INNOVATIVE FOCUS AT LEAST SECONDARY)



GRIT buyer participants from organizations with fewer than 10 insights professionals name about 2.5 ways they invest in innovation, on average, while those with 10 to 49 staff name 3.2 and those with 50 or more name 3.7. More with 50-plus (79%) and 10 to 49 staff (59%) dedicate people to trying new ways of doing things, compared to less than half of those with 5 to 9 (41%) and fewer than 5 staff (49%). Most of those in the three largest categories collaborate with business experts, but those in the largest category are much more likely to do so

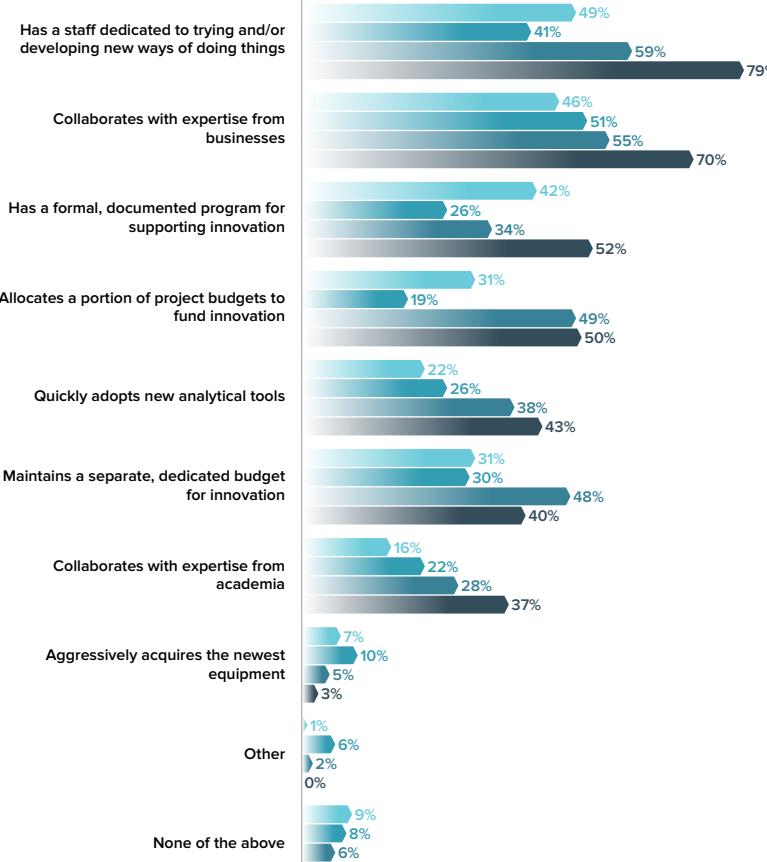
(70%). Most of them also have a formal, documented program (52%) and about half of those in the two largest staff size categories allocate portions of project budgets to innovation.

Those in the two largest categories are also more likely than those with smaller staffs to quickly adopt new analytical tools and maintain a separate budget for innovation.

Most buyers who consider innovation to be at least a secondary priority dedicate staff to it, but those who say it is a key priority are even more likely to do it.



HOW ORGANIZATION INVESTS IN INNOVATION: INSIGHTS STAFF SIZE (BUYER, INNOVATIVE FOCUS AT LEAST SECONDARY)



Most in the three largest categories collaborate with business experts, but those in the largest category are much more likely to do it.



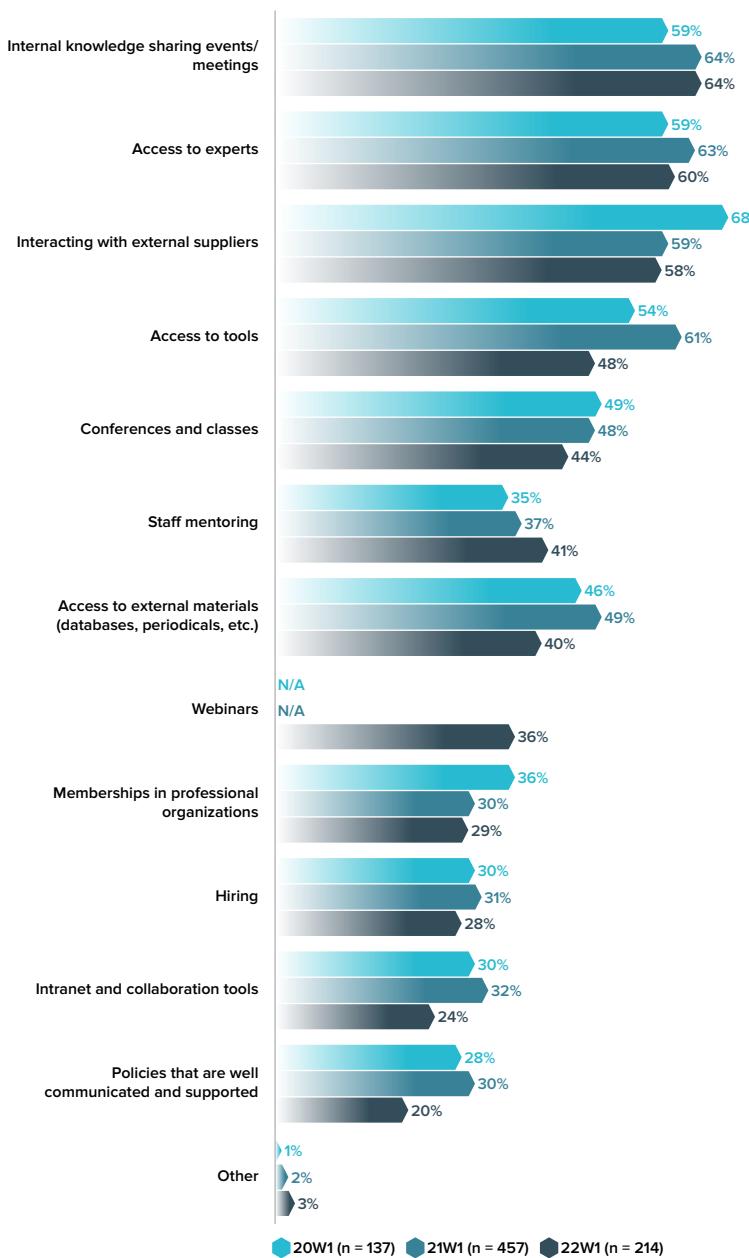
In each wave, most buyer participants say that internal knowledge sharing events, access to experts, and interacting with external suppliers are critical to their innovation efforts. The first two have hovered around 60% in each wave, but access to suppliers dropped from 68% before the pandemic to 59% just after it began, settling in at 58% now. As we discuss in the Organizational Success Factors section, buyers didn't stop working with suppliers, but the average staff member may have had fewer opportunities to interact with them.

In each of the last two waves, most also said it was critical to provide access to tools, but now only a minority say it is (48%). Access to tools follows a pattern similar to what we saw with automation: a spike in the first year of the pandemic, then a return to pre-pandemic levels (54% in 20W1) a year later. GRIT hypothesizes that use of automated tools crested as buyers tried to figure out how to best allocate work internally and to suppliers, but receded once they had a plan in place.

Other potential innovation resources that require out-of-pocket expenditures also seem to have declined. Access to external materials peaked at 49% last year, but is now at 40%. Memberships in professional organizations was at 36% pre-pandemic, but has slid down to 29% now.

In the past, GRIT has found that having clear, well-communicated policies in place is an important element of innovation focus development. However, this seems to have declined since last year, from 30% to 20%. This finding seems to fit with a general narrative which says that the pandemic triggered buyers to delegate more of the task of insights innovation to suppliers while they focused more on the business. While some of the other resources may cost time and out-of-pocket money, developing and communicating policies may require more commitment and follow-through, making it challenging to manage in these difficult times.

MOST CRITICAL TO DEVELOP AND MAINTAIN INNOVATIVE FOCUS: GRIT WAVE (BUYER, INNOVATIVE FOCUS AT LEAST SECONDARY)

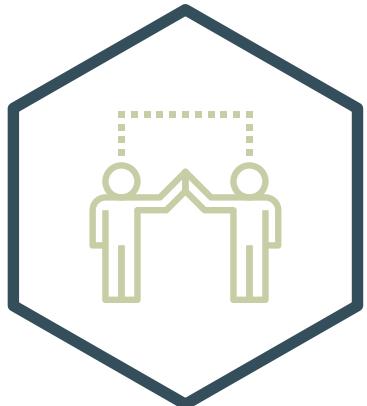


In each of the last two waves, most also said it was critical to provide access to tools, but now only a minority say it is.



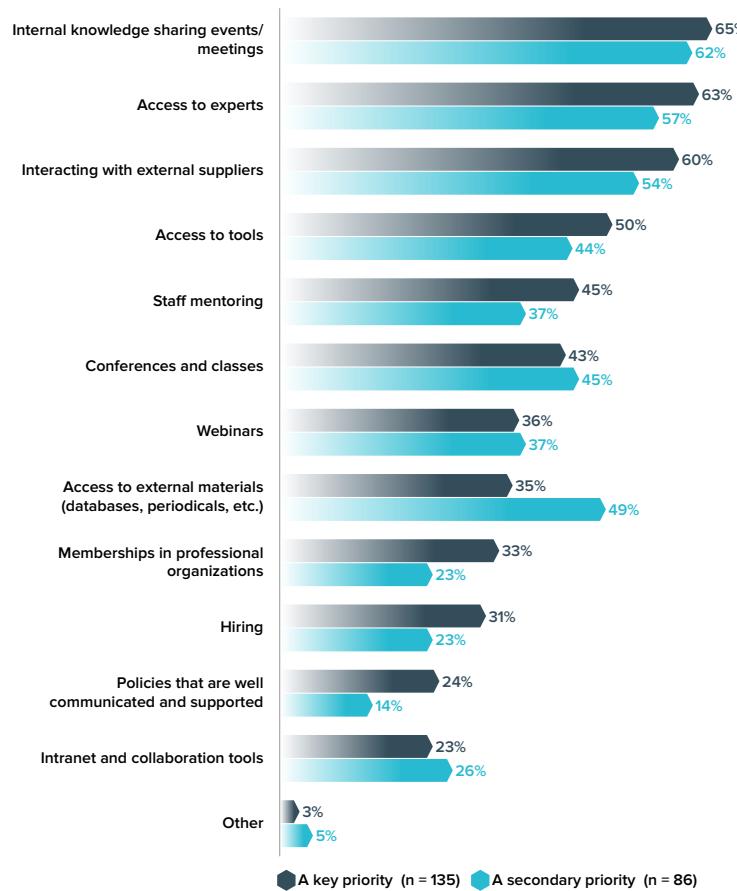
Whether developing an innovative focus is a key priority or secondary, most buyer participants say that internal knowledge sharing events/meetings, access to experts, and interacting with external suppliers are critical to their efforts. The three biggest gaps in which those who say it's a key priority exceed those who say it's secondary are memberships in professional organizations (+10%), policies that are well communicated and supported (+10%), and hiring (+8%).

On the other hand, those who say innovation focus is secondary are much more likely to also say that access to external materials is critical to their efforts (+14%). This suggests that those who place only a secondary priority on innovation prefer to support it with resources that do not require much commitment or time from managers.



Whether developing an innovative focus is a key priority or secondary, most buyer participants say that internal knowledge sharing events/meetings, access to experts, and interacting with external suppliers are critical to their efforts.

MOST CRITICAL TO DEVELOP AND MAINTAIN INNOVATIVE FOCUS: GRIT WAVE (BUYER, INNOVATIVE FOCUS AT LEAST SECONDARY)



■ A key priority (n = 135) ■ A secondary priority (n = 86)

Those who say innovation focus is secondary are much more likely to also say that access to external materials is critical.



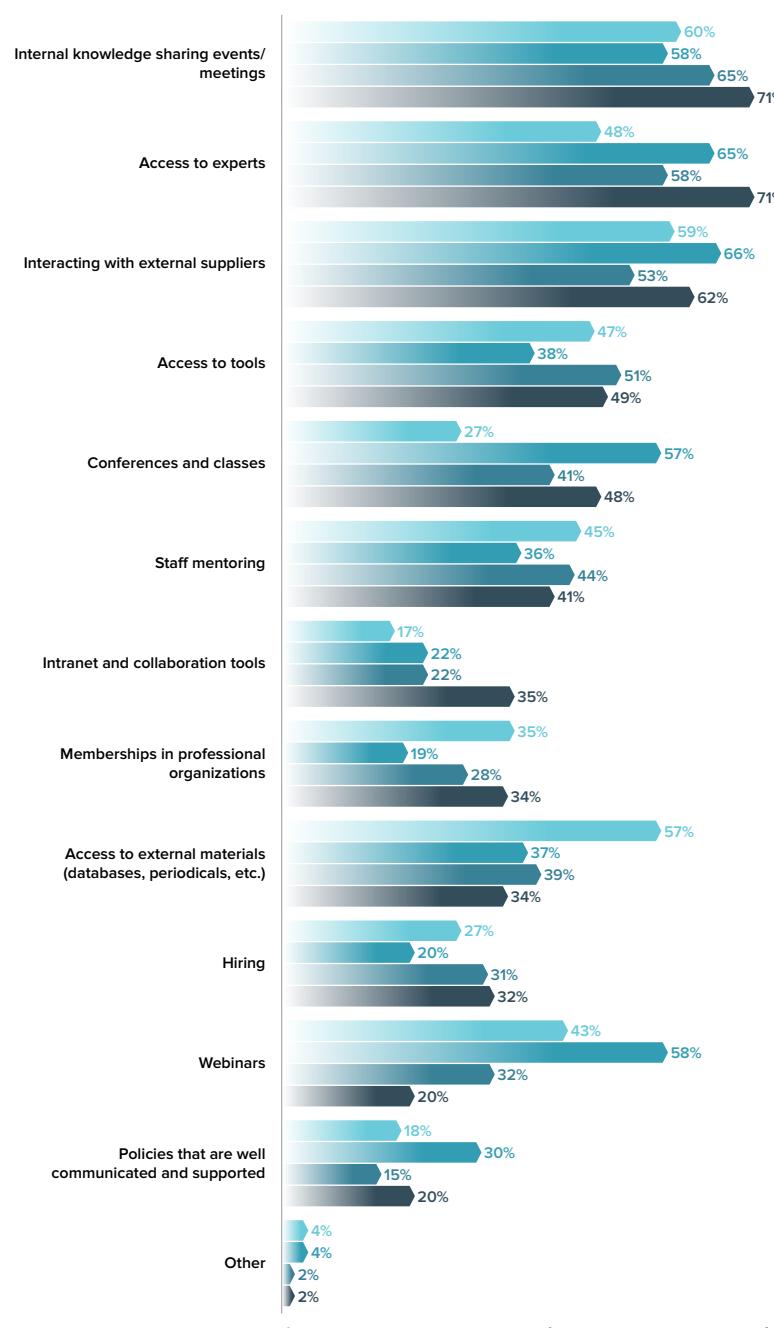
If we look at critical resources by staff size, we don't see a lot of consistent trends, but two stand out. Those with smaller staffs are more likely to say that access to external materials and webinars are critical. Again, these seem to be resources that require less commitment and time from managers than some of the others require, and those with smaller staffs may not be able to make such commitments as often as those with larger staffs.

Across those who have a formal, documented program for innovation, responsibility for it varies by organization, and nearly two leaders are named, on average (1.8). The Chief or Head of Innovation (41%) is cited most frequently, followed by the executive or leadership team (32%), R&D (31%), and the head of the insights organization (27%).

WHO LEADS INNOVATION PROGRAM (BUYER WITH FORMAL, DOCUMENTED PROGRAM)



MOST CRITICAL TO DEVELOP AND MAINTAIN INNOVATIVE FOCUS: INSIGHTS STAFF SIZE (BUYER, INNOVATIVE FOCUS AT LEAST SECONDARY)



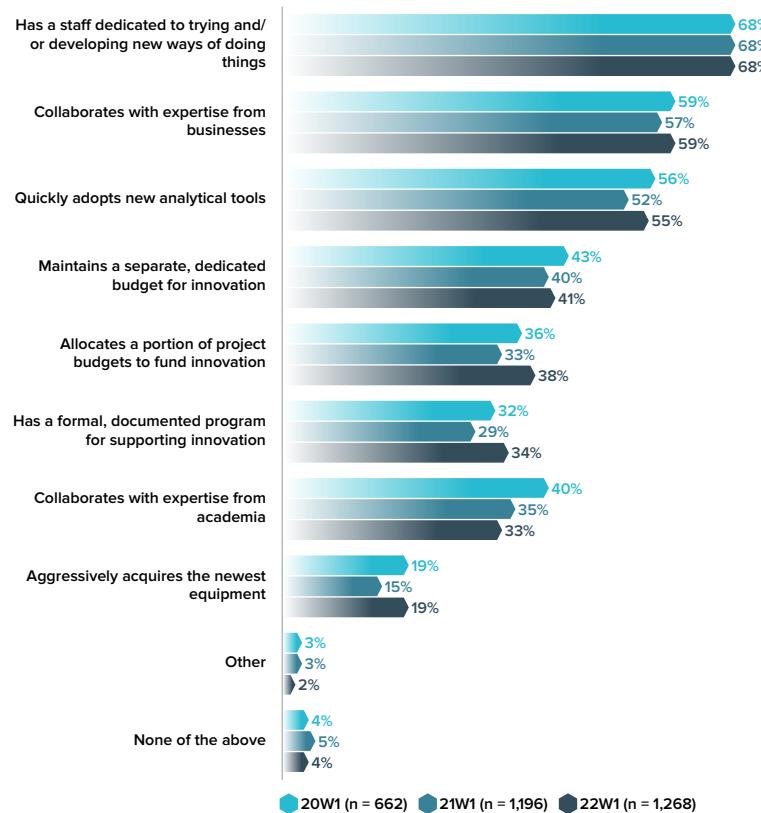
Across those who have a formal, documented program for innovation, responsibility for it varies by organization.



SUPPLIER PERSPECTIVE

The ways that suppliers invest in innovation have not changed much over time, and most participants in each wave say they dedicate staff to trying or developing new ways of doing things, collaborate with business experts, and quickly adopt new analytical tools. A decline in collaboration with academia is the only change, from 40% before the pandemic to 33% now.

HOW ORGANIZATION INVESTS IN INNOVATION: GRIT WAVE (SUPPLIER, INNOVATIVE FOCUS AT LEAST SECONDARY)



DIGITAL QUALITATIVE

Powerful Technology,
Expertise & Recruitment

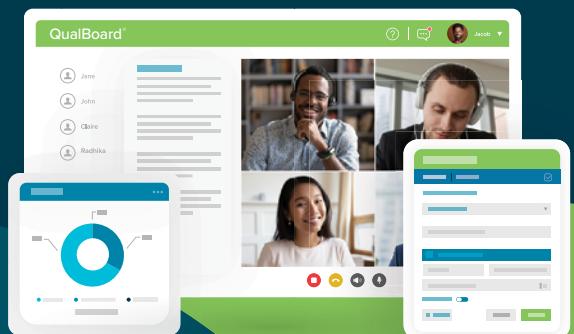
QualBoard
Online Discussions

QuantText
Hybrid Quant+Qual

Over The Shoulder
Mobile Ethnographies

QualMeeting
Virtual Focus Groups & IDIs

Usability & Eye-Tracking
Online Research Labs



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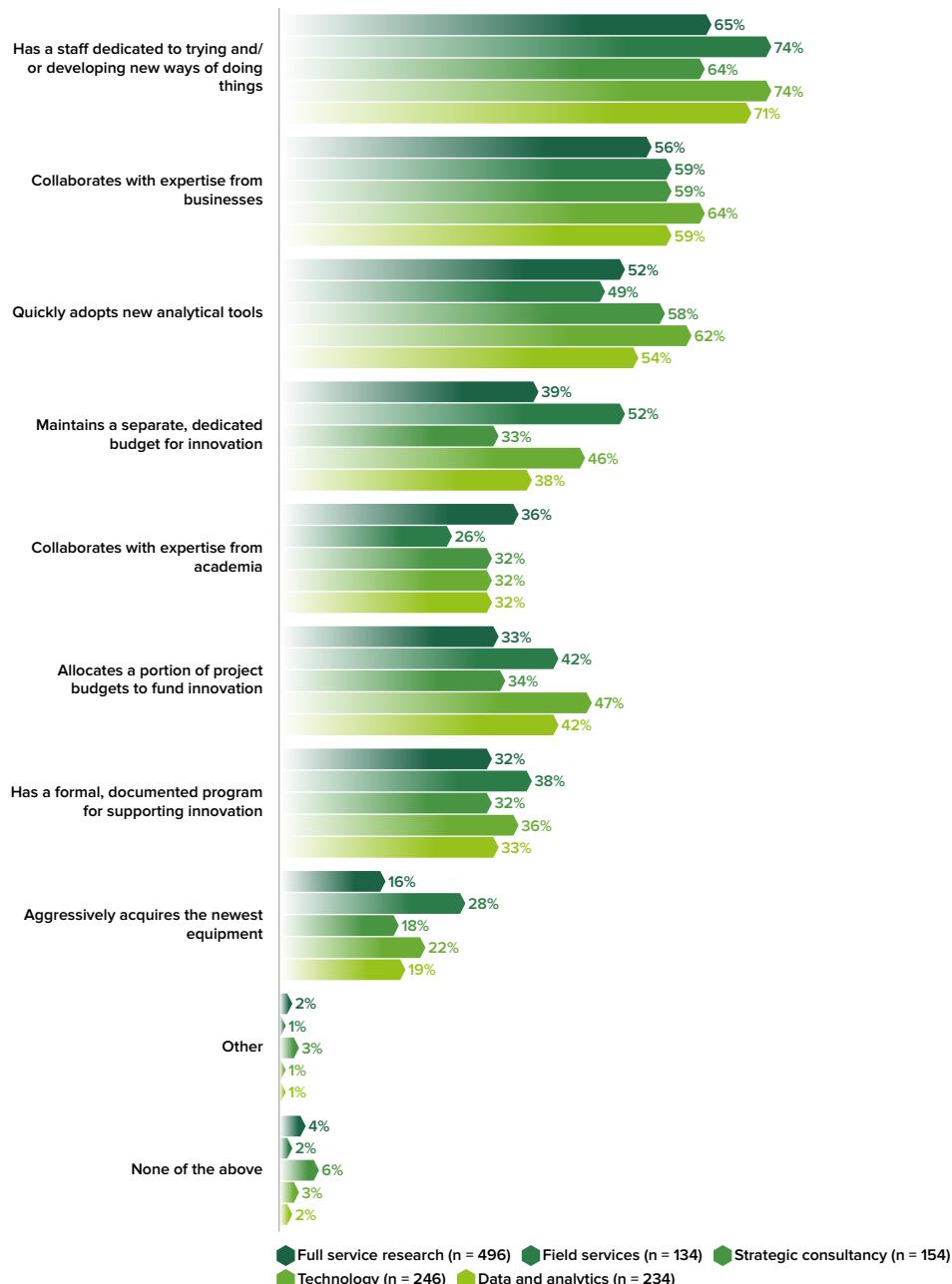
In each supplier segment, most participants say they invest in innovation by dedicating staff and collaborating with business experts, and, except for a slight minority in field services (49%), most quickly adopt new analytics tools. Although a majority in each segment invest via dedicating staff, the majorities are larger in the specialist segments, field services, technology, and data and analytics.

Most participants in field services (52%) maintain a separate budget dedicated to innovation, as do just under half in technology (46%). Also, specialist segments are more likely to allocate portions of project budgets to innovation than are full service research providers and strategic consultancies.

Most in each wave dedicate staff to trying or developing new ways of doing things, collaborate with business experts, and quickly adopt new analytical tools.



HOW ORGANIZATION INVESTS IN INNOVATION: PROFESSIONAL FOCUS (SUPPLIER, INNOVATIVE FOCUS AT LEAST SECONDARY)



Specialist segments are more likely to allocate portions of project budgets to innovation than are full service research providers and strategic consultancies.



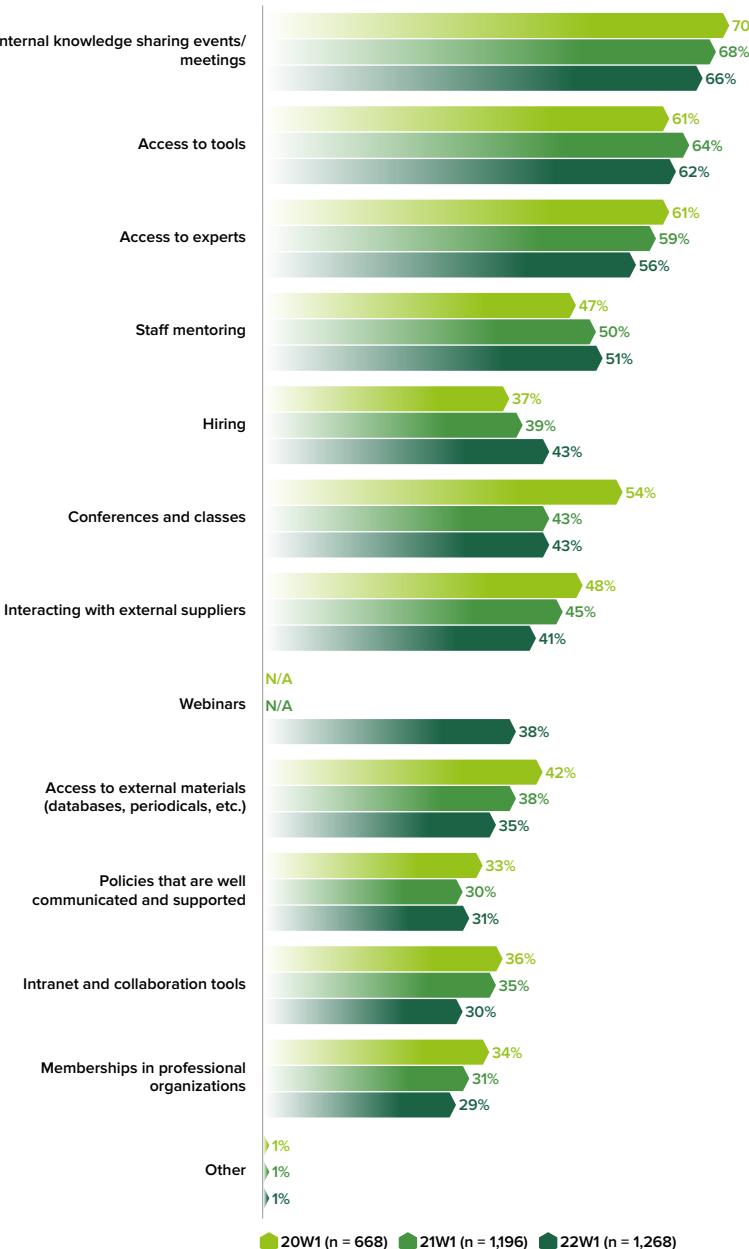
Across supplier segments, there are some common practices that are more characteristic of those who consider innovation focus to be a key priority than of those who don't. In every segment, they are more likely to quickly adopt new analytical tools, and in most they are more likely to collaborate with business experts. Perhaps more importantly, in almost every segment, those who highly prioritize innovation are more likely to have a formal, documented program for it and maintain a separate, dedicated budget.

For the last two waves, only 43% think classes and conferences are critical compared to a majority before the pandemic (54%), and the importance of interacting with external suppliers has fallen from 48% before the pandemic to 41% now. Buyers experienced a similar drop, and these declines could be due to the difficulty of getting together during the pandemic.

For the current wave, we also asked about webinars as a way to develop and maintain innovative focus, and 38% of participants said they are critical, making it the eighth most popular resource, just ahead of access to external materials (35%). Among buyer participants, a similar proportion said webinars were critical (36%), and it was the eighth most popular for them, too.

For the last two waves, only 43% think classes and conferences are critical compared to a majority before the pandemic, and the importance of interacting with external suppliers has fallen from 48% before the pandemic to 41% now.

MOST CRITICAL TO DEVELOP AND MAINTAIN INNOVATIVE FOCUS: GRIT WAVE (SUPPLIER, INNOVATIVE FOCUS AT LEAST SECONDARY)



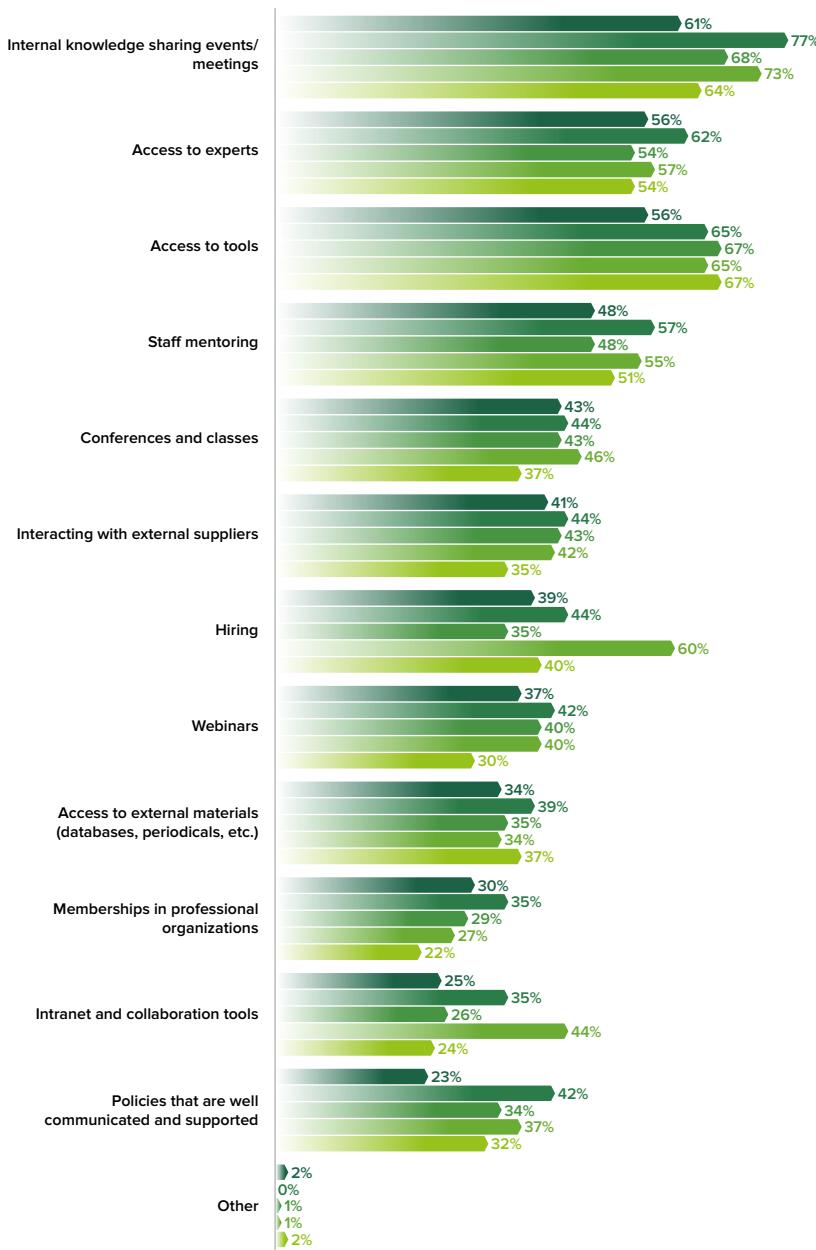
Those who highly prioritize innovation are more likely to have a formal, documented program for it and maintain a separate, dedicated budget.



In each supplier segment, most participants say that internal knowledge sharing events and access to tools and experts are critical to innovation, and about half say staff mentoring is also critical. On average, field services and technology participants said nearly six were critical while the other supplier segments named only five. There are differences across the segments, and the most significant is also very logical: arguably, technology providers are in the business of selling innovation, and they are the only segment in which most participants say that hiring is critical to their innovation strategy (60%). Field services (44%) is a distant second.

Similar to buyers, suppliers in each segment that have formal innovation programs say they are run by an average of two leaders. Among full service research participants, nearly half say it's led by an executive or leadership team (46%), followed by a CEO or COO (42%). Field services participants give similar responses, except that most name an executive or leadership team (66%), and the CEO or COO is a more distant second (40%) just ahead of the Chief or Head of Innovation (36%). For strategic consultancies, the CEO or COO are most likely to call the innovation shots (42%), followed by the Chief or Head of Innovation (33%) and an executive or leadership team (26%) or the head of the insights organization (26%). Most technology participants say their innovation programs are run by the CEO or COO (56%), followed by an executive or leadership team (46%). Among data and analytics participants, leadership is distributed across an executive or leadership team (44%), the CEO or COO (42%), and a Chief or Head of Innovation (38%).

MOST CRITICAL TO DEVELOP AND MAINTAIN INNOVATIVE FOCUS: PROFESSIONAL FOCUS (SUPPLIER, INNOVATIVE FOCUS AT LEAST SECONDARY)



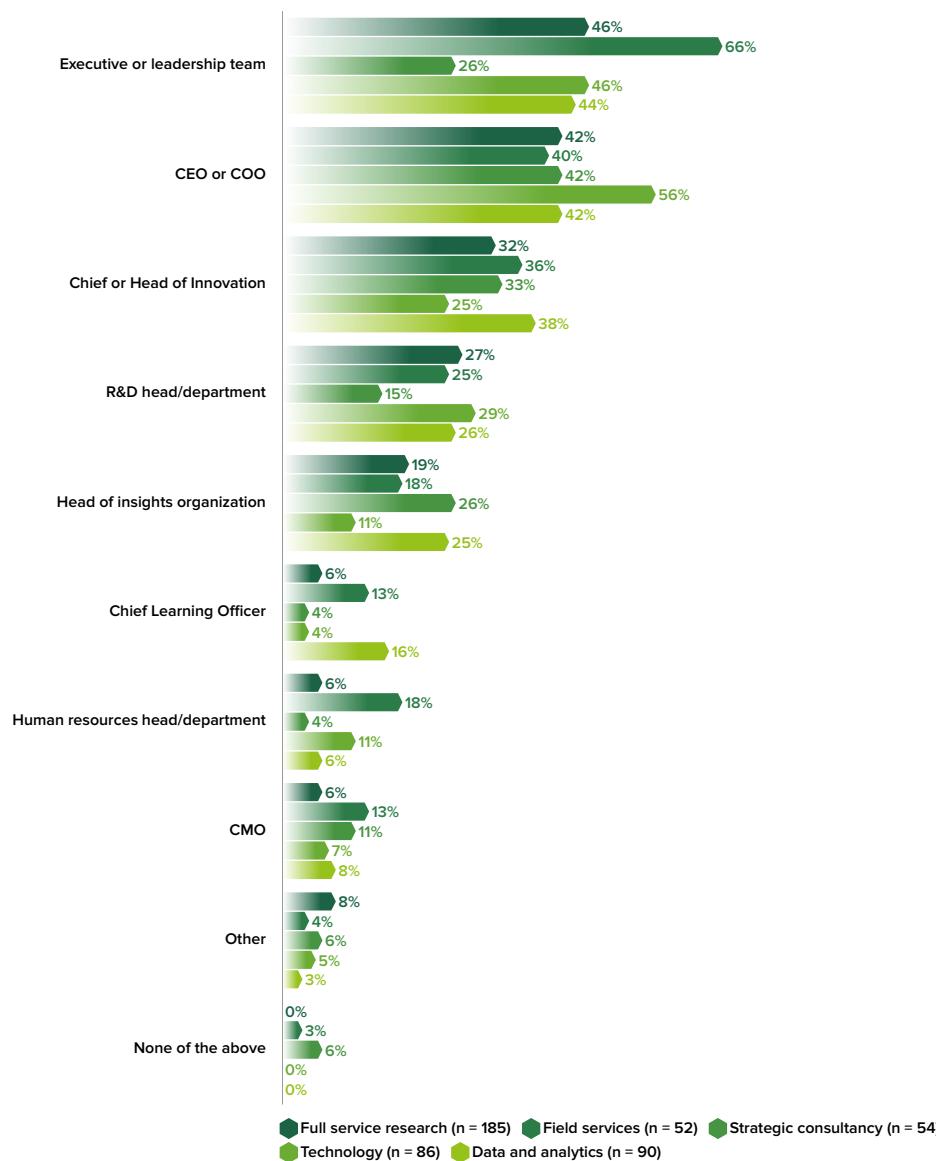
Full service research (n = 496) Field services (n = 134) Strategic consultancy (n = 154)
Technology (n = 246) Data and analytics (n = 234)

Arguably, technology providers are in the business of selling innovation, and they are the only segment in which most say hiring is critical to their innovation strategy.



Similar to buyers, suppliers in each segment that have formal innovation programs say they are run by an average of two leaders.



WHO LEADS INNOVATION PROGRAM: PROFESSIONAL FOCUS (SUPPLIER WITH FORMAL, DOCUMENTED PROGRAM)


INNOVATION IN THE AGE OF UNCERTAINTY

Zachary Nippert

President, CivicScience

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We have a simple, but ambitious motto at CivicScience: "Everything affects everything, and everything is constantly changing. So, we study everything constantly." It's a core principle in every aspect of our company, from the thousands of survey questions we ask every day, to the products and services we deliver, to the way we manage our internal operations.

This principle was never more critical than in the early days of the pandemic when - literally - everything changed. Consumer attitudes and behaviors shifted on a dime, then shifted again. The way people worked was altered forever. The aftershocks are still rippling, as we wade through minute-by-minute undulations of economic and cultural chaos.

Innovation only matters when it solves real problems. And, far too often, business leaders don't have a full inventory of the problems (or opportunities) they face - or they learn about them too late. Consumer insights teams are organized to be myopic, studying narrow frames of products, categories, and functions. They entrench tools and metrics in their business to measure the same thing repeatedly. They run huge studies that take weeks or months to complete, yielding insights that are outdated before the first report lands on the CEO's desk.

CONTINUES ON THE NEXT PAGE

THE BIG PICTURE

Innovation is still a big deal in the insights world, and that doesn't change simply because other priorities have emerged in the last two years or because some segments are more focused on it than others. Buyers seem to be looking to suppliers for innovation more than they had in the past, and technology and data and analytics providers seem to be blazing the trails.

This is consistent with our findings in the Adoption of Automation section in which we discuss how the technology and data and analytics segments are ahead of the curve, as well as the importance of analytics in driving the demand for automation. In that light, it's not surprising that these two segments are leading innovation, too.

Those who are most serious about innovation demonstrate their commitment to it via time and money. They are more likely to dedicate staff resources to trying new ways to do things and to knowledge sharing, they take the time to formalize and document their innovation programs, and they find ways to fund it, either via dedicated budgets or by allocating funding from project budgets. While these activities tend to characterize those who prioritize innovation most highly, there are several other activities that are popular across segments and particular to certain ones. As insights organizations continue to evolve, they will continue to adapt their own unique approaches to innovation, but they will also share a common interest in promoting it.

Those who are most serious about innovation demonstrate their commitment to it via time and money.



EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

We have another motto at our company (we're big on mottos): "Love problems." It sounds counterintuitive. Solutions are fun and sexy. People get pats on the back when they find them. Discovering problems and bringing them to light, however, is uncomfortable, scary even. I'll fully admit, as a leader in our business, learning about new problems from my team isn't fun.

But we celebrate it.

Because problems are the embryo of innovation. Without constantly - and honestly - taking stock of everything around your customer, your market, and your business, innovation dies before it starts.

One final CivicScience motto: "*That's the way we've always done it*" is never the right answer to any question." Continuity is comfortable. People seldom lose their jobs for maintaining the status quo. Replacing one vendor with another, simply because they're incrementally better or less expensive is not innovation.

Find partners who challenge everything you think you know and help you level up. Find partners who bring new problems – the bigger the better – to your doorstep. Then, you can be the hero for finding the solution.

You can be the innovator.



GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

WHICH SUPPLIERS DOES THE GRIT AUDIENCE BELIEVE ARE INNOVATING INSIGHTS?

Insights organizations continue to leverage the brand attribute of “innovation” in their positioning, but are they backing it up with real change? In our annual ranking questions we attempt to find out who is branding better, but also who is earning it.

OVERVIEW

The GRIT Top 50 has emerged as one of the key metrics suppliers of insights services use to understand their position in the industry. 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 versus 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, there is ample evidence from many sources, including the GRIT Report, that 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 rightly responding to market signals.

While a company's inclusion and relative position in the GRIT 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 we have said in the past and is worth repeating again:

"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."

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 and meaning in the industry. However, we do continue to refine and iterate on the process we use. In recent waves of GRIT, we've made some question changes that improve the rankings significantly on several levels.

In the past, we asked participants to name buyers and suppliers separately, but now we ask only one question and do not force participants to decide who is a "buyer" and who is a "supplier." In recent years, we also ask about the participant's relationship to the companies they name, as well as where the companies fit in the industry as buyers, supplier types, or other roles. 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.

After data collection is complete, we execute an intensely rigorous data cleaning process (see the Appendix for more details) according to a set of rules we have established over many waves. We "roll up" all sub brands and products, as well as rebrands and acquisitions, to the parent company brand, then simply count up the number of mentions.

For this wave, using the aggregate of total mentions, we developed a list of over 1,503 unique companies from 6,108 total responses. Many of these companies are single-mention, so we focus on firms with a minimum threshold of mentions and then code them. In this wave we coded 103 companies with at least 5 mentions, although only companies that received 18 or more mentions made it on to the core GRIT Top 50 list for suppliers.

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 6 top 20 segment rankings that we believe are just as important to pay attention to:

1. Data and analytics provider
2. Field service agency
3. Full service research agency
4. Qualitative research provider
5. Strategic consultancy
6. Technology provider

For these lists, suppliers were ranked from the 103 companies with five or more aggregate mentions.

In this wave we coded 103 companies with at least 5 mentions... only companies that received 18 or more mentions made it on the GRIT Top 50.



GRIT'S 50 MOST INNOVATIVE SUPPLIERS

Now, after providing the appropriate context and other details and without further ado, here are the 2022 GRIT Top 50 rankings:

Rollup	Mentions	2022 Rank	2021 Rank	Change
Dynata *	333	1	8	7
Ipsos *	271	2	1	(1)
Kantar *	262	3	2	(1)
Hotspex	179	4	3	(1)
Nielsen *	173	5	4	(1)
SKIM Group	160	6	7	1
Dig Insights *	144	7	9	2
Qualtrics	119	8	6	(2)
Behaviorally	110	9	11	2
Zappi	99	10	10	0
QualSights	96	11	DEBUT	DEBUT
quantilope	90	12	17	5
Rival Group (formerly Reid Campbell Group) *	89	13	24	11
NAILBITER	79	14	27	13
CINT *	70	15	19	4
PureSpectrum *	62	16	49	33
Remesh	59	17	14	(3)
TRC Market Research	59	18	50	32
Toluna *	58	19	12	(7)
Recollective	57	20	25	5
Shapiro+Raj	54	21	22	1
Suzy *	54	22	45	23
Material *	52	23	5	(18)
CivicScience	46	24	DEBUT	DEBUT
Fuel Cycle	46	25	29	4

Rollup	Mentions	2022 Rank	2021 Rank	Change
Voxpopme	46	26	15	(11)
GutCheck	44	27	DEBUT	DEBUT
GfK *	43	28	21	(7)
Schlesinger Group *	43	29	35	6
BVA *	41	30	DEBUT	DEBUT
aytm	38	31	20	(11)
Highlight	37	32	DEBUT	DEBUT
FlexMR	34	33	44	11
Forsta *	34	34	32	(2)
Insites Consulting *	34	35	42	7
Platform One (formerly Potentiate)	34	36	37	1
Research Strategy Group	32	37	34	(3)
The Logit Group	31	38	23	(15)
System1 Group	23	39	31	(8)
Buzzback	22	40	28	(12)
Catalyx	22	41	DEBUT	DEBUT
Disqo *	22	42	DEBUT	DEBUT
Macromill *	22	43	36	(7)
Medallia *	22	44	26	(18)
Mintel	20	45	DEBUT	DEBUT
Prodege *	20	46	DEBUT	DEBUT
IRI *	19	47	40	(7)
My-Take	19	48	48	0
YouGov *	19	49	DEBUT	DEBUT
Factworks	18	50	DEBUT	DEBUT

*Includes all sub brands, divisions, acquisitions until April 2022 and branded products

For the first time, Dynata has emerged as the supplier that is considered the most innovative by GRIT participants. Over the last decade or so, the company has evolved from eRewards to Research Now to Dynata, with each rebranding driven by a series of mergers and acquisitions that have both consolidated their role as the largest supplier in the global sample segment and driven their expansion into many different offerings. They have now achieved the scale to drive real change across the industry and are backing that up with their steady release of solutions focused on leveraging data and the means to collect and analyze it in new, innovative ways. And of course, based on their size and resources, they have been aggressively marketing that evolution. GRIT participants have taken notice of both the message and its substance, and this year Dynata is recognized for it.

The former number one, Ipsos, fell to the second spot, while their close competitor Kantar fell to the third spot. However, we should point out that Ipsos and Kantar have been neck-and-neck for the top spots for years, and the difference of mentions between them is only nine (with less than fifty separating them both from Dynata), so both companies continue to be very much top of mind when it comes to being considered innovative. Similar to Dynata, both companies have a strong recent history of M&A activity driving new offerings, as well as the global scope and marketing budgets to ensure the insights industry is aware of them.

Looking at the rest of the top ten of the list, it is amazingly stable with all of the remaining companies also appearing in the top ten in 2021 and only minor shifting of positions. Hotspex moved down one to fourth, Nielsen dropped one to the fifth spot, SKIM Group moved up one to sixth, Dig Insights moved up two spots to number 7, Qualtrics dropped two spots to 8, Behaviorally moved up to ninth and Zappi retained their position as tenth.

Collectively, the top ten have somewhat solidified their overall positions as the leaders in being perceived as innovative, but as the history of the GRIT 50 rankings show, no company can rest on their laurels because there are at least forty other companies learning from them and gunning for their spots.

Volatility defines the remainder of the list, with eleven companies making their GRIT 50 debuts. QualSights comes in at 11, CivicScience at 24, GutCheck returns to the list after an absence of a few years at 27, BVA Group also returns after an absence at 30, startup (and IIeX Pitch winner) Highlight shows up at 32. Catalyx appears at 41, Disqo debuts at 42, Mintel and Prodege at 45 and 46 respectively, Yougov appears at 49 and Factworks wraps up the list at 50.

The surge of new entrants indicates that the industry continues to look outside of the “usual suspects” for solutions and that “challenger brands” are entering the market and aggressively positioning themselves as alternatives to the leaders. In looking at these debuts, it is clear that tech-led suppliers continue to gain both market and mind share.

Regarding significant upward movement, we see six brands rose at least ten spots: Purespectrum +33, TRC +32, Suzy +23, NAILBITER +13 and both Rival Group (formerly Reid Campbell Group) and FlexMR +11.

Other upwardly mobile brands this year that moved up by less than ten are CINT, Recollective, Shapiro+Raj, FuelCycle, Schlesinger Group, Insites Consulting, and Platform One (formerly Potentiate).

There are also some declines in ranking, but in a field this dynamic and competitive, staying in the rankings is an accomplishment, and we expect to see continued fluidity in the years ahead.

The surge of new entrants indicates that the industry continues to look outside of the “usual suspects” for solutions.



Congratulations to all the companies that made the list regardless of their position; we can only say keep doing what you are doing, because it is making an

impression in the minds of the industry, and this is where you can measure that impact.

WHY SUPPLIERS ARE CONSIDERED INNOVATIVE

We asked respondents to explain their choice of insights suppliers as “most innovative” via a verbatim response that we then did a thematic analysis via text analytics. Among the 2,093 total responses received, we see some “no brainer” themes like innovation, but overwhelmingly the dominant themes are related to the broad concept of technology, with words like “platform,” “tool”, and “data” woven throughout the responses.

As we have said in previous waves of GRIT, the industry is clearly now working within a spectrum of “technology-led” at one end and “service-led” at the other, and those companies that are clustering at the tech side of that spectrum continue to capture more brand awareness.

However, themes only give us a high-level view. Context is key, so we pulled a selection of the full verbatim responses related to the top 10 suppliers to give some more nuance. These responses came from buyers who rated these suppliers as most innovative from all suppliers they listed, and we think they effectively highlight what does indeed make a company innovative.

One observation that seems common across all of these companies is their focus on productization, either through organic development from their own IP or via M&A activity to augment their solutions.



One observation we can make that seems common across all of these companies is their focus on productization, either through organic development from their own IP or via M&A activity to augment their solutions. Whereas in previous editions of GRIT the evidence seemed to suggest suppliers were focusing on their core, these data suggest that a winning formula is expanding the revenue pie by offering a wider set of solutions to capture more share of wallet.

This does have significant implications for how suppliers position themselves, as we explore more deeply in the next section.

Topic	Mentions	Mention Rate	Topic	Mentions	Mention Rate
innovative	407	19.4%	service	142	6.8%
research	407	19.4%	work	119	5.7%
insight	307	14.7%	company	114	5.4%
new	286	13.7%	development	105	5.0%
client	284	13.6%	method	102	4.9%
technology	227	10.8%	unique	101	4.8%
platform	221	10.6%	industry	98	4.7%
data	215	10.3%	product	92	4.4%
tool	198	9.5%	analytics	91	4.3%
approach	196	9.4%	improve	87	4.2%
solution	188	9.0%	ability	85	4.1%
market	166	7.9%	consumer	82	3.9%
methodology	162	7.7%			



CATEGORY RANKINGS

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

1. Data and analytics provider
2. Field service agency
3. Full service research agency
4. Qualitative research provider
5. Strategic consultancy
6. Technology provider
7. Other

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.

These lists were developed by simply analyzing the mentions of each company by how GRIT respondents categorized them. Since this resulted in a wide range of mention frequencies, we have opted to simply present each subcategory in rank order by frequency of mention in that category vs. actually listing the number of mentions for each.

These lists were developed by simply analyzing the mentions of each company by how GRIT respondents categorized them.



Embrace innovation.

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Response	Count	Percentage
Several times per hour	10	25%
Once per hour	15	37.5%
Several times per day	10	25%
Once per day	5	12.5%
Several times per week	10	25%
Once per week	15	37.5%
Once per month	5	12.5%
Never	5	12.5%
I don't know	5	12.5%

Here are the category rankings for 2022:

DATA AND ANALYTICS

Supplier	Rank by Number of Mentions
Dynata	1
Kantar	2
Nielsen	3
NAILBITER	4
Hotspex	5
Ipsos	6
CivicScience	7
SKIM Group	8
Zappi	9
Qualtrics	10
Toluna	11
Behaviorally	12
quantilope	13
Cint	14
Suzy	15
GfK	16
QualSights	17
aytm	18
Dig Insights	19
IRI	20
PureSpectrum	21
Schlesinger Group	22
NPD Group	23
Morning Consult	24
Prodege	25

FIELD SERVICES

Supplier	Rank by Number of Mentions
Dynata	1
Cint	2
The Logit Group	3
Kantar	4
Schlesinger Group	5
Ipsos	6
InnovateMR	7
Toluna	8
Dig Insights	9
PureSpectrum	10
Nielsen	11
Qualtrics	12
Zappi	13
Disqo	14
Macromill	15
Prodege	16
1Q	17
Borderless Access	18
Canadian Viewpoint	19
Forsta	20
Quest Mindshare	21
M3	22
Appinio	23
Echo Market Research	24
GfK	25

FULL SERVICE RESEARCH AGENCY

Supplier Name	Rank by Number of Mentions
Ipsos	1
Kantar	2
SKIM Group	3
Hotspex	4
Dynata	5
Nielsen	6
Behaviorally	7
Dig Insights	8
Rival Group (formerly Reid Campbell Group)	9
TRC Market Research	10
GutCheck	11
Material	12
BVA	13
NAILBITER	14
GfK	15
Research Strategy Group	16
Insites Consulting	17
Shapiro+Raj	18
BuzzBack	19
Platform One (formerly Potentiate)	20
FlexMR	21
System1 Group	22
Zappi	23
PureSpectrum	24
aytm	25

QUALITATIVE RESEARCH

Supplier	Rank by Number of Mentions
QualSights	1
Voxpopme	2
Remesh	3
Ipsos	4
Dynata	5
Nielsen	6
Recollective	7
Kantar	8
iTracks	9
Schlesinger Group	10
Discuss.io	11
Highlight	12
NAILBITER	13
Qualtrics	14
Toluna	15
GfK	16
Hotspex	17
Insites Consulting	18
Suzy	19
C Space	20
CivicScience	21
Discover.ai	22
GutCheck	23
Happy Thinking People	24
Mintel	25

STRATEGIC CONSULTING

Supplier	Rank by Number of Mentions
Shapiro+Raj	1
Hotspex	2
Dig Insights	3
Behaviorally	4
Material	5
TRC Market Research	6
Kantar	7
Factworks	8
BVA	9
Ipsos	10
Catalyx	11
SKIM Group	12
CivicScience	13
Nielsen	14
Research Strategy Group	15
Toluna	16
Dynata	17
Insites Consulting	18
Mintel	19
System1 Group	20
Zappi	21
Medallia	22
KPMG	23
C Space	24
fiftyfive5	25

TECHNOLOGY

Supplier	Rank by Number of Mentions
Qualtrics	1
quantilope	2
Zappi	3
Recollective	4
QualSights	5
Dig Insights	6
Fuel Cycle	7
Remesh	8
PureSpectrum	9
Rival Group (formerly Reid Campbell Group)	10
Forsta	11
Suzy	12
Highlight	13
Voxpopme	14
FlexMR	15
aytm	16
Cint	17
Discuss.io	18
My-Take	19
Momentive	20
Medallia	21
Toluna	22
Dynata	23
Displayr	24
Disqo	25

That may go against the traditional wisdom of focused branding, or perhaps the traditional maxim of “diversify or die” makes “focused branding” dance to its tune rather than choking to death under an overly restrictive idea of what “focus” means.



Again, the frame of reference here is how GRIT respondents categorize these companies, so it is always interesting to understand how a company is perceived by the market versus how they may be positioning themselves.

First, as mentioned previously, there seems to be a trend among the companies perceived to be most innovative to embrace a “diffusion strategy” of having multiple offerings that could be categorized as addressing multiple strategic insights issues. That is clearly evident in our sub category lists based on the level of duplication and overlap we see from suppliers that appear in multiple rankings.

Second, when we compile supplier rankings within service type, we see possible evidence of sub-optimal returns on brand investments. Similar to the story of the blind man and the elephant, it seems as if an insights professional’s direct experience with a supplier dominates their image of it; brand marketing does not, and consistent brand positioning is not part of their direct experience. 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, it appears that this phenomenon impacts virtually all suppliers in the GRIT 50, and rather than being a possible liability as we have previously suggested, this strategy of offering a multi-dimensional set of solutions may very well be a strength.

Clearly, the evidence suggests that offering more solutions is linked to a perception of being innovative as a brand attribute and benefits these suppliers as they grow their businesses. That may go against the traditional wisdom of focused branding, but like so many things in the past few years, perhaps the traditional wisdom simply doesn’t apply in our rapidly evolving world. Or perhaps the traditional maxim of “diversify or die” makes “focused branding” dance to its tune rather than choking to death under an overly restrictive idea of what “focus” means.

EXPERT COMMENTARY



GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

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I

Innovation is necessary for business growth and ultimately, survival. However, as a complex multi-faceted concept, it can be challenging to realize, execute, and measure.

It was fascinating to read this year’s Most Innovative Suppliers list exploring how and why brands are perceived as innovative. And, as the founder of a challenger brand, it was encouraging to see new entrants this year, reading how insights professionals are open to choosing suppliers that help them best achieve their goals.

One of the fastest shifting trends identified in this year’s report is the renewed focus on productization, with the report referencing how many companies, particularly tech-led, are investing heavily in augmenting their product-lines and services.

Yes, the most innovative companies likely care about capturing a greater share of wallet, but it’s clear that developing a breadth of solutions that truly support insights professionals and their growing needs also directly correlates with being perceived as innovative.

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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 it is to succeed in the marketplace.

Moreover, in what appears to go against the trend of centralizing focus we saw as the pandemic unfolded, offering a more diverse set of solutions that address multiple business issues and fit into several categories seems to be closely associated with being innovative. Buyers are not penalizing suppliers for “being all things to all people;” instead, they appear to be rewarding suppliers that are expanding their wheelhouses with new solutions.

This strategy appears to be largely driven by technology-led products being regularly launched by leading suppliers, and a real appreciation by buyers for creating new solutions that can help them achieve their goals. Ultimately that sounds like the formula for market success to us, and the suppliers who made it onto the rankings in this edition of GRIT are obviously leveraging that well.

However, this “arms race” in the industry will continue to create volatility, with newer entrants striving for differentiation while more established (and well-funded) companies look for more opportunities for consolidation. This is part of the natural cycle for many industries, insights included, so it will be interesting to watch as these forces continue to drive change and growth as we look to the future.

EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE



Whilst many tech-led players captured both mind and market-share in this year's report, I believe that the most innovative and impactful suppliers are those that recognize the importance of building and expanding solutions that unlock and support human expertise - whether that's with tech or service-led solutions.

This is something that guides us at Stravito. By simplifying knowledge discovery, we enable individuals in global organizations to store, search for, discover and understand insights with ease. We achieve this through one AI-powered platform, but we are constantly expanding our features, integrations, and partnerships to deliver on our promise of enterprise-wide usage, ensuring individuals integrate insights into their strategies to drive business growth.

The key elements that underpin our focus include automation, personalization, and user experience. As highlighted by the buyers in this report, these are vital table-stakes components. Focusing our innovation efforts on these concrete areas enables us to deliver an enjoyable product that helps humans to work in a more productive, collaborative, and effective way. In other words, providing a solution they want to and will continue to use.

While the innovation journey can be complicated, it doesn't have to be. If you want to cut through the noise, put humans first.



GRIT TOP 25 MOST INNOVATIVE BUYERS

WHICH BUYERS DOES THE GRIT AUDIENCE BELIEVE ARE INNOVATING INSIGHTS?

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 else.

THE TOP 25 MOST INNOVATIVE BUYERS

To accompany our review of the most innovative suppliers, we asked participants to also consider who the most innovative buyers are, and, as discussed in the previous section, we collected both in a single verbatim response. The buyer data focuses on the top 25 rather than 50 because the numbers tend to cluster around a few companies and then dissipate faster than is the case with suppliers. In fact, for this analysis we captured roughly 50 buyers named out of a total of 1,503 unique companies mentioned, and of those only twenty-five received more than eight mentions.

As in the supplier rankings, we asked participants to classify each company by type, resulting in a cleaner list that has cleared up some of the ambiguity of previous years on what constitutes a buyer versus supplier with some perhaps surprising results for this list.

The table below shows the rankings for 2022 compared to 2021.

TOP 25 MOST INNOVATIVE BUYERS

Roll Up	Mentions	2022 Rank	2021 Rank	Change
Alphabet *	110	1	3	2
P&G	55	2	1	(1)
Amazon *	36	3	5	2
Gartner	34	4	DEBUT	DEBUT
Meta *	34	5	7	2
PepsiCo	30	6	4	(2)
McKinsey	30	7	DEBUT	DEBUT
Unilever	25	8	2	(6)
Accenture	23	9	DEBUT	DEBUT
Coca-Cola	21	10	6	(4)
Deloitte	20	11	DEBUT	DEBUT
Apple	19	12	8	(4)
Microsoft	19	13	10	(3)
Forrester	18	14	DEBUT	DEBUT
BCG	18	15	DEBUT	DEBUT
Bain & Company	14	16	DEBUT	DEBUT
Tata Consultancy Services	12	17	DEBUT	DEBUT
TikTok	12	18	DEBUT	DEBUT
General Mills	10	19	DEBUT	DEBUT
Clorox	10	20	14	(6)
IBM	10	21	DEBUT	DEBUT
Mondelez	10	22	17	(5)
Colgate Palmolive	8	23	13	(10)
J&J *	8	24	18	(6)
Merck	8	25	DEBUT	DEBUT

*Includes all sub-brands, divisions, acquisitions until April 2022 and branded products

Alphabet has unseated perennial front-runner P&G as the buyer considered most innovative when it comes to their insights organization, with the CPG giant now in the second spot and a wide margin between them.

Amazon and Meta also moved up while previous leaders such as PepsiCo, Unilever, and Coca-Cola slid downwards.

It is interesting that technology companies were the big upward movers while the traditional CPG brands that have long been considered the trend-setters in the insights and analytics space lost some mindshare. Certainly, over the past few years, technology companies have come to serve a larger and larger role in the lives of humanity and are now just as much household names (perhaps more so!) than many other types of companies. However, this is focused on the perception of the insights organization rather than general brand perception, so clearly that growth of mindshare has a demonstrable impact on our industry as well.

Another striking difference is the sheer number of debuts on this list: twelve companies are making their first appearance on the buyer list, and eight of them are companies we would classify as management consultancies versus direct brands. While these companies have always been part of the insights ecosystem and are indeed major buyers of research services, the market has also seen them as suppliers in the past because they often sell (or resell) research solutions to brands. However, using our newly modified questions to more fully understand the nuances of how organizations categorize themselves as well as how the market sees them, it seems as if these firms are now very much perceived as buyers, and, of course, innovative ones at that!

The other standout is the extreme volatility of the rankings. While thirteen of the companies mentioned have been mainstays on the list, their rankings have changed quite a bit from 2021.

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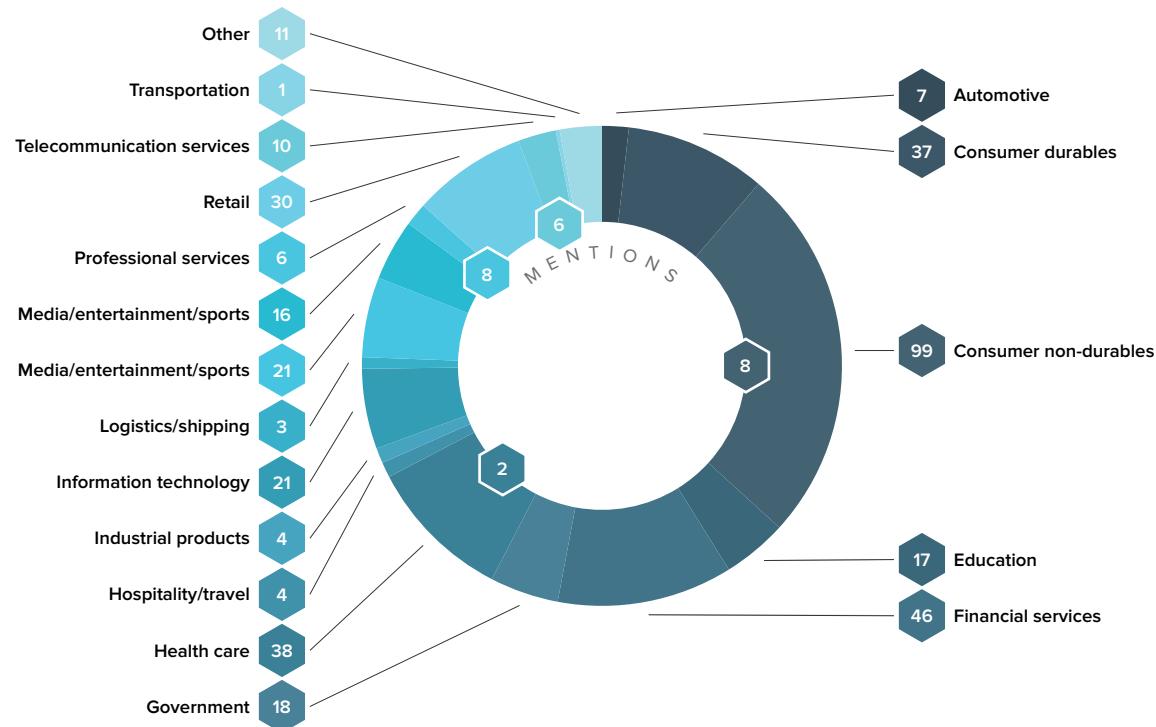
BUYER CORRELATION TO INDUSTRY

When comparing the distribution of GRIT buyer respondents to the classification of companies cited as most innovative, we see some very stark differences that point to the dominance of not just specific brands, but of categories that function as the driving force of change in the industry.

Despite a good distribution of buyers across many categories, professional services (management consultancies) and telecommunication services (tech companies) carry an outside influence in being perceived as innovative. Obviously, consumer non-durables (CPG) have long driven the industry forward just by sheer financial leverage (P&G and Unilever are the two largest insights spenders in the world), but technology companies have extensive internal capabilities due to their access to, and use of, data. Consequently, their movement into relative parity with CPG companies makes sense because they are actually in the business of data-driven innovation.

However, the emergence of professional services companies is very intriguing. These companies sit in an interesting “in-between” space, leveraging access to data (often purchased via suppliers) but through a lens of highly specialized IP related to business strategy. The ability of those firms to translate that into practical innovation that drives measurable change is a hallmark of their success, and obviously their ability to market those achievements is something that many in the industry are paying attention to.

WHICH ONE BEST DESCRIBES YOUR INDUSTRY OR PRIMARY INDUSTRY?



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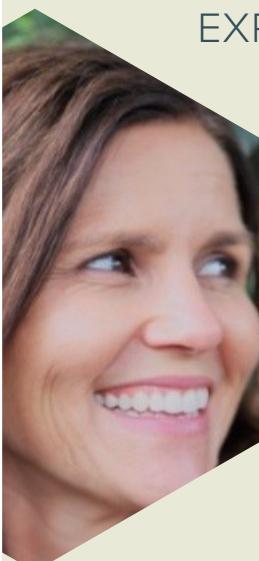
CHANGING INDUSTRY SCOPE

In past waves of GRIT we included a section on the changing scope of the industry. We were attempting to understand how the makeup of the supplier-side of the industry was shifting, particularly with the entrance of both emerging suppliers as well as “non-traditional” suppliers such as strategy consultancies, Big Tech companies, and other “buyer-side” organizations that were launching what would normally be considered “supplier” offerings. However, in reviewing the results of this edition of GRIT, we determined that this was largely redundant, so we have dropped that section.

That said, the core concept is still important so we wanted to address it as a key learning herein. As we see in the analysis of companies that GRIT respondents listed for the GRIT 50 Suppliers, sublists and GRIT 25 Buyers it appears that much more clarity exists among the industry on who is a Buyer and who is a Supplier. We certainly still see more emerging suppliers ranking in the minds of the industry, but we are also seeing a somewhat surprising shift in perception of many companies that formerly were considered both suppliers and buyers into just one category: buyers. The strategic consultancies have always been buyers in the sense that they mostly outsource data collection to traditional buyers, and many of the buyers who have launched insights functions have created spin-off brands that are more clearly identified as separate from the core business. It appears GRIT respondents are aware of these trends, and when asked how to classify these companies focused on their role in the industry rather than their positioning. This change shows up clearly in the preceding section.

So, while the makeup and scope of the industry continues to change, we feel it is duplicative to have a standalone section on that topic since core questions like the GRIT rankings produce the same basic information. Going forward, we'll monitor these shifts here.

EXPERT COMMENTARY



FUELING COMPANY GROWTH THROUGH PROCESS INNOVATION

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The appetite for consumer insights has grown voraciously and will continue to accelerate. Companies are increasingly searching for ways to satiate the demand, using consumer insights to drive innovation, elevate business performance, drive competitive advantage, and increase market share.

When it comes to innovation in the consumer insights space, there are three main areas: product, process, and people.

Undoubtedly, those working in the research industry have a keen eye for product innovation. Correspondingly, innovation in people management is an area best left to the experts in the field – HR specialists.

This leaves us with processes – one of the most significant areas of opportunity for innovation in the research industry.

Process Innovation

Better techniques and software are the main drivers of process innovation, impacting both how the research:

1. Gets done (data collection, survey design, interviews, etc.)
2. Helps internal stakeholders create new products and services.

This article will focus on how consumer insights teams leverage process innovation to fuel faster insights and, ultimately, company growth.

THE BIG PICTURE

To summarize, a few buyers really stand out as innovative for a wide range of insights professionals, and then there are those 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 their efforts.

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EXPERT COMMENTARY

CONTINUED FROM PREVIOUS PAGE

Finding and sharing stories in data faster

Every market researcher will be all-too familiar with stakeholder demands that projects be completed quicker.

Software innovation has made it easier to find and disseminate insights faster in a variety of ways:

- Most tedious manual work can now be automated, e.g., cleaning and formatting data.
- The rise of all-in-one analysis and reporting solutions speeds up the process of producing and disseminating work.
- Smart systems make a wide range of advanced methods accessible to all skill levels.
- On-going analyses, pilot studies, trackers, and syndicated studies can be updated and reproduced instantly.

Thanks to these time-saving innovations, researchers can put insights in front of stakeholders quicker and with greater quality control.

Empowering researchers and stakeholders with dynamic reporting

Unlike static PowerPoint reports, modern dashboards and interactive reports are connected to source data and can automatically update to reflect any new data. They can also be queried and filtered on the fly, empowering stakeholders to 'self-service.'

Utilizing dynamic dashboards also saves researchers significant time throughout the reporting process. Data visualizations, reports, and analyses can be built once and reused, with only the underlying data source changing, eliminating countless hours of repetitive work.

Research teams cannot overlook process innovation to meet the ever-growing demand for consumer insights. Advances in software give stakeholders better insights faster, fuelling product innovation and company growth.

FINAL THOUGHTS

The only constant is change – Heraclitus

From sample to data to analytics to delivery to customers – all are changing. And have been for the past twenty years.

I'm not going to recap all of the above, but rather focus on two of them – and in the space of this effort, not very thoroughly – data and customers.

The impact of behavioral economics, non-conscious measurement, and passive data (real behavior data) cannot be overestimated. As a field, we have known that the relationship between what a person says and what that person does has been very tenuous. For many years, we tried to improve our understanding of that relationship by asking better questions – with modest improvements along the way.

About 15 years ago, we started seeing this data and the related models move into the consumer insights field in a way that was much more robust (yes, there were efforts prior to that with occasional success).

In 2022, I believe that we can say these are the companies of the future. In this year's GRIT Most Innovative Suppliers – four of the companies on the list are highly connected to these tools. Arguably, only one of the companies on the list would be excluded from one of these three major descriptions. Beyond the companies on the Most Innovative Suppliers list – we see the growth in a number of categories in the methodologies being used – Applied Neuroscience, B/E models and data collection tools, passive data, and several others. These tools and models are being utilized more and more. And they are getting us closer to understanding what a person does and, most importantly, why they are doing it.

And like the tools and models above, the customers have changed as well. We don't have much trending data (but we do have a little), but the anecdotal evidence is suggesting that the primary decision maker is shifting because of the democratization of insights. The insights department is still the final decision maker in most cases – other departments within the buyer organization are more often becoming the primary decision maker for the way in which insights are gathered and delivered. Some of this is due to the overall shift in focus to analytics from traditional insights over the past 10 years. Some due to the technology solutions that are simple to use (e.g., Alchemer, Zappi, etc.). And some due to shifting roles within departments that reduce time and cost to insights.

For buyers, this means that the insights are becoming closer to the end user of the insights. For suppliers, the client base within an organization is expanding – and the relationships with a client organization need to expand. This puts additional prioritization on sales, marketing, and thought leadership.

Over the past 15 years (maybe a little more), our industry has gone through a lot of changes. More changes are on the way. In the cases above, the change is good. Better insights for more people.

Gregg Archibald
Managing Partner, Gen2 Advisors



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