

UNABRIDGED
EDITION

Full Detail &
Complete Analysis



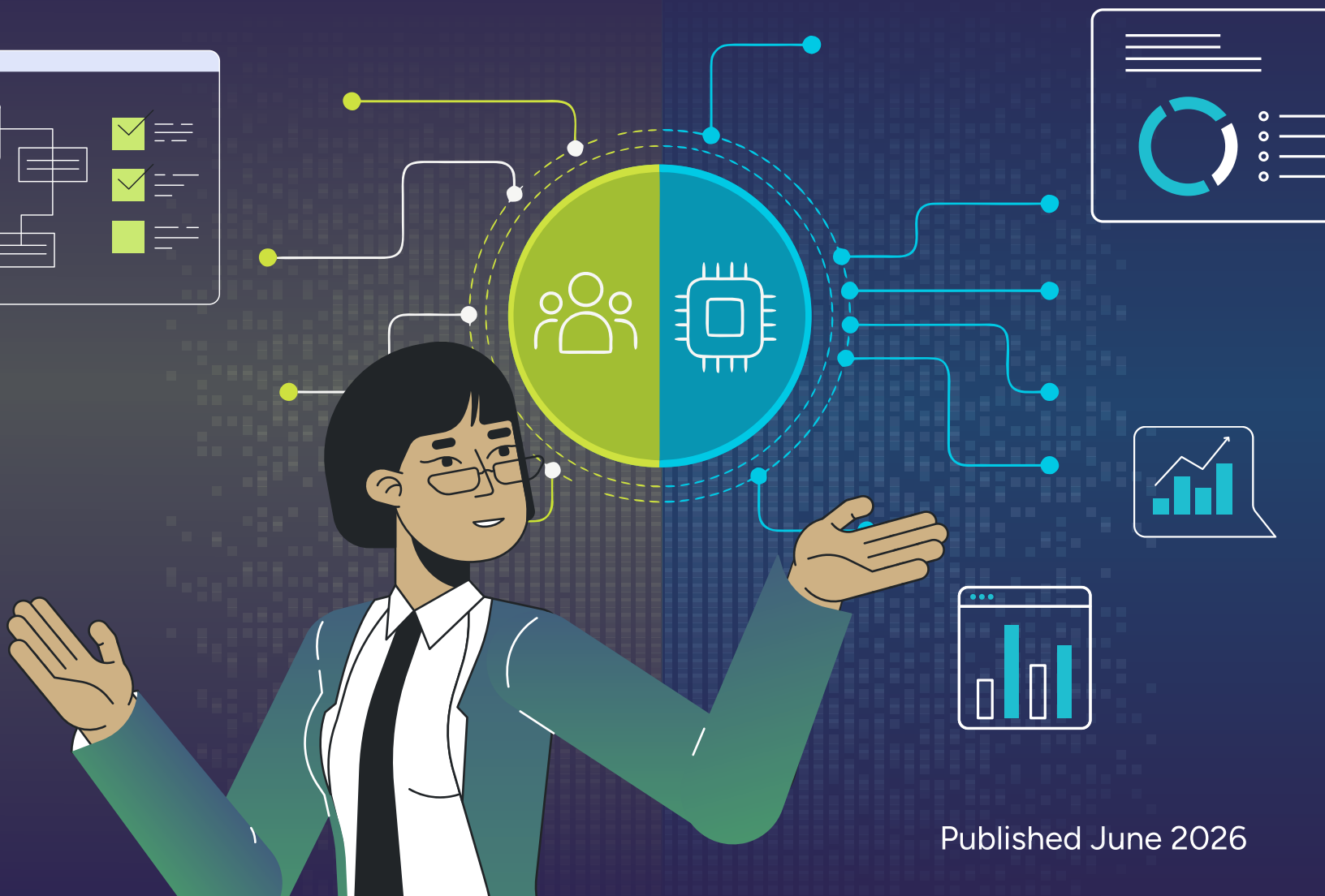
Greenbook

16TH EDITION

GRIT Insights Practice Report

Greenbook **R**esearch **I**ndustry **T**rends

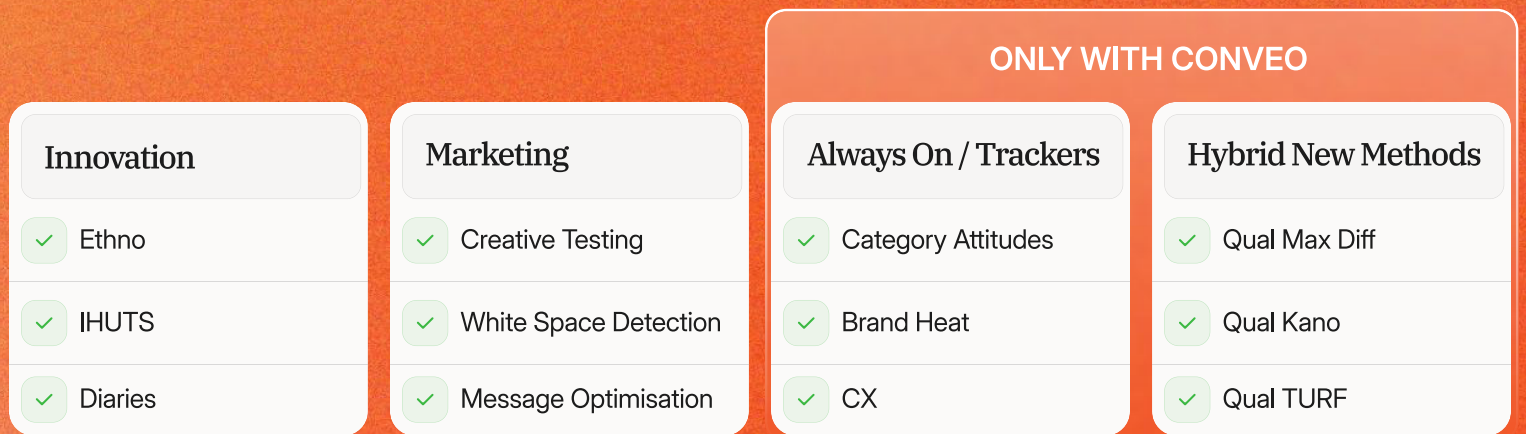
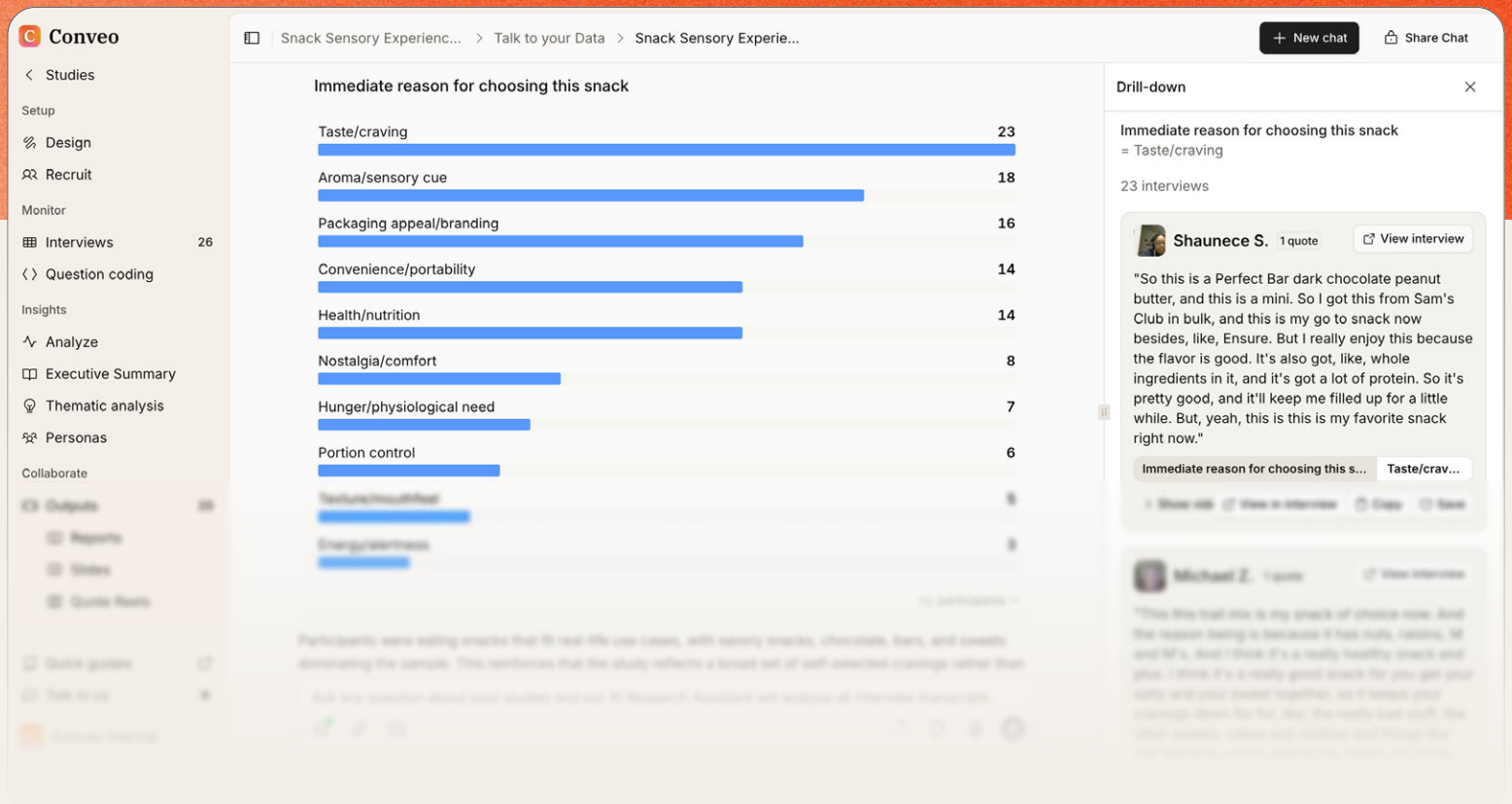
What insights and analytics professionals need to know about
AI adoption, new research methods, and operational change.



Published June 2026

AI research: conversational and observational.

Run AI-moderated interviews that fuel business growth with proactive, deep customer understanding.

Conveo

Snack Sensory Experience > Talk to your Data > Snack Sensory Experie...

Immediate reason for choosing this snack

Reason	Count
Taste/craving	23
Aroma/sensory cue	18
Packaging appeal/branding	16
Convenience/portability	14
Health/nutrition	14
Nostalgia/comfort	8
Hunger/physiological need	7
Portion control	6
Texture/mouthfeel	5
Energy/alertness	3

Participants were eating snacks that fit real-life use cases, with savory snacks, chocolate, bars, and sweets dominating the sample. This reinforces that the study reflects a broad set of self-selected cravings rather than...

Ask any question about your studies and our AI Research Assistant will analyze all interview transcripts.

Drill-down

Immediate reason for choosing this snack
= Taste/craving

23 interviews

Shaunece S. 1 quote View interview

"So this is a Perfect Bar dark chocolate peanut butter, and this is a mini. So I got this from Sam's Club in bulk, and this is my go to snack now besides, like, Ensure. But I really enjoy this because the flavor is good. It's also got, like, whole ingredients in it, and it's got a lot of protein. So it's pretty good, and it'll keep me filled up for a little while. But, yeah, this is this is my favorite snack right now."

Immediate reason for choosing this s... Taste/crav...

Show all View interview Copy Save

Michael Z. 1 quote View interview

"This bar had me in my snack of choice now. And the reason being is because it has nuts, marsh, M&M's, and I think it's a really healthy snack and plus, I think it's a really good snack for you get your fatty and your sweet together, so it keeps your cravings down for the day, the really best stuff. Not other snacks, candy and cookies and things like that because they're not really the best stuff of the day."



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FOREWORD [ORIENTATION]

Welcome to the 2026 *GRIT Insights Practice Report*, based on data collected between January 11 and March 9, 2026. This edition focuses on how the work of insights is being practiced, organized, managed, bought, sold, automated, governed, and felt by the people closest to it. If the *Business & Innovation Report* looks outward at market structure and competitive positioning, this report looks inward at the operating system of the profession: the roles, methods, suppliers, investments, governance practices, and confidence levels that determine whether insights can still do what the industry promises it can do.

The current GRIT analysis is based on 735 completed surveys from professionals who work in research, analytics, and insights: 328 brand-side or buyer-side participants, 387 supplier-side participants, and 20 other industry participants. Most participants are very experienced, and majorities of both brand-side and supplier-side respondents make or influence strategic decisions. In other words, the report is not simply a reading of market sentiment. It is a reading of how experienced practitioners, business leaders, operators, and decision influencers see the work changing from inside their own organizations.

This edition also introduces one of the most important structural improvements we have made to the *Insights Practice Report*. We continue to report brand-side results through research-focused and analytics-focused segments, but supplier-side results now distinguish tech-led suppliers from service-led suppliers by employee size: 20 FTE or fewer, 21 to 100 FTE, 101 to 500 FTE, and 500+ FTE. That may sound like a technical change, but it is much more than that. Supplier size now tells us something essential about operating model, investment capacity, governance maturity, revenue mix, automation strategy, and the kinds of client problems a firm is structurally built to solve.

The data reveals this is not just AI adoption; it is a reconfiguration of how insights work is organized, governed, and activated.

Across the report, AI and automation are visible everywhere, but they are not the whole story. The more important story is how they are changing the division of labor. Brand-side analytics professionals are expanding budgets, staff, methods, technology spending, and strategic remit, while brand-side researchers are showing signs of pressure and consolidation.

The supplier market is also sorting itself by scale and capability: tech-led firms are refining their infrastructure roles, the 101 to 500 FTE service-led segment appears especially well-positioned, very large suppliers are working through a managed transition, and smaller firms continue to carry deep expertise while facing new infrastructure and governance demands.

The methods sections make the same point from another angle. Synthetic data, crowdsourcing, data integration, online communities, owned panels, fraud detection, AI-moderated qualitative approaches, emotion and affect analytics, and marketplaces are not isolated novelties. They are clues about where the industry is seeking control, speed, flexibility, quality assurance, and lower dependency on traditional execution models. At the same time, durable methods such as online surveys, in-person and online qualitative work, ethnography, and core analytics remain important, but they are being used differently by different segments for different strategic purposes.



We have also split *Business Outlook* from *Mood & Confidence* and added *Governance & Risk* because the industry now needs a more complete picture of both performance and confidence. Technology spending is the most consistent positive signal in the report, but confidence is uneven. It is highest where insights work is closest to business decisions, where operating models appear clearer, and where AI expectations and guidelines are more developed. Governance, in this context, is not paperwork. It is becoming part of the trust infrastructure that determines whether faster, more automated insights can also be credible, interpretable, and useful.

As always, the *GRIT Report* can be what you make of it. In each section, we provide the data and enough interpretation to help you understand what the tables and charts are saying, but not to insist that our interpretation is the only reasonable one. We offer hypotheses, not commandments. Your own segment, clients, organization, and experience may lead you to a sharper explanation than ours, and that is part of the point. GRIT is designed to give the industry a common fact base from which better arguments, better decisions, and better strategies can emerge.

Although the vast majority of the design and analysis is done in-house by the Greenbook team, GRIT continues to depend on a coalition of people and organizations who care enough about this industry to contribute time, attention, expertise, and support. Thank you to the GRIT team, our contributors, sponsors, commentary providers, sample partners, and everyone who took the time to participate. We also want to recognize Forsta for their data collection platform, NewtonX for their contributions to maintaining a clean and robust GRIT sample, and Displayr for their excellent analytical platform. Without that shared commitment from all, we simply could not produce a report that helps the industry see itself with this level of clarity.

Leonard F. Murphy

Chief Advisor for Insights and Development,
Greenbook



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THE OPERATING MODEL MOVED FIRST [STRATEGIC INTERPRETATION]

Leonard F. Murphy

Chief Advisor for Insights and Development, Greenbook

We have spent two years asking what AI will do to the insights industry. The 2026 GRIT data answers a different question: what the industry has already done to itself in response. The headline is not adoption. **It is reorganization.** AI is the visible accelerant, but the deeper story in this wave is that the operating model of insights moved before most leadership teams realized they had a decision to make.

Consider what is now true at the same time. Technology spending is up across nearly every segment, with brand-side analytics professionals at a new high and even the smallest service-led suppliers ticking upward. Analytics professionals use agentic AI for an average of 3.6 of seven tracked tasks; brand-side researchers, 2.3. Every segment expects automation to keep increasing, with none expecting it to reverse. And yet AI policy governance is the only formal decision role that fails to crack the top three in any segment, even among the heaviest agentic users. We have built an industry that is governing supplier choice, technology acquisition, and outsourcing while quietly leaving AI policy to be set somewhere else.

That is not a technology gap. It is an operating-model gap. The decisions AI is being asked to absorb like what to buy, who to hire, how to sample, how to model, how to interpret, etc... are precisely the decisions insights professionals have historically owned. If the people who understand the consequences of those decisions are not in the room when AI policy is set, the resulting policies will feel both restrictive and naive at once.

AI is the visible accelerant. The operating model of insights moved first.

The second signal is the widening gulf between brand-side analytics and brand-side research. Analytics professionals are expanding on every dimension we track at once: research-project budgets at their strongest level since tracking began, staff increases outpacing decreases roughly four to one, technology spending and outsourcing at new highs, the share with budgets above \$15MM up sharply, the share below \$1MM cut by more than half.

Brand-side researchers show project spending close to stagnant, the first negative reading on staffing in the tracked period, outsourcing in contraction, and method portfolios consolidating around controllable, desk-executable approaches. This is not the difference between two job titles. **It is the difference between an operating model being expanded and one under quiet redefinition.**

I do not read this as the end of brand-side research. I read it as the end of a particular version of it; the version organized around commissioning and execution. The version that thrives is the one organized around judgment, governance, synthesis, and activation. Researchers who can specify the right question, validate the evidence, interpret the ambiguity, and translate findings into decisions are not being displaced by AI; they are being asked to do the part of the job AI cannot do. The risk is that organizations under cost pressure cut the people doing that work because their output is harder to count than a project plan.



On the supplier side, the market is sorting itself by operating model rather than by legacy label. Tech-led suppliers, despite a long-term low in revenue increases, have raised technology spending for two consecutive years and are retrenching toward defensible infrastructure like fraud detection, data collection platforms, sample and survey infrastructure that mass-market generative AI cannot easily commoditize (yet).

The 500+ FTE service-led segment is in a managed transition: revenue flat for three years, staffing stagnant, but technology spending at its highest point since 22A and the offerings mix shifting toward consulting, analytics, technology, and synthetic data. The 101–500 FTE service-led segment is the standout: leading service-led revenue growth, the highest rate of formal AI rules in the industry at 83 percent, the highest confidence in AI risk minimization at 77 percent, technology spending at a new high with zero decreases, and staffing increases holding in the 40-percent range for a third consecutive year. The smallest service-led firms still carry deep, principal-level expertise but face the sharpest infrastructure and governance constraints.

Strip the labels off and the pattern becomes legible. The segments doing best are those where a clear operating model has been chosen and resourced, not the segments with the loudest AI claims. Governance, technology investment, capability expansion, and revenue move together. They are facets of the same decision: what kind of business this firm is going to be in two years.

The methods and selection sections tell the same story from different angles. Synthetic data and crowdsourcing are the broadest cross-segment momentum signals. Sample has become a trust-infrastructure category, not a procurement detail. Marketplaces for sample, software, tools, and talent are becoming access infrastructure with a real prospect of moving from human-browsed to agent-mediated. And ease of interpreting and communicating results has displaced speed of results as the defining quality criterion. ***The market has decided that a faster result that cannot be communicated, defended, and acted on is not a higher-quality result.***

Data quality, service quality, and pricing remain the inviolable table stakes; reputation, technology use, and (quietly but consistently) thought leadership are the differentiators that decide outcomes. If agentic systems begin mediating procurement, the criteria those systems encode will determine market access.

Senior leaders should stop asking how to use AI and start asking what work, decisions, risks, suppliers, data, and talent need to be redesigned around trusted automation. That is a different conversation, and it does not start with a tool selection. Three viable strategic postures fall out of the data:

- **Orchestrators.** Own the workflow. The Orchestrator role belongs to organizations and suppliers that integrate research, analytics, insights operations, technology, supplier management, and governance into a coherent system for moving evidence into decisions. They invest in insights operations as connective tissue. They run formal supplier portfolios by control point rather than by legacy label. They set explicit task-by-task automation policies: what to automate, what to govern tightly, what to keep human-led instead of treating automation as a uniform trend. Their advantage compounds because every additional integration makes the next one cheaper.



Senior leaders should stop asking how to use AI and start asking what work, decisions, risks, suppliers, data, and talent need to be redesigned around trusted automation.



- **Trust Builders.** Own the substrate. The Trust Builder role belongs to firms that compete on sample integrity, fraud detection, data provenance, synthetic-data validation, AI audit trails, and the disciplined blending of synthetic and human evidence. The 2026 data is unambiguous: only 42 percent of brand-side analytics professionals and 44 percent of brand-side researchers are confident their organizations minimize unacceptable AI misuse risks, and confidence in risk minimization correlates strongly with exceeding goals. That is a market begging for credible trust infrastructure. Trust Builders publish their methods, expose their controls, and treat governance as a client-facing capability rather than back-office paperwork.
- **Decision Partners.** Own the last mile. The Decision Partner role belongs to professionals and firms that move from output generation to decision facilitation and business accountability. They organize around the criterion that the market itself elevated this year: ease of interpreting and communicating results. They invest in synthesis, storytelling, advisory skill, scenario framing, and the quiet craft of making evidence usable inside a real organization under real time pressure. They measure themselves on whether decisions changed, not on whether projects finished. As AI commoditizes production, the last mile is where durable margin lives.

These postures are not mutually exclusive; the strongest operators in the 2026 data show elements of all three, but each requires investment, and most organizations will need to lead with one. The companies and teams most at risk are not the slow adopters of AI. They are the efficient executors with no clear control point: suppliers making AI claims with no proof of trust, mid-market firms that are neither defensibly small nor scaled, large suppliers that cannot explain what they are becoming, research teams confined to project execution while analytics counterparts absorb the strategic remit, and small suppliers whose principal-level judgment is real but whose infrastructure cannot answer modern buyer questions about governance, sample quality, and AI policy.

The era of insights-as-projects ended quietly. ***The era of insights-as-operating-model has begun loudly.*** The 2026 GRIT data does not ask whether to participate in that shift. It asks who will redesign their organization around it, and who will wait to be redesigned by someone else.

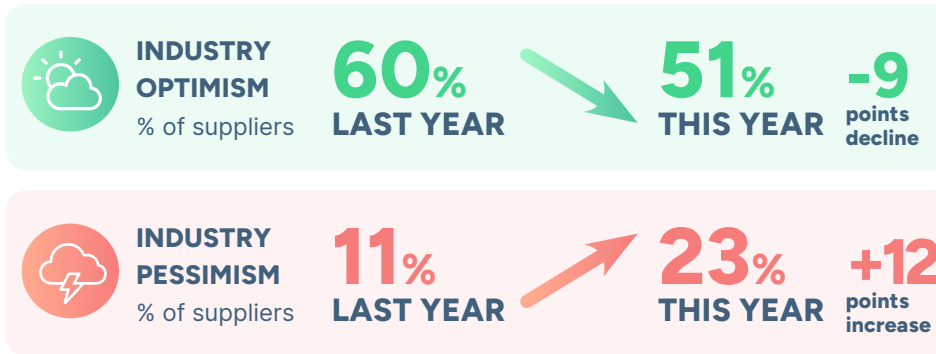


Those most at risk are not the slow adopters of AI; they are the efficient executors with no clear control point.



EXECUTIVE HIGHLIGHTS

SMALLER SUPPLIERS' FAITH IS ERODING



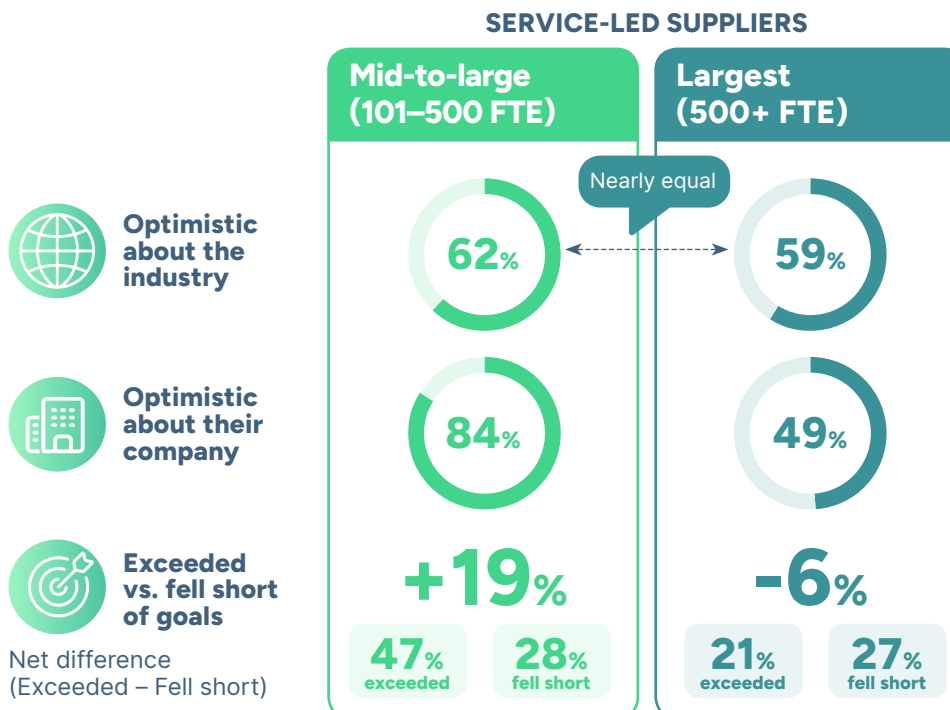
"Smaller service-led suppliers" = service-led suppliers with 20 or fewer employees.

Source: 2026 GRIT Insights Practice Report, Greenbook



Increasingly, the smallest suppliers are struggling to find a comfortable place within the insights industry. Optimism about the industry's future is falling while pessimism is rising — and pessimism is growing faster.

DOES INDUSTRY TIDE LIFT ALL BOATS?



"Mid-to-large" = service-led suppliers with 101–500 FTE; "Largest" = service-led suppliers with 500+ FTE. Data from the 2026 GRIT Insights Practice Report.

Source: 2026 GRIT Insights Practice Report, Greenbook

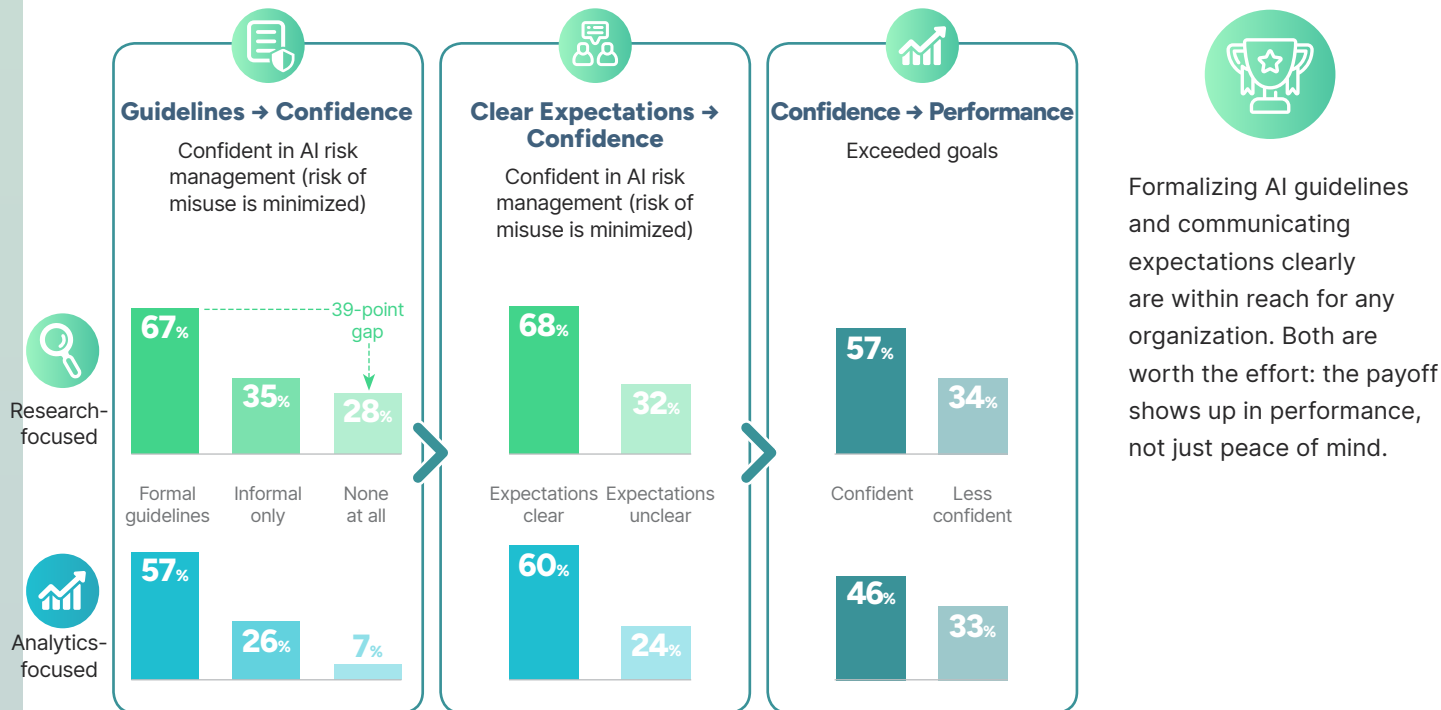


Although the two largest service-led supplier segments have similar optimism about the insights industry, the largest suppliers are much less optimistic about their companies; they are also less much less likely to be exceeding their goals. Overall, this suggests the next-largest suppliers are piloting new courses rather than following established industry paths.



EXECUTIVE HIGHLIGHTS

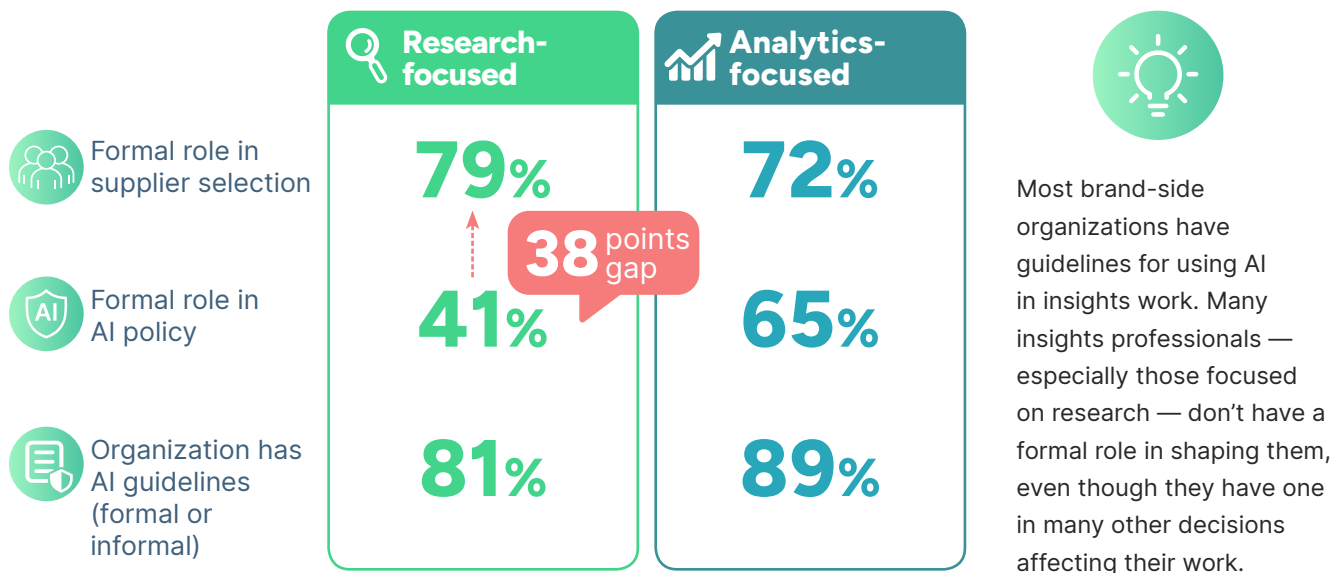
THE BRAND-SIDE GOVERNANCE PAYOFF



Confidence reflects “completely or mostly confident organization minimizes risks of AI misuse”. Data reflects brand-side insights professionals. “Research-focused” and “analytics-focused” reflect primary orientation within the insights function, not job title.

Source: 2026 GRIT Insights Practice Report, Greenbook and NewtonX

THE BRAND-SIDE AI POLICY GAP



Data reflects brand-side insights professionals. “Research-focused” and “analytics-focused” reflect primary orientation within the insights function, not job title.

Source: 2026 GRIT Insights Practice Report, Greenbook



EXECUTIVE HIGHLIGHTS

LARGEST SUPPLIERS MOVE TOWARD SYNTHETIC, AWAY FROM FIELD SERVICES

Largest service-led suppliers (500+ FTE)

Field services: significant revenue source

30%
2025



16%
2026

Synthetic data: in use

26%
2025



44%
2026

Mid-to-large service-led suppliers (101–500 FTE)

Field services: significant revenue source

23%
2025



33%
2026

Synthetic data: in use

16%
2025



34%
2026



Since last year, synthetic data adoption among the largest service-led suppliers nearly doubled; at the same time, the percentage claiming field services as a significant source of revenue nearly halved. Is this a coincidence or a strategy?

"Field services" reflects share reporting it as a significant revenue source. "Synthetic data" reflects share reporting current use.

"Largest service-led" = service-led suppliers with 500+ FTE; "Mid-to-large service-led" = service-led suppliers with 101–500 FTE.

Data compares 2025 to 2026 GRIT Insights Practice Report waves.

Source: 2026 GRIT Insights Practice Report, Greenbook

DEMAND FOR OUTSOURCING IS STABLE, BUT RISING



CURRENT SATISFACTION

Current level is about right (range across activities)



FUTURE INTENT

Expect outsourcing to increase vs. decrease



Brand-side insights professionals

57%–64%

say current outsourcing levels are about right

+31%

Increase

-14%

Decrease

2:1

expect increase



Service-led suppliers with 20+ FTE

53%–63%

say current outsourcing levels are about right

+29%

Increase

-16%

Decrease

2:1

expect increase



Most insights suppliers and brand-side professionals say outsourcing levels feel about right today. However, about twice as many in both segments expect it to increase as expect it to decrease. The demand is there, but not yet realized.

"Brand-side insights professionals" includes both research-focused and analytics-focused. "Suppliers with 20+ FTE" includes service-led suppliers with 21–100, 101–500, and 500+ employees.

Source: 2026 GRIT Insights Practice Report, Greenbook and NewtonX



DESIGN, METHODOLOGY & SAMPLE

This section explains how the GRIT process is designed, what the final sample looks like, and how the report is structured, including key segments, labels, and definitions.

WHAT IS THE GRIT REPORT? [ORIENTATION]

Literally, “GRIT” stands for *Greenbook Research Industry Trends Report*, but it also stands for comprehensive and objective analysis of the research, analytics, and insights industry from the perspective of insights professionals. We collect data via surveys of industry professionals and focus on reporting “just the facts,” to paraphrase the old FBI, although we also engage in profiling, like the modern FBI. The

main sections of the report focus on data and provide enough commentary and context to enable you to accurately understand it and interpret the meaning according to your experience and perspective.

Our goal is not to hype any particular themes or to pass final judgment on any issue: our goal is to foster honest debate and to provide critical thinkers with tools to understand the industry around them, their place in it, and how to move forward. As part of this discussion, we also provide clearly labeled commentaries and editorial opinions, and these sometimes agree with the interpretations in the main sections, sometimes challenge them, and always highlight important concepts.

Greenbook publishes two *GRIT* reports per year: *Insights Practice* (this report) and *Business & Innovation*. To help you find and write your own story, we break everything out by segment: two brand-side (research- and analytics-focused), tech-led suppliers, and four service-led supplier segments by employee size. This is the first *Insights Practice Report* to include the service-led supplier segment break-outs, so we have a lot of new information to share, even if some of the data is older.

This *GRIT Report* is based on analysis of data collected between January 11, 2026 and March 9, 2026 via an online survey of professionals who work in one or more areas of research, analytics, and insights.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
- **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
- **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
- **Editor call-outs**
 - Boxes labeled **Editor’s note:** or **Editor’s POV:** and signed “**L.M., ed.**” are editorial opinions, **not data.**
- **Takeaway:** a one-line summary appears under tables and charts.

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

- Our 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 research, analytics, and insights (or influence spend) 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. However, we shouldn't be imprisoned by old survey questions just for the sake of tracking.
- GRIT should provide reliable and relevant facts, and it should also raise questions and stimulate conversation.

We like to say GRIT evolves with the industry because we define the industry very broadly and allow the population to be defined via relationships. Most participants are recruited by Greenbook via a variety of methods, including GDPR-compliant opt-in email lists and various social media channels. However, our efforts are supplemented by volunteer efforts of others.

Once again, we proactively reached out to all our directory listers to make sure they knew they could invite their networks to take the survey, and, as is our practice, anyone who received an invitation from Greenbook could 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 survey industry niches as they emerge.

RELABELING PAST GRIT PAST WAVES [ORIENTATION]

Beginning in the last *Insights Practice Report*, we've changed how we refer to each wave of data collection. Historically, we've referred to them using the last two digits of the year plus "W1" or "W2" to refer to whether it was the first or second wave of data collection that year. So, "15W1" meant "the first wave of data collection in 2015," "20W2" meant "the second wave of data collection in 2020," and so on.

We've changed it to reflect the year of publication and focus of the report. Prior to 2019, Greenbook (or, more properly, "GreenBook" back then) published two *GRIT Reports* per year but did not distinguish between them. Starting in 2019, Greenbook began publishing two versions of the *GRIT Report*, a *Business & Innovation* report (BI) and an *Insights Practice* report (IP). The new abbreviations for the waves are the last two numbers of the year of publication plus "A" to refer to the "*Insights Practice Report*" (the first report published) or "B" to refer the "*Business & Innovation Report*" (the second report). So, the first report since the split is referred to as "19B" and the report you are now reading is referred to as "26A."

You've probably figured out why we don't just use "BI" and "IP" – these didn't exist prior to 2019, and *GRIT Reports* sometimes track data all the way back to 2014, the first year of the so-called "modern era." *GRIT Reports* actually began much further back in time, but not much trackable data exists from those days. Some key milestones:

- "14AB" – there was only one report published in 2014, so we are labelling it "AB"
- "16A" – is really "15B." Two waves of data were collected in 2015, and this report actually slid into publication before the new year, but we are labeling it "A" to be consistent with later years
- "19B" – the first *Business & Innovation Report*
- "20B" – the first report of the COVID era; the official beginning (according to the US) came in the middle of fieldwork
- "23A" – the first report of the post-genAI world
- "23B" – the last report of the COVID era; the US declared the end on May 11, 2023, although you can look at our data and choose your own end date
- "26A" – the best *GRIT Report* ...until the next one!





WHAT'S NEW IN THIS REPORT ^[DATA]

GRIT continues to report results by our two brand-side/buyer-side segments, market research and data and analytics professionals, but we've revamped our supplier segmentation. Historically, we've reported six supplier segments based on their highest revenue service area: full-service research, field services, qualitative research, strategic consulting, technology, and data and analytics.

For the first time in the *Insights Practice Report*, we are breaking out service-led suppliers by employee size, and you'll see these results tracked from 2020, the early days of the pandemic. Our new segments are technology-led plus four size categories within service-led: 20 employees or fewer, 21 to 100 employees, 101 to 500 employees, and more than 500 employees. (In the report, these are labelled as follows: Tech-led, Service-led: ≤20 FTE,

Service-led: 21-100 FTE, Service-led: 101-500 FTE, and Service-led: 500+ FTE).

Over the years, we've found that tech-led versus service-led is the most stable supplier-side segmentation because their operations, business models, and needs are so distinct from each other. We also believe segmentation by supplier size is the most actionable for our audience. Although it's impractical to create a report with every distinct size break that deserves discussion, we believe the industry can easily imagine personas for each of the four segments we are reporting. Most suppliers can relate to companies in their same weight class, so to speak, more readily than to any other possible segmentation. We believe this is a giant step toward our goal of enabling every insights professional to see themselves in the GRIT Report.

THE FINAL SAMPLE ^[DATA]

After rigorous data cleaning, the current GRIT analysis is based on 735 completed surveys from three distinct populations: brands/buyers (n = 328), suppliers (n = 387), and others (n = 20). Please note that 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 brands/buyers or suppliers according to our definitions, not as a proportion of brand/buyer or supplier *companies*.

GRIT SAMPLE SIZE: GRIT WAVE



Takeaway: GRIT collects robust sample from brand- and supplier-side professionals to represent industry demand as well as what the industry offers.


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Because of external changes over the past year to how email communications are being arbitrated through various intermediaries, this year's sample is a bit lighter than previous years. A lot of our recruiting is email-based, and several emerging practices conspired to create obstacles to reaching potential GRIT participants. Like creating the *GRIT Report* itself, this was an intense learning experience, to say the least.

Except as an indication of overall participation, the total sample size is irrelevant because almost every analysis in this report is segmented by brand/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 "brand/buyer" professionals should be relative to "supplier" professionals. Second, generally speaking, it is not very useful to know aggregate results across brands/buyers and suppliers because they have different business models and objectives and aggregating them washes out important differences. Mixing them doesn't enhance anyone's understanding of the industry.

Most of the report is broken out by the two brand and five supplier segments. For the smallest segment (tech-led), $n = 39$; for the largest (brand-side

research), $n = 176$. The other five range from $n = 55$ to $n = 158$. Within the report, we note the sample sizes that apply to each chart and table, except in the few cases when space does not allow for it. For example, when a table or chart includes results across questions with different sample sizes, we typically don't clutter it with the n 's, but they usually appear somewhere else in the report.

GRIT SAMPLE SIZE: GRIT SEGMENT

Brand	
Research	176
Analytics	152
Supplier	
Tech-led	39
Service-led: ≤ 20 FTE	158
Service-led: 21-100 FTE	79
Service-led: 101-500 FTE	56
Service-led: 500+ FTE	55

Takeaway: Sizes of GRIT's new segments range from 39 to 158.

Source: GRIT Report and NewtonX

Sample sizes may deviate from the totals reported in this introduction 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 does not do projects, they are not asked how projects are allocated across qualitative and quantitative.

Of course, those on the brand/buyer path are not asked about revenue they earned from selling services or any other supplier-specific questions. Although they might earn some revenue from insights-related services, that is not our focus as far as they are concerned.

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, several *Managing Insights* questions are randomly assigned to a portion of the sample, and all randomly assigned questions are capped for each individual to control survey length.

Further, in some analyses the sample sizes appear smaller because we exclude people who answered "don't know" from the report in order to better understand the distribution of people who do know.

It is not very useful to know aggregate results across brands/buyers and suppliers because they have different business models and objectives.



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SAMPLE ADJUSTMENT [ORIENTATION]

Recruitment to the GRIT survey is partly 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 skewing the sample in unanticipated ways. For some reports, we may conduct supplemental recruiting efforts, as we do with NewtonX, and those differences must be taken into account. We address aberrations by weighting participants when necessary.

As a trends report for a dynamic industry, the topics we measure are expected to change, so devising a weighting scheme is tricky. It's easy to choose target weights that would completely defeat the purpose of looking at trends because they could make something that changed organically look the same as it did before.

To minimize the risk of undermining trend measurement, 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. Consider a hypothetical insights professional, even (or especially) a prominent one, who might take the survey multiple times to try to influence the results. If they knew the weighting scheme, this malefactor might be even more tempted to take it more times, although the weighting scheme doesn't matter for deleted surveys, which these surely would become.

All the results in this report are weighted except where noted.

In this section, we've provided a couple of tables to give you an idea of the distributions by region represented in brand and supplier results. Through 2021, we did not supplement recruiting efforts and so did not weight the data. This year's sample includes supplemental brand sample. We've weighted these waves to account for changes we introduced.

GRIT SAMPLE SIZE: REGION

	Brand	Supplier
North America	179	229
Europe	87	78
Asia-Pacific	45	46
South & Central America	8	18
Africa & Middle East	7	14
Multi-region or undefined	2	2

Takeaway: North America is the most prominent regional contributor, followed by Europe and Asia-Pacific.

Source: GRIT Report and NewtonX





PARTICIPATION ACROSS GLOBAL REGIONS: LAST FIVE INSIGHTS PRACTICE WAVES (BRAND)

	22A	23A	24A	25A	26A
North America	61%	62%	63%	63%	64%
Europe	24%	27%	25%	25%	22%
Asia-Pacific	8%	6%	6%	6%	9%
Africa & Middle East	4%	2%	2%	3%	2%
South & Central America	2%	3%	4%	3%	2%
Multi-region or undefined	1%	1%	0%	1%	1%
n =	254	402	385	379	328
Takeaway: Across waves, North America has been the most prominent regional contributor on the brand side, followed by Europe and Asia-Pacific.					

Source: GRIT Report and NewtonX

PARTICIPATION ACROSS GLOBAL REGIONS: LAST FIVE INSIGHTS PRACTICE WAVES (SUPPLIER)

	22A	23A	24A	25A	26A
North America	51%	49%	49%	48%	50%
Europe	26%	26%	26%	25%	24%
Asia-Pacific	16%	16%	16%	16%	17%
South & Central America	3%	5%	5%	5%	4%
Africa & Middle East	4%	3%	3%	3%	3%
Multi-region or undefined	0%	1%	1%	2%	1%
n =	1,002	731	628	596	387
Takeaway: Across waves, North America has been the most prominent regional contributor on the supplier side, followed by Europe and Asia-Pacific.					

Source: GRIT Report

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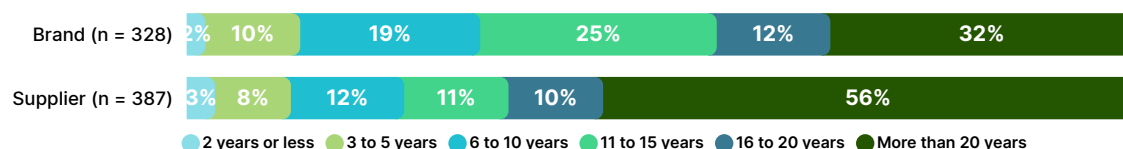


EXPERIENCED GRIT PARTICIPANTS [DATA]

Perspectives in the *GRIT Report* are strongly influenced by those who know best and balanced by those who bring a fresh outlook. Most of our brand-side and supplier professionals have more than ten years of experience working in insights, analytics, or

research, and fewer than 5% of brands and suppliers have two years or fewer (results are weighted). More than 60% of brand and supplier participants make or influence strategic decisions, while fewer than 20% have no formal influence.

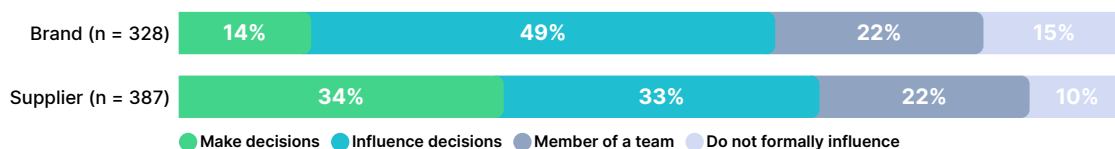
YEARS IN ROLE RELATED TO INSIGHTS, ANALYTICS, OR RESEARCH: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Very few brands (2%) and suppliers (3%) have two years or fewer experience, and most suppliers have more than 20 years (56%).

ROLE IN STRATEGIC DECISIONS: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: More than 60% of brands (63%) and suppliers (67%) make or influence strategic decisions.

GRIT DATA QUALITY ASSURANCE [ORIENTATION]

GRIT wants the industry to tell us who's in the industry, and we accomplish this by focusing on our contacts, their referrals, and traffic across Greenbook.org and social media. Our qualifications are broad because we don't want to presuppose who belongs and who doesn't, and we don't have quotas – the more the merrier.

Although our approach is designed to cast a broad net across the industry, it includes safeguards to ensure that respondents actually participate in insights, either as suppliers, producers, or users. Despite very minimal requirements, a surprising number of participants fail to qualify out of thousands who enter the survey, possibly because they aren't reading the questions. In reality, some of these might be qualified insights professionals, but we can't include anyone who doesn't pay enough attention, no matter who they are.

Consequently, the quality assurance burden weighs more heavily on data cleaning than on data collection, and many more are removed based on more than a dozen flags we evaluate. We flag heavily and make individual "naughty or nice" assessments. We want to respect the very many people who volunteer their time to take the GRIT survey, and we give the benefit of reasonable doubt to those who make an honest effort.

When someone tries to be cute, fakes a survey, and gets caught, their survey(s) are deleted, but they also create flags for similar people who took the survey. Not only do their survey(s) get deleted, but they might contribute to a pattern that leads to the deletion of other surveys from like-minded colleagues. Others who may take the survey for their own purposes are unwelcome, and they run the risk of becoming flags for others who share similar patterns.





The responsibility for data quality assurance falls heavily on the processing, but we must thank our partners, Forsta and NewtonX, for their contributions to maintaining a clean and robust GRIT sample. Forsta programs and hosts the GRIT survey for both our own and the NewtonX sample. In our first wave with them, we did not use any of their fraud detection tools and cleaned data in the usual way. Since then, we have used their tools and spent much less time evaluating surveys. Of course, it would have been nice to save time the first time through, but then we wouldn't have a benchmark.

This is GRIT's seventh time partnering with NewtonX, and processing the sample they provide is much easier versus the data we collect ourselves. When we process the data they provide, we only see normal issues like you'd see 20 years ago – speed-throughs, straightlining, etc. – and we don't see much of it. Of course, we have to point out the data GRIT collected and reported in past waves is just as clean and robust as the data from Forsta and NewtonX, but theirs don't take us nearly as much effort to review and evaluate.

DIFFERENCES FROM LAST YEAR [ORIENTATION]

Because the GRIT survey tracks trends, we try to keep it consistent from wave to wave, but we place more value on getting complete and accurate information on the current state of the industry than we do on tracking for the sake of tracking. If we were measuring changes in KPIs to determine bonuses, we'd be more conservative about revisions, but we're not doing that (and we wouldn't recommend that practice, anyway).

We've already mentioned our shift in focus from supplier specialties to supplier size classes, and that change doesn't undermine our ability to track because we are able to create those segments for past waves. Other significant revisions include:

- Re-imagined *Automation* – isn't everything automated to some degree these days? – and investment in technology – if you use it, you invest in it – as *Managing Insights* and *Investing in Insights*, focusing on agentic AI and outsourcing
- Via LLM chats, updated, shortened, and clarified brand-side roles, methodologies, areas insights impact, industries served, and what kinds of activities can be automated – these changes are highlighted throughout the report
- Split *Business Outlook* into two sections, *Business Outlook* (budget, revenue, tech spend, staff size, and outsourcing) and *Mood & Confidence* (optimism and goal performance)
- Added *Governance & Risk* to examine how comfortable insights professionals are with how their organizations are managing AI use for insights work
- Carried over and improved AI-targeted enhancements from *B&I*

The biggest point is that GRIT's design has been updated for an industry that no longer fits cleanly into legacy labels. The new supplier segmentation, based on tech-led versus service-led models and service-led employee size, gives buyers and suppliers a more practical way to understand where they actually sit in the market and who their relevant peers really are.
– LM, ed.





TAILORING FOR AI READERS ^[ORIENTATION]

In an effort to encourage LLMs to pay more attention to the actual GRIT data, we carried over several AI-targeted improvements from the last *GRIT Business & Innovation Report*. Each sub-section is tagged as “orientation,” “data,” “perspective,” or “strategic interpretation.” In an ideal world, the tags should help LLMs focus on data to make more accurate summaries.

We’ve also added takeaways to each table and chart. This should also help AI focus on the facts, as well as aid human and humanoid skimmers.

In a call-out box in each section, instructions are included to help LLMs, and possibly humans, separate fact from opinion. It explains how to use the “orientation,” “data,” “perspective,” and “strategic interpretation” tags, and, in some sections, it says in plain English that “POV” means “point-of-view” because LLMs don’t necessarily know what “POV” means. (This is not a joke.)

One enhancement we did not carry-over: each sub-section is no longer phrased as a question instead of a label. While ChatGPT assured us the question format would aid discovery by AI, Claude disputed this premise and agreed the practice was annoying to humans and too reminiscent of fluffy web pages for recipes and entertainment updates. We’ll do it in the section overviews, but not for every sub-section.

Why does a well-known industry institution like the *GRIT Report* need to be optimized for AI discoverability and interpretation? To some extent, every publication should try to optimize AI discoverability, but that’s not our primary concern because Greenbook’s marketing team and our partners do a great job of getting the word out. Our primary concern is making sure that anyone who asks an LLM to summarize the report gets an accurate summary. We have not had good experiences when we released our latest reports.

Every LLM we tried focused on the opinions in the report and ignored the data unless it was cited in an opinion piece. It loves dramatics. One LLM went as far as to highlight the findings regarding regional differences even though that particular report did not include any analysis by region. When the LLMs cited statistics, these invariably came from opinions and commentaries, and those pieces often referred to data not in evidence – at least not in the report’s data subsections. In sum, the LLMs produced summaries of some details contained in the report, but never a summary of the report itself.

These problems were not specific to any brand of LLM; they were universal. ChatGPT explained that LLMs will prioritize content that is strongly worded, that looks like a summary, or is more bombastic than a Norwegian metal band. If it likes what it sees, it’s not likely to dig deeper. This means an LLM summary will focus on perspectives and opinions and may never consider the actual data in the report. This is unfortunate for GRIT because we don’t pretend to have the final say – we want you to read the report and decide for yourself, and we provide perspectives as part of the debate that should occur, not as the end of it. Left to their own devices, LLMs read the report exactly as we don’t want it to be read.

LLMs produced summaries of some details contained in the report, but never a summary of the report itself.

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That's why you'll see content clearly labeled as "orientation," "data," "perspective," and "strategic interpretation." That's why you may see some text that seems like it was written for a robot. That's why you may see text boxes with instructions that explain the

obvious. That's why the opening blurbs under each section title have the same structure and focus on laying out that section's contents instead of trying to state an interesting finding that might hook you into reading the section.

THE BIG PICTURE [STRATEGIC INTERPRETATION]

As always, the *2026 GRIT Insights Practice Report* provides you with comprehensive and actionable insights regarding industry trends, free of charge. As in the last *GRIT Business & Innovation Report*, this one breaks out supplier segments in a way we believe you'll find to be intuitive, by tech-led versus service-led and by employee size. We're confident you'll be able to "see yourself" in this report more clearly than ever before.

We now know that, without guidance, LLMs will amplify the most provocative content – i.e., strong statements and aggressive claims – even to the exclusion of reading the actual data because it assumes these magnificent statements came from the data.

Some come directly from GRIT data and some come from outside data and experiences, but very seldom do they represent the definitive statement. No statement could. GRIT has always been a forum for different perspectives while presenting data neutrally so any reader can form their own opinions.

GRIT doesn't know your specific business; you do. Understanding the design, methodology, and sample composition empowers you to make your own assessments of trends, to separate fact from hypothesis, and decide which are meaningful for you. We offer perspectives to help you think through the implications, but the rest is up to you.

For the thousands of real, live insights professionals who contribute to GRIT, we thank you for your time and effort and hope you enjoy our reports. And by "our," we mean GRIT's and yours.



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INVESTOR SPOTLIGHT

PERSPECTIVE BY GEN2 ADVISORS AND OAKLINS DESILVA+PHILLIPS

THE GREAT RECLASSIFICATION

KEY TAKEAWAYS [PERSPECTIVE]

The 2026 GRIT Insights Practice Report data describes an insights and analytics market in the middle of a structural reclassification, and the investment story is more nuanced than the familiar shorthand of “tech-led winners versus service-led survivors.”

Tech-led supplier revenue has cooled even as technology spending stays high, suggesting deliberate retrenchment toward defensible infrastructure rather than category dominance. The 101–500 FTE service-led segment has emerged as the clearest growth profile in the supplier landscape, simultaneously expanding revenue, capability, governance, and technology investment. The 500+ FTE segment is in a visible managed transition. The smallest service-led firms carry principal-level expertise but face the sharpest infrastructure constraints. Brand-side analytics budgets are at all-time highs while

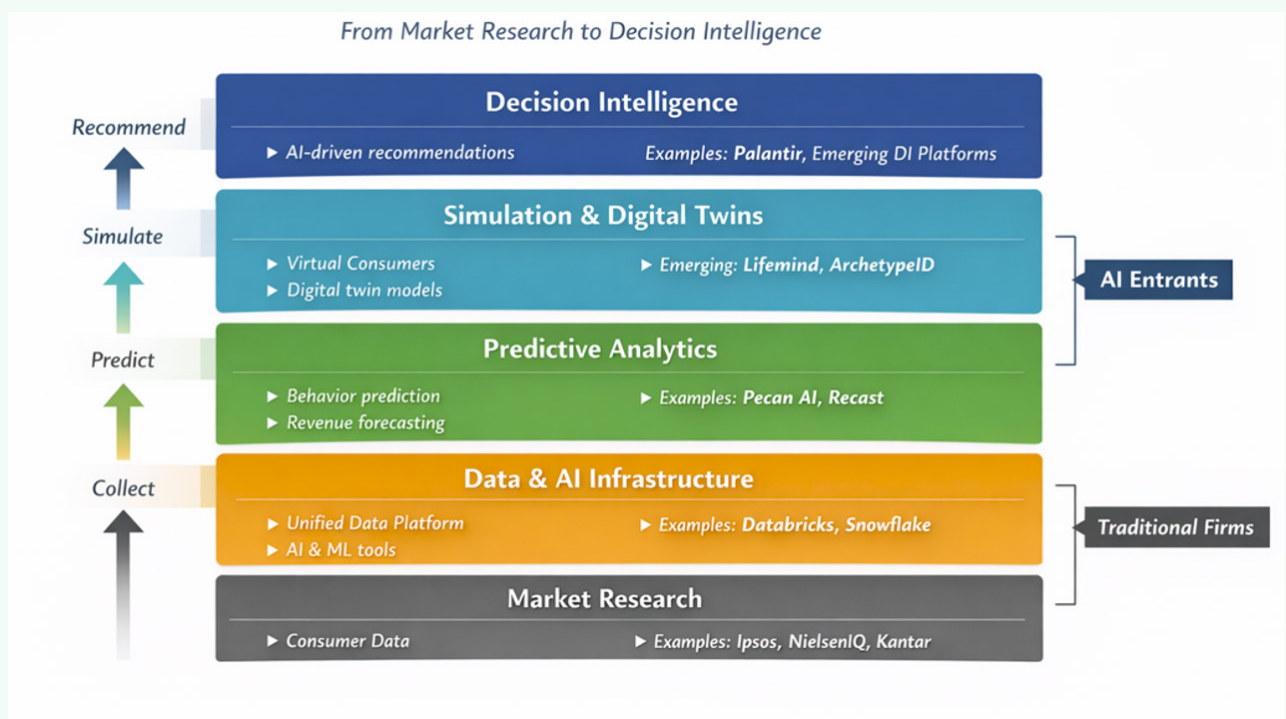
supplier revenue softens broadly, pointing toward concentration, mix shift, and a redistribution of value capture rather than uniform demand contraction.

Over the next 12–18 months, we expect this reclassification to accelerate through M&A, capability acquisitions, and selective platform builds organized around control points rather than category labels.

This new decision intelligence infrastructure stack can be visualized as both a workflow and taxonomy:

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the **[DATA]** subsections.
- **[ORIENTATION]** = how to pay attention to this topic
- **[DATA]** = GRIT survey results
- **[PERSPECTIVE]** = interpretation or opinion





The most defensible assets own data substrate, workflow embedding, governance and trust infrastructure, sample integrity, and last-mile decision activation. The least defensible are undifferentiated execution, generic AI claims without proof, and mid-market firms that are neither operationally lean

nor strategically scaled. For supplier leadership, the imperative is to clarify the firm's control point and resource it; for investors, to evaluate companies by what they actually do and by what cannot be replicated around them, rather than by the label they wear in the market.

THE GREAT CAPITAL RECALIBRATION OF THE INSIGHTS & ANALYTICS INDUSTRY ^[PERSPECTIVE]

GRIT is built primarily to track the dynamics of the function, methods, and segments that make up the insights and analytics industry, deliberately holding macroeconomic and capital-market factors at arm's length. Complementing GRIT, Gen2 Advisors and Oaklins DeSilva+Phillips have developed this *Investor Spotlight* to extend the strategic and capital-markets implications of the 2026 data for C-suite leaders and investors making real allocation decisions in the next four to six quarters. The perspective is shaped by ongoing work "in the trenches" on transactions, valuations, capability assessments, and strategic engagements across insights, analytics, marketing technology, and adjacent information businesses.

Where the 2025 *Investor Spotlight* emphasized a brutal bifurcation between technology winners and service-led survivors, the 2026 data invites a more careful read. The bifurcation has not gone away, but the lines have been redrawn, control points have shifted, and the premium now attaches less to category and more to what a firm structurally controls inside the new value chain.

As with last year, this is a perspective section rather than data reporting; it is open to debate, it is not investment advice, and we are not investment professionals in the regulated sense. We do believe our combined experience and reading of this year's data warrant serious consideration from anyone deploying capital, evaluating an exit, or designing a strategic plan in this market.

THE CAPITAL ENVIRONMENT: FROM DEPLOYMENT PRESSURE TO SELECTIVITY ^[PERSPECTIVE]

Private capital available to deploy into insights, analytics, and adjacent information services remains substantial, and the 2026 environment continues to favor strategic and platform-oriented buyers over financial sponsors looking for clean roll-ups. Accumulated dry powder and elevated holding periods sustain a baseline of activity even when valuations and strategic clarity diverge.

Capital has also become noticeably more selective. The era in which any "AI-powered" descriptor justified an outsized multiple has ended; buyers are doing harder diligence on revenue durability, gross margin, AI integration depth, governance posture, data ownership, and the realism of stated synergies. Deals are still getting done, but the diligence cycle is longer, gating questions are sharper, and AI claims are treated as hypotheses to be tested rather than facts to be priced in.





The implication for supplier leadership is that the next four to six quarters will see meaningful M&A, but activity will concentrate around assets that can be reclassified into higher-value categories.

Strategic acquirers will keep pursuing capability and infrastructure plays where the target supplies a control point: proprietary data, workflow embedding, governance trust, sample provenance, vertical depth,

etc... rather than incremental scale. Mid-market service-led firms will face accelerated pressure to declare a platform path or seek a partner who can complete that path on their behalf. Continuation vehicles, minority recapitalizations, and structured equity will play a larger role as sponsors and management teams navigate value gaps traditional exits cannot bridge cleanly.

THE RECLASSIFICATION: SUPPLIER SEGMENTS IN THE 2026 DATA ^[DATA+]

The most important update from the 2026 data is that the supplier landscape no longer sorts cleanly into “tech-led winners” and “service-led survivors.” GRIT’s refined segmentation separating tech-led from service-led suppliers and breaking service-led firms into ≤20, 21–100, 101–500, and 500+ FTE bands produces a more textured map. We read the segments this way:

Tech-led suppliers: from category dominance to defensible infrastructure

Tech-led revenue increases sit at a long-term low of 58 percent, but technology spending has been strong for two consecutive years and the offerings mix has shifted away from analytics services toward infrastructure mass-market generative AI cannot easily replicate such as fraud detection, CAPI platforms, online survey infrastructure, and similar substrate. Optimism remains the highest in the industry, with an

81-point company-level optimism-to-pessimism gap. The pattern reads as deliberate retrenchment, not retreat: narrowing offerings to where defensibility is highest and competing pressure from off-the-shelf AI is lowest. ***The practical investor filter is whether a tech-led target has actually picked a non-commoditizable layer to own, or is recycling generic generative-AI features and hoping the legacy multiple holds.***

Service-led 101–500 FTE: the standout segment

This segment is the clearest growth and quality profile in the data. Revenue growth leads service-led peers; technology spending is at a new high with zero decreases; staffing increases have held in the 40-percent range for a third consecutive year. It also leads the industry on governance — the highest rate of formal AI rules at 83 percent and the highest confidence in AI risk minimization at 77 percent — and on method-portfolio expansion. Optimism is among the highest in the data. In plain terms, the segment is simultaneously expanding capability, formalizing governance, investing in technology, and growing revenue. ***We treat it as the most credible “investment-grade” service-led profile in the report, and mid-market firms that fit this template represent the cleanest platform candidates and acquisition targets in the market.***





Service-led 500+ FTE: managed transition, not melt-down

The 500+ FTE service-led segment shows revenue trends essentially flat for three years, stagnant staffing, and a notable mood reset, with company optimism at its lowest point after the sharpest single-year decline outside the pandemic. At the same time, technology spending has reached its highest point since 22A, and the offerings narrative is moving toward consulting, analytics, technology, and synthetic data. We read this as a managed transition: large players actively restructuring fixed cost while attempting to reclassify their revenue mix toward higher-value services. The 22A pattern of a technology surge preceding hiring expansion makes the next 12–18 months a meaningful signal about whether this transition is gaining traction. For investors, the relevant questions are whether the capability evolution is real, whether legacy contracts and labor model still obscure strategic direction, and whether the cap table can absorb the time required to convert investment into revenue. ***There are real assets inside these organizations; where a discount exists, it often reflects time and execution risk rather than terminal value.***

Gen2 Advisors

Website: gen2advisors.com

Gen2 Advisors constantly scan and track ways to manage insights, keep up with the latest tools and technology, and predict the impact of all this information on the future before it's here. Through syndicated reports, advisory services, and consulting engagements, we present emerging management, applications, and technology in a systematic overview, and tell you how to apply it to your individual business.

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Website: oaklins.com

Oaklins DeSilva+Phillips is an investment bank for clients that operate at the intersection of content, technology and services. This includes enterprises operating within the media, advertising & marketing, education, healthcare, information services and technology sectors.

Smaller service-led suppliers (≤20 and 21–100 FTE): expertise meets uneven cash conversion

The 21–100 FTE segment is in clear transition risk: only 54 percent reported revenue increases, down roughly 20 points from the 23A peak, while technology spending has climbed and method portfolios continue to expand. Investment is being made; conversion to revenue has not yet caught up. For sponsors, this is where structured capital (minority equity, growth debt, partnership structures) can be more constructive than control transactions, and where consolidation logic compounds when complementary capability sets are joined under a single operating spine. The ≤20 FTE band is over-represented by owners and principals with deep, often elite expertise; only 37 percent reported revenue increases, only 24 percent have formal AI rules, and optimism is the lowest of any segment. The strategic profile splits between an elite minority defending a true boutique premium through partner ecosystems for infrastructure and AI tooling, and a larger group at risk of becoming subscale specialists without the technology backbone to remain credible. ***For investors, this is a tuck-in segment for buyers building specialized verticals or geographic depth around an existing platform.***

Brand side as a market signal

The brand-side picture is the clearest demand-side signal in the 2026 data. Analytics professionals are expanding research-project budgets to their strongest level in tracked history, with 53 percent reporting increases against 10 percent decreases, and budget composition has shifted upmarket: the share with budgets above \$15MM grew from 27 to 40 percent while the share below \$1MM fell from 34 to 15 percent since 23A. Staffing, outsourcing, and technology spending are all at new highs. Brand-side researchers, by contrast, show project spending close to stagnant, the first negative reading on staffing, outsourcing in contraction, and a method portfolio consolidating around controllable approaches. ***Against broadly soft supplier revenue, the most plausible read is that buyer-side analytics spend is concentrating among a smaller set of partners while traditional research spend is held flat, redistributed, or quietly absorbed into analytics, data, and technology budgets.***





THE AI AND TRUST PARADOX: INVESTMENT THEME, DILIGENCE TRAP [PERSPECTIVE]

AI remains the dominant lens through which deals are framed, but the 2026 data reveals a paradox that should reshape diligence. Adoption is real and converging: every segment has settled on the same top three agentic-AI use cases of analyzing or modeling data, generating reports and dashboards, and preparing or integrating data even as depth of use diverges sharply by segment. At the same time, AI policy governance is the only one of seven formal decision roles that fails to crack the top three in any segment. **The people closest to the workflow AI is absorbing are also people often unlikely to have a say in formally governing AI itself.**

Buyer-side confidence is the limiting factor. Only 42 percent of brand-side analytics professionals and 44 percent of brand-side researchers are confident their organizations minimize unacceptable AI misuse risks, the lowest of any segment. Yet that confidence carries real performance signal: among brand-side researchers, 57 percent of the most confident exceeded goals versus 34 percent of the less

confident; among analytics professionals, the least confident fall short at three times the rate of the most confident. Formal guidelines and clear expectations roughly double confidence, and both appear necessary. The 101–500 FTE service-led segment leads on both, which is not a coincidence given its stronger performance profile.

For investors, the implication is direct. AI capability is becoming table stakes; trust infrastructure is becoming the premium category. Companies that demonstrate disciplined governance, validated synthetic-data practice, defensible sample provenance, transparent fraud and quality controls, and human checkpoints in the right places are building durable moats. Companies whose AI thesis is a marketing layer over commoditized models are exposed. Two assets making the same AI claim may have meaningfully different terminal values once governance and data substrate are diligenced properly.

INVESTMENT THEMES FROM THE 2026 DATA [PERSPECTIVE]

Several themes emerge from the data that we expect to organize capital deployment in the coming year. They are not mutually exclusive, and the strongest assets typically express more than one.

1. **Trust and quality infrastructure as a premium category.** Sample integrity, fraud detection, respondent authentication, data provenance, synthetic-data validation, and AI audit trails are moving from operational support into strategic infrastructure. With buyer confidence in AI risk minimization persistently below 50 percent and “data quality, service quality, pricing” the inviolable supplier-selection trinity, this is an underwriteable thesis rather than a slogan. Specialist providers that productize these capabilities in a verifiable form should command premium valuations regardless of legacy category.

2. **Decision-orchestration platforms over point tools.** The displacement of speed of results by ease of interpreting and communicating results signals a buyer market that values orchestration of evidence into decisions over raw output. The rise of insights operations as the connective tissue of brand-side teams reinforces this. Platforms that integrate research, analytics, supplier management, governance, and activation **AND** meet workflows where they live should outperform standalone point tools.





3. **Verified human data and proprietary substrate.** As synthetic and AI-generated content commoditize, verified human-origin data becomes more valuable, not less. Owned panels, proprietary communities, behavioral and passive signals, and validated first-party data are the substrate on which trustworthy synthetic methods rest. Assets with defensible, properly governed access to high-quality human-origin data, especially when paired with workflow technology that exposes that substrate inside customer decisions, are positioned to be reclassified upward.
4. **Mid-market consolidation organized around control points.** The mid-market service-led segment will continue to face pressure to choose: declare a platform path, declare a specialty path, or accept a partner. The most successful consolidations will be organized around control points like data, workflow, governance, vertical depth, and sample integrity rather than scale or geography alone. Roll-ups that aggregate revenue without resolving the operating-model question are likely to underperform.
5. **Vertical and decision-domain specialization.** Brand-side analytics leads in pricing, CX, UX, advanced analytics, business intelligence, and partner/channel decisions; brand-side research continues to lead in consumer market insights and brand and advertising work. Suppliers and platforms that align depth to specific high-value decision domains, rather than competing on horizontal breadth, increasingly win renewals and reach premium economics.
6. **Marketplaces and activation services.** Sample, software, tool, and talent marketplaces are now embedded access infrastructure, and with 66 percent of brand-side analytics professionals expecting automated or agentic systems to mediate most insights purchases, the relevant question is whether a marketplace asset is structurally positioned to be the system agents call, or merely a directory waiting to be replaced by one. In parallel, the durable margin in production-automated workflows migrates to the last mile of synthesis, advisory, scenario design, decision translation, and outcome accountability; assets that productize activation should outperform those competing only on faster delivery.

OUTLOOK: THE NEXT 12–18 MONTHS [PERSPECTIVE]

Reading the 2026 data alongside our ongoing transaction and advisory experience, we expect the following directional patterns over the next four to six quarters.

- **M&A activity stays meaningful but increasingly selective.** Strategic and PE-backed acquirers continue to pursue capability and infrastructure rather than pure scale, with AI integration depth, governance posture, and data ownership as gating diligence questions. Continuation vehicles, minority recapitalizations, and structured equity play a more visible role as sponsors bridge valuation gaps. AI-washed targets face longer timelines and more frequent re-trades or terminations.
- **Capital concentrates around defensible control points.** Trust and quality infrastructure (fraud detection, sample provenance, governance tooling, validation frameworks) attracts a disproportionate share of attention and premium multiples. Workflow-embedded platforms with proprietary data substrate outperform horizontal AI platforms competing on generic capabilities, and vertical or decision-domain specialization outperforms generalist positioning.
- **Buyer behavior continues to redistribute spend.** Analytics-side budgets keep expanding while research-side budgets stay constrained, with corresponding implications for which suppliers grow, which contract, and which are quietly delisted. Insights operations becomes a more formal buyer-side function, and suppliers that integrate cleanly with it gain a structural advantage. Even early-form agentic procurement raises the stakes on machine-readable reputation, content, and capability descriptions.





- **Supplier strategies trifurcate.** Scaled platforms with integrated capabilities, defensible data substrate, and demonstrated AI integration extend their lead. Mid-market firms that resolve the operating-model question converge toward the 101–500 FTE “investment-grade” profile visible in

the 2026 data. Elite boutiques double down on principal-led expertise, partnered infrastructure, and client intimacy. The undifferentiated middle faces margin pressure, consolidation, or wind-down.

STRATEGIC IMPERATIVES FOR SUPPLIER LEADERSHIP AND INVESTORS [PERSPECTIVE]

For supplier leadership

- **Pick a control point and resource it.** Trust infrastructure, decision orchestration, verified data, vertical depth, and activation are where durable margin lives; pursuing all in parallel under-funds each.
- **Make AI claims defensible.** Pair every capability statement with measurable governance, validation, and outcome evidence, and move AI policy from informal practice to documented policy with clear ownership.
- **Treat governance as a commercial asset.** The 2026 data suggests buyers will reward credible governance with trust and budget, and penalize its absence. Lead with it in pursuits, collateral, and onboarding.
- **Clarify the operating-model story externally.** Large suppliers in particular need a clear, frequently repeated narrative about what labor-intensive execution is being retired and what is replacing it.
- **Decide your structural endpoint within roughly 12 months.** Mid-market firms should arrive at a deliberate answer to scale, specialize, or partner, and execute against it.

For investors and acquirers

- **Underwrite control points, not categories.** Evaluate targets by what they structurally control like data substrate, workflow embedding, governance, vertical depth, and activation not by whether they call themselves “tech-led” or “full-service.”
- **Diligence AI claims as hypotheses.** Test for integration depth, governance maturity, data ownership, and incremental margin contribution; discount targets where AI is a marketing layer rather than an operating layer.
- **Re-base scoring frameworks.** Efficiency, gross profit per employee, AI integration depth, governance posture, retention, and outcome orientation are stronger signals of durable quality than headcount, scale, or category labels.
- **Consider non-control structures** in the 21–100 FTE capability-building segment, where structured equity and partnership arrangements may outperform control transactions on a risk-adjusted basis.
- **Watch the 101–500 FTE service-led segment closely.** It is the cleanest pool of platform-grade and platform-plus-capability targets in the market today and will not stay underpriced indefinitely.
- **Stress-test buyer-side concentration risk.** Expanding analytics budgets alongside softening supplier revenue point to rising concentration; boards should understand whether they are inadvertently reducing strategic optionality.





CONCLUSION [PERSPECTIVE]

The 2026 GRIT IP Report data describes an industry that has stopped debating whether it is being transformed and started revealing how. Tech-led suppliers are retrenching toward defensible infrastructure. The 101–500 FTE service-led segment has built the most coherent operating profile in the supplier landscape. The largest service-led suppliers are working through a managed transition that will define their next five years. Smaller specialists carry real expertise but face infrastructure constraints. Brand-side analytics is expanding into a more commercially proximate, technology-rich, governance-aware function, while brand-side research is being asked to redefine its leadership claim around judgment, governance, synthesis, and activation rather than execution.

Capital will follow this reclassification. **The premium will continue to attach to companies that own a clear control point:** trust infrastructure, verified data, workflow embedding, governance, decision activation, vertical depth and that can demonstrate the operating model behind their AI claims. The discount will apply to undifferentiated execution, generic AI positioning, and firms that have not yet resolved the operating-model question.

The next 12–18 months will reveal which firms become the next platforms, which become acquisition targets, and which are quietly routed out of the value chain. For supplier C-suites, the decisions made on technology investment, governance posture, M&A positioning, and operating-model clarity over the next two to four quarters will shape the trajectory through 2027–2028. The question is no longer whether to transform; it is whether you lead your transformation or have it led for you.

DATA SOURCES AND CAVEAT

- GRIT 2026 Insights Practice Report (Greenbook), including the *Managing Insights*, *Investing in Insights*, *Governance & Risks*, *Mood & Confidence*, *Selection Criteria*, *Business Outlook*, *Evolving Supplier Landscape*, and *Methods* sections.
- Senior Insights Leader synthesis and section analyses developed alongside the 2026 GRIT release.
- Cross-source synthesis of related 2026 industry reporting where directionally consistent with the GRIT data.
- Direct experience of Gen2 Advisors and Oaklins DeSilva+Phillips teams across transactions, capability assessments, valuation work, and strategic engagements in insights, analytics, marketing technology, and adjacent information services.

This commentary represents a synthesis of the 2026 GRIT data and the perspective of experienced advisors. It is not investment advice, and we are not investment professionals in the regulated sense. Individual company circumstances will vary materially. Projections and directional language are estimates based on current conditions and are subject to change with macroeconomic, regulatory, technological, and competitive developments. Readers should treat the views expressed here as a starting point for diligence and strategic dialogue, not as a substitute for them.





INDUSTRY BUZZ TOPICS

Each year, GRIT asks insights professionals which topics they follow most closely and why to identify which topics have the most “buzz.”

WHAT HAS THE INSIGHTS INDUSTRY BUZZING? [ORIENTATION]

In an effort to identify the key and emerging topics that have the insights industry “buzzing,” we ask GRIT participants to name the topics they follow closely and why they follow them. Some skip the question, some give terse responses, some write more in-depth answers, and some have AI author a lengthy bloviation

on their behalf that seems to mean something unless you pay attention to it. The latter is like being served a gallon of water when you ask for a shot of espresso.

Although independently derived, on the surface, this year’s major themes look a lot like last year’s major themes: AI (2026) versus AI & Machine Learning (2025); Data & Analytics versus Data Analytics & Data Science; Consumer & Market Insights versus Brand, Marketing, and Customer Insights; and Methods versus Research Methods & Tools. One of 2026’s major themes aligns with one of 2025’s “minor chords:” Specific Verticals versus Industry-Specific Topics. The last major theme this year, Synthetic Data & Personas, was just a gleam in 2025’s eye.

One major theme from 2025, Data Quality & Integrity, is a minor chord this year, Data Quality & Fraud (although it still resonates loudly with smaller service-led suppliers). In all probability, data quality hasn’t become less of a crisis, but has become something you encounter rather than a topic you pursue. With respect to buzz topics, we suspect some of the most familiar topics are taken for granted.

HOW TO READ THIS SECTION

- **Tags; For a purely data focused summary, prioritize the [DATA] subsections.**
 - **[ORIENTATION]** = how to pay attention to this topic
 - **[DATA]** = GRIT survey results
 - **[PERSPECTIVE]** = interpretation or opinion
 - **[STRATEGIC INTERPRETATION]** = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples: 26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor’s note:** or **Editor’s POV:** and signed “**L.M., ed.**” are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

2026 BUZZ TOPICS

MAJOR THEMES	MINOR CHORDS
AI	Data quality & fraud
Data & analytics	Industry & workforce trends
Consumer & market insights	Privacy/regulation/governance
Methods	Behavioral & social science
Synthetic data & personas	Marketing measurement
Specific verticals	

Source: GRIT Report and NewtonX



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At the “major theme” level, none of these may seem particularly “buzzy,” but the bee stings in the details. For example, in 2024, the queen bee of AI was “what can I use it for?” Last year, the AI buzz proliferated into sub-themes like AI Integration, AI-driven Research & Insights Capabilities, AI-driven Automation & Efficiency, Generative AI & Synthetic Data, and AI & Data Privacy. In 2026, the AI discussion has differentiated further even as it has become more “baked into” other themes.

GRIT coded the verbatim comments according to the themes we identified and calculated percentages of GRIT participants who mentioned them. Some version of the “AI” theme was mentioned by a majority of every GRIT segment except for brand-side analytics professionals (45%) and service-led suppliers with 500+ FTE (38%). However, it’s the most frequent theme in every segment. We hypothesize AI is in the minority in these two segments because they take it for granted; we’ll get into that later in this section and throughout this report.

TOP THREE BUZZ TOPIC THEMES: GRIT SEGMENT

	Brand: Research	Brand: Analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
AI	54%	45%	54%	54%	53%	55%	38%
Consumer & market insights	15%	20%	8%	14%	3%	22%	26%
Methods	15%	7%	9%	21%	23%	16%	16%
Synthetic data & personas	14%	5%	25%	11%	15%	28%	9%
Data & analytics	11%	30%	29%	15%	19%	21%	28%
Data quality & fraud	2%	2%	12%	21%	17%	3%	5%
n =	101	121	20	70	31	19	19

Green shading indicates top three areas led by segment.

Takeaway: AI is the leading buzz topic in each segment, although only mentioned by minorities among brand-side analytics professionals (45%) and service-led suppliers with 500+ FTE (38%).

Source: GRIT Report and NewtonX

AI remains the dominant topic, but the meaningful change is that the conversation has become more operational, more granular, and more tied to governance, workflow, synthetic data, and professional identity. The industry is no longer asking only what AI is; it is asking which forms of AI belong in which parts of the work, under which rules, and with what consequences.

– LM, ed.

We’ll discuss each of these themes in more detail, mostly by letting our GRIT participants do the talking. As we have in the past, we often include the whole verbatim, not just the part that applies to the topic in question. There may be something to gain from seeing one topic in the context of all the topics GRIT participants follow.

After we detail these themes, we’ll recap them by looking at their distributions by GRIT segment.





AI [DATA]

Two years ago, the AI buzz in the 2024 *GRIT Insights Practice Report* centered around the debate: “what can (or should) I use AI for?” In the last year’s report, “AI & Machine Learning” was a much more multi-faceted topic, breaking down into “AI Integration,” “AI-driven Research & Insights Capabilities,” “AI-driven Automation & Efficiency,” “Generative AI & Synthetic Data,” and “AI & Data Privacy.”

This year, the AI discussion concerns AI tools and platforms plus forms of AI, including generative and agentic AI. “AI” continues to be a general topic unto itself, but we’ll discuss it via four sub-topics: “AI Impact on Industries & Workflow,” “Wariness About AI,” “AI & the Research Process,” and “AI & Analytics.” “AI”

AI | GENERAL [DATA]

In our initial analysis pass, “AI (General)” emerged as one of 11 total major themes and minor chords. The verbatims classified as “AI (General)” tend to treat AI as a broad environmental force impacting industries, workflows, and the profession. The GRIT participant’s relationship to it is often observational or evaluative, such as watching, worrying, or assessing impact. On further review, we’ve broken it down into “AI Impact on Industries & Workflow,” “Wariness About AI,” “AI & the Research Process,” and “AI & Analytics.”

continues to be a fascination and a concern at a high level, but the discussion of it continues to become more granular and nuanced as it spreads.

AI SUB-TOPICS

AI (General)
AI Impact on Industries & Workflow
Wariness About AI
AI & the Research Process
AI & Analytics
Generative AI/LLMs
Agentic AI/Automation
AI Tools & Platforms

Source: GRIT Report and NewtonX

AI Impact on Industries & Workflow

Insights professionals’ value proposition, turning data into actionable knowledge, sits squarely in the path of AI disruption, so maintaining awareness of industry-wide change can reveal professional opportunities as well as uncover existential risks. These GRIT participants track AI at the macro level, including its spread across industries and how it impacts the insights sector in particular. Attention spreads across trends that impact their personal as well as professional lives, within and outside of the insights industry, and the topics they closely follow include:

- “The biggest right now is AI and its progression and adoption across all industries and verticals
- “The changes in how search is conducted moving from Google or specific information websites to AI/chat gpt
- “Technology and AI and their impact/opportunities for the insights industry.
- “Effect of AI on vertical industry spending

Some are especially concerned with its effect on how work gets done, but a few express cautious optimism about AI’s potential to enhance their own project work:

- “AI, pretty obvious where the work is headed
- “Impact of technology and AI on work and organizations
- “The max potential of AI. AI appears to get more and more powerful and useful. I wish to see it helps more on our projects.

Insights professionals’ value proposition, turning data into actionable knowledge, sits squarely in the path of AI disruption.



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One GRIT participant specifically cited *syndicated research and AI-powered solutions*; syndicated research is a delivery format being actively reshaped by AI tooling. As we'll see in *Evolving Supplier Landscape*, syndicated reports are especially important to service-led suppliers with 500+ FTE as most of them (51%) offer these.

Wariness About AI

Even if insights professionals are being actively pressured by clients, employers, and vendors to adopt AI, who will get the blame if things go awry? Some GRIT participants realize it is essential to form a defensible, evidence-based position on when and whether it actually delivers.

These GRIT participants share a skeptical or cautious orientation toward AI, acknowledging its disruptive force while questioning its accuracy, reliability, or appropriate use in research. For some, hope and fear coexist.

- “The obvious answer is AI, of course. How is it disrupting our industry? What promise and/or catastrophe lies ahead?”
- “The introduction of AI has been extremely disruptive. insights/research/analytics are all going through an evolution, which is exciting, and dangerous at the same time.”

Several explicitly call out misinformation, overselling, and the risk of misapplication:

- “I keep my eye on AI but tend to find my own path, too much misinformation and sales pitches”
- “...AI quality and ethics...I'm very skeptical about AI use for research, I think it's being over-used and mis-used, and don't like to implement it in our research solutions.”
- “Everyone follows very closely AI and its role both within the insights, research and analytics function but also in the overall picture of what the future will look like with the presence of AI. How to best implement AI, take advantage of the technology while still keeping accuracy, relevancy of insights and data, critical thinking and human interpretation.”

One participant compares AI to a “rearview mirror, not a front windshield” to illustrate the view that AI synthesizes the past rather than generating genuine foresight.

- “...probably AI more than anything else right now. I've long maintained that AI is a great rearview mirror, but isn't a front windshield. I haven't seen any tool/platform/idea that makes me believe otherwise to date.”

As we've documented in past GRIT reports and as we'll see in *Managing Insights* and *Investing in Insights*, AI's strongest critics also tend to be its most engaged users.

AI & the Research Process

For insights professionals whose daily work involves designing and executing research, understanding where AI can reduce cost or time without compromising quality is an immediate operational concern, not an abstract one. Some GRIT participants mention their interest in how AI is being integrated throughout the research workflow:

- “AI and Conversational Research”
- “AI impact in research sampling and workflows”
- “AI integration into the data collection process.”
- “The development of AI in reporting...”
- “AI and its use in research analysis and conducting research”
- “How AI is helping in market research (simulations, expanding data sets etc)...”
- “AI, data integrations. Seeing how AI can be incorporated to assist current tasks like survey creation, programming, and analysis”

For insights professionals, understanding where AI can reduce cost or time without compromising quality is an immediate operational concern.



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AI & Analytics

AI's use for analytics is top-of-mind for some GRIT participants because it's where the most immediate productivity gains are visible. AI tools can compress tasks such as cleaning data, writing code, and drafting summaries from hours into minutes, so AI has urgent professional relevance for data and analytics work.

- 💬 *Adoption of AI and use of data and analytics*
- 💬 *Leveraging analytical insights into automated processes and enriching it all with AI*
- 💬 *New platforms, AI developments and their possible contributions to modeling, analysis, and reporting.*

- 💬 *Customer insight research trends and AI analytics relating to data research and business intelligence*
- 💬 *I am most interested in AI for 3D understanding*

Some GRIT participants not only look to increase speed and efficiency, but to improve quality, too:

- 💬 *How AI can generate better insights from raw data*
- 💬 *Artificial intelligence has become a huge focal point as we utilize in our ongoing battle of improving quality, speed and efficiency of our analytics we produce.*

AI | GENERATIVE AI/LLMS ^[DATA]

Independently of "AI (General)", "Generative AI/LLMS" emerges as a distinct theme. The distinction is more than semantic, though terminology is part of it. Unlike "AI (General)," the "Generative AI/LLMs" verbatims are more specific and applied. The perspective is less "what does this mean for us?" and more "how do we use this?"

These GRIT participants are monitoring the genAI landscape at a fairly high level:

- 💬 *Use of GenAI*
- 💬 *Impact of generative AI*
- 💬 *Developments in LLM. Automation...*
- 💬 *Natural Language processing. AI prompting and validating, Machine learning changes, data visualization strategies.*

Some GRIT participants are concerned with where and how genAI fits into the research value chain from operations and insight generation to reporting and decision intelligence:

- 💬 *GenAI and its impact on research*
- 💬 *Generative AI applications/replacement, eg, synthetic consumer panels*
- 💬 *Currently I'm most interested in Synthetic Data and using Generative AI in the market research process.*
- 💬 *The role that genAI is playing / will play in research operations, insight generation, and reporting*
- 💬 *Disruptive innovation: how to implement genAI solutions and AI agents in the insight value chain and what specific value they can drive*
- 💬 *AI, traditional, generative and Agentic and emerging tech in the data, analytics, insights area solution build and delivery, service delivery making organization insight drive by providing decision intelligence*



Unlike "AI (General)," the "Generative AI/LLMs" sub-theme is less about "what does this mean for us?" and more "how do we use this?"





A recurring GRIT theme is how insights functions are under constant pressure to do more with less, and some participants monitor how genAI can compress timelines and reduce manual effort in research production. For them, genAI is a productivity lever within existing workflows rather than a transformative or disruptive force.

Enhancing Speed and Quality through the Utilization of Generative AI

- New software solutions more specifically regarding language models and AI to improve speed and streamline processes.*
- I'm currently interested in using genAI to make market research processes more efficient...and would like to learn from others about how they are measuring the ROI of their market research efforts.*
- Low code & no code business analytics solutions. Gen AI for text to SQL. Governance and documentation ai-ready. structured and unstructured data to feed knowledge base*

AI | AGENTIC AI/AUTOMATION [DATA]

In addition to “GenAI and LLMs,” agentic AI is top of mind for insights professionals because it represents the point at which AI stops being a drafting assistant and starts replacing entire workflow segments. As such, it might be considered both the most promising efficiency opportunity and the most direct challenge to how insights teams are staffed and structured.

These GRIT participants focus on AI not just as a tool for individual tasks but as an engine for redesigning how work flows. Several frame it explicitly around efficiency and cost reduction, while others emphasize the strategic repositioning it enables:

- ...Agentic workflows - efficiency play...*
- Using AI to redesign workflows and improve efficiencies*
- Artificial Intelligence and Agentic AI - especially in the data domain*
- ...agentic ai for sharing regular insights*
- Generative AI. Data science. Multi Agentic workflows. Quantum computing*
- Currently it feels like everything is focused on AI and all the different ways it can be used - to aggregate data, to be used as a strategic thought partner, to help automate or streamline manual processes to free up my time on value-added work for my organization. I follow this closely because that's what's being talked about everywhere.*

For some, agentic AI could help them go beyond transforming activities to revolutionizing their entire operation:

- I focus specifically on topics related to the use of AI and agentic models in research processes, with the aim of reducing the time required to obtain reliable results and improving the quality of the resulting reports and insights. Cost reduction through automated processes is another area of significant interest to our company, particularly for optimizing and streamlining our operational structure.*



Agentic AI represents the point at which AI stops being a drafting assistant and starts replacing entire workflow segments.



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AI | AI TOOLS & PLATFORMS ^[DATA]

Those tracking “Agentic AI/Automation” are looking beyond technology evaluation into design and deployment. By contrast, GRIT participants who follow “AI Tools & Platforms” are in evaluation and monitoring mode: they want to know what exists, what’s emerging, and what vendors are offering. One group is watching the market; the other is rebuilding workflows.

- “AI tools for market research.
- “We track AI trends to understand which new tools are being developed to help businesses operate more efficiently
- “The use of AI in research, either as tools to improve internal productivity or efficiency or as products to offer to the marketplace.
- “One stop recruitment and research platforms
- “Specific AI use cases and tools that help with everyday activities; new methodologies or approaches to common questions (e.g., new product development/concept testing)
- “The deep research features of current AI tools has drastically changed the landscape with respect to insights, research, and analytics.
- “AI/ML new tool development and deployment. Advanced marketing and technology scouting. Scientific and engineering new innovation progress.

Some have a particular focus on analytics and reporting s they relate to AI:

- “The capabilities and role of AI in analytics. Developments for insights from data in our stack. Competitive use of analytics tools and AI to improve marketing or business development outcomes.
- “Data analytics tools, AI tool developments, unstructured data collection and analytics, behavioral analytics, to ensure that we as an industry are relevant and deliver value
- “AI usage as a platform or supplemental piece. Trends in terms of deliverables and what people want to digest



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DATA & ANALYTICS [DATA]

After the AI theme with its large cluster of sub-themes, the next most prominent theme (or mega-theme) is “Data & Analytics.” It encompasses three sub-themes: “Analytics Tools/Platforms/BI,” “Insight Activation/Storytelling,” and “Data Visualization & Reporting.”

DATA & ANALYTICS SUB-TOPICS

Analytics tools/platforms/BI
Insight activation/storytelling
Data visualization & reporting

Source: GRIT Report and NewtonX

DATA & ANALYTICS | ANALYTICS TOOLS/PLATFORMS/BI [DATA]

Some GRIT participants are following the vendor and product landscape for analytics. Their orientation is evaluative and practical, and some seek to stay current on software updates and new tool launches.

- IT, Web, AI, data
- Technology, platforms and tools to help with analytics
- Data management, cloud systems, business intelligence tools
- Software updates for the tools I currently use for data analysis and reporting to ensure I am taking advantage of the full platform / tool offer.

Other GRIT participants are more likely to focus on what they *do* with data; which analytical techniques, models, and processes they apply in their work:

- Text-based analysis. Most relevant to the proprietary data we have access to.
- Research and Development analytics, research pipeline
- New technology, machine learning, predictive analytics, artificial intelligence
- Quant models, Sector and company research, bloomberg tools
- Bloomberg analytics mainly for fixed income instruments.
- I follow all the topics as we provide data processing services such as Data validation, Data cleaning, cross tabulation, Automation, and software development.

Some specifically mention topics related more directly to business impact:

- ...forecasting and revenue analytics...
- We use big data to make decisions weekly on our business to help improve Results
- Evaluation, performance and quality measurement, predictive analytics, visual presentation of data and results.
- Customer Analytics, KYC data, Underwriting E2E process data, Claim E2E process
- Customer and revenue analytics, product usage and experimentation, and AI-augmented decisioning, primarily because they sit at the intersection of business impact, data architecture, and automation initiatives.

“Customer analytics, product usage, and AI-augmented decisioning sit at the intersection of business impact and automation initiatives.”





Data and analytics strategy is another top-of-mind sub-topic. These GRIT participants frame analytics in terms of organizational impact, architecture, governance, and business outcomes; for them, analytics is a capability to be built and sustained, not just a set of tools or techniques to be applied.

“Data integration; impact of AI on insights; analytics and data science

“I follow enterprise data analytics and AI driven data insights for data driven decision making

“Feedback management, CX value analyses, speech analytics

“External data acquisition, governance and leveraging as part of analytical use cases

“We are mostly concerned about data insight and analytics in Energy, smart city and eGovernance domain

“Information Management for the Department as that’s one of the major topics I’ve been told to work on.

DATA & ANALYTICS | INSIGHT ACTIVATION/STORYTELLING ^[DATA]

Another data and analytics sub-topic, “Insight Activation/Storytelling,” is top of mind for insights professionals because methodological rigor means little if findings don’t reach or move decision-makers. As we see in past *GRIT Reports*, most recently in the *2025 Business & Innovation Report’s Unmet Needs*, bridging the gap between generating meaningful results and having stakeholders recognize, understand, and act on them is a major pain point, as

well as a risk to the survival of insights and research groups. Some are tuned in to changing the status quo:

“New ways of delivering insights. We need to be more innovative.

“Strategic storytelling, AI-augmented research and insights

“Drilling down to short, concise, actionable insights - no fluff; I’m so over AI topics

“Insight Leadership. Transforming insight within a Corporate enterprise. Building the Insight brand.

Some GRIT participants explicitly frame this as a leadership and culture challenge rather than a technical one, and several note the gap they need to bridge:

“Innovation in how we run Insight capture and enable the learnings from it into our key strategic decisions meeting best practice standards.

“Looking for info on how to best connect insights to the c-suite. NOT looking for more blah blah about ai.

“I closely follow topics related to internal communication and audience behavior analysis. I am interested in understanding how data helps reveal which messages resonate best with people, which channels are most effective, and how engagement and participation can be improved.

“We work mostly with CX needs, therefore insights related to CX, especially how to make insights relevant and actionable, how to appeal to business decision-maker to make the insights stories resonate and drive them to take action based on them.

Insight Activation/Storytelling is top of mind because methodological rigor means little if findings don’t reach or move decision-makers.



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The tension around failure to communicate is palpable, including the need to justify research investment, having a business impact, and aligning stakeholder priorities with investment in credible insight work:

- ” I focus on processes, prioritization and measuring the success. Research needs to deliver to be sustainable in an organization.
- ” I follow applied analytics and AI-driven insights most closely, particularly how data is used to improve decision-making and operational efficiency.

I am especially interested in practical research that connects analysis to real-world outcomes rather than purely theoretical models.

- ” AI impacts of course, but more importantly, trying to understand and correct the underlying reasons why executive managements are again, like with the “Big Data” and “Metaverse” hypemobiles, working so hard to NOT use real, human centric research insights in driving their business.

DATA & ANALYTICS | DATA VISUALIZATION & REPORTING ^[DATA]

The sub-topic, “Data Visualization & Reporting,” addresses a key mechanism to ensure the success of “Insight Activation/Storytelling.” The explosion of data sources and AI-generated analysis has created a parallel challenge of comprehension and communication, and insights professionals are under pressure to deliver findings faster and in formats that busy, non-technical stakeholders can and will actually use.

These GRIT participants are concerned with how data gets transformed into insights, and how insights are converted into effective and actionable communications. Comments include *Data visualization strategies, Data reporting and visualization, and visual presentation of data and results*. Some elaborate further:

- ” Visualisations for metrics, and also data quality reporting. Analytics for quality and efficiency
- ” Research planning: ensuring top quality insights from the very start planning phase. Analysis: translating data into actions. Reporting: effective ways to communicate insights to different audiences
- ” ...how data can help businesses work better. This includes things like how companies keep their information clean and accurate, how they automate manual tasks, and how they use reports or dashboards to make smarter decisions. I like these topics because they show how good data can save time, reduce mistakes, and help teams work more smoothly.

Often, their interest includes AI's and automation's impact on that process. Dashboarding, auto-generated reports, no-code visualization tools, and AI-enabled reporting are recurring themes.

- ” All about IA and how to automate reports
- ” Report AI enablement
- ” No code or low code solution for generating dashboard. ability to handle big data. AI
- ” Digital twin surveys (super interesting potential); AI-based auto dashboards/insights

Dashboarding, auto-generated reports, no-code visualization tools, and AI-enabled reporting are recurring themes.





One participant frames AI-enhanced visualization explicitly as a democratization opportunity:

“How AI can facilitate, automate, and democratize the use of information within organizations. What are the best tools for data visualization?”

CONSUMER & MARKET INSIGHTS [DATA]

In our initial analysis pass, “Consumer & Market Insights” was identified as a major theme. It’s a broad and varied topic, so we’ll discuss it as

three sub-topics: “Consumer Behavior & Trends,” “Market & Competitive Intelligence,” and “Brand & Product Research.”

CONSUMER BEHAVIOR & TRENDS [DATA]

It’s no surprise that consumer behavior is top of mind for GRIT participants because each GRIT segment ranks CPG high on its list of markets served. Their interest is expressed as fundamentally observational and anticipatory: what are consumers doing, why are they doing it, and where are they headed?

Some mention research methodologies or approaches as they relate to consumers:

- “Attribution modeling and consumer trends
- “People analytics, consumer behavior analytics, performance metrics
- “Consumer trends and shifting behaviour. consumer survey methodologies
- “Packaging research, shopper research, advertising research, behavioral research. Because that’s what we do

Some comments reflect a foresight orientation:

- “Consumer insights, shift in category purchase drivers or consumer drivers of product liking, category future foresight
- “Look a lot at the future of the next generation and key consumer trends and responses
- “Talk with youth data and automatic insights
- “I follow advances in predictive insight frameworks that link consumer research to real marketplace outcomes. It will be interesting to see retail and platform data integration correlate research metrics with performance signals of retailers like amazon and walmart. I’m also watching how the industry is evolving beyond validation, towards risk quantification.



Their interest is fundamentally: what are consumers doing, why are they doing it, and where are they headed?

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Other participants pay attention to more general consumer-related trends:

- “New ingredients, health consumer trends
- “Consumer buying power; shopper megatrends when it comes to food/beverage
- “Macro trends in media buying, customer behavior, stock market performance, new tool launches, and insurance industry consolidation

“Since, in addition to my work as a marketer, I am also a PhD candidate in Neuromarketing, I am deeply interested in the data and information on how customers (individuals and legal entities) make decisions and the factors that initiate decision-making.

MARKET & COMPETITIVE INTELLIGENCE [DATA]

Some GRIT participants are curious about the context surrounding the consumer, such as markets, competitors, and industry structure, rather than solely about the consumers. The “Market & Competitive Intelligence” perspective is strategic and surveillance-oriented:

- “Competitive Intelligence
- “Competitive research, product research, consumer analytics, demand forecasting and analytics
- “Marketing trends. Competitors performance. Industry performance. Population interests

- “Industry benchmarks, consumer behavior indexes, competitor results
- “In general, we do research on market trends, who the competitors are in each industry, where to invest, and things like that.
- “Mostly we deal with demand and supply of FMCG through consumer perspective to get some best things for business externally and do the same to get best tools internally for us

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BRAND & PRODUCT RESEARCH [DATA]

Some GRIT participants closely follow consumer insights for brand and product decisions. The work is applied and evaluative: research here is a means to a commercial end rather than knowledge generation for its own sake. Some mention brand and product in conjunction with each other:

- “Product and Brand strategy
- Innovation. Brand and comms research
- We track Brand KPIs and run qualitative research on our product perception in Europe.

Some briefly mention their brand interests without elaboration, such as *brand related topics* and *COMPREHENSIVE BRANDING*. Product-related comments are sometimes more detailed:

- “Opportunity assessment and product development
- We usually conduct product testing to assess and validate new initiatives starting from consumers’ needs
- AI in research, strategy, marketing and product domain knowledge, foresight and trends
- We focus on the intersection of cultural insights, brand strategy, and changing human priorities.
- I conduct further research into user acquisition and habits, as well as how they utilize new technologies and the ease with which they might adapt to new digital and consumption habits.

METHODS [DATA]

“Methods” is another major theme that is best taken by sub-topic. These are “Mixed/Emerging Methods,” “Quantitative Methods,” and “Qualitative Methods.” In past waves, it was more common for specific methodologies to emerge in GRIT participants’ verbatim comments, but in recent years there doesn’t seem to be as much consensus around specific “hot” methodologies.

Possibly, this is because there has been more of a leveling: knowledge has become more available, and automation has enabled more access to specific methods. There may be less of a need to follow a specific, trending method because the learning and adoption curves are lower, so the emphasis is on scanning across methods. This year, synthetic data may be the exception because the learning curve for it is still steep.

METHODS SUB-TOPICS

Mixed/emerging methods
Quantitative methods
Qualitative methods

Source: GRIT Report and NewtonX



In the past, it was common for specific methodologies to emerge, but recently there’s not as much consensus around “hot” methodologies.



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METHODS | MIXED/EMERGING METHODS ^[DATA]

Well-known factors such as the spread of AI capability, declining respondent participation, and client demand for faster and cheaper research simultaneously threatens established methods and opens space for new ones. Consequently, GRIT participants might consider methodological awareness a matter of professional survival as much as intellectual curiosity.

They pay attention the evolution of how research gets done considering new methodologies, emerging approaches, and the integration of technology into research design and execution. Much of the interest is stated in broad terms:

- Methodological improvements
- The latest methodologies, technology and innovation.
- Market research, consumer rights, and the qualitative and quantitative advancement of new methods...
- Industry trends, new tools and methodologies, information on privacy laws impacting research, continuing education
- I follow trends in how AI is impacting my industry. And, also new tools and approaches for how to think about exploratory, insight research

Other GRIT participants mention specific methods or approaches:

- New research methodologies, in particular for working across languages using AI. Whole new worlds are opening in the field. Also, new analysis tools that leverage technology.
- Survey methodology, public opinion research methods, AI in research
- Methodology and participant continuance as we have seen an industry-wide decline in the numbers of people willing to participate.

A couple specifically mention hybridizing qual and quant research:

- We are especially focused on research segmented by key demographics, and the role of AI in making qualitative research quantitative
- I pay close attention to how qualitative and quantitative data are combined, I'm skeptical of research that relies solely on dashboards without interpretation



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METHODS | QUANTITATIVE METHODS ^[DATA]

Much of this *Insights Practice Report* deals with quantitative methodologies, and GRIT participants noted their interest in them before we presented any of those questions.

- 💬 *Consumer survey methodologies*
- 💬 *Customer surveys, revenue management, network planning*
- 💬 *Advanced analysis methods (MaxDiff, conjoint, etc.)*
- 💬 *Psychometric studies, Consumer Journey Analysis, CLV/NPS tracking*
- 💬 *Survey analyses, particularly conjoint and MaxDiff because I use them most often. Also keeping an eye on AI and if / how / when it might be able to reliably replicate human panels*

Some specifically follow how AI might be influencing quantitative methods:

- 💬 *New research technologies, AI-enabled research and analysis, especially quantitative surveys.*
- 💬 *The application of AI and how to best adapt practically to Research generation and analysis, as well as the vitality and health of the survey research industry itself*

METHODS | QUALITATIVE METHODS ^[DATA]

This *Insights Practice Report* deals with qualitative methodologies, and, again, GRIT participants noted their interest in them before we presented any of those questions.

- 💬 *Qualitative research and cultural insight*
- 💬 *Online qualitative research platforms. Online Qualitative Research. Content Analysis. Qualitative content analysis. DIY research. Consumer Insights (on end-client side). Transcription/ translation/ language localisation. Text analysis.*

- 💬 *Qualitative, AI, neuroscience, semiotics, BE*
- 💬 *Lately I've been interested in new ways for quickly analyzing and summarizing qualitative data and best practices for recruiting B2B research participants. I work for an enterprise SaaS company, a lot of the work I've been doing recently has involved qualitative interviews for product discovery or UX research, and analysis of qualitative data still takes longer than I'd like it to...*

Some specifically refer to how AI impacts qualitative research:

- 💬 *Qualitative research and AI.*
- 💬 *... AI-led qual at scale, agentic AI*
- 💬 *Qualitative methods, AI, academic qualitative research*
- 💬 *How to ensure qual has the future it deserves in this fast-changing AI-fueled reality. clients want everything, immediately, and for free if possible - but qual = human = time- and resource-consuming*
- 💬 *ResTech, AI for qualitative data analysis, Evolution of qual research methodology, synthetic respondents/data, AI moderation*



"How to ensure qual has the future it deserves in this fast-changing AI-fueled reality."





SYNTHETIC DATA & PERSONAS [DATA]

Recent *GRIT Reports* have shown synthetic data gaining trial and acceptance, and, later in this report, we'll see that it is practically mainstream (see *Data and Analytics*). Some GRIT participants seem to be following it because it's disruptive, or at least a hot topic:

- 💬 *Use of AI, synthetic data seem to be filling my inbox these days*
- 💬 *...synthetic data and digital twins because adoption growing...*
- 💬 *Digital twin surveys (super interesting potential); AI-based auto dashboards/insights*
- 💬 *The disruption of AI in our space - everything from AI-powered analysis to synthetic data sources.*
- 💬 *Generative AI applications/replacement, eg, synthetic consumer panels*

Others mention synthetic data in tandem with organizational impact, but don't necessarily link them directly, although they may be parts of the same package:

- 💬 *AI and its impact on the insights industry, everything from social listening tools to synthetic respondents. Also following ways to make insights land more deeply with an organizations and develop true advocates.*
- 💬 *AI, operational efficiency, automation, synthetic respondents, insights mining, etc.*
- 💬 *Currently I'm most interested in Synthetic Data and using Generative AI in the market research process. I also am watching to see how other internal market research departments measure ROI.*

SPECIFIC VERTICALS [DATA]

For many of these GRIT participants, their insights work depends on deep domain knowledge, making industry-specific trends, regulations, and developments as essential to follow as any research methodology or tool. Healthcare and pharma are the most frequently mentioned, followed by financial services, CPG, energy, and media. The remainder scatter across education, entertainment, agriculture, audio technology, government, and highly specialized niches. Often, these are expressed as a single word or phrase without elaboration.

Comments related to healthcare and pharma are more varied than others, possibly because there are more of them. They include general industry tracking, specific industry topics, and research as it relates to healthcare and pharma.

- 💬 *Healthcare trends and analysis, analysis and research on growth in the pharma industry, new drugs and Value Based Care.*
- 💬 *Healthcare and consumer technology trends. Professionals (e.g. physicans) and consumer behaviors.*
- 💬 *Following proteomics and genomics as we are proposing these services in analytics*
- 💬 *... public - private collaborations for public data usage in healthcare research.*
- 💬 *I track trends in pharmaceutical marketing, prescribing behaviors, and patient engagement because they directly impact outcomes, market strategy, and innovation in treatments*
- 💬 *Latest developments in cancer research, research in neglected tropical diseases, how AI is being used to enhance scientific research; insights, precision, decisions.*



Healthcare and pharma are the most frequently mentioned, followed by financial services, CPG, energy, and media.





Of course, CPG is a popular vertical to follow as it is one of the most common markets served by each GRIT segment:

- 💬 *Email marketing trends with CPG*
- 💬 *We watch consumer products and medical products closely*
- 💬 *I follow customer and consumer spend and sentiments around the economy or certain spend patterns when it comes to specific business or verticals.*

- 💬 *We closely follow CPG Insights and research because it is one of the most dynamic and data driven sectors....[much more AI-generated text]... CPG research also provides actionable insights across categories like food & beverage, personal care, and household products, making it highly relevant for strategy, product development, and competitive positioning.*

DATA QUALITY & FRAUD [DATA]

“Data Quality & Fraud” is a “minor chord” for most GRIT segments, but becomes a more substantial concern among service-led suppliers with 100 or fewer FTE. Possibly, smaller service-led firms mention it more because they have fewer resources with which to manage it, so the problem is more acute.

Or, possibly, the brand-side, tech-led, and large supplier obsession with AI and other themes pushes data quality and fraud under their threshold to mention it. It could also be they perceive the causes and solutions for data quality and fraud to be inextricably bound up with AI, and these segments follow data quality and fraud as it relates to AI rather than as a purely independent topic.

Unlike most other topics, data quality and fraud clearly resonates emotionally, and GRIT participants who mention it tend to seem more alarmed and indignant than when mentioning other topics they follow:

- 💬 *The usage and impact of AI and stopping fraudulent responses*
- 💬 *AI and fraud in data collection - relate most closely to my role and i see the most outsized fear/hype*
- 💬 *AI and panel fraud, because for the former is the future and the latter outrages me in a professional sense.*
- 💬 *the impact of synthetic data for quant, how both clients and suppliers are doing such lazy, poor research*
- 💬 *I want to stop being a solo-entrepreneur and return to large corporate life as a Chief Analytics Officer. I am horrified at the magnitude of job loss and the elimination of entire Research departments in corporate America. I am very interested in finding solutions to data fraud. I am (and hopefully all of us) are attempting to stay current on new tools, like AI, that should extend our capability not replace us.*



Unlike most other topics, Data Quality and Fraud clearly resonates emotionally, eliciting alarm and indignation.



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GRIT is disappointed that no one mentioned GRIT's pet peeve: industry-on-industry crime in which insights professionals commit survey fraud. We concluded the last sub-section with an excerpt from an AI-generated quote simply to express our disgust at this practice from people who should know better.

We understand when people dictate a long audio comment that gets transcribed, but what do they gain from supplying an AI-generated quote instead of simply skipping the question? They risk having their entire survey tossed out, but what do they gain? We've said it before and we'll repeat it now: we want to hear what you have to say how you want to say it; we don't want to hear an LLM's approximation of what you might say if you could speak for yourself. We deeply appreciate the contributions from people who speak out in their own words. Your true voices add a lot to our deliverable.

Some comments are more matter-of-fact about data quality and fraud, but still with gravitas:

- 💬 *Data quality because we are implementing new tools and practices to keep up/get fraud out in new ways*
- 💬 *Data quality among panelists and participants - I primarily work in recruitment/data collection so this is a pertinent subject to the success of my role and career.*
- 💬 *Respondent Engagement. Incentives. Panel Management. Synthetic Data. Fraud Prevention*
- 💬 *Respondent quality initiatives because it's a well-known issue. Using AI to support research and analytics*

INDUSTRY & WORKFORCE TRENDS ^[DATA]

"Industry & Workforce Trends" is another "minor chord," although it also echoes in some major themes. This is another of the more personally-charged themes as participants track what is happening to their profession, their teams, and their own job

security in real time. Some follow employment trends, especially as they relate to AI:

- 💬 *News and trends related to employment in the research industry*
- 💬 *Impact of AI on jobs and hiring - who's going to be working with me a year from now?*
- 💬 *The topic I follow most closely right now is AI because my company is trying to leverage it as much as possible, not so much to improve our insights, but to replace employees*

In addition to general concern about employment, some GRIT participants comment about the impact on their work:

- 💬 *Corp-wide cuts have affected research and insight teams the most. Not enough labor to conduct all the necessary surveys and research*
- 💬 *Industry lay-offs; affects the whole industry globally. Balance of human-led insights/consultation with AI-led support; we are an agency that does both, while tech-led our people expertise is what we're known for*

Industry & Workforce Trends is another of the more personally-charged themes - what is happening to their profession, their teams, and their own jobs.



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Also, some are more engaged with the what the AI-employment dynamic will mean for the skills they need to have on staff and how the workflow will evolve:

- 💬 *The role of insights within the organization; The role of AI and its place within the insights organization; The role of consulting and influencing; The level and types of training afforded to insights professionals; Employment trends in insights.*
- 💬 *The impact of AI on the identification and sharing of insights; the evolving need for analytics (and more technical) skills on an insights team; the role of insights in sharing and informing key business decisions*

- 💬 *Use of AI in market research as it is having a huge impact on the industry. Capability building for insights teams, as I believe there is less internal coaching from managers than there used to be. Evolution of the Insights function, as I believe it is disappearing or being merged with other functions in some organizations*

PRIVACY/REGULATION/GOVERNANCE [DATA]

“Privacy/Regulation/Governance” is a minor chord coming from GRIT participants who are concerned with the tightening global data privacy landscape and salient security risks.

- 💬 *Cybersecurity*
- 💬 *AI, data privacy, new tools and techniques (other than AI), helpful case studies*
- 💬 *I follow regulatory landscape which is constantly changing...*
- 💬 *I mostly follow topics that explain how data can help businesses work better....I also keep an eye on areas like risk, performance, and regulations—basically anything that affects how a business operates safely and efficiently.*

Several connect regulation directly to research practice and research subject matter. Some of the concerns are likely driven by an interest in a particular vertical:

- 💬 *Industry trends, new tools and methodologies, information on privacy laws impacting research, continuing education*
- 💬 *Government oversight and regulation - critical to my client...*
- 💬 *...I closely track European cosmetic regulations, including evolving guidelines on safety and sustainability, as well as new ingredient restrictions, as these factors directly influence both formulation design and product development strategy.*
- 💬 *We follow regulatory guidelines very closely because we conduct a large amount of research with regulated products such as tobacco, OTP, alcohol, and various gambling products. We are also very active with political projects and follow elections very closely.*

“I keep an eye on areas like risk, performance, and regulations — anything that affects how a business operates safely and efficiently.”





BEHAVIORAL & SOCIAL SCIENCE [DATA]

Another minor chord with echoes in broader themes such as “Methods,” “Behavioral & Social Science” represents a different tone from some other topics. These GRIT participants express less manifest anxiety about AI and disruption and more intellectual curiosity:

- 💬 *Topics on human interaction and culture*
- 💬 *Psychological topics, because I can relate with most of them*
- 💬 *Behavioural science, environment, climate change, public policy, public engagement in science*
- 💬 *Everything related to cultural studies, AI, market strategies, and commercial support.*
- 💬 *Human-centered and patient-centered insights. Emotions and mindsets insights...*

One GRIT participant explicitly positions their interest in behavioral science against the industry's current AI preoccupation:

- 💬 *I follow AI-related updates and changes because this is the conversation the industry is having. It's almost impossible not to follow this because most research conversations are focused here right now (though I wish they weren't). I also follow research ops conversations, the inclusion of behavioral science within the world of insights, and participatory design methodologies. I follow these because they are personally more interesting than AI-based conversations and lead to the kinds of insights I want to see the industry lean into more heavily.*

MARKETING MEASUREMENT [DATA]

“Marketing Measurement” is another distinct topic attracting attention from some GRIT participants. Although one of the less-developed topics, the core concern is clearly to prove and optimize marketing impact in ways that connect back to business outcomes and budget decisions. It echoes concerns

we heard in the last *Business & Innovation Report* and earlier under “Insight Activation/Storytelling:” to strengthen respect for research in these uncertain times, researchers need to proactively demonstrate the connection between their activities and real-world business benefits.

- 💬 *Marketing sciences topics*
- 💬 *Insights and analytics as they guide optimizing spend and getting positive ROAS*
- 💬 *Media measurement. Advertising Effectiveness. Primary research. Social Analytics*
- 💬 *I follow marketing measurement, consumer insights, and advanced analytics most closely because they directly inform how brands allocate budgets, optimize performance, and connect insight to commercial outcomes.*
- 💬 *I mainly focus on marketing measurement & attribution (MMM, incrementality), customer & audience intelligence (CLV, retention, cohorts), and omnichannel journey analytics, because these areas are critical for understanding true marketing impact and driving sustainable growth...*

The concern is clearly to prove and optimize marketing impact in ways that connect back to business outcomes and budget decisions.



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BUZZ TOPICS | BRAND POV ^[DATA]

Now that we've fleshed out the six major themes and five "minor chords," let's recap by looking at them by GRIT segment. Because we can't force everyone to tell us "which topics you follow most closely and why," the n's are smaller than they will be in other sections. These results are based on codings of the verbatim responses vis-à-vis the themes and represent percentages of GRIT participants who provided an answer, not the percentage of all responses. The themes were derived across all GRIT responses, not segment-by-segment.

Perhaps surprisingly, brand-side researchers (54%) are more likely to say they follow AI than those in analytics (45%). Still, it's the top theme for both segments, and it's very possible analytics professionals don't specifically mention "AI" because they are more likely to take it for granted. In later sections, we'll see the analytics segment is more engaged with AI, but they also seem to be more wary of it.

The analytics segment is slightly more likely to mention "Consumer & Market Insights" (20% to 15%). In *Scope of Insights Impact*, we'll see that more than 85% in each segment contribute to "consumer market insights," but researchers are much more likely to lead it (62% to 36%). Again, it is possible the more engaged segment is more likely to take it for granted when asked which topics they follow closely.

The same could be true for "Methods" and "Synthetic Data & Personas," which are mentioned less frequently in the analytics segment. As we'll see later, analytics professionals tend to use more methods and are farther up the curve with synthetic data. Possibly, for them, curiosity may be satiated via their own exploration through use rather than as something they "follow."

Another way to look at it: emerging methods and synthetic data may be more disruptive for researchers than for those in analytics, and they may also be more foreign to their usual workflow. Consequently, researchers may make more of a conscious effort to follow them while the analytics professionals' experience may seem less like "following" them than like "encountering" them.

The last two major themes, "Data & Analytics" and "Specific Verticals," seem to be intuitively aligned with analytics professionals, even though we've just suggested that GRIT participants may overlook the familiar when asked for topics they follow closely. Analytics professionals are more likely to mention "Data & Analytics" (30%) than researchers (11%), possibly because what's happening with data and analytics is potentially just as disruptive to analytics professionals as synthetic data and methods trends may be for researchers. For them, this topic may require more deliberate effort to keep on top of it.

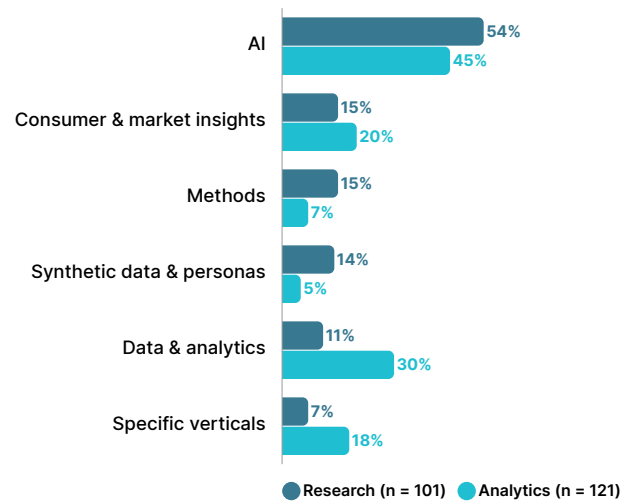
As for "Specific Verticals," it's not a stretch to accept that analytics professionals have more incentive to constantly monitor their industries for emerging trends. For example, in *Scope of Insights Impact*, we'll see that most analytics professionals say insights staff lead business intelligence and reporting (51%) but only 29% of researchers make the same claim.

Analytics professionals tend to be farther up the curve with synthetic data, and their curiosity may be satiated via their own exploration.

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BUZZ TOPICS – MAJOR THEMES (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are more likely than researchers to closely follow 'Data & Analytics' (30% to 11%) and 'Specific Verticals' (18% to 7%); researchers are somewhat more likely to follow 'AI' (54% to 45%) and 'Methods' (15% to 7%).

For completeness, let's take a quick look at "minor chords" on the brand side. Researchers are more likely to be concerned about "Industry & Workforce" trends than analytics professionals (7% to 0%). Perhaps this is associated with their greater focus on "AI" and its association with employment uncertainty, but it's not a dominant theme. However, its stronger presence on the research side should make more sense as you read through later sections of the report, like *Business Outlook*. Some of them are in a risky position.

Analytics professionals are more focused on "Privacy/Regulation/Governance" (7% to 3%). It's not a strong effect, but it could be related to their greater focus on "Specific Verticals." This concern may also be related to the kinds of data they work with more often than researchers, such as data that does not come from primary research.

BUZZ TOPICS – MINOR CHORDS (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers may be more likely to closely follow 'Industry & Workforce Trends' (7% to 0%); analytics professionals may be more likely to follow 'Privacy/Regulation/Governance' (7% to 3%).



Brand-side researchers are more likely to be concerned about Industry & Workforce trends than analytics professionals.



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BUZZ TOPICS | SUPPLIER POV ^[DATA]

For supplier segments, some sample sizes are much smaller, so tread with care.

Although “AI” is the most popular buzz topic among service-led suppliers with 500+ FTE, it is the only supplier segment in which “AI” is mentioned by a minority (38%). We suspect this is because of the “take it for granted” theory.

Throughout this report, we’ll discuss our hypothesis that many of the largest service-led suppliers are deploying AI-dependent solutions to aggressively restructure their costs to be more competitive. For example, a large staff means large fixed costs, and the demands of today’s insights market require agility. Consequently, AI is a fact of life for the largest service-led suppliers; possibly, the topics they follow closely are within that context, so they do not call it out explicitly.

Within service-led suppliers, those with 500+ FTE are the most likely to follow “Data & Analytics” (28%) and “Consumer & Market Insights” (26%). The former suggests a need to focus on revenue sources that are more IP-dependent and less labor-intensive; the latter may reflect the scale they need to be competitive against other weight classes.

Tech-led suppliers are the most likely segment to follow “Data & Analytics” (29%) and “Synthetic Data & Personas” (25%). These are the kinds of solutions driving disruption in the industry, and tech-led suppliers need to be on top of them.

BUZZ TOPICS – MAJOR THEMES (SUPPLIER)

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
AI	54%	54%	53%	55%	38%
Data & analytics	29%	15%	19%	21%	28%
Consumer & market insights	8%	14%	3%	22%	26%
Methods	9%	21%	23%	16%	16%
Synthetic data & personas	25%	11%	15%	28%	9%
Specific verticals	8%	9%	15%	0%	8%
n =	20	70	31	19	19

Takeaway: “AI” is the most frequent theme in each supplier segment, and it is mentioned by a majority of every segment except service-led suppliers with 500+ FTE (38%).

Source: GRIT Report



Although AI is the top buzz topic among service-led suppliers with 500+ FTE, it is only mentioned by a minority of them.

As we mentioned earlier, “Data Quality & Fraud” is a “minor chord” overall, but not for service-led suppliers with 100 or fewer FTE. We speculate this may be because they are in the worst position resource-wise to deal with it. As we’ll see in *Sample*, service-led suppliers with ≤20 FTE are the least likely of the service-led segments to own their own panels (17% versus majorities in the other three segments) and have in-house tools to detect sample fraud (45% versus more than 70% in the others). This doesn’t explain why “Data Quality & Fraud” resonates well among service-led suppliers with 21-100 FTE; perhaps some of them recently emigrated from the ≤20 FTE segment.



BUZZ TOPICS – MINOR CHORDS (SUPPLIER)

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Industry & workforce trends	5%	5%	8%	13%	9%
Data quality & fraud	12%	21%	17%	3%	5%
Marketing measurement	8%	0%	5%	0%	5%
Behavioral & social science	0%	8%	3%	5%	0%
Privacy/regulation/governance	0%	5%	3%	0%	0%
n =	20	70	31	19	19

Takeaway: Although considered a “minor chord” overall, “Data Quality & Fraud” seems more like a major theme among service-led suppliers with ≤20 FTE (21%) and with 21 to 100 FTE (17%).

Source: GRIT Report

THE BIG PICTURE [STRATEGIC INTERPRETATION]

While our 2026 buzz topics look a lot like 2025’s, the buzzing within each topic is evolving. We’ve discussed how the discussion of “AI” has evolved, but we should also note how the tone changed. This may be the

first GRIT wave in which the two asymptotes are not characterized by fear on one extreme and ridicule of non-adopters by AI evangelists on the other. The debate seems much more informed and rational now.

2026 MAJOR THEMES	2025 MAJOR THEMES
AI	AI & machine learning
Data & analytics	Data analytics & Data Science
Consumer & market insights	Brand, marketing, & customer insights
Methods	Research methods & tools
Synthetic data & personas	[Not a major theme]
Specific verticals	Industry-specific trends
[Minor Chord]	Data quality & integrity

Source: GRIT Report and NewtonX



Insights professionals aren’t arguing about whether to adopt AI anymore; they’re asking which kind, for which purpose, and with what safeguards.

AI is ubiquitous but maturing; it is no longer a binary debate but a more differentiated, nuanced conversation. Insights professionals aren’t arguing about whether to adopt AI anymore, they’re asking which kind (generative, agentic, tool-based), for which purpose, and with what safeguards. The emotional temperature has cooled even as the stakes have risen.

Of course, some people are sick of hearing about AI, but it’s a bit like saying you’re sick of AIR. It’s everywhere, and some of it is healthy while some of it is polluted. The difference matters.



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Mostly due to the spread of AI, some GRIT participants are very concerned about the insights industry: job loss, uncertainty about skills needed, and lack of attention to quality relative to cost savings. Of course, those who are REALLY concerned about job loss may not be in the GRIT sample anymore. Throughout this report, we'll touch on the relationship between AI/automation, staffing, and outsourcing, especially with respect to how companies with high fixed costs seem to be trying to right-size them via AI given the current competitive environment.

There are two distinct orientations toward AI: surveillance and deployment. Across every AI sub-topic, a consistent split emerges between those who are watching AI (evaluating tools, tracking developments, forming positions) and those who are deploying it (redesigning workflows, building agentic systems, measuring ROI). The agentic AI group in particular represents a vanguard that has moved well past the evaluation stage.

Synthetic data has crossed a threshold; what was "just a gleam in 2025's eye" is now a major theme. It's generating a specific kind of contested attention that's neither enthusiastic adoption nor flat rejection,

but active, sometimes anxious evaluation. It seems to be in a similar place as AI was in general in 2024-25 when many were not far along the adoption curve and harbored either vague hopes or unexplored fears about it.

As the *Unmet Needs* section of the last *GRIT Business & Innovation Report* reinforced, many brand-side insights professionals are anxious to prove their function's legitimacy. Well-publicized concerns about sample quality and fraud cast doubt on research, but GRIT participants also articulate a need to bridge the gap between robust findings and insights activation. Activation/Storytelling, Marketing Measurement, Industry & Workforce Trends, and Data Quality & Fraud all share an underlying anxiety about whether insights work is valued, trusted, and sustainable. The concern goes beyond "will AI take my job;" it's "does my organization believe in what I do?"

Of course, we can't paint all GRIT segments with the same brush. Brand-side researchers and analytics professionals are focused on different topics, and concerns vary across service-led supplier size segments, underlining the fact the insights industry is not experiencing a unified moment. Different segments are at different stages and have genuinely different priorities. For example, it's not just that everyone is talking about AI, it's that they're talking about very different things within AI depending on who they are.

As a final note, the "take it for granted" effect can obscure real engagement. For example, the segments least likely to mention AI, brand-side analytics professionals and large service-led suppliers, are arguably the most deeply engaged with it. Lower mention rates don't necessarily mean lower engagement; familiarity can suppress explicit mention.

Also, it seems like the more disruptive a topic is, the more likely it is to be closely followed. Once a segment has engaged with a topic as part of its day-to-day activities, they might not think about their engagement as "following closely." It's just something else they do

Synthetic data has crossed a threshold; what was "just a gleam in 2025's eye" is now a major theme.



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REFRAMING AI FOR INSIGHTS: FROM THREAT TO OPPORTUNITY AND OPERATING SYSTEM

Niels Schillewaert, PhD

Head of Research and Methodologies, Conveo

The 2026 GRIT Insights Practice Report shows the AI debate has matured. The “should we use it?” binary is mostly behind us. Yet reading between the lines, the industry’s view of AI for insights still feels too narrow.

Four limiting beliefs surface across the verbatims. AI is treated as a force that *replaces* the human voice rather than *amplifies* it. The comprehension of AI is dominated by *synthetic* data and synthesizing the *past*, which eliminates the *human* at the very moment we need them most. AI is read more as a threat than an *opportunity*, especially around jobs and value. And much of the AI conversation is perceived as *not method-backed*: hype unmoored from research craft. This framing is *restrictive* and may lead to missed opportunities.

We believe the opposite is true. AI, used well, leads to *more research*, *more insight*, and more human empathy, not less. It expands the footprint of insights in two directions at once: generating deeper understanding and activating it inside the business.

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Niels Schillewaert, PhD, is Head of Research & Methodologies at Conveo. Niels was a co-founder at Human8 (formerly InSites Consulting) and has a strong academic background as a Professor of Marketing at the Vlerick Business School. His research was published in leading scientific journals such as Journal of Marketing and The International Journal of Research in Marketing. Niels is a frequent speaker at international conferences. He is the Former President of ESOMAR.

And AI for insights cannot be a tech experiment bolted onto research. It has to be *built by researchers, for researchers*. Method and rigor have to come first!

GRIT participants pointed to the right frame themselves when they talked about integrating AI across the research value chain, and when agentic AI emerged as a top buzz topic. Agentic workflows, used right, are not about removing humans or expertise. They are the operational scaffolding that lets human empathy show up in more decisions, more often. These are common human-centered methods (e.g., design thinking) and AI, *working together*. Thinking about AI this way lays the foundation for insights as an *always-on operating system*: a living layer of consumer understanding that compounds with every conversation, every wave, every market.

The most exciting signal in GRIT is that AI is creating a genuinely new methodology that is *complementary* to our toolbox. AI for insights becomes an assistant that gives us superpowers. A mash-up of qualitative and quantitative: AI-moderated conversations with real people, at the magnitude and power of quant. Structured data with human nuance. The “why” finally has a number next to it.

The final emerging signal of added value that AI can bring is insight *activation* and storytelling. What that really means is not better slides. It is about bringing the consumer into the boardroom: their voice, their face, their video-based reality, their reasoning, sitting next to the P&L. Decisions made with the customer present, not just represented.

Opportunities ahead for AI and insights!





BRAND-SIDE ROLES & TEAMS

This section discusses how brand-side roles differ across market research and analytics professionals and the distinct corporate profiles that tend to be associated with each.

ARE INSIGHTS ROLES CONVERGING? [ORIENTATION]

Maybe you can settle this for us – are insights roles converging or diverging?

Our initial impression after looking across all the data was that brand-side research and analytics are becoming more integrated, but ChatGPT and Claude kept insisting they are diverging. It's an open question, but an important one because those who identify

primarily with a data and analytics role say they have larger budgets and more insights professionals on staff than those who identify with research. Our analytics segment continues to add more research methodologies, but is this because the segment is absorbing more researchers or going their own way?

GRIT asks participants to name the primary role insights professionals play at their organizations, and researchers skew toward in-house research (32% to 6%) and strategic insights consulting (24% to 9%). Analytics professionals skew toward data analysis and modeling (33% to 8%) and customer experience (CX)/user experience (UX)/voice of the customer (VoC) (20% to 3%). However, majorities in each segment say five of the six roles we presented are significant for their insights staffs. Although the dominant role may differ across segments, they have a lot of roles in common.

HOW TO READ THIS SECTION

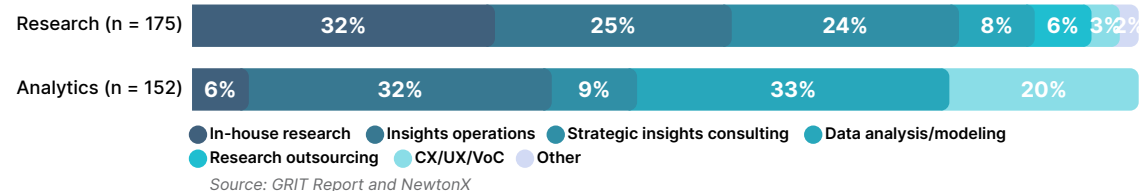
- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "L.M., ed." are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Our analytics segment continues to add more research methodologies, but is the segment absorbing more researchers or going their own way?

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PRIMARY ROLE OF INSIGHTS PROFESSIONALS: BRAND SEGMENT



Takeaway: Most brand-side researchers are concentrated in in-house research (32%), insights operations (25%), and strategic insights consulting (24%); analytics professionals are primarily in data analysis/modeling (33%) and insights operations (32%), with notable representation in CX/UX/VoC (20%).

This year, we modified the role labels and added “insights, analytics, or research operations.” While analytics professionals chose this option more often than researchers (32% to 25%), it’s not nearly as skewed as some of the other roles. Unfortunately, we

do not have any tracking data for this role, otherwise we might be tempted to think insights professionals are adopting a hub-and-spoke model in which they manage insights operations across distributed, often non-expert, staff.

SIGNIFICANT ROLES FOR PEOPLE WHO PRIMARILY FOCUS ON INSIGHTS (BRAND)

26A Wording	25A Wording
Customer/user feedback or (VoC) programs	“Voice of the Customer or Consumer” (VoC)
In-house data analysis or modeling	Data analysts
In-house research provider to internal clients	In-house research provider to internal clients
Insights, analytics, or research operations	[not included]
Research outsourcing or supplier management	Research outsourcing
Strategic insights consulting or advisory	Strategic insights consultants

Source: GRIT Report and NewtonX

As we discuss this topic in this and other sections, the year-on-year trends will be important to interpret. We know the research and analytics segments ARE

different, but it’s not clear whether they are becoming more integrated or more siloed.



GET MORE LEADS

Connect with brands actively searching for research and insights partners.



In-Market Buyers

Reach brands actively searching for research partners



Smart Matching

Get connected to buyers based on your expertise



Qualified Leads

Engage with decision-makers ready to move forward

Find the right services to achieve your marketing goals.
Greenbook.org/for-suppliers



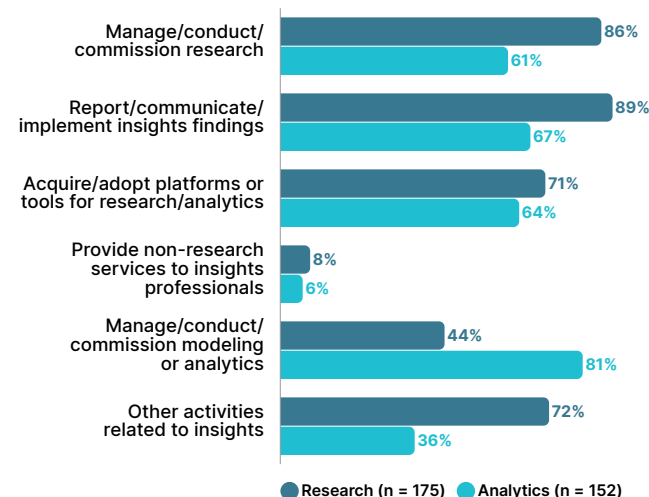
ROLE DIFFERENCES | BRAND POV [DATA]

For brand-side analytics professionals, managing, conducting, and commissioning modeling or analytics is clearly a more defining role than it is for researchers (81% to 44%). However, roles that skew toward researchers are much less defining: the gap for managing, conducting, and commissioning research is 86%, which seems “defining,” to 61%, which is still very substantial. The next largest role gap is reporting, communicating, and implementing insights findings which has a similar signature (89% to 67%).

In other words, we can be much more certain that someone engaged with modeling or analytics is an “analytics professional” than we can be that someone engaged in research, reporting, or downstream insights work is a “researcher.” The most “defining” role for researchers seems less of a defined role than a grab bag: “other activities related to insights,” 72% to 36%.

Based on findings from the *2025 Business & Innovation Report*, it seems unlikely these “other” activities are focused on staff management and development since those skew toward analytics. If we assume analytics professionals work on more, quick-turnaround projects with less elapsed time from set-up to deliverables, maybe “other activities” for researchers includes more general project management they consider as distinct from the other roles we presented. This may be something to bear in mind for the rest of this section, *Scope of Insights Impact*, and the methodology sections of this report.

KEY ACTIVITIES: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are more involved in modeling and analytics work (81% to 44%), but roles that skew toward researchers have smaller gaps.

Brand-side researchers are distinguished by their primary role as in-house researchers (32% to 6%) and their perception that all insights professionals on staff are part of a formal group (52% to 14%). However, the in-house research role seems better at distinguishing analytics professionals (94% do not see in-house research as the primary focus of insights specialists) than it is at defining researchers (68% do not select in-house research). Also, while most in the research segment say all insights professionals are in a formal group, 48% do not.

In earlier *GRIT Reports*, we’ve touched on the wide difference between researchers and analytics professionals regarding their perception of whether all insights professionals on staff are part of a formal group. It could be that the type of organizations that are more likely to have researchers than analytics professionals are more likely to organize them into a formal group. It might also be that researchers tend to interpret “insights professional” to mean a researcher like themselves, while an analytics professional takes a broader view.





For example, a researcher who works primarily on brand trackers may associate “insights professional” with others who do similar kinds of work while an analytics professional working in business intelligence may consider the term to incorporate those doing analytics plus those doing brand trackers and similar work. The brand tracker may perceive those in roles similar to themselves as being part of a formal group while the analytics professional may be looking across groups.

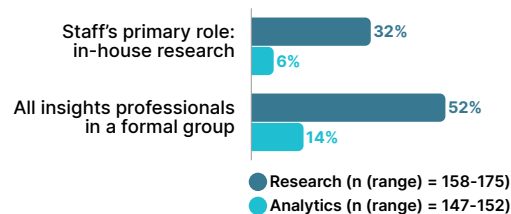
Supplier engagement is another major differentiator across the two segments. If we look only at suppliers they work with regularly, researchers are much more likely to work with full-service research providers (52% to 27%). Analytics professionals skew toward data and analytics providers (70% to 43%) and strategic consultancies (38% to 20%). Technology providers work regularly with each segment; 62% of researchers and 72% of analytics.

Analytics professionals are more likely at companies working in financial services (38% to 26%), and most say their work is primarily B2B (54% to 38%). By contrast, researchers are more likely to work in CPG (25% to 16%) and to have all of their work be B2C (22% to 3%). The B2B versus B2C split and the industry differences don’t define each segment, but they provide glimpses into their tendencies.

Insights operations is emerging as the connective tissue of the modern insights function. This signals a shift from insights as a primarily executional discipline to insights as an operating model that manages tools, suppliers, workflows, standards, distributed teams, and the flow of decision-ready evidence through the enterprise.

– LM, ed.

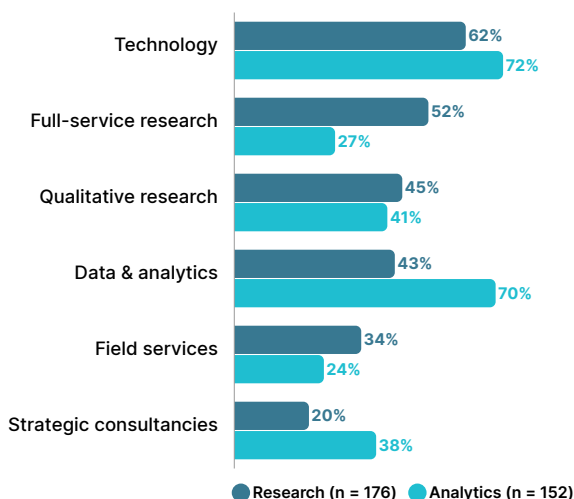
KEY CHARACTERISTICS OF RESEARCH SEGMENT: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers are more than five times as likely as analytics professionals to say in-house research is the primary role for insights professionals on staff (32% to 6%), and nearly four times as likely to say all insights professionals work within a formal research or insights group (52% to 14%).

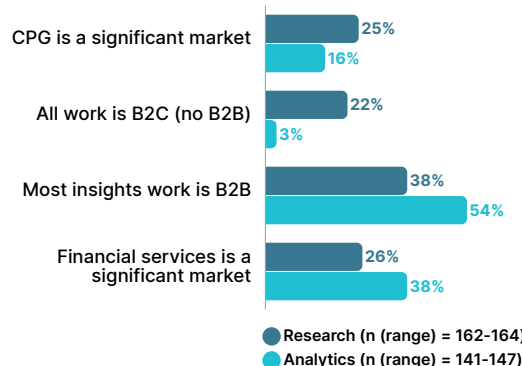
SUPPLIER TYPES WORK WITH REGULARLY: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Both brand-side segments rely heavily on technology suppliers, but researchers are nearly twice as likely to work regularly with full-service research (52% to 27%), while analytics professionals are more likely to engage data and analytics (70% to 43%) and strategic consultancies (38% vs. 20%).

KEY RESEARCH FOCUS: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are more likely to focus on B2B work (54% to 38% say it's most of their work) and financial services (38% vs. 26%), while researchers are more likely to work in CPG (25% to 16%).



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As we'll explore more deeply later, brand-side analytics professionals are more likely to apply agentic AI. Compared to 43% of researchers, 73% use agentic AI to prepare and integrate data. While that may reflect their great likelihood to work with data in those ways, they are also more likely to use agentic AI to create and update reports, dashboards, and so on (71% to 50%). Although you could argue that analytics professionals have more tasks that can benefit from agentic AI, they also seem to be more engaged with it.

GRIT asks brand-side professionals to name their department or functional area. We updated our choices to include "customer experience (CX) or VoC" and merged "product management" and "R&D" into "product, user experience (UX), innovation, or R&D." We also elaborated on analytics (now "analytics or Data Science") and marketing (now "marketing, brand, or communications").

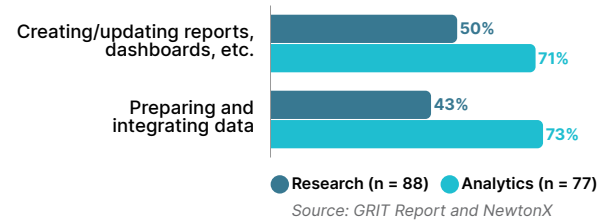
YOUR DEPARTMENT OR FUNCTIONAL AREA (BRAND)

26A Wording	25A Wording
Analytics or Data Science	Analytics
Customer Experience (CX) or VoC	[not included]
Executive team	Executive team
Insights or research group	Insights or research group
Marketing, brand, or communications	Marketing
Product, User Experience (UX), Innovation, or R&D	Product management
	R&D

Source: GRIT Report and NewtonX

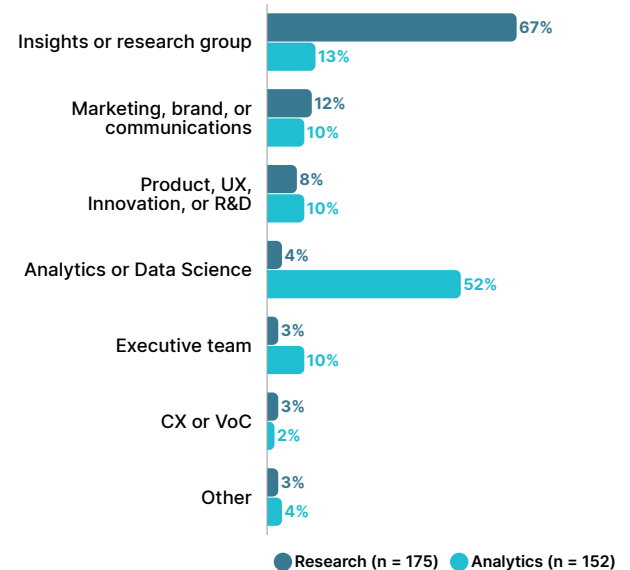
Most researchers say they sit in the insights or research group (67%) compared to just 13% of analytics professionals. The latter are more likely to be part of analytics or Data Science (52% to 4%), and, to a lesser extent, the executive team (10% to 3%). With respect to other departments or areas, the two segments are not much different.

CURRENT USE OF AGENTIC AI: BRAND SEGMENT



Takeaway: Brand-side analytics professionals are substantially more likely than researchers to currently use agentic AI for both creating/updating reports (71% vs. 50%) and preparing and integrating data (73% vs. 43%).

PARTICIPANT DEPARTMENT/AREA: BRAND SEGMENT



Takeaway: Most brand-side research professionals are situated in insights or research groups (67%), while most analytics professionals are in analytics or Data Science departments (52%).



Analytics professionals have more tasks for agentic AI and seem more engaged with it.





The percentage of GRIT participants who are brand-side researchers and in a formal insights or research group is about where it was last year (70% last year to 67% now), and still more than from 22A (53%) to

24A (58%). Meanwhile, and despite the label change, marketing/brand/communications dipped only slightly from 14% last year to 12% currently after hovering around 20% in 22A and 23A.

DEPARTMENT OR FUNCTIONAL AREA: GRIT WAVE (BRAND: RESEARCH)

	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Insights or research group	53%	58%	58%	70%	67%	-3%
Marketing, brand, or communications	22%	20%	11%	14%	12%	-2%
Product, UX, Innovation, or R&D	6%	7%	16%	5%	8%	+3%
R&D	3%	4%	11%	5%	N/A	N/A
Product management	3%	3%	4%	0%	N/A	N/A
Analytics or Data Science	6%	3%	9%	3%	4%	+1%
Executive team	4%	5%	4%	3%	3%	--
CX or VoC	N/A	N/A	N/A	N/A	3%	N/A
Other	1%	0%	4%	5%	3%	-2%
n =	254	211	191	202	175	

Takeaway: The share of brand-side researchers in insights or research groups has grown from 53% in 22A to 67% in 26A, while marketing, brand, or communications representation has declined from a high of 22% (22A) to 12% in 26A.

Source: GRIT Report and NewtonX

The percentage of GRIT participants who are brand-side analytics professionals and in an analytics or Data Science group has increased +6% in each of the past two years (to 52%) while the percentage in an insights or research group has fallen since last year from 18% to 13%. Similar to researchers, the percentage in marketing/brand/communications has fallen from a high of 27% in 23A, when it was equal to analytics/Data Science, to just 10% now.

The declines in each segment for marketing/brand/communications suggest either a) these functions are being served by an insights, research, or analytics group or b) they have become self-sufficient but do not consider themselves to be insights professionals.

PARTICIPANT DEPARTMENT/AREA: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Analytics or Data Science	27%	40%	46%	52%	+6%
Insights or research group	10%	10%	18%	13%	-5%
Product, UX, Innovation, or R&D	17%	15%	10%	10%	--
R&D	8%	10%	7%	N/A	N/A
Product management	9%	5%	3%	N/A	N/A
Marketing, brand, or communications	27%	12%	9%	10%	+1%
Executive team	6%	12%	11%	10%	-1%
CX or VoC	N/A	N/A	N/A	2%	N/A
Other	12%	10%	6%	4%	-2%
n =	183	194	177	152	

Takeaway: Brand-side analytics professionals in formal analytics or Data Science departments have grown from 27% in 23A to 52% in 26A.

Source: GRIT Report and NewtonX





MOST SIGNIFICANT ROLES | BRAND POV [DATA]

When GRIT asks for any significant role played by insights professionals, our new category, “insights, analytics, or research operations,” is selected by more than 80% in each brand-side segment. The widest gaps skewing toward researchers are research outsourcing (61% of researchers to 41% of analytics) and in-house research (68% to 56%). In the other direction, 76% of analytics professionals name data analysis and modeling to 66% of researchers.

In addition to these four roles, most in each segment also name strategic insights consulting (63% researchers to 57% analytics) and CX/UX/VoC (53% to 57%). In both segments, insights professionals have nearly four significant roles, on average. The two segments may have different points of focus, but they also have a lot of similarities.

ALL SIGNIFICANT INSIGHTS PROFESSIONAL ROLES: BRAND SEGMENT

	Research	Analytics	Research – analytics
Insights operations	82%	83%	-1%
In-house research	68%	56%	+12%
Data analysis/modeling	66%	76%	-10%
Strategic insights consulting	63%	57%	+6%
Research outsourcing	61%	41%	+20%
CX/UX/VoC	53%	57%	-4%
Other	3%	1%	+2%
Average number of roles:	3.9	3.7	+0.2
n =	175	152	

Takeaway: Insights operations is the most widely recognized role across both brand-side segments (82% researchers, 83% analytics); researchers are much more likely to include research outsourcing as significant (61% to 41%), while analytics professionals are more likely to include data analysis/modeling (76% to 66%).

Source: GRIT Report and NewtonX

Despite the refinements we made to our list of roles, they haven’t changed much since last year. Among brand-side researchers, in-house research fell -7% from 75% last year to 68%, and CX/UX/VoC fell -8% from 61% to 53%. The average number of significant roles seemingly increased from 3.3 to 3.9, but that can all be accounted for by the addition of insights operations (debuting at 82%). Not much has changed, and data analysis/modeling (66%) and research outsourcing (61%) have held on to the gains they made in recent years.



When asked for significant roles, “insights, analytics, or research operations,” is selected by more than 80% in each segment.



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ALL SIGNIFICANT INSIGHTS PROFESSIONAL ROLES: GRIT WAVE (BRAND: RESEARCH)

	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A – 25A
Insights operations	N/A	N/A	N/A	N/A	N/A	82%	N/A
In-house research	62%	70%	65%	70%	75%	68%	-7%
Strategic insights consulting	67%	67%	62%	58%	66%	63%	-3%
Data analysis/modeling	44%	70%	51%	75%	68%	66%	-2%
Research outsourcing	46%	45%	41%	56%	60%	61%	+1%
CX/UX/VoC	61%	71%	66%	64%	61%	53%	-8%
Average number of roles:	2.8	3.2	2.9	3.2	3.3	3.9	+0.6
n =	271	251	211	191	191	175	

Takeaway: Among brand-side researchers, the number who say research outsourcing is a significant role for insights professionals has grown from 46% in 21A to 61% in 26A.

Source: GRIT Report and NewtonX

Note: GRIT does not have data on the analytics segment until the 2023 Insights Practice Report dataset. Because we cannot separate the two segments prior to this point in time, earlier years are considered to be “aggregated.” However, it’s likely that the research segment heavily dominated in those years, so we compare the aggregate results to the research segment for tracking.

In the analytics segment, data analysis/modeling fell a surprising -19% as a significant role for insights professionals, from 95% in 25A to 76% now. Possibly, the rise in DIY analytics tools may have empowered some who do not specialize in insights to do their own analytics, shifting some roles from executing

analytics and modeling to mentoring. This mentoring could be part of “insights operations” (83%). Although GRIT participants in the brand-side analytics segment may see modeling and analytics as a significant role personally, it could be less characteristic of insight professionals in aggregate.

ALL SIGNIFICANT INSIGHTS PROFESSIONAL ROLES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A – 25A
Insights operations	N/A	N/A	N/A	83%	N/A
Data analysis/modeling	79%	90%	95%	76%	-19%
CX/UX/VoC	40%	38%	51%	57%	+6%
Strategic insights consulting	46%	52%	62%	57%	-5%
In-house research	45%	54%	56%	56%	--
Research outsourcing	27%	34%	39%	41%	+2%
Average number of roles:	2.4	2.7	3.0	2.9	-0.1
n =	183	194	177	152	

Takeaway: Peaking at 95% in 25A, data analysis/modeling declined sharply as a significant role for insights professionals from the brand-side analytics point of view, to 76% in 26A, while CX/UX/VoC continued a steady increase from 40% to 57% over the same period.

Source: GRIT Report and NewtonX

GRIT’s newly introduced role, insights, analytics, or research operations, was selected as the primary role for insights professionals by 32% of the brand-side analytics segment, about even with data analysis/modeling’s 33%. Among researchers, it was named by 25%, just ahead of strategic insights consulting (24%) and behind in-house research (32%).

The biggest gaps skewed toward research are in-house research (32% to 6%) and strategic insights consulting (24% to 9%). The primary role gaps skewed toward the analytics segment are data analysis/modeling (33% to 8%) and CX/UX/VoC (20% to 3%). Overall, insights operations seems to be common ground.





PRIMARY ROLE OF INSIGHTS PROFESSIONALS: BRAND SEGMENT

	Research	Analytics	Research – analytics
In-house research	32%	6%	+26%
Insights operations	25%	32%	-7%
Strategic insights consulting	24%	9%	+15%
Data analysis/modeling	8%	33%	-25%
Research outsourcing	6%	--	+6%
CX/UX/VoC	3%	20%	-17%
Other	2%	--	+2%
n =	175	152	

Takeaway: For 32% of brand-side researchers, in-house research is a primary role versus only 6% of analytics; 33% of analytics professionals cite data analysis/modeling versus 8% of researchers.

Source: GRIT Report and NewtonX

Looking at how primary roles have evolved over time should tell us something about which roles insights operations cannibalized. Among brand-side researchers, strategic insights consulting fell from 42% last year to 24% this year, and CX/UX/VoC fell from 15% to 3%.

Intuitively, strategic insights consulting seems like it would be vulnerable to operations because it likely spans a lot of individual roles, and this suggests that CX/UX/VoC also has such a role. Over the years, we've seen a lot of back-and-forth between consulting and VoC, so it makes sense they would both be related to operations.



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PRIMARY ROLE OF INSIGHTS PROFESSIONALS: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
In-house research	24%	33%	21%	30%	35%	32%	32%	--
Insights operations	N/A	N/A	N/A	N/A	N/A	N/A	25%	N/A
Strategic insights consulting	36%	36%	33%	32%	27%	42%	24%	-18%
Data analysis/modeling	3%	5%	14%	10%	15%	7%	8%	+1%
Research outsourcing	6%	10%	5%	6%	7%	3%	6%	+3%
CX/UX/VoC	28%	16%	25%	22%	17%	15%	3%	-12%
n =	173	152	251	211	191	202	175	

Takeaway: Among brand-side researchers, strategic insights consulting as a primary role declined from 42% in 25A to 24% in 26A, while CX/UX/VoC dropped from 15% to 3% as insights operations (32%) was introduced.

Source: GRIT Report and NewtonX

On the analytics side, insights operations (32%) also ate into strategic insights consulting (21% in 25A to 9% currently), but it may have hit data analysis/modeling harder, as it fell from 60% to just 33%. Unlike in the research segment, CX/UX/VoC increased +10% from 10% to 20%. The introduction of insights operations doesn't fully account for the drop in analysis/modeling,

suggesting another dynamic at work. Possibly, as analytics has mainstreamed over time, it is less likely to be seen as a specialty and more likely to be viewed as a skill that needs to be more common. For example, perhaps some former analytics specialists now are better defined by their CX/UX/VoC roles than by "analytics."

PRIMARY ROLE OF INSIGHTS PROFESSIONALS: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Data analysis/modeling	48%	58%	60%	33%	-27%
Insights operations	N/A	N/A	N/A	32%	N/A
CX/UX/VoC	18%	10%	10%	20%	10%
Strategic insights consulting	14%	11%	21%	9%	-12%
In-house research	15%	17%	4%	6%	+2%
Research outsourcing	4%	4%	4%	0%	-4%
n =	183	194	177	152	

Takeaway: Among brand-side analytics professionals, data analysis/modeling as a primary role fell sharply from 60% in 25A to 33% in 26A, coinciding with the first appearance of insights operations as a tracked category (32% in 26A).

Source: GRIT Report and NewtonX

Looking at how these primary roles overlap with significant roles sheds more light on these dynamics. Among researchers, when operations is the primary role, the most significant other role is data analysis/modeling (68%). For strategic insights consulting, 96% name operations as significant. When the primary role is in-house research, the most common significant roles are operations (71%), data analysis/modeling (65%), and research outsourcing (63%).



Possibly, analytics is less likely to be seen as a specialty and more likely to be viewed as a fundamental skill.





ALL OTHER SIGNIFICANT INSIGHTS PROFESSIONAL ROLES: PRIMARY ROLE (BRAND: RESEARCH)

	Insights operations	In-house research	Strategic insights consulting	Data analysis/modeling	Research outsourcing
CX/UX/VoC	48%	58%	50%	60%	42%
Data analysis/modeling	68%	65%	61%		60%
In-house research	53%		67%	36%	22%
Insights operations		71%	96%	69%	62%
Research outsourcing	59%	63%	67%	26%	
Strategic insights consulting	56%	57%		34%	48%
Other	0%	0%	3%	0%	0%
Average number of secondary roles:	2.8	3.1	3.4	2.3	2.3
n =	52	47	39	18	12

CX/UX/VoC and "other" not shown due to very low n.

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: Among brand-side researchers, those whose primary role is strategic insights consulting report the broadest secondary role portfolio (average 3.4 roles), with 96% also citing insights operations as significant.

Source: GRIT Report and NewtonX

Among brand-side analytics, when the primary role is data analysis/modeling, operations is the key secondary significant role (79%). When the primary role is operations, data analysis/modeling is key (62%).

For CX/UX/VoC, 3.5 roles are significant on average, led by data analysis/modeling (80%), insights operations (78%), and research outsourcing (72%).

ALL OTHER SIGNIFICANT INSIGHTS PROFESSIONAL ROLES: PRIMARY ROLE (BRAND: ANALYTICS)

	Data analysis/modeling	Insights operations	CX/UX/VoC	Strategic insights consulting
CX/UX/VoC	60%	35%		33%
Data analysis/modeling		62%	80%	50%
In-house research	62%	38%	68%	43%
Insights operations	79%		78%	78%
Research outsourcing	36%	29%	72%	32%
Strategic insights consulting	56%	53%	54%	
Other	0%	3%	0%	0%
Average number of secondary roles:	2.9	2.2	3.5	2.4
n =	53	52	27	13

Research outsourcing, in-house research and "other" not shown due to very low (or no) n.

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: Among brand-side analytics professionals, those primarily in CX/UX/VoC report the broadest secondary portfolio (average 3.5 roles), with 80% also citing data analysis/modeling and 78% citing insights operations as significant.

Source: GRIT Report and NewtonX





NATURE OF THE WORK | BRAND POV [DATA]

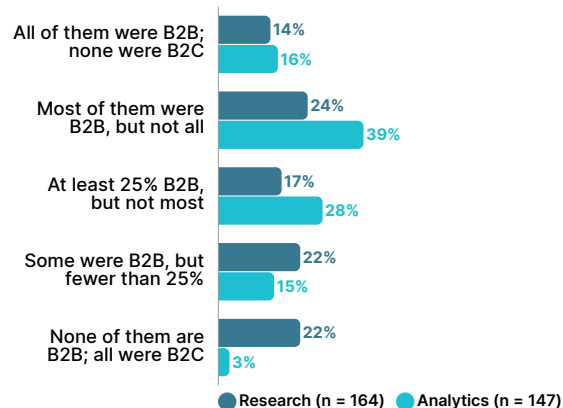
The two brand-side segments differ by the type of work they do. On the research side, 44% say B2C projects are at least 75% of what they do. On the analytics side, 55% say most of their work is B2B.

The research segment is more likely to do projects that are quant-only (45% to 33%). The analytics segment is more likely to do qualiquant (39% to 28%).

If we look at supplier types they work with at least occasionally, each type is named by at least two-thirds in each segment. On the low end, strategic consultancies are named by 67% of researchers; on the high end, technology providers are named by 96% of analytics. Mirroring the differences for supplier types they work with regularly, analytics professionals are more likely to engage data and analytics firms (91% to 74%) and strategic consultancies (88% to 67%).

Among researchers, 44% say B2C projects are at least 75% of what they do; for analytics, 55% say most of their work is B2B.

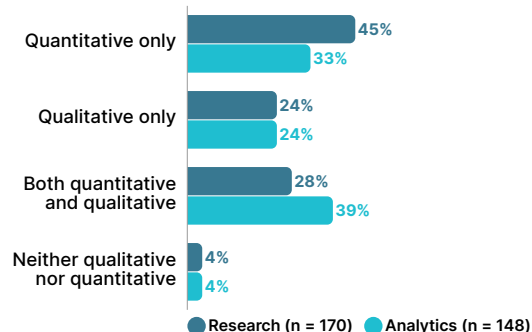
PERCENTAGE OF B2B PROJECTS VERSUS B2C: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are much more B2B-oriented than researchers: 55% report most or all projects are B2B, compared to 38% of researchers; 22% of researchers report exclusively B2C work versus only 3% of analytics.

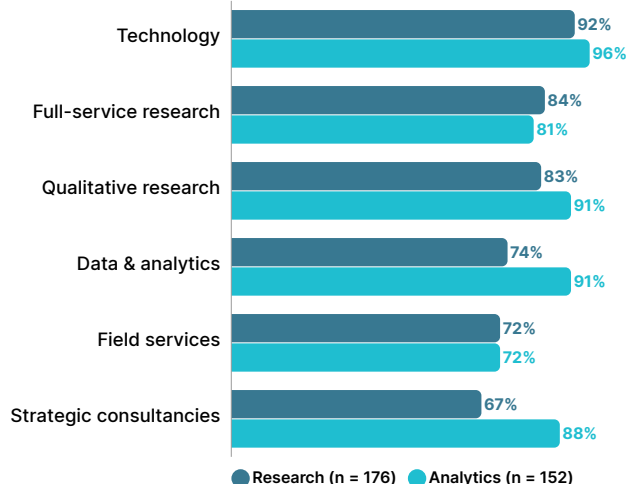
ALLOCATION OF QUALITATIVE AND QUANTITATIVE PROJECTS: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: More brand-side researchers report that all projects are quantitative (45% vs. 33%), while analytics professionals are more likely to report qualiquant projects (39% vs. 28%).

SUPPLIER TYPES WORK WITH AT LEAST OCCASIONALLY: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Nearly all brand-side researchers (92%) and analytics professionals (96%) work with technology providers at least occasionally; analytics professionals are more likely to engage data and analytics firms (91% to 74%) and strategic consultancies (88% to 67%).



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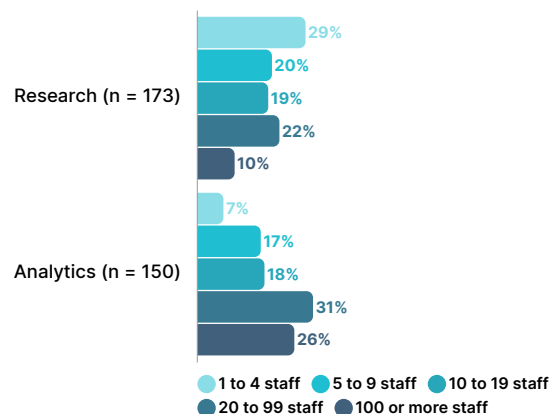


CORPORATE PROFILES | BRAND POV [DATA]

Looking at other aspects of the typical context for brand-side researchers and analytics professionals, researchers tend to say there are fewer insights professionals on staff. Among researchers, 49% say there are fewer than 10 insights professionals on staff where they work, while only 24% of analytics professionals say the same. Conversely, 57% of analytics professionals say the staff size is 20 or more compared to only 32% of researchers.

As we've mentioned earlier, and in previous reports, we don't know if these two types of brand-side professionals really work in different environments or if they merely perceive them differently. There may be a lot of researchers who do not consider insights workers outside of their formal group to be "insights professionals." Analytics professionals, on the other hand, may have a less exclusive definition. So, they may each have the same amounts of these kinds of people on staff, but they label some of them differently.

NUMBER OF INSIGHTS PROFESSIONALS: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, 49% say there are fewer than 10 insights professionals on staff where they work, while only 24% of analytics professionals say the same. Conversely, 57% of analytics professionals say the staff size is 20 or more compared to only 32% of researchers.

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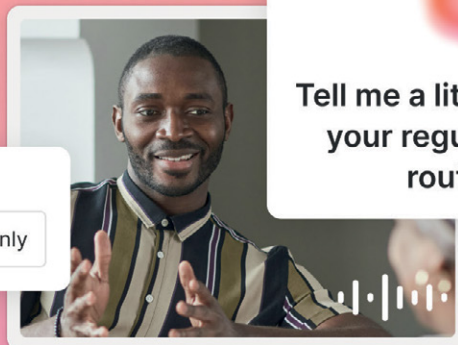
Interview type



Video



Audio only



Tell me a little bit about
your regular coffee
routine?



Coming out of the pandemic, brand-side research staffs have shifted upward. In 23A, 43% had one to four professionals, but this number has been about 30% in three of the past four years. On the other end,

the number claiming 20 or more staff increased +6% from 23A to 24A, then another +6% from 24A to 25A. It's currently 32%.

NUMBER OF INSIGHTS PROFESSIONALS: GRIT WAVE (BRAND: RESEARCH)

	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
1 to 4 staff	38%	31%	43%	30%	30%	36%	29%	-7%
5 to 9 staff	23%	27%	23%	29%	29%	20%	20%	--
10 to 19 staff	13%	13%	15%	15%	15%	17%	19%	+2%
20 or more staff	25%	29%	20%	26%	26%	32%	32%	--
n =	270	244	208	186	186	198	173	

Takeaway: The distribution of team sizes among brand-side researchers has shifted upward since 23A, with small staffs (1-4 professionals) decreasing from 43% to 29% and larger staff (20+) increasing from 20% to 32%.

Source: GRIT Report and NewtonX

At brand-side organizations with analytics professionals, the top end of the insights staff size has been fairly steady if not growing from 23A (51%)

to 26A (57%), but there is more movement up to the middle. The smallest staff size of one to four professionals has fallen over that time from 22% to 7%.

NUMBER OF INSIGHTS PROFESSIONALS: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
1 to 4 staff	22%	11%	13%	7%	-6%
5 to 9 staff	14%	17%	12%	17%	+5%
10 to 19 staff	13%	16%	15%	18%	+3%
20 or more staff	51%	56%	57%	57%	--
n =	175	190	175	150	

Takeaway: Since 23A most brand-side analytics professionals report 20 or more insights professionals on staff (currently 57%) while those with small staffs (1-4 professionals) has fallen from 22% to 7%.

Source: GRIT Report and NewtonX

Most brand-side researchers say all insights professionals are in a formal group (52%), and 91% say at least some of the are in one. Only 14% on the

analytics side say all insights professionals are in a formal group, but 94% say at least some of them are in a group.

PROFESSIONALS IN FORMAL INSIGHTS GROUP: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers are far more likely to say that all insights professionals on staff work within a formal insights group (52% versus 14%).





After three years above 60%, the percentage of brand-side researchers saying all insights professionals are in a formal group fell from 65% last year to 52% this year. Although we don't know if there is a corresponding trend with the primary role being

insights operations, this could be a sign that more insights work is being distributed to non-specialists or that specialists are being embedded in functions and mentored or managed by the insights group.

PROFESSIONALS IN FORMAL INSIGHTS GROUP: GRIT WAVE (BRAND: RESEARCH)

	23A	24A	25A	26A	26A - 25A
Yes, all of them	61%	65%	65%	52%	-13%
Yes, some of them	29%	28%	30%	39%	+9%
None of them	10%	7%	5%	9%	+4%
n =	188	171	178	158	

Takeaway: The share of brand-side researchers stating that all insights staff work in a formal group dropped from 65% in 25A to 52% in 26A.

Source: GRIT Report and NewtonX

Coincidentally, we also see a -13% drop of all insights professionals being in a formal group on the analytics side, from 27% to 14%. Since 23A, the percentage who

say none are in formal group has receded from 12% to today's 6%.

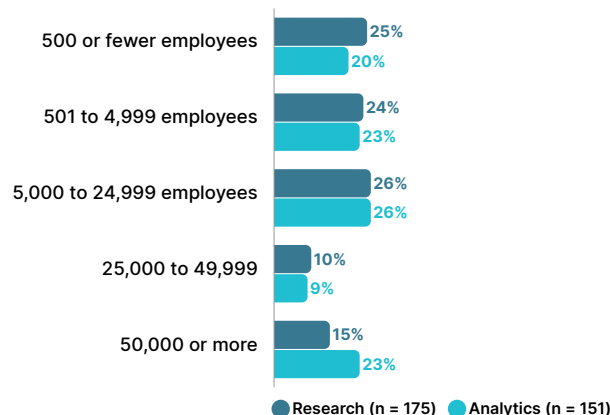
PROFESSIONALS IN FORMAL INSIGHTS GROUP: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Yes, all of them	22%	25%	27%	14%	-13%
Yes, some of them	67%	67%	64%	80%	+16%
None of them	12%	9%	9%	6%	-3%
n =	162	167	163	147	

Takeaway: The share of brand-side analytics professionals stating that all insights staff work in a formal group dropped from 27% in 25A to 14% in 26A.

Source: GRIT Report and NewtonX

COMPANY SIZE: BRAND SEGMENT



Takeaway: Company size distributions are similar across brand-side segments, though analytics professionals are somewhat more likely to be at very large companies (50,000 or more employees: 23% versus. 15%).

The distribution of company employee sizes is similar across the brand-side research and analytics segments, with researchers' companies tending to be a little smaller (25% with 500 or fewer employees compared to 20%) and analytics tending to be a bit larger (23% have 50,000 or more employees compared to 15% for research).

Coincidentally, we see a -13% drop of all insights professionals being in a formal group in both segments.



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Considering markets their companies serve, the largest gaps skewing toward analytics are financial services (38% to 26%), technology and telecom (35% to 28%), and consumer durables and

home products (13% to 8%). Consumer packaged goods (25% to 16%) and public sector, education, or NFP (14% to 6%) skew toward research.

SIGNIFICANT MARKETS - LARGEST GAPS: BRAND SEGMENT

	Research	Analytics	Research - analytics
Consumer packaged goods (CPG/ FMCG)	25%	16%	+9%
Public sector, education, or NFP	14%	6%	+8%
Consumer durables & home products	8%	13%	-5%
Technology & telecom	28%	35%	-7%
Financial services	26%	38%	-12%
n =	162	141	

Takeaway: Financial services shows the largest market gap between brand-side segments (38% analytics versus 26% researchers), while CPG/FMCG skews toward researchers (25% vs. 16%).

Source: GRIT Report and NewtonX

Among other markets they claim to be significant for their companies, brand-side professionals are not much different across segments. Six are named by at least 10% in each segment: media, entertainment, and sports (12% research, 11% analytics); retail

and ecommerce (16% and 17%); healthcare and pharmaceuticals (16% and 17%); industrial and manufacturing (11% and 13%); professional & business services (10% and 12%); and automotive (11% and 13%).

SIGNIFICANT MARKETS - OTHER GAPS: BRAND SEGMENT

	Research	Analytics	Research - analytics
Media, entertainment, & sports	12%	11%	+1%
Transport, logistics, & shipping	7%	6%	+1%
Retail & ecommerce	16%	17%	-1%
Hospitality, travel, & leisure	9%	10%	-1%
Healthcare & pharmaceuticals	16%	17%	-1%
Industrial & manufacturing	11%	13%	-2%
Professional & business services	10%	12%	-2%
Automotive	11%	13%	-2%
Market research, insights, or analytics	8%	12%	-4%
n =	162	141	

Takeaway: Market representation is similar across brand-side researchers and analytics professionals for industries outside of financial services, CPG, technology and telecom, consumer durables, and public sector and NFP.

Source: GRIT Report and NewtonX





THE BIG PICTURE [STRATEGIC INTERPRETATION]

Our two brand-side “segments,” research and analytics, represent archetypes based on organizational placement rather than based purely on skill or discipline. It’s related to where they sit, such as in an insights/research group versus an analytics/Data Science department; whom they work for, such as B2C CPG versus B2B financial services; and how they define the scope of “insights professional” on their team.

There could probably be more tangible segment definitions based on topic clusters such as consumer market insights, advertising and communications research, brand management, and shopper insights for “research” and business intelligence and reporting, Data Science and advanced analytics, and digital UX and web analytics for “analytics.” However, this is beyond the scope of GRIT, and we are satisfied that our “research” versus “analytics” comparisons are improvements over our old “aggregate buyers” framework.

GRIT participants speaking from an analytics perspective have more insights professionals on staff than those speaking from a research perspective, and later we’ll see that they also tend to have larger research project budgets. This highlights the importance of considering the degree to which these are siloed versus simply different perspectives on the same environment, and whether they are converging or diverging.

On this point, our data is genuinely ambiguous. The segments share structural overlap, such as high rates of the same secondary roles, similar supplier engagement at the “at least occasionally” level, and near-identical formal group shrinkage this wave, but their cores are moving in opposite directions. Analytics professionals are becoming *more* concentrated in formal analytics/Data Science departments (27% to 52% since 23A), while researchers are consolidating in insights/research groups (53% to 67% since 22A). Although they share a broad middle ground,

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GRIT brand-side “research” participants seem to be increasingly located within research groups while “analytics” participants are increasingly located within analytics groups.

However, these trends are not reflected in what they tell us about the “at-large” population of insights professionals at their organizations. Both segments show the same -13% drop in “all insights professionals in a formal group” this wave, but insights staff sizes are generally growing, not shrinking. The combination of more insights professionals but fewer fully consolidated suggests the insights function is expanding into the organization rather than retreating or contracting.

The likely mechanism is embedded or distributed specialists being managed or mentored by a central group, rather than sitting inside it. Our new role, insights operations, debuted as a significant role at 80%+ in both segments, and this suggests that if more insights work is being done by non-specialists, someone needs to coordinate it. Both segments show this pattern simultaneously, which argues it could be a structural organizational shift, not a research-specific or analytics-specific story.

Another theme we’ve discussed is the mainstreaming of analytics skills, or at least of analytics execution regardless of skill. Data analysis and modeling is becoming a basic skill rather than a specialty. As a primary role among analytics professionals, data analysis and modeling fell from 60% in 25A to 33% in 26A, a -27% drop that the introduction of insights operations doesn’t fully explain. Meanwhile, it also fell as a significant role, from 95% to 76%.

The CX/UX/VoC increase, +10% as primary role, is also relevant: some former analytics specialists may now define themselves by their domain application rather than their technique. Analytics as a method is losing its role-defining power within the analytics segment, even as the segment itself is growing and consolidating. The skill is diffusing while the identity is professionalizing around something else, such as operations or domain expertise.

Although not a real-world change, we introduced “insights operations” as a role, and the cannibalization signatures are clear and distinguishable by segment. Among researchers, the two biggest declines in primary roles coinciding with this introduction are strategic insights consulting (-18%) and CX/UX/VoC (-12%). Among analytics professionals, the biggest declines are data analysis and modeling (-27%) and strategic insights consulting (-12%).

Insights operations may be absorbing the coordinating and enabling functions that GRIT brand-side research participants previously attributed to “consulting” and the delivery management functions that GRIT brand-side analytics participants used to attribute to “analytics.” It didn’t replace either role’s technical core; it captured the orchestration layer that sat on top.

Finally, the formal group findings, along with the “at-large” growth and operations debut, suggest a possible hub-and-spoke organizational transition. If so, GRIT participants may increasingly be (or aspiring to be) the hub, while the at-large population comprise the spokes. If so, insights operations is less a new role type but more of a new relationship to the organization: managing insights capacity that doesn’t report to you.

Insights operations debuted as significant at 80%+ in both segments; if more work is done by non-specialists, someone needs to coordinate it.



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HOW INSIGHTS WINS WHEN EVERYONE CAN PROMPT AI

Monika Rogers

SVP Growth Strategy, CMB

The *GRIT Report* shows insights and analytics teams in transition. Roles are becoming more distributed, operations are more central, and the boundaries between research, analytics, strategy, and activation are increasingly blurred. What we learned was that org charts are getting messier as insights work spreads out across the enterprise. Underneath this is the spread of AI, which is not the only cause of these shifts, but is accelerating these changes, pushing insight work outward into the enterprise.

More Distributed Teams:

Our own research showed some insights roles getting pulled closer to decision-making as they are even more tightly woven into product, marketing, CX, and growth. As AI makes everyone a potential insights user, these teams are expected to move faster to test ideas against known data, to generate new ideas or creative executions and to translate what the data means for action. To own their value, they now simultaneously need to be the strategic partner that proactively asks the right questions, determines research gaps, and helps guide alignment. Their future work product may not look like standard research deliverables. Instead, it may look like a decision brief, a launch scorecard, a trade-off simulation, or a set of guardrails or risks for a team that is already prompting GPT.

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Monika is SVP of Growth Strategy at CMB, where she leads the firm's growth strategy, go-to-market approach, and long-term positioning. She oversees growth across new client acquisition, client expansion, and sustained account development. With more than 20 years of experience in insights consulting, growth strategy, and cross-functional leadership, Monika is known for building high-performing teams and turning forward-looking vision into measurable outcomes.

Centralized Research Operations:

At the same time, GRIT found that more than 80% of both insights and analytics teams consider operations a core part of their role. AI only heightens the need for a central “control tower” to coordinate AI-assisted insights, protect data quality, and manage security concerns. As research flows into data lakes and as we've implemented AI personas trained on existing knowledge, teams need clear confidence levels, validated inputs, and continuously optimized data and models. Centralized insights operations win by making distributed teams faster and more trusted through governance, shared standards, training, reusable knowledge assets, and workflow integration.

Better Analytics Integration:

AI makes evidence streams more connectable. GRIT did not see evidence of convergence between insights and analytics. However, we have found a growing opportunity for AI to integrate internal and external signals to better predict behavior. And AI can create connections across work teams even if org charts do not converge. Brand-side analytics professionals may be the ones to lead the way, as they are much more likely than researchers to be using agentic AI today, both for creating/updating reports and dashboards (71% vs. 50%) and for preparing/integrating data (73% vs. 43%). While the GRIT report highlights role differences, there is significant opportunity for AI to make it easier to connect multiple evidence streams that turn synthesis into strategic decisions.

The Future of Insights Impact

We see a future state emerging for client-side teams that is powered by decisions. They will not define success by how much research they conduct or how fast they've uncovered it. They will define success by how effectively they can predict outcomes and impact the top and bottom line of business performance.





SCOPE OF INSIGHTS IMPACT

This section examines how brand-side researchers and analytics professionals spend time with respect to business topics, and which business disciplines the insights functions leads or makes contributions.

ARE RESEARCH AND ANALYTICS SEPARATE DOMAINS? | BRAND POV ^[ORIENTATION]

In previous *GRIT Insights Practice Reports*, we've asked brand-side participants to tell us whether insights professionals lead particular business disciplines, whether they contribute without leading, or whether they are uninvolved. We've also asked which business topics insights professionals

impact, then, of those topics, which do they impact most directly.

This time, we continue to ask about leadership and contribution across insights professionals, but we have consolidated the list of twelve disciplines to ten. We have also shifted from the perspective of which business topics do insights professionals in general impact to a perspective that is probably much more relevant to GRIT participants: where do they spend their own time. We also reduced our list of business topics from eighteen to twelve.

If we look at the research and analytics perspectives on roles insights professionals have in business disciplines, we see a lot of overlap across the disciplines to which they at least contribute. They share three top-five disciplines: competitive and market intelligence (90% research, 94% analytics), product development and innovation (89% and 87%), and business intelligence and reporting (85% and 96%).

The largest gap across the two segments is, predictably, Data Science and advanced analytics; 90% for analytics versus 68% for research. The other business disciplines look more similar. Consumer market insights is in the top five for researchers and not for analytics, but the gap is only 90% research to 86% analytics. The same is true for advertising and communications research where the gap is only 82% to 79%. For the last difference across the top fives, 89% of the analytics segment say insights professionals contribute to customer experience (CX), but so do 79% of researchers. It seems that both segments contribute insights to a lot of business disciplines they have in common.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the **[DATA]** subsections.
 - **[ORIENTATION]** = how to pay attention to this topic
 - **[DATA]** = GRIT survey results
 - **[PERSPECTIVE]** = interpretation or opinion
 - **[STRATEGIC INTERPRETATION]** = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples: 26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

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TOP FIVE AREAS INSIGHTS PROFESSIONALS LEAD OR CONTRIBUTE: BRAND SEGMENT

	Research	Analytics	Research - analytics
Consumer market insights	90%	86%	+4%
Competitive & market intelligence	90%	94%	-4%
Product development & innovation	89%	87%	+2%
Business intelligence & reporting	85%	96%	-11%
Advertising & communications research	82%	79%	+3%
Customer experience (CX)	79%	89%	-10%
Data Science & advanced analytics	68%	90%	-22%
n =	175	152	

Green shading indicates top five areas led by segment.

Takeaway: The top areas which insights professionals lead or contribute to are similar across both brand-side segments; the biggest difference is Data Science and advanced analytics (68% for researchers to 90% for analytics).

Source: GRIT Report and NewtonX

When we look at areas they say insights professionals lead, we see stronger differences. The biggest gap, again predictably, is Data Science and advanced analytics, named by 58% of the analytics segment but only 24% of the research segment. The next largest gap favors researchers; 62% say insights professionals

lead consumer market insights compared to just 36% of analytics. Researchers are also more likely to name advertising and communications research (37% to 21%), and analytics professionals are more likely to name business intelligence and reporting (51% to 29%).

TOP FIVE AREAS LED BY INSIGHTS PROFESSIONALS: BRAND SEGMENT

	Research	Analytics	Research - analytics
Consumer market insights	62%	36%	+26%
Competitive & market intelligence	40%	38%	+2%
Advertising & communications research	37%	21%	+16%
Business intelligence & reporting	29%	51%	-22%
Shopper insights	29%	27%	+2%
Product development & innovation	27%	31%	-4%
Data Science & advanced analytics	24%	58%	-34%
n =	175	152	

Green shading indicates top five areas led by segment.

Takeaway: Brand-side researchers are much more likely to lead consumer market insights (62% versus 36% for analytics), while Data Science and advanced analytics is twice as likely to be led by analytics professionals (58% vs. 24%).

Source: GRIT Report and NewtonX



When we look at areas insights professionals lead, we see strong differences across segments.

It looks like researchers and analytics professionals have clearly delineated domains, but that doesn't mean they are siloed within them. Researchers tend to view the insights function as leading disciplines such as consumer market insights and advertising, while the analytics perspective is more likely to attribute leadership to Data Science and advanced analytics and business intelligence and reporting.



HOW INSIGHTS PROFESSIONALS SPEND THEIR TIME| BRAND POV ^[DATA]

For the first time, GRIT explores the business topics on which GRIT participants personally spend their time. In past *Insights Practice Reports*, we've asked which business topics are most directly impacted by insights professionals, but it also makes sense to ask participants about their direct experience rather than for perceptions of what their colleagues are doing.

We narrowed the set of eighteen topics to twelve and made some of them more descriptive. For

example, “consumer/shopper experience (online or digital)” and “website experience optimization” are now represented by “digital, online, and website experience.” Also, “brand positioning” has become “brand strategy and positioning,” “advertising or media” has become “advertising, media, and campaign performance,” and so on. We are not going to compare these apples to the oranges of the previous years, but this gives you an idea of how the business topics changed.

ON WHICH DO YOU SPEND A SIGNIFICANT AMOUNT OF YOUR TIME? (BRAND) WHICH AREAS ARE DIRECTLY IMPACTED BY YOUR INSIGHTS PROFESSIONALS? (BRAND)

26A Wording	25A Wording
Advertising, media, & campaign performance	Advertising or media
Brand strategy & positioning	Brand positioning
Brand tracking	Brand tracking
Customer satisfaction, loyalty, & value	Customer satisfaction or loyalty
Digital, online, & website experience	Consumer/shopper experience (online or digital)
	Website experience optimization
Market structure, competition, & opportunity	Customer share of wallet or lifetime value
Partner/channel selection or optimization	Partner/channel selection or optimization
Pricing	Pricing
Product or service development - early stage	Product or service development - early stage
Product or service development - later stage	Product or service development - later stage
Segmentation & audience definition	Segmentation
Shopper behavior & offline experience	Consumer/shopper experience (offline)
[not included]	Consumer shopping/purchase behavior
[not included]	Attitudes and opinions
[not included]	Competitive assessment
[not included]	Market size or opportunity
[not included]	Marketing mix

Source: GRIT Report and NewtonX



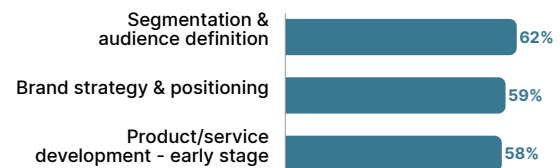


On the research side, most brand-side professionals spend significant time on segmentation and audience definition (62%), brand strategy and positioning (59%), and early-stage product/service development (58%). Four other topics were named by nearly half, led by brand tracking (49%).

On the analytics side, the picture is quite different. No business topic is named by a majority, and only two from their top tier overlaps with the researchers' leading topics: segmentation and audience definition (42%) and early-stage product/service development (41%). The other business topics in analytics' top tier are market structure, competition, and opportunity (48%), customer satisfaction, loyalty, and value (46%), later stage product/service development (42%), and digital, online, and website experience (41%).

From this comparison, we might hypothesize that researchers are more homogenous as a segment with respect to the business topics on which they focus than analytics professionals. Brand research is a foundation of the research segment, and we can see suggestions of CX/UX focus among analytics via customer satisfaction, loyalty, & value, later stage product/service development and online, and website experience.

TOP BUSINESS TOPICS ON WHICH SPEND SIGNIFICANT TIME (BRAND: RESEARCH)

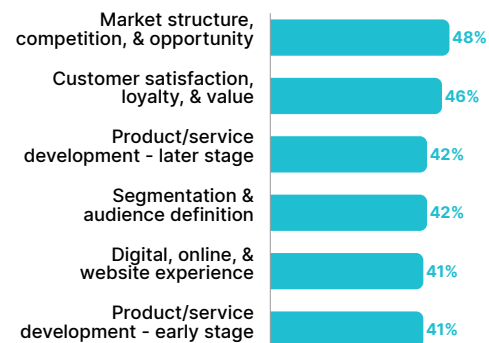


(n = 175)

Source: GRIT Report and NewtonX

Takeaway: Most brand-side researchers spend significant time on segmentation and audience definition (62%), brand strategy and positioning (59%), and early-stage product/service development (58%).

TOP BUSINESS TOPICS ON WHICH SPEND SIGNIFICANT TIME (BRAND: ANALYTICS)



(n = 152)

Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are most likely to spend significant time on market structure, competition, and opportunity (48%) and customer satisfaction, loyalty, and value (46%), but no single area dominates.

Brand-side researchers are much more likely than analytics professionals to spend significant time on five business topics, led by brand tracking (49% to 17%), brand strategy and positioning (59% to 36%), and segmentation and audience definition (62% to 42%). More of them also spend significant time on shopper behavior and offline experience (33% to 14%) and early-stage product/service development (58% to 41%). Even though segmentation and audience definition and early-stage product/service development are among the most frequent activities for analytics, the gaps indicate just how much more homogenous the researcher experience is.

Three activities skew toward analytics professionals: partner/channel selection or optimization (37% analytics to 16% research), pricing (38% to 22%), and digital, online, and website experience (41% to 28%).

The critical distinction in this section is between contributing to decisions and leading them. Insights professionals are involved across a broadening range of business issues, but democratized research and analytics tools make it more important to define where insights owns standards, synthesis, integration, and decision leadership rather than simply supporting work across the organization.

– LM, ed.



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The average brand-side researcher spends significant time on 5.0 activities compared to 4.3 for analytics professionals, and three topics apply to a majority of researchers compared to none for analytics. The overall impression is that researchers may have to be jacks- and jacquelines-of-all-trades with respect to business topics while analytics professionals are more specialized within topics. This would be consistent

with trends we see in *Brand-side Roles and Teams* regarding the mainstreaming of analytics. In that observation, analytics professionals seem to identify more with business topics they work on than with the analytics skill that enables that work, and that would be consistent with working on fewer topics, on average.

WHERE GRIT PARTICIPANTS SPEND SIGNIFICANT TIME: BRAND SEGMENT

	Research	Analytics	Research - analytics
Segmentation & audience definition	62%	42%	+20%
Brand strategy & positioning	59%	36%	+23%
Product/service development - early stage	58%	41%	+17%
Brand tracking	49%	17%	+32%
Market structure, competition, & opportunity	47%	48%	-1%
Product or service development - later stage	47%	42%	+5%
Customer satisfaction, loyalty, & value	47%	46%	+1%
Advertising, media, & campaign performance	34%	32%	+2%
Shopper behavior & offline experience	33%	14%	+19%
Digital, online, & website experience	28%	41%	-13%
Pricing	22%	38%	-16%
Partner/channel selection or optimization	16%	37%	-21%
None of these	1%	1%	--
Average number of significant areas:	5.0	4.3	+0.7
n =	175	152	

Takeaway: Brand tracking shows the largest gap between brand-side segments (49% of researchers vs. 17% of analytics), followed by brand strategy and positioning (59% to 36%) and segmentation and audience definition (62% to 42%). Analytics professionals are more likely to lead partner/channel selection (37% to 16%).

Source: GRIT Report and NewtonX

We also ask brand-side GRIT participants which of their significant activities they consider to be primary. Three business topics were chosen as “primary” by more than 10% in each segment: early-stage product or service development (17% research, 14% analytics), customer satisfaction, loyalty, and value

(17% and 12%), and market structure, competition, and opportunity (12% and 18%). One is primary for more than 10% in research but not in analytics, and it also represents the largest gap: brand strategy and positioning (19% in research, 5% in analytics).





GRIT PARTICIPANTS' PRIMARY FOCUS: BRAND SEGMENT

	Research	Analytics	Research - analytics
Brand strategy & positioning	19%	5%	+14%
Product or service development - early stage	17%	14%	+3%
Customer satisfaction, loyalty, & value	17%	12%	+5%
Market structure, competition, & opportunity	12%	18%	-6%
Segmentation & audience definition	8%	7%	-1%
Advertising, media, & campaign performance	7%	9%	-2%
Brand tracking	6%	2%	+4%
Product or service development - later stage	5%	9%	-4%
Shopper behavior & offline experience	4%	1%	+3%
Digital, online, & website experience	4%	8%	-4%
Pricing	1%	6%	-5%
Partner/channel selection or optimization	--	9%	-9%
n =	166	139	

Takeaway: Brand strategy and positioning is the top primary focus for brand-side researchers (19%), while analytics professionals are most likely to cite market structure, competition & opportunity (18%) or early-stage product development (14%).

Source: GRIT Report and NewtonX

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WHAT INSIGHTS PROFESSIONALS LEAD |

BRAND POV ^[DATA]

As we do in each *Insights Practice Report*, we ask brand-side GRIT participants which disciplines are led by insights professionals. Each segment cites about the same number of disciplines led by insights professionals, on average, 3.1 for research and 3.2 for analytics. However, they differ as to which ones they lead. From the researcher point of view, insights professionals are more likely to lead consumer market insights (62% to 36%) and advertising and communications research (37% to 21%). From the analytics point of view, they are more likely to lead Data Science & advanced analytics (58% to 24%) and business intelligence and reporting (51% to 29%).

Only consumer market insights among researchers and Data Science and advanced analytics and business intelligence and reporting among analytics are named by majorities. For four disciplines, the gap between the segments is 2% or less. We'd be tempted to suggest that while consumer insights, business intelligence, and Data Science are clearly aligned with one segment's point of view or the other's, other disciplines are not clearly the domain of one segment versus the other. However, we have to be careful because GRIT participants represent individuals, not companies.

DISCIPLINES INSIGHTS PROFESSIONALS LEAD: BRAND SEGMENT

	Research	Analytics	Research - analytics
Consumer market insights	62%	36%	+26%
Competitive & market intelligence	40%	38%	+2%
Advertising & communications research	37%	21%	+16%
Business intelligence & reporting	29%	51%	-22%
Shopper insights	29%	27%	+2%
Product development & innovation	27%	31%	-4%
Customer experience (CX)	27%	26%	+1%
Data Science & advanced analytics	24%	58%	-34%
Brand management	15%	17%	-2%
Digital UX & web analytics	14%	20%	-6%
Average number of disciplines lead:	3.1	3.2	-0.1
n =	175	152	

Takeaway: The largest brand-side leadership gaps are in Data Science and advanced analytics (58% analytics versus 24% researchers) and consumer market insights (36% analytics to 62% researchers).

Source: GRIT Report and NewtonX



For researchers, insights professionals are more likely to lead consumer market insights and advertising and communications research.

Because these are individual perspectives on their organizations rather than truths about types of organizations, we can only say that differences are correlated with segment membership, but not that the difference applies to research organizations or to analytics organizations. For example, regardless of how intuitive it seems, we can't really say that researchers lead consumer market insights, only that researchers are more likely to say insights professionals lead consumer market insights where they work. For all we know, it could be led by analytics professionals who work for the same company.



Still, as we hypothesize in *Brand-side Roles and Teams*, researchers may be likely to define “insights professionals” as other researchers. From that perspective, when they say “insights professionals lead consumer market insights,” they are likely to mean it’s led by researchers. We can’t be certain, but the responses in this section look as though both segments seem to be thinking about insights professionals “like themselves.”

For this report, we have consolidated our list of twelve disciplines to ten and elaborated on some. We now consider “Big Data analytics” and “Data Science” to be covered by “Data Science and advanced analytics,” and “usability” and “web analytics” to be covered by “digital UX and web analytics.” The translations across this wave and previous waves are in an accompanying table, and you can refer to these if you have questions about whether a change was due to a real-world change or to a change in the survey.

WHAT ROLE DOES YOUR INSIGHTS GROUP OR INSIGHTS PROFESSIONALS HAVE IN...? [BRAND]

26A Wording	25A Wording
Advertising & communications research	Advertising research
Brand management	Brand management
Business intelligence & reporting	Business intelligence
Competitive & market intelligence	Competitive intelligence
Consumer market insights	Consumer market insights
Customer experience (CX)	Customer experience
Data Science & advanced analytics	Big Data analytics
	Data Science
Digital UX & web analytics	Usability
	Web analytics
Product development & innovation	Product development
Shopper insights	Shopper research

Source: GRIT Report and NewtonX

From the researcher perspective, consumer market insights (62%), competitive and market intelligence (40%), advertising and communications research (37%), and shopper insights are perennially among the top five disciplines led by insights professionals. Consumer market insights, however, fell from 74% to 62% while remaining the most frequently named. Customer experience (CX), which was just “customer experience” in prior waves, fell -13% from 40% to 27% and out of the top five for the first time. It was nudged out by business intelligence and reporting (29%) which increased +5% from last year. Product development and innovation, which was simply “product development” in prior waves, increased +11% from 16% last year to 27% this year.

Responses in this section look as though both segments seem to be thinking about insights professionals “like themselves.”



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DISCIPLINES LED BY INSIGHTS PROFESSIONALS: GRIT WAVE (BRAND: RESEARCH)

	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Consumer market insights	70%	73%	73%	70%	74%	62%	-12%
Competitive & market intelligence	24%	29%	36%	32%	33%	40%	+7%
Advertising & communications research	41%	44%	48%	37%	42%	37%	-5%
Business intelligence & reporting	21%	25%	28%	26%	24%	29%	+5%
Shopper insights	35%	37%	37%	31%	31%	29%	-2%
Customer experience (CX)	31%	36%	35%	34%	40%	27%	-13%
Product development & innovation	15%	11%	20%	21%	16%	27%	+11%
Data Science & advanced analytics	N/A	N/A	N/A	N/A	N/A	24%	N/A
Data Science	16%	15%	18%	23%	16%	N/A	N/A
Big Data analytics	13%	18%	15%	21%	13%	N/A	N/A
Brand management	13%	12%	19%	11%	19%	15%	-4%
Digital UX & web analytics	N/A	N/A	N/A	N/A	N/A	14%	N/A
Usability	13%	16%	20%	21%	16%	N/A	N/A
Web analytics	13%	9%	14%	12%	10%	N/A	N/A
Average number of disciplines led:	3.1	3.3	3.6	3.4	3.3	3.1	-0.2
n =	271	251	211	190	202	175	

Green shading indicates top five within wave.

Takeaway: Among brand-side researchers, their top five areas led have always included consumer market insights (62%), competitive and market intelligence (40%), advertising and communications research (37%), and shopper insights (29%). In 26A, business intelligence and reporting (29%) edged CX out of the top five.

Source: GRIT Report and NewtonX

On the analytics side, Data Science & advanced analytics (58%) is the top area led. It represents prior waves' Data Science (60% last year) and Big Data analytics (59% last year). (Unfortunately, we can't aggregate the two for a comparison due to question randomization to shorten the average survey). Business intelligence and reporting, which was just "business intelligence" last year, fell -10% from 61% to 51% but has been among the top five areas led in each wave.

Consumer market insights has also been in the top five each wave despite plunging -12% from 48% last year to 36% currently. Competitive and market intelligence, formerly "competitive intelligence," has been among the top five every wave except 23A, and slipped slightly from 41% last year to 38% currently. Despite a modest +2% increase from 29% to 31%, product development and innovation, formerly "product development," entered the top five for the first time due to the consolidation of Data Science and Big Data analytics.

There was one other double-digit change. Shopper insights, which had been "shopper research," increased +10% from 17% to 27%.



For analytics professionals, competitive and market intelligence has been among the top five areas led every wave except 23A.



DISCIPLINES LED BY INSIGHTS PROFESSIONALS: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Data Science & advanced analytics	N/A	N/A	N/A	58%	N/A
Data Science	33%	48%	60%	N/A	N/A
Big Data analytics	40%	52%	59%	N/A	N/A
Business intelligence & reporting	42%	51%	61%	51%	-10%
Competitive & market intelligence	33%	40%	41%	38%	-3%
Consumer market insights	38%	41%	48%	36%	-12%
Product development & innovation	30%	22%	29%	31%	+2%
Shopper insights	27%	19%	17%	27%	+10%
Customer experience (CX)	40%	27%	35%	26%	-9%
Advertising & communications research	36%	18%	22%	21%	-1%
Digital UX & web analytics	N/A	N/A	N/A	20%	N/A
Usability	26%	23%	24%	N/A	N/A
Web analytics	35%	31%	34%	N/A	N/A
Brand management	28%	13%	15%	17%	+2%
Average number of disciplines led:	4.1	3.8	4.5	3.2	-1.3
n =	183	194	177	152	

Green shading indicates top five within wave.

Takeaway: Among brand-side analytics professionals, their top five areas led have always included Data Science and advanced analytics (58%), business intelligence and reporting (51%), and consumer market insights (36%). Product development and innovation (31%) entered the top five in 26A.

Source: GRIT Report and NewtonX

Overall, there has not been a lot of change since 25A, but the -12% drop in consumer market insights leadership among researchers could represent a “democratization” of these insights, distributing the work to non-specialists. There was a -12% drop on the analytics side, too. The similar drop in CX (-13%) could reflect stronger emergence of CX as a standalone, analytics-oriented discipline (see *Brand-side Roles and Teams*).



The drop in consumer market insights leadership among researchers could represent a “democratization” of these insights, distributing the work to non-specialists.



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WHERE INSIGHTS PROFESSIONALS CONTRIBUTE | BRAND POV ^[DATA]

Beyond which disciplines are led, GRIT also asks to which disciplines brand-side insights professionals contribute. The research segment, on average, leads or contributes to 7.8 of our ten disciplines, while the analytics segment leads or contributes to 8.5. Four

gaps favor analytics: digital UX and web analytics (80% analytics to 55% research), Data Science and advanced analytics (90% to 68%), business intelligence and reporting (96% to 85%), and CX (89% to 79%).

DISCIPLINES INSIGHTS PROFESSIONALS LEAD OR CONTRIBUTE: BRAND SEGMENT

	Research	Analytics	Research - analytics
Consumer market insights	90%	86%	+4%
Competitive & market intelligence	90%	94%	-4%
Product development & innovation	89%	87%	+2%
Business intelligence & reporting	85%	96%	-11%
Advertising & communications research	82%	79%	+3%
Customer experience (CX)	79%	89%	-10%
Brand management	79%	72%	+7%
Data Science & advanced analytics	68%	90%	-22%
Shopper insights	63%	72%	-9%
Digital UX & web analytics	55%	80%	-25%
Average number of disciplines lead or contribute:	7.8	8.5	-0.7
n =	175	152	

Takeaway: Brand-side analytics professionals are more likely than researchers to lead or contribute to digital UX & web analytics (80% to 55%) and Data Science and advanced analytics (90% to 68%).

Source: GRIT Report and NewtonX



The research segment, on average, leads or contributes to 7.8 of our ten disciplines, while the analytics segment leads or contributes to 8.5.

The top five areas to which brand-side researchers say insight professionals contribute has included competitive and market intelligence (90%), consumer market insights (90%), and product development & innovation (89%) in each of our six years. This year, business intelligence and reporting (85%) and advertising and communications research (82%) pushed CX (79%) and brand management (79%) out of the top five.

CX had been among the top five in each of the previous five waves, but fell -12%, from 91% last year to 79% this year. While no other discipline fell by double-digits, the total number of disciplines to which they contribute fell by -1.6, from 9.4 to 7.8. However, the consolidation of Data Science and Big Data analytics plus the consolidation of usability and web analytics accounts for most of this.

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DISCIPLINES INSIGHTS PROFESSIONALS LEAD OR CONTRIBUTE: GRIT WAVE (BRAND: RESEARCH)

	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Competitive & market intelligence	88%	86%	88%	87%	87%	90%	+3%
Consumer market insights	92%	98%	93%	92%	96%	90%	-6%
Product development & innovation	87%	89%	86%	89%	89%	89%	--
Business intelligence & reporting	84%	85%	84%	84%	86%	85%	-1%
Advertising & communications research	74%	85%	80%	76%	80%	82%	+2%
Customer experience (CX)	87%	92%	90%	91%	91%	79%	-12%
Brand management	86%	85%	89%	80%	87%	79%	-8%
Data Science & advanced analytics	N/A	N/A	N/A	N/A	N/A	68%	N/A
Data Science	67%	64%	64%	72%	71%	N/A	N/A
Big Data analytics	64%	63%	62%	62%	65%	N/A	N/A
Shopper insights	62%	64%	69%	59%	64%	63%	-1%
Digital UX & web analytics	N/A	N/A	N/A	N/A	N/A	55%	N/A
Usability	73%	74%	75%	76%	74%	N/A	N/A
Web analytics	51%	49%	52%	54%	50%	N/A	N/A
Average number of disciplines led or contribute:	9.2	9.3	9.3	9.2	9.4	7.8	-1.6
n =	271	251	211	190	202	175	

Green shading indicates top five within wave.

Takeaway: Among the areas brand-side researchers lead or contribute, competitive & market intelligence (90%), consumer market insights (90%), and product development and innovation (89%) have always been among the top five.

Source: GRIT Report and NewtonX

From the analytics perspective, insights professionals lead or contribute to an average of 8.5 disciplines, down -1.7 from last year's 10.2. Most of this decline results from the consolidation of Data Science and Big Data analytics plus the consolidation of usability and web analytics.

The top three disciplines, business intelligence and reporting (96%), competitive and market intelligence (94%), and Data Science and advanced analytics (90%), have been among the top disciplines since 24A. CX (89%) has been among the top five in three of four waves, and product development and innovation (87%) returns to the top five despite no change in percentage.

The two biggest changes came toward the bottom of the list. Advertising and communications research increased +13% from 66% last year to 79% currently, and shopper insights increased +10%, from 62% to 72%.

Among the areas which researchers lead or contribute to, competitive & market intelligence and product development & innovation have always been among the top five.





DISCIPLINES INSIGHTS PROFESSIONALS LEAD OR CONTRIBUTE: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Business intelligence & reporting	91%	94%	93%	96%	+3%
Competitive & market intelligence	85%	90%	93%	94%	+1%
Data Science & advanced analytics	N/A	N/A	N/A	90%	N/A
Data Science	82%	89%	97%	N/A	N/A
Big Data analytics	87%	92%	94%	N/A	N/A
Customer experience (CX)	91%	85%	91%	89%	-2%
Product development & innovation	86%	85%	87%	87%	--
Consumer market insights	85%	87%	89%	86%	-3%
Digital UX & web analytics	N/A	N/A	N/A	80%	N/A
Web analytics	84%	77%	91%	N/A	N/A
Usability	87%	81%	85%	N/A	N/A
Advertising & communications research	68%	69%	66%	79%	+13%
Shopper insights	63%	56%	62%	72%	+10%
Brand management	74%	71%	73%	72%	-1%
Average number of disciplines led or contribute:	9.8	9.8	10.2	8.5	-1.7
n =	183	194	177	152	

Green shading indicates top five within wave.

Takeaway: Among the areas brand-side analytics lead or contribute, business intelligence and reporting (96%), competitive and market intelligence (94%), and Data Science and advanced analytics (90%) have always been in the top five.

Source: GRIT Report and NewtonX

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THE BIG PICTURE [STRATEGIC INTERPRETATION]

Although brand-side researchers and analytics professionals contribute to many of the same disciplines, researchers are much more likely to say insights professionals lead consumer market insights while analytics are much more likely to say insights professionals lead Data Science and advanced analytics plus business intelligence and reporting. These are well delineated domains, although not siloed because researchers and analytics professionals share similar perceptions about contributions across them.

On average, researchers say insights professionals contribute to about 78% of the ten disciplines GRIT covers, and analytics professionals claim 85%. These did not change much from last year; among researchers, CX fell -12%, and, among analytics, contributions to shopper insights and advertising and communications research increased by double digits. These changes could be due to greater acknowledgment of what analytics can contribute to these, and it could be that more analytics professionals are identifying more with the CX discipline than they do with analytics as a skill (see *Brand-side Roles and Teams*).

Although insights professionals contribute to many areas, it does not mean they are the only contributors, and changes in which areas they lead may indicate insights work is becoming more distributed to other, non-specialist functions. Among researchers, 62% say insights professionals lead consumer market insights, but this is down -12% from last year. Possibly, more of this work is being done by end users while researchers shift attention to more defined disciplines, like brand strategy.

Similarly, on the analytics side, the number saying insights professionals lead business intelligence and reporting fell -10%. Possibly, more end users of business intelligence are able to accomplish more on their own. We know the percentage of insights professionals who contribute to business intelligence didn't change, but the drop in leadership might indicate that those contributions are not as exclusive to insights specialists as they once were.

Looking at how individual GRIT participants spend their time, researchers seem more homogenous as a group, and analytics professionals seem more specialized by business topic. Researchers spend significant time on an average of 5.0 topics, and most of them spend significant time on segmentation and audience definition, brand strategy and positioning, and early-stage product development.

Analytics professionals, on the other hand, spend significant time on an average of only 4.3 topics, and none of them are significant for a majority. This suggests they are more specialized within domains, possibly becoming more embedded in business functions. This is consistent with findings in *Brand-side Roles and Teams*, which observes that researchers tend to identify more with a central group while analytics see insights professionals as spread across more diverse contexts. It also suggests that analytics is "mainstreaming," in the sense that its seen less as a specialty role in itself and more as a skill that supports specific business disciplines.

In future *GRIT Reports*, we might expect to see insights professionals continue to identify more strongly with business topics than with research or analytics skills, and we expect to see more insights work continue to move outside of specialists.

Looking at how individuals spend time, researchers seem more homogeneous; analytics professionals seem to specialize more by business topic.

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EVOLVING SUPPLIER LANDSCAPE

From the perspectives of tech-led suppliers and service-led suppliers across employee size bands, this section discusses how the supplier landscape has evolved with respect to revenue sources and service offering portfolios.

HOW IS THE SUPPLIER LANDSCAPE CHANGING? [ORIENTATION]

With the 2025 *Business & Innovation Report*, GRIT changed our supplier segmentation from segments based on a supplier's highest revenue source to segments based on tech-led versus service-led, with service-led broken out by employee size. Our former revenue source-based segments were full-service

research, field services, qualitative research, strategic consulting, data and analytics, and technology.

While they were distinct and useful for a number of years, dynamics such as COVID, the *Data Enlightenment*, the AI tsunami, the relentless advancement of automation, and good old-fashioned economics have dulled the luster of that particular segmentation scheme.

While technology suppliers remain a distinct segment, the composition of service-led supplier segments constantly changes as suppliers add offerings in attempts to grow their businesses. Consequently, we have one mega-segment of full-service research suppliers, many of whom have broad service portfolios, and a set of consistently smaller and unstable segments that are difficult track due to the alternating strengths of their revenue streams.

Full-service research surged during the pandemic, at least in terms of share of suppliers, because brand-side researchers were losing staff and smaller suppliers were endangered, making full-service research a strong survival strategy. It waned coming out of the pandemic as specialists had an opportunity to re-emerge, but it has surged again as larger suppliers (or those aiming to become larger suppliers) add more offerings and organize them under the full-service banner.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.



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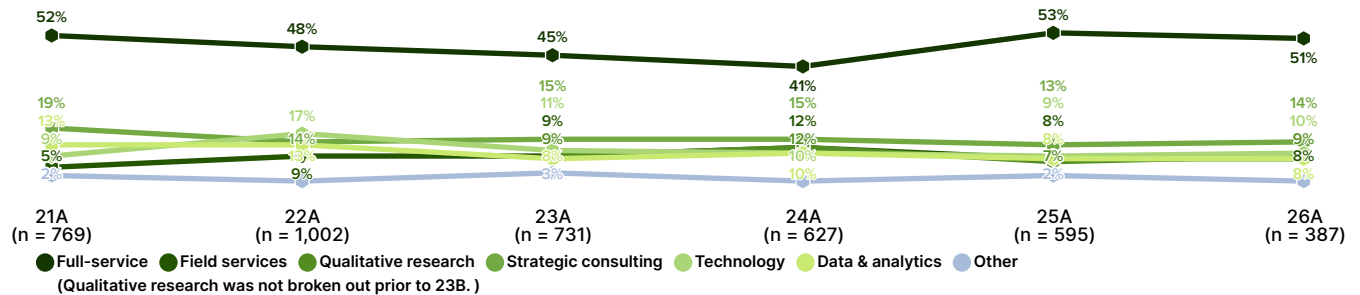
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This dynamic has been further complicated by the trend for the largest suppliers to increase automation and downsize staff as they attempt to engineer a more sustainable cost structure. Historically, some of the largest suppliers have been built around field services, and this may explain why the number of GRIT

participants identifying themselves as primarily field services has fallen from a high of 12% in 24A to just 8% the past two years. The trend toward packaging specialties under full-service research has made it difficult to find and track true specialists.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE BY SUPPLIER HIGHEST REVENUE SOURCE



Takeaway: Full-service research has been the dominant revenue source throughout the tracked period, ranging from 41% to 53% across waves, with no other category exceeding 19% in any wave.

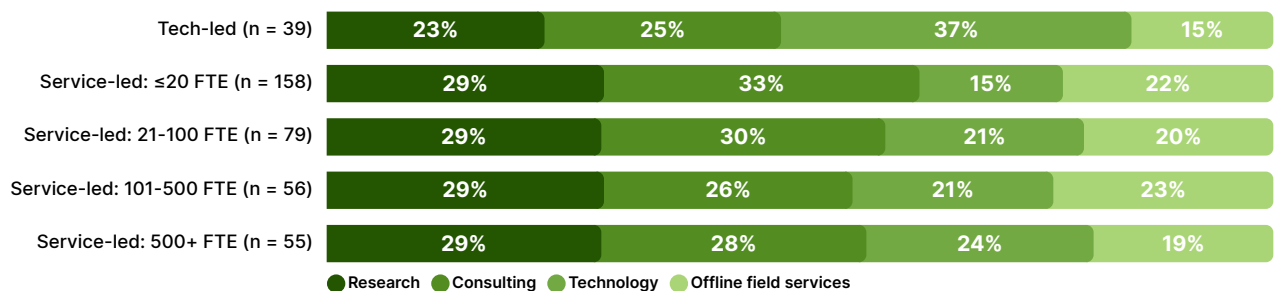
In each GRIT wave, we ask supplier-side participants to identify the offerings their company sells or licenses from a list of more than 25, each one classified as a “research service,” “consulting service,” “offline field service,” or “technology platform or tool.” We count up the number of offerings from each category and calculate the percentage of offerings represented by each category. It’s a crude measure because we don’t account for the importance of each offering, but it is nevertheless revealing.

Tech-led suppliers have the highest percentage of technology offerings, which may seem obvious, but it means many of them rely on multiple kinds of

technology offerings rather than a single line. The percentage of technology offerings for tech-led suppliers is just 37%, indicating that their portfolios tend to stretch well beyond technology into services.

Another finding that has persisted over the years is that smaller service-led suppliers have fewer technology offerings while the largest service-led suppliers offer the most. Although it stands out less clearly in this wave, service-led employee size has always been strongly correlated with increased proportions of technology offerings. The implication has been that suppliers who want to grow need to expand the technology portion of their portfolios.

PROPORTION OF ALL SERVICES OFFERED: SUPPLIER SEGMENT



Takeaway: Tech-led suppliers allocate a notably higher share of their offerings to technology (37%) compared to all service-led segments (15% to 24%), while service-led segments each allocate 29% to research services.

Because of observations like this – as well as from years of participating in the industry – we’ve made the transition from segments based on revenue sources

to segments based on employee size. This approach was very revealing in the latest *Business & Innovation Report*, and you’ll see why if you keep on reading.


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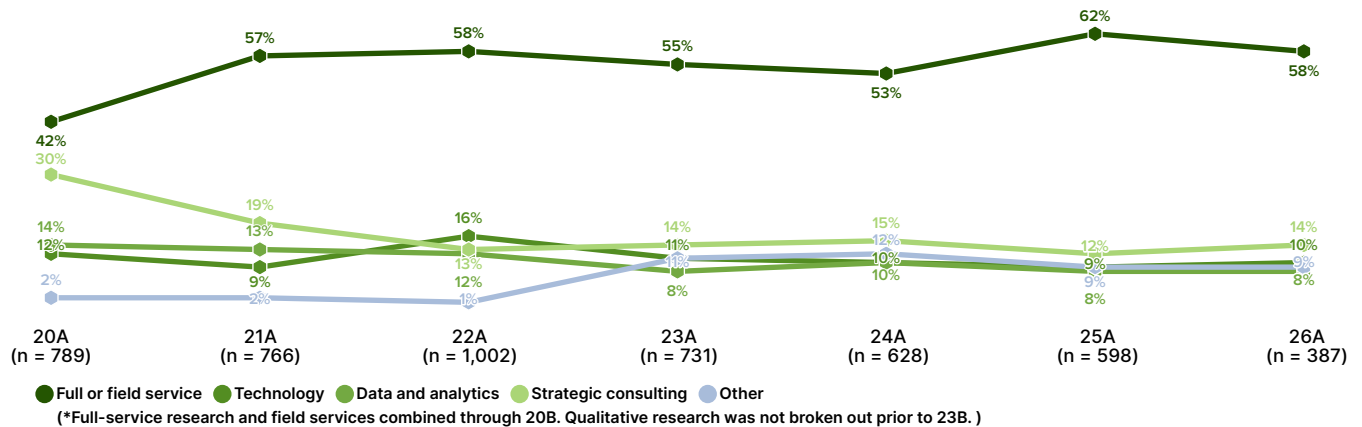
SUPPLIER COMPOSITION BY REVENUE SOURCE

| SUPPLIER POV [DATA]

When GRIT first introduced revenue source-based segments, full-service research and field services were presented as a single segment. At the onset of the pandemic, it accounted for 42% of suppliers, then grew into a majority as the pandemic unfolded, never

falling below 53% and currently at 58% after hitting a high of 62% last year. Strategic consulting entered the pandemic at 30%, then fell to 19% in 21A and 13% in 22A; it hasn't recovered.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE (SUPPLIER)

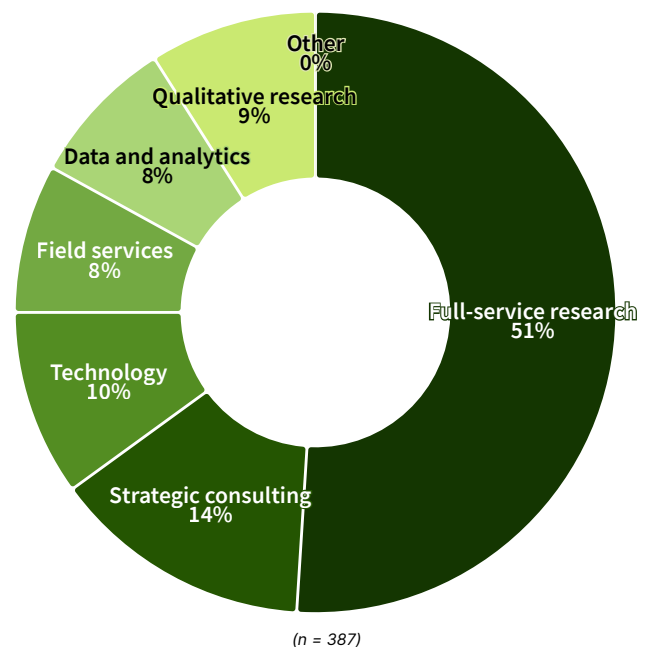


Source: GRIT Report

Takeaway: Full-service and field service combined has ranged from 53% to 62% across waves since the start of the pandemic, and technology, data and analytics, and strategic consulting each have accounted for 19% or less.

Today, full-service research accounts for 51% of supplier-side GRIT participants, strategic consulting is still at 14%, and three other segments are in single digits. Technology accounts for 10% and hasn't been above 11% since a brief surge at the start of the pandemic.

SUPPLIER TYPE/HIGHEST REVENUE (SUPPLIER)



Source: GRIT Report

Takeaway: Full-service research accounts for just over half (51%) of supplier-side professionals by primary revenue source; all other categories are 14% or below.

Strategic consulting entered the pandemic at 30%, then fell to 19% in 21A and 13% in 22A; it hasn't recovered.



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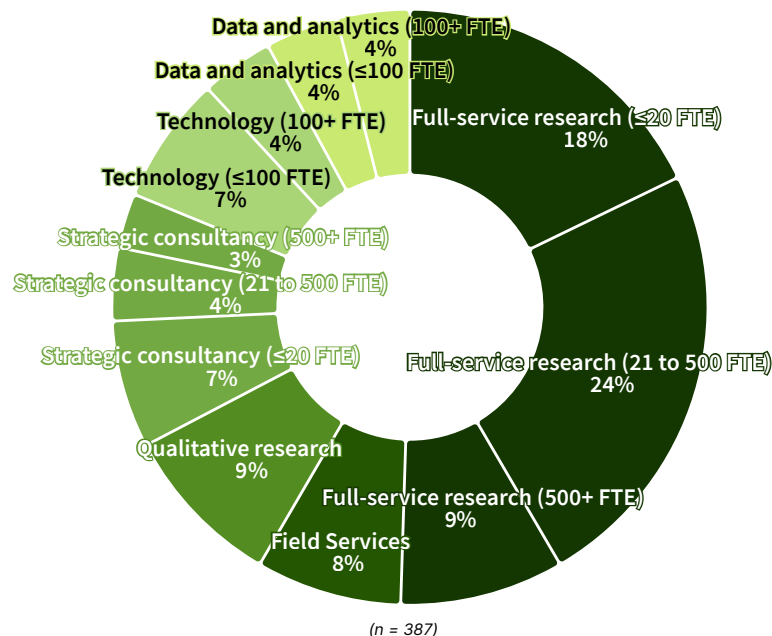
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Nearly half of full-service research participants have 21 to 500 FTE (24% of all supplier-side participants), while those with ≤ 20 FTE are just below that (18%), and half as many of those have 500+ FTE (9%). Among strategic consultancies, those with ≤ 20 FTE account for half (7% overall) followed by those with 21 to 500 FTE (4%) and those with 500+ FTE (3%).

For specialist suppliers like technology and data and analytics, GRIT historically splits them into a smaller and a larger segment with a break at 100 FTE. Nearly twice as many GRIT participants are with smaller technology suppliers (7%) as with larger ones (4%). Data and analytics providers split equally at 100 FTE, 4% with 100 or fewer FTE and 4% with more.

SUPPLIER TYPE/HIGHEST REVENUE (SUPPLIER)



Source: GRIT Report

Takeaway: Mid-size full-service research firms (21 to 500 FTE) represent the largest single slice of the supplier landscape at 24%, while all technology and data and analytics segments combined account for 19%.

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During the pandemic, smaller full-service research suppliers fell from 19% to 11% of all supplier-side GRIT participants, but this has ranged from 16% to 19% since 24A. Mid-sized full-service research suppliers increased from 24% to 30% as the pandemic unfolded, and have stabilized at 24% the past two waves. The segment with the most FTEs waned slightly during the pandemic, but has been back to its pre-pandemic level the last two waves.

Unlike other segments, full-service research growth is less likely to be noticeably limited by acquisitions.

For example, since the first wave of the pandemic, smaller technology providers have consistently accounted for just 5% to 7% of suppliers while larger ones have ranged from 4% to 5%. It's likely that revenue from technology offerings account for a ever-growing percentage of all revenue but that many successful tech companies have been acquired by larger full-service suppliers (or have grown into them). Consequently, the segment doesn't grow, and the relative stability of segment sizes hides the dynamics of the segment compositions.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE (SUPPLIER)

	21A	22A	23A	24A	25A	26A	26A - 25A
Full-service research (≤ 20 FTE)	19%	11%	11%	16%	19%	18%	-1%
Full-service research (21 to 500 FTE)	24%	30%	28%	19%	24%	24%	--
Full-service research (500+ FTE)	9%	7%	6%	6%	10%	9%	-1%
Field Services	5%	9%	9%	12%	8%	8%	--
Qualitative research			9%	12%	7%	9%	+2%
Strategic consultancy (≤ 20 FTE)	11%	7%	7%	5%	7%	7%	--
Strategic consultancy (21 to 500 FTE)	6%	3%	3%	7%	4%	4%	--
Strategic consultancy (500+ FTE)	3%	4%	5%	3%	2%	3%	1%
Technology (≤ 100 FTE)	5%	7%	6%	5%	5%	7%	+2%
Technology (100+ FTE)	4%	10%	5%	5%	4%	4%	--
Data and analytics (≤ 100 FTE)	8%	7%	4%	5%	5%	4%	-1%
Data and analytics (100+ FTE)	5%	6%	4%	5%	3%	4%	+1%
Other	2%	0%	3%	0%	2%	0%	-2%
n =	769	1,002	731	627	595	387	

Qualitative research not introduced until 23B.

Takeaway: The composition of the supplier landscape has been relatively stable across waves; smaller data and analytics and strategic consultancies may be contracting.

Source: GRIT Report





SUPPLIER SEGMENT EVOLUTION |

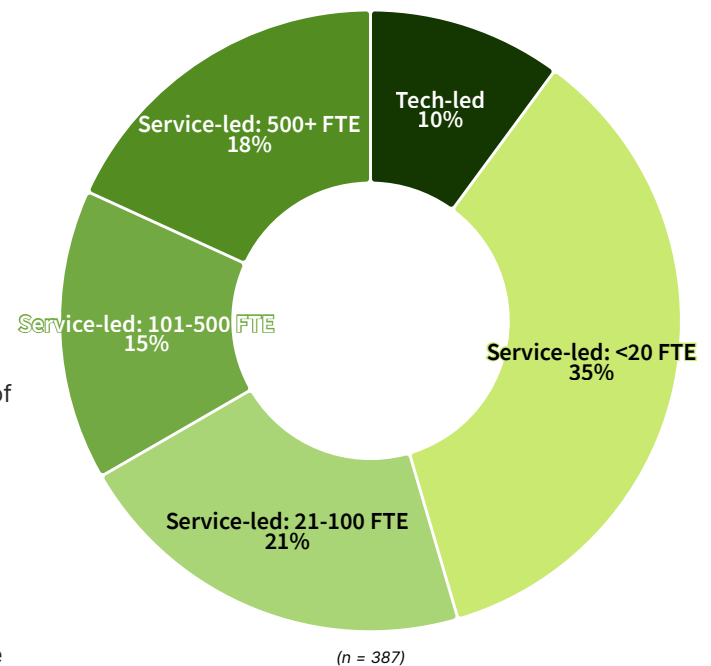
SUPPLIER POV [DATA]

Switching to the new segmentation, GRIT participants split 90%-10% across service-led and tech-led suppliers. Suppliers with <20 FTE are the largest service-led segment (35%), followed by those with 21 to 100 FTE (21%). Those with 101 to 500 FTE account for 15% while those with 500+ FTE account for 18%. Obviously, there are different breaks that could also be meaningful, companies with a single employee are different from those with two to five, and so on, but there are limits. As you read this report, you'll see these supplier segments help us understand the industry better even if we fall short of total enlightenment.

If we cross our new segmentation with our old revenue source-based one, some patterns emerge. As the number of employees increases, so does the percentage of full-service research suppliers – up to a point. The percentage increases from 51% of those with ≤20 FTE to 71% of those with 101-500 FTE, but it falls to just 49% of those with 500+ FTE. In that segment, primary revenue streams are more likely to be strategic consulting (20%, about twice the proportion of those with 21-500 FTE) and data and analytics (17%, about twice the next highest segment).

Service-led suppliers with ≤20 FTE are the most likely to be defined by qualitative research (17%) followed by those with 21-100 FTE (9%). Among companies with more than 100 FTE, only 3% identify qualitative research as their primary revenue source. Those with ≤20 FTE are the least likely to earn their main revenue from field services (5%); in each other service-led

SUPPLIER SEGMENT SIZES

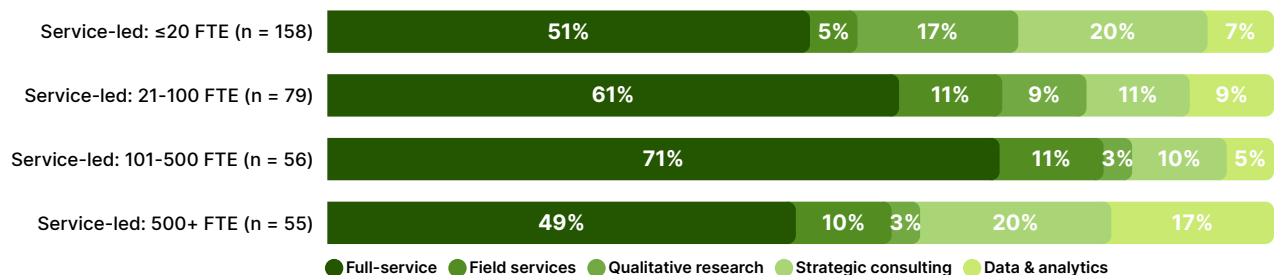


Source: GRIT Report

Takeaway: Service-led suppliers make up 90% of GRIT supplier-side professionals; the largest single segment is service-led ≤20 FTE (35%).

segment, twice as many do (10-11%). Smaller suppliers seem to be a haven for specialists in qualitative research and strategic consulting, along with an expected amount of full-service researchers; the largest suppliers seem to be realigning their offerings away from a research identity to support stronger strategic consulting personas.

SUPPLIER TYPE/HIGHEST REVENUE: SERVICE-LED SEGMENT



Source: GRIT Report

Takeaway: Full-service research is the primary revenue source for nearly half or more of service-led suppliers across all size bands, ranging from 49% (500+ FTE) to 71% (101-500 FTE); strategic consulting skews toward the smallest (20%) and largest (20%) service-led firms.



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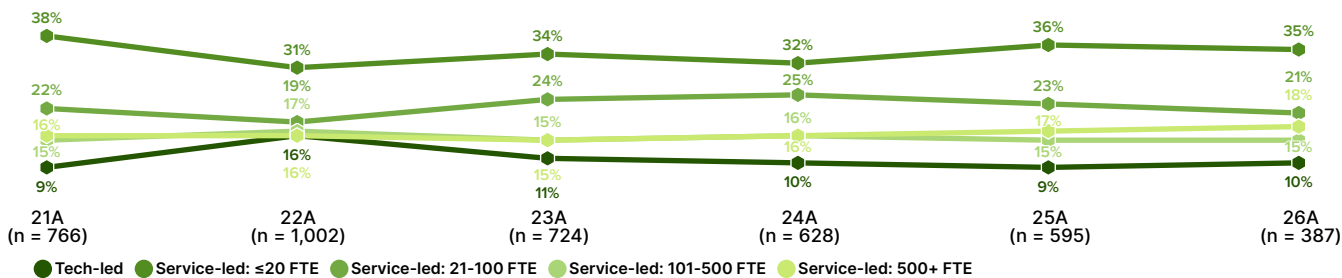
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Aside from aberrations at the nadir of the pandemic, segment sizes have been fairly stable. Except for 23A, tech-led has ranged from 9% to 11%; service-led with

≤20 FTE, 32% to 38%; service-led with 21-100 FTE, 21% to 25%; service-led with 101-500 FTE, 15%-16%; and service-led with 500+ FTE, 15% to 17%.

GRIT SEGMENT: GRIT WAVE BY SUPPLIER SEGMENT



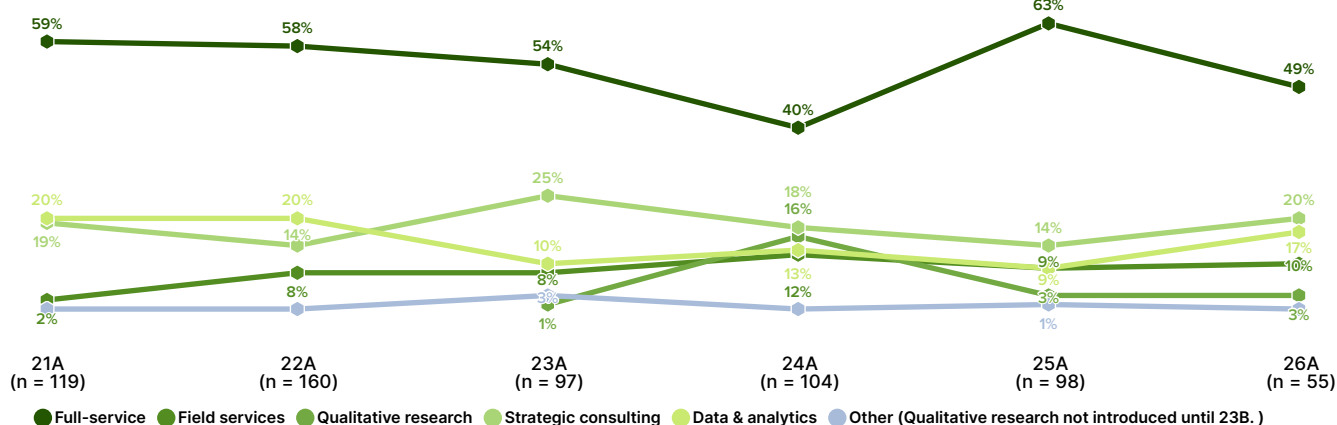
Source: GRIT Report

Takeaway: The relative size of each supplier segment has been consistent across waves since 21A, with service-led ≤20 FTE holding the largest share (31-38%) and tech-led consistently the smallest (9-16%) throughout.

Among service-led suppliers with 500+ FTE, full-service research as the main revenue source steadily declined from 59% in 21A to 40% three years later. Despite a temporary rebound to 63% last year, the percentage of GRIT participants working for firms

defined by full-service research fell to 49% this year. Meanwhile, strategic consultancies increased from 14% in 25A to 20%, and data and analytics providers jumped from 9% to 17%.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Full-service research has been the dominant revenue source for 500+ FTE service-led suppliers throughout the tracked period (40% to 63%), followed by strategic consulting (20% currently) and data and analytics (17% currently).



Among the largest service-led suppliers, full-service research steadily declined as the main revenue source from 59% in 21A to 40% three years later.

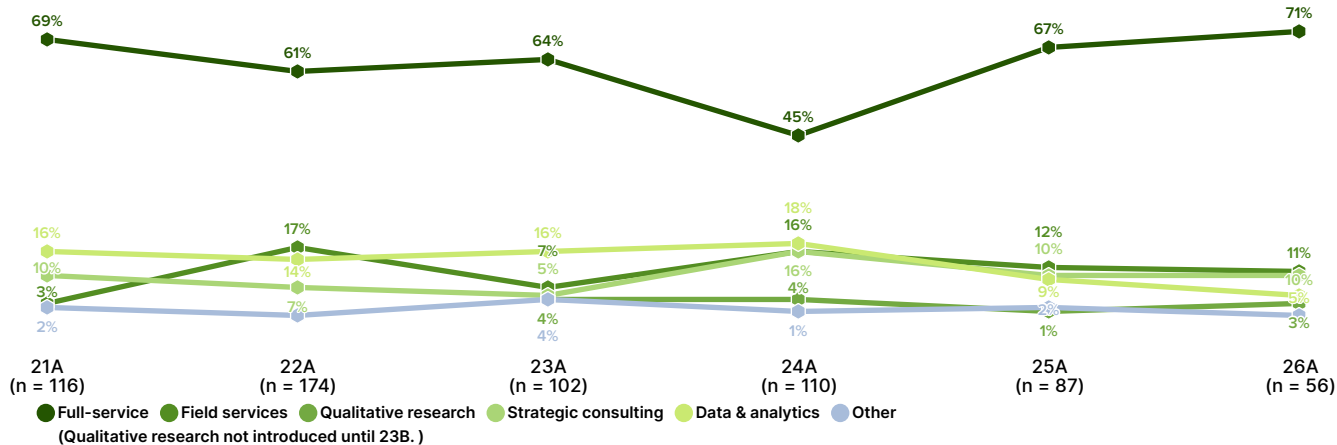
Since 21A, at least 60% of GRIT participants from service-led suppliers with 101-500 FTE have come from full-service research firms, with the exception of 24A, when the percentage dipped to 45%, possibly related to the instant proliferation of genAI. Coinciding with that dip, field services more than doubled from 7% in 23A to 16% and strategic consultancies tripled from 5% to 16%. Since then, field services have remained above 10% while strategic consulting has returned to its 21A level (10%).



When the percentage from full-service research rebounded to 67% in 25A, the percentage identifying as data and analytics suppliers halved, from 18% in 24A to 9% in 25A, then to 5% currently. These dynamics may support the hypothesis that it's difficult to grow beyond a certain size as a specialist

supplier, such as field services, qualitative research, or data and analytics; your chances of breaking the 100 FTE barrier are better if you package everything under full-service research, or, to a lesser extent, strategic consulting.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE (SERVICE-LED: 101-500 FTE)

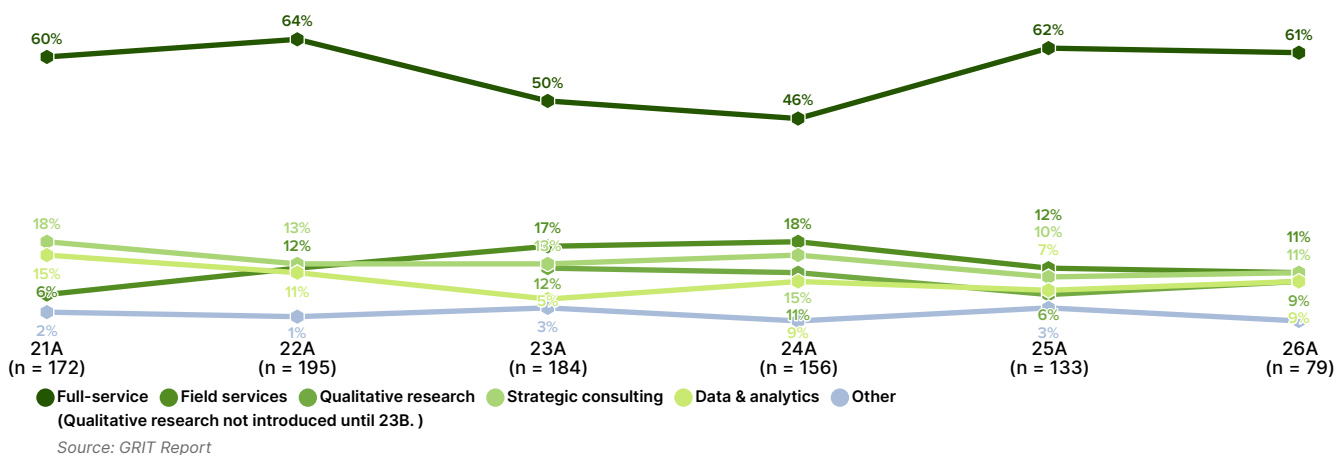


Takeaway: Full-service research has been the dominant revenue source for 101 to 500 FTE service-led suppliers and has grown from 45% in 24A to 71% in 26A.

Among service-led suppliers with 21 to 100 FTE, full-service research is also historically dominant, despite a dip in 23A and 24A. Currently 61%, the percentage of GRIT participants in this segment from full-service research firms has been at least 60%, save for 23A (50%) and 24A (46%). Field services enjoyed a slight increase during these years, peaking at 18%, but otherwise has been no larger than 12%.

When full-service research resurged to 62% last year, field services and strategic consulting fell by one-third and qualitative research fell by nearly half, but data and analytics remained just under 10%. These shifts may be due to specialist companies being acquired by full-service research firms, mergers that moved them up to another service-led segment, or even downsizing that moved them into the ≤20 FTE segment.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE (SERVICE-LED: 21-100 FTE)



Takeaway: Full-service research has been the dominant revenue source for 21 to 100 FTE service-led suppliers and has grown from 46% in 24A to 61% in 26A.



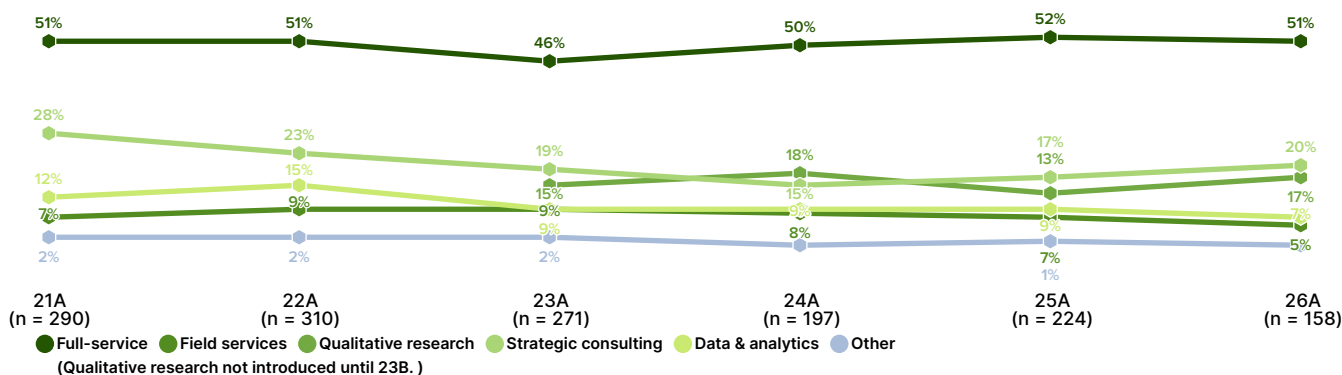


Even considering the down years of 23A and 24A, GRIT participants in the service-led suppliers with ≤ 20 FTE segment from full-service research suppliers never ranged outside of 46% to 52%. Field services have never strayed beyond 5% (a new 26A low) to 9%, and qualitative research has only ranged from 13% to 18%.

Strategic consulting was 28% of the segment in 21A but fell to 19% in 23A and has been 15% to 20% since.

Data and analytics were above 10% before 23A, but have been below 10% since then. Historically, there seems to be something of an equilibrium state regarding the distribution of supplier revenue-source types within service-led suppliers with ≤ 20 FTE, but that equilibrium changed for strategic consulting and data and analytics after 22A. Possibly, these two revenue sources became more important to larger suppliers (or tech-led ones) who poached them from this segment.

SUPPLIER TYPE/HIGHEST REVENUE: GRIT WAVE (SERVICE-LED: ≤ 20 FTE)



Takeaway: Except for 23A, half or more of service-led suppliers with ≤ 20 FTE suppliers claim full-service research as their primary revenue source, currently 51% and followed by strategic consulting (20%) and qualitative research (17%).



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If we look beyond the highest revenue source to all significant revenue sources, some patterns emerge. Tech-led suppliers have 2.1 significant sources of revenue, on average, and one of the two is always technology. Service-led suppliers with ≤ 20 FTE have only 2.0, and those with 500+ FTE have 2.3. In between, the averages rise to 2.6 for those with 21-100 FTE and to 2.8 for those with 101-500 FTE.

Part of the crest in the middle is due to full-service research. This revenue is significant for 84% of service-led suppliers with 101-500 FTE and 90% of those with 21-100 FTE, but only for 69% of those with 500+ and only 65% of those with ≤ 20 FTE. Even though about two-thirds or more in each segment earn from full-service research, it peaks in the middle two segments.

Field services revenue follows a similar pattern. As a significant revenue source, it peaks at 33% for service-led suppliers with 101-500 FTE and 30% for those with 21 to 100 FTE, but is much lower for those with ≤ 20 FTE (17%) and more than 500 FTE (16%). Full-service research and field services are more characteristic of suppliers with 21 to 500 FTE than within either of the extremes.

Data and analytics are significant for 43% to 48% of segments with more than 20 FTE, but only 25% of those with ≤ 20 FTE. Similarly, technology is a significant revenue source for 23% to 31% of those with more than 20 FTE, peaking within 101-500 FTE. For those with fewer employees, it's only 9%.

Qualitative research moves in the opposite direction, ranging from 38% to 41% among service-led suppliers with 500 or fewer FTE, but only 31% for those with 500+ FTE. Across service-led segments, strategic consulting is a significant revenue source for 38% to 47%, the narrowest range for any revenue source.

To recap, full and field services peak as significant revenue sources in the middle two size segments. Data and analytics and technology become more significant once there are more than 20 FTE.

Qualitative research is less common among those with 500+ FTE, and strategic consulting is equivalently common in each size segment.

ALL SIGNIFICANT REVENUE SOURCES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤ 20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Full-service research	31%	65%	90%	84%	69%
Data and analytics	38%	25%	43%	48%	48%
Strategic consulting	17%	47%	38%	47%	43%
Qualitative research	10%	41%	38%	39%	31%
Technology	100%	9%	23%	31%	23%
Field services	19%	17%	30%	33%	16%
Average number of sources	2.1	2.0	2.6	2.8	2.3
n =	39	158	79	56	55

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: Data and analytics is the most frequent non-technology revenue source that is significant for tech-led suppliers (38%); for most service-led suppliers, full-service research is significant.

Source: GRIT Report





Among tech-led suppliers, full-service research became more common once the pandemic unfolded. Only 23% named it as significant in 21A, but it's been higher in every wave since then, eclipsing 30% three times, including the current 31%. Field services were only 7% in 21A, but has been more than double in each wave except 23A; it's currently significant for 19%.

Qualitative research, currently significant for just 10%, peaked at 25% in 24A; the pattern may correlate with the rate of innovation for breakthrough technical solutions for qual.

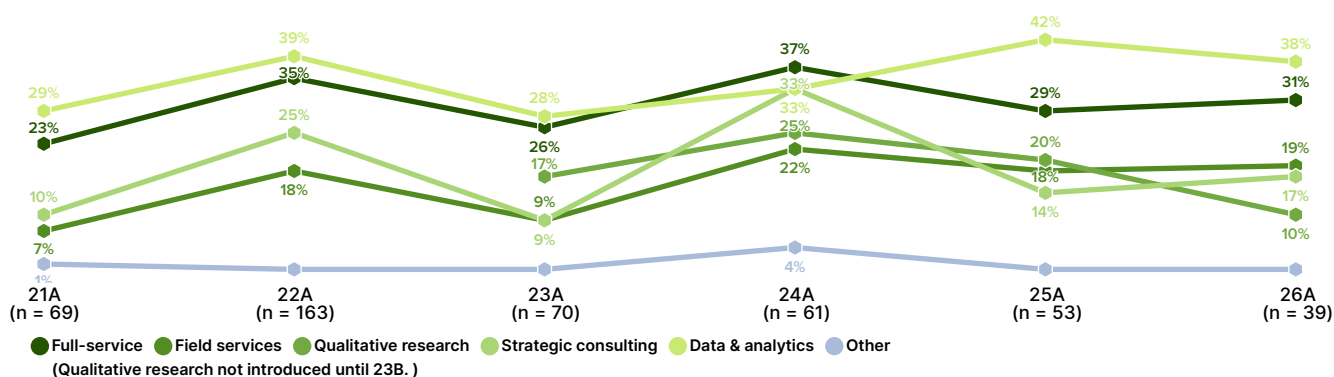
Strategic consulting was a significant source of revenue for 10% of tech-led suppliers in 21A, jumped to 25% as the pandemic unfolded in 22A, reached 33% in 24A, and has fallen back to 17% today. This arc was interrupted in 23A when the percentage fell to 9%, a 23A-24A behavior we've discussed earlier. This trend parallels the other "generalist" service area, full-service research.

Data and analytics were a significant revenue source for 29% of tech-led suppliers in 21A, rose to 39% as the pandemic unfolded, contracted back to 28% in 23A, then eventually rose up to 42% last year. Currently it's sustaining that level at 38%.

We suspect fluctuations in qualitative research as a significant revenue source are driven by related breakthroughs in technology. Full-service research and strategic consulting seem to have become more mainstream ways for tech-led suppliers to supplement revenue, and field services sometimes follows onto full-service research.

Data and analytics, however, seem to have become more intimately entwined with technology and are sustaining a level of consistency as a significant revenue source that the others can't sustain.

ALL SIGNIFICANT REVENUE SOURCES: GRIT WAVE (TECH-LED)



Source: GRIT Report

Takeaway: Data and analytics is the most common non-technology revenue source for tech-led suppliers (38%), followed by full-service research (31%).

Historically, full-service research is a significant revenue source for most GRIT participants in the service-led supplier with 500+ FTE segment, but the percentage has fluctuated. Most recently, it fell from 77% last year to 69% this year. Overall, its trajectory as the main revenue source has been downward, suggesting that full-service research is a reliable revenue stream for very large suppliers, but not how they ultimately want to differentiate.

Field services have followed a similar up and down path as has full-service research, slipping from 30% the past two years to 16% currently. Qualitative research has declined each of the last two years, from 43% in 24A to 36% last year, then to 31% in 26A. Perhaps the increased ability to automate and scale qualitative research has made it a less competitive offering from companies with large numbers of employees. Of our revenue sources, full-service research, field services, and qualitative research might be considered more "traditional;" maybe automation is reducing the labor behind traditional research to the extent that it is more practical for mid-size companies and brand-side DIYers than for very large suppliers.

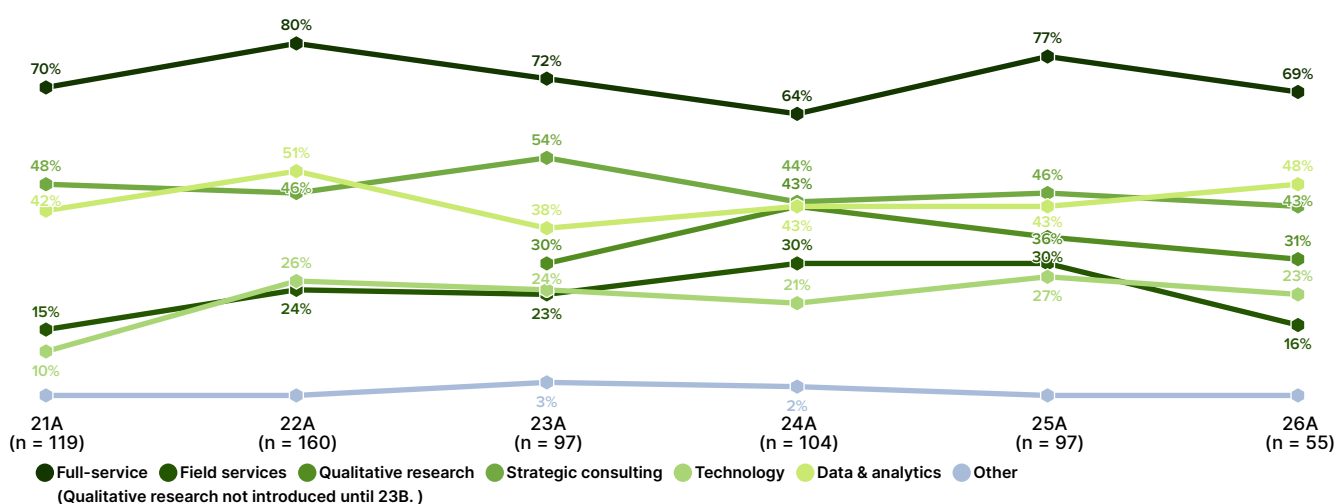




If we consider those three sources to be “traditional research,” it implies strategic consulting, data and analytics, and technology are not. Apart from a spike to 54% in 23A, the percentage reporting strategic consulting has not varied outside of 43% (26A) to 46% (22A and 25A) since 2022. In that time, technology has stayed between 21% (24A) and 27% (25A). Apart from a jump to 51% at the start of the pandemic in 22A, the percentage with data and analytics as a significant revenue source ranged from 38% to 43% from 22A to 25A, and is now 48%.

From the standpoint of employee size, perhaps what distinguishes “traditional research” from strategic consulting, data and analytics, and technology is pass-through expenses. Full-service research, field services, and qualitative research have built-in expenses due to data collection costs; money you have to collect from clients but which don't contribute directly to profit. In the past, perhaps a company needed more labor because these were labor-intensive even though they were not high margin. Possibly, automation has removed the labor requirements for this lower-margin work, pushing the “sweet spot” for “traditional research” down to companies with 21 to 500 employees.

ALL SIGNIFICANT REVENUE SOURCES: GRIT WAVE (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Most service-led suppliers with 500+ FTE draw revenue from full-service research (69%), but that's down -8% from 25A; field services also declined from 30% in 25A to 16% in 26A.

“Traditional” research is thriving among service-led suppliers with 101-500 FTE. After declining as a significant source of revenue from 21A's 80% during the pandemic to 62% in 24A, it rebounded to a new high of 83% last year and currently sits at 84%. Field services has increased to an all-time high of 33% after ranging from 23% to 26% the previous two years. Qualitative research is also named as a significant revenue source by more in this segment this year than in any prior recorded year, 39% currently to 25A's previous high of 34%.

However, “non-traditional” revenue sources are also thriving among service-led suppliers with 101-500 FTE. Strategic consulting is at an all-time high of 47%, up +15% from 25A. Data and analytics tied its 24A high of 48%, and technology reached a new

high of 31% after increasing +14% from last year. Service-led suppliers with 101-500 FTE are increasing reliance on all sources of revenue, traditional research or otherwise.

In the 2025 *Business & Innovation Report*, GRIT hypothesized that this segment is a mix of smaller suppliers who have grown methodically and larger suppliers who have right-sized their operations. In *Business Outlook*, we'll see that service-led suppliers with 101-500 FTE lead all service-led suppliers in revenue trend and are very strong in technology spending. On the surface, it looks like many of these companies are developing portfolios of traditional and non-traditional research that optimize revenue versus staff investment trade-offs.



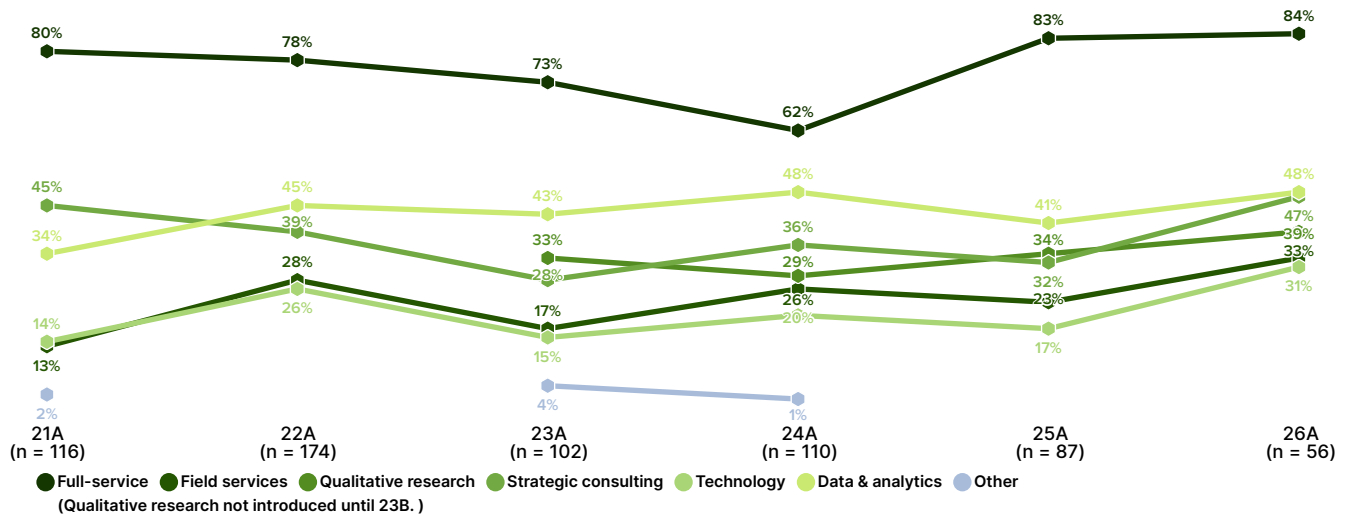
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ALL SIGNIFICANT REVENUE SOURCES: GRIT WAVE (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Full-service research dominates as a significant revenue source among service-led suppliers with 101 to 500 FTE, and three other sources increased by double-digits since 25A: strategic consulting (32% to 47%), technology (17% to 31%), and field services (23% to 33%).

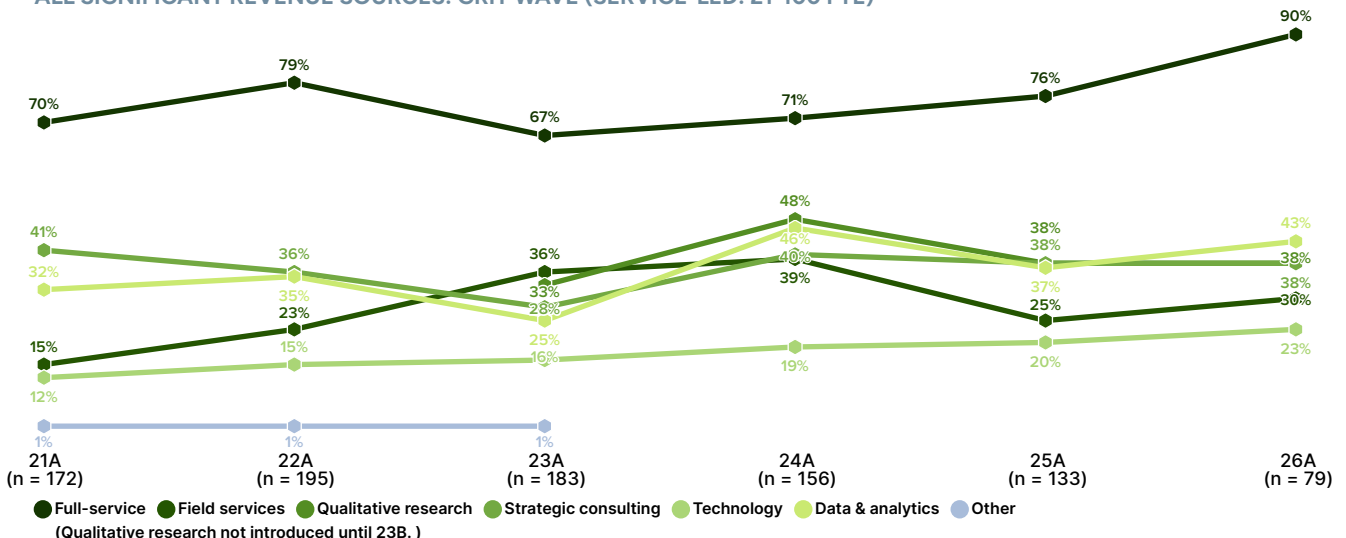
Similar to service-led suppliers with 101-500 FTE, those with 21 to 100 have reached a new high in full-service research as a significant revenue source, up from 76% last year and 67% in 23A to a 90% currently. While other revenue sources are below their peak levels, they tend to be comparable to historical averages. Qualitative research (38%) is in-between its previous low (33%) and high (48%). Except for 23A, strategic consulting (38%) is comparable to its typical range from 36% to 41%. At 43%, data and analytics is close to its high of 46% set two years ago.

Technology (23%) and field services (30%) seem to be trending in opposite directions. Technology has gradually increased from 12% in 21A, and field services is below its highs of 39% set in 24A and 36% set in 23A. Possibly, growth of technology revenue leads to

growth in employee size, which lifts them out of this segment. The field services trend is less consistent, possibly highlighting the opportunity it presents, such as buttressing full-service research, and the risks, such as the burden of pass-through expenses.

The segment contains a mix of suppliers coming up from service-led suppliers with ≤20 FTE, those on their way to the 101-500 FTE segment, and those who have found equilibrium. The rise of full-service research and, to a more moderate extent, technology as revenue sources, the stability of strategic consulting, qualitative research, and data and analytics, and the moderate decline of field services despite the rise in full-service suggest this segment is a crucible for service-led suppliers trying to optimize a winning formula.

ALL SIGNIFICANT REVENUE SOURCES: GRIT WAVE (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: As a significant revenue source, full-service research jumped from 76% of service-led suppliers with 21-100 FTE in 25A to 90% in 26A, its third straight increase.



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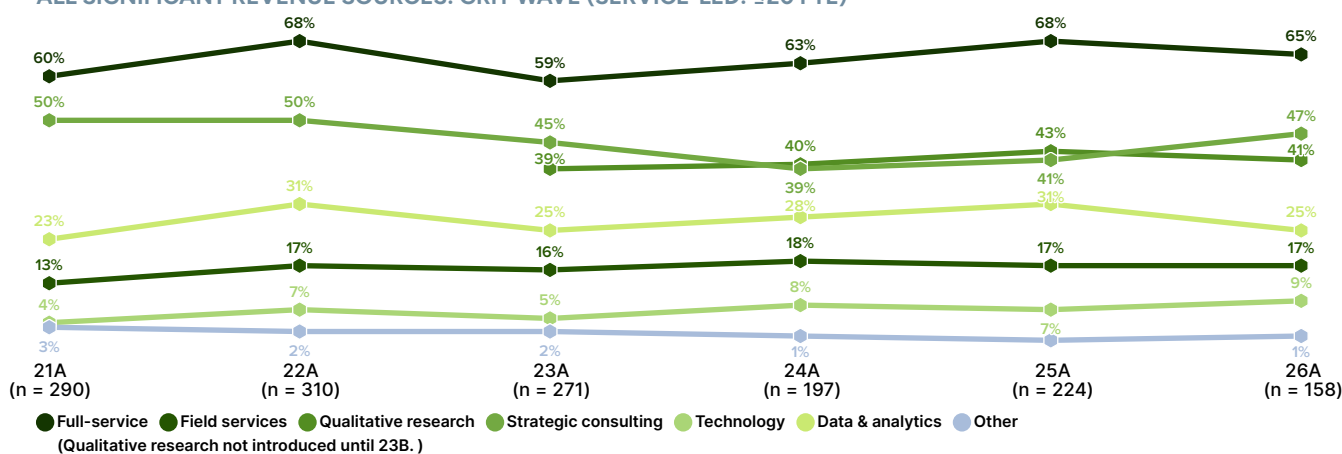


Full-service research seems to be a mainstay of the service-led supplier with ≤ 20 FTE segment, never falling below 59% or rising above 68%. Field services have never strayed outside of 13% to 18%, and qualitative research has always been between 39% and 43%. Strategic consulting had been 50% in 21A and 22A, fell to 39% by 24A, and is currently back up to 47%.

Technology has ranged narrowly from 4% (21A) to 9% (26A); it's technically more than double our original reading, but still small in the grand scheme

of the segment. Data and analytics have ranged from 23% in 21A to 31% in 22A and 25A, and is currently 25%. Some of the segment appears to be entrepreneurs with different specialties while others are simply established small businesses. Among GRIT participants in the service-led supplier with ≤ 20 FTE segment, 56% work for companies who have been in business for 10 years or fewer. In other service-led segments, this ranges from only 28% for those with 21 to 100 FTE down to 10% or 11% in the other segments. Newer entrepreneurs are more characteristic of this segment than any other one.

ALL SIGNIFICANT REVENUE SOURCES: GRIT WAVE (SERVICE-LED: ≤ 20 FTE)



Source: GRIT Report

Takeaway: Most service-led suppliers with ≤ 20 FTE claim full-service research as a significant revenue source (65%), followed by strategic consulting (47%) and qualitative research (41%).

So far, we have pointed out some trend interruptions or reversals that occurred around 23A and 24A, and more discussion should bring these seeming anomalies into clearer focus. Regarding 23A, the genAI shockwave likely caused genuine strategic disorientation. Suppliers who had been building specialty practices such as data and analytics, strategic consulting, and qualitative tech may have paused portfolio expansion or pulled back positioning claims while they figured out what their offerings would actually look like in an AI-enabled world.

The 23A/24A dip in full-service research among mid-size suppliers, coinciding with spikes in field services and strategic consulting, is consistent with suppliers experimenting with identity rather than consolidating under a familiar banner. The genAI moment may have temporarily broken the full-service-as-default gravity.

The 24A GRIT wave represents post-COVID normalization. The official end of COVID emergency declarations in mid-2023 likely accelerated several

delayed decisions simultaneously: staff reductions that had been deferred, acquisitions that had been planned but postponed, and restructuring that had been politically difficult during the pandemic. Suppliers who had grown to serve pandemic-era demand (especially in qualitative and field services) may have right-sized sharply. This could explain why some specialist categories tank specifically in 24A; it's not that demand disappeared, but that the organizational units serving that demand shrank or were absorbed.

In addition to these two factors, acquisitions may have also had an impact. If successful specialists in data and analytics, qualitative, and strategic consulting were being acquired by larger full-service firms in 23A and 24A, the GRIT sample would show those categories shrinking not because the capabilities disappeared but because the people now identify with their acquirer's primary revenue source. This would produce exactly the pattern you see: specialist segments dip while full-service rebounds, without any real change in what the industry actually does.



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SERVICE POSITIONING BY OFFERING |

SUPPLIER POV ^[DATA]

In each GRIT wave we ask suppliers which of 25+ offerings are most important to their positioning. Full-service research continues to be the leading offering most important among service-led suppliers. As we might expect from our earlier discussion of revenue sources, it peaks among service-led suppliers with 21 to 100 FTE (42%) and those with 101 to 500 FTE (41%), and it's somewhat lower at the extremes (33% among 500+ FTE and 34% among those with ≤20 FTE).

Except for those with 101 to 500 FTE, the percentage saying that more than one offering is equally important ranges from 9% among those with 21 to 100 FTE to 15% for those with ≤20 FTE. It peaks among those with 101 to 500 FTE (21%). Overall, we see suppliers

wanting to differentiate on a single, leading offering, but, in this segment, there may be more to work out as they grow their portfolios. It may not yet be clear to them what to emphasize in marketing from here.

Strategic insights consulting is the other offering that reaches double digits in any service-led segment, 14% among ≤20 FTE, 13% among 21-100 FTE, and 10% among 500+ FTE. Among tech-led suppliers, the leading offering for positioning is technology for online quantitative data collection (19%). This is followed by technology for basic or advanced analytics (12%). These two technologies also exceed 5% for service-led suppliers with 500+ FTE.

SERVICE MOST IMPORTANT TO POSITIONING: SUPPLIER SEGMENT (AT LEAST 5% OF ANY TWO SEGMENTS)

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Full-service research	7%	34%	42%	41%	33%
More than one are equally most important	10%	15%	9%	21%	13%
Strategic insights consulting	--	14%	13%	5%	10%
Tech for basic or advanced analytics	12%	1%	1%	--	6%
Tech for online quant data collection	19%	1%	2%	--	5%
Sampling	2%	2%	7%	7%	4%
n =	39	158	79	56	55

Takeaway: Full-service research is the leading offering most important for positioning among service-led suppliers, from 33% of those with 500+ FTE to 42% of those with 21 to 100 FTE; for tech-led suppliers, it's technology for online quantitative data collection (19%).

Source: GRIT Report



Among tech-led suppliers, the leading offering for positioning is technology for online quantitative data collection.

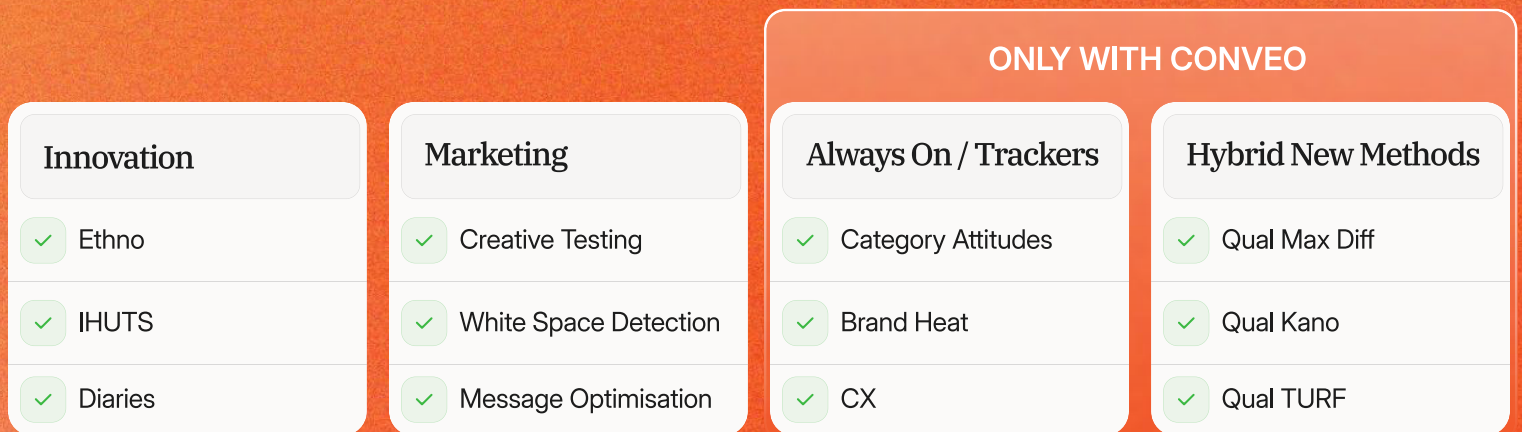
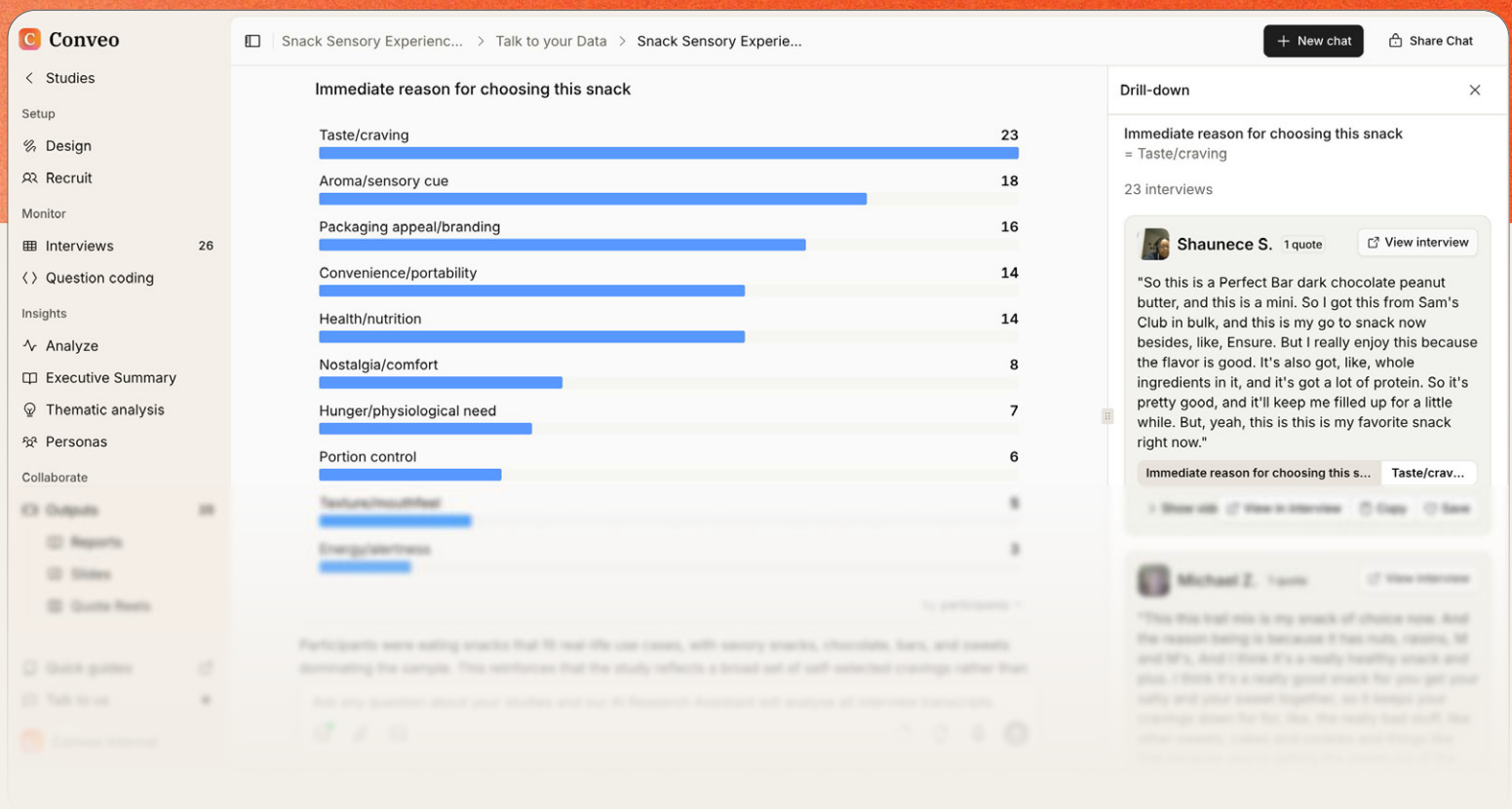
If we look within technology offerings, we find DIY surveys (12%) and online communities (8%) are also important to tech-led suppliers. A few service-led suppliers with 500 or fewer FTE use technology offerings to position themselves, but these only reach 4% (online communities among those with 21 to 100 FTE) and 3% (online qualitative data collection in the same segment).

Three technology offerings reach 3% among service-led suppliers with 500+ FTE. Technology for basic or advanced analytics is most important for positioning to 6%; online quantitative data collection to 5%; and online communities for 3%.



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Immediate reason for choosing this snack

Reason	Count
Taste/craving	23
Aroma/sensory cue	18
Packaging appeal/branding	16
Convenience/portability	14
Health/nutrition	14
Nostalgia/comfort	8
Hunger/physiological need	7
Portion control	6
Texture/mouthfeel	5
Energy/alertness	3

Participants were eating snacks that fit real-life use cases, with savory snacks, chocolate, bars, and sweets dominating the sample. This reinforces that the study reflects a broad set of self-selected cravings rather than...

Ask any question about your studies and our AI Research Assistant will analyze all interview transcripts.

Drill-down

Immediate reason for choosing this snack
= Taste/craving

23 interviews

Shaunece S. 1 quote [View interview](#)

"So this is a Perfect Bar dark chocolate peanut butter, and this is a mini. So I got this from Sam's Club in bulk, and this is my go to snack now besides, like, Ensure. But I really enjoy this because the flavor is good. It's also got, like, whole ingredients in it, and it's got a lot of protein. So it's pretty good, and it'll keep me filled up for a little while. But, yeah, this is this is my favorite snack right now."

Immediate reason for choosing this s... Taste/crav...

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Michael Z. 1 quote [View interview](#)

"This bar had me in my snack of choice now. And the reason being is because it has nuts, marsh, M&M's, and I think it's a really healthy snack and plus, I think it's a really good snack for you get your fatty and your sweet together, so it keeps your cravings down for the day, the really best stuff. Not other snacks, candy and cookies and things like that because they're not really the best stuff of the day."



TECHNOLOGY OFFERING MOST IMPORTANT TO POSITIONING: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online quant data collection	19%	1%	2%	--	5%
DIY surveys	12%	--	--	2%	--
Basic or advanced analytics	12%	1%	1%	--	6%
Online communities (MROC)	8%	1%	4%	2%	3%
Collection and/or analysis of unstructured data	5%	2%	--	--	--
DIY sample access	3%	1%	--	--	1%
Synthetic data or synthetic sample	2%	--	--	1%	--
Online qual data collection	--	2%	3%	--	--
Passive data collection and/or analysis	--	1%	--	--	--
Nonconscious data collection and/or analysis	--	1%	1%	--	--
n =	39	158	79	56	55

Takeaway: Three technology offerings are named by at least 10% of the tech-led segment as most important to positioning: online quant data collection (19%), DIY surveys (12%), and basic or advanced analytics (12%).

Source: GRIT Report

After strategic insights consulting, the only other consulting offering that pops out is technology consulting among tech-led suppliers. Three other services reach 4% in any segment: CX/UX consulting

(tech-led), business strategy (service-led with 21 to 100 FTE), and brand strategy or management (101 to 500 FTE).

CONSULTING SERVICES MOST IMPORTANT TO POSITIONING: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Strategic insights consulting	--	14%	13%	5%	10%
Technology consulting	8%	1%	1%	--	3%
Marketing strategy consulting	2%	1%	2%	--	2%
Brand management/strategy consulting	--	3%	--	4%	2%
Customer or user experience (CX/UX) consulting	4%	1%	1%	--	1%
Business strategy consulting	2%	1%	4%	--	--
Product development/innovation consulting	--	1%	3%	--	--
Marcom, advertising, or PR consulting	--	1%	1%	1%	--
Other consulting services	--	--	--	4%	--
n =	39	158	79	56	55

Takeaway: Strategic insights consulting is cited by as the offering most important to positioning by at least 10% of service-led segments: those with ≤20 FTE (14%), with 21-100 FTE (13%), and with 500+ FTE (10%).

Source: GRIT Report





The only offline field service that stands out as most important to positioning is sampling. This applies to

7% among service-led with 21 to 100 FTE and with 101 to 500 FTE, plus 4% of those with 500+ FTE.

OFFLINE FIELD SERVICE MOST IMPORTANT TO POSITIONING: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Sampling	2%	2%	7%	7%	4%
Offline qual data collection	--	--	--	--	3%
Recruiting/pre-recruiting	--	2%	--	3%	1%
Moderating/interviewing	2%	2%	2%	2%	--
Offline quant data collection	--	2%	--	1%	--
Interviewing facilities/locations	--	--	--	--	--
n =	39	158	79	56	55

Takeaway: Offline field service offerings are infrequently cited by any segment as most important to positioning, with sampling reaching only 7% in the service-led supplier with 21-100 and 101-500 FTE.

Source: GRIT Report

Full-service research is important to positioning for more than one-third of GRIT participants in each service-led segment, but also for 7% of the tech-led segment. The other research services that resonate

for positioning are syndicated data and/or reports (8% for 500+ FTE), industry-focused research (5% of ≤20 FTE), and analytical services (4% for ≤20 FTE).

RESEARCH SERVICE MOST IMPORTANT TO POSITIONING: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Full-service research	7%	34%	42%	41%	33%
Syndicated data and/or reports	--	1%	--	1%	8%
Analytical services	3%	4%	2%	3%	3%
Secondary research	--	1%	--	--	2%
Industry-focused research	--	5%	1%	2%	--
Research/analysis based on unstructured data	2%	3%	1%	--	--
Data services	--	--	--	--	--
Applied neuroscience/biometrics research	--	--	--	--	--
Other research services	--	--	1%	--	--
n =	39	158	79	56	55

Takeaway: Full-service research is the offering most important to positioning for more than 30% of each service-led supplier segment and the leading research service among tech-led suppliers (7%); syndicated data and reports is most important for 8% of service-led with 500+ FTE.

Source: GRIT Report





OFFERINGS BY SERVICE CATEGORY |

SUPPLIER POV ^[DATA]

Looking beyond the offering most important to positioning, GRIT examines all offerings. Among consulting offerings, at least 74% in each service-led segment offer strategic insights consulting. This is also offered by nearly half of tech-led suppliers (45%), eclipsed only by technology consulting (48%) in their segment.

On average, tech-led suppliers offer 2.7 consulting services, but service-led segments offer 3.9 or more

of these. In each service-led segment, most offer product development and innovation consulting, and half or more offer brand management and strategy consulting. A majority offer marketing strategy consulting in each service-led segment except those with 101 to 500 FTE (44%), and at least half offer business strategy consulting except 101 to 500 FTE (41%).

CONSULTING SERVICES OFFERINGS: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Strategic insights	45%	80%	79%	74%	75%
Product development/innovation	36%	55%	58%	59%	67%
Marketing strategy	32%	63%	52%	44%	60%
Customer or user experience (CX/UX)	35%	48%	42%	46%	55%
Brand management/strategy	22%	55%	61%	50%	51%
Business strategy	24%	54%	50%	41%	50%
Marketing communications, advertising, or PR	26%	47%	50%	51%	44%
Technology consulting	48%	20%	25%	22%	29%
Other consulting services	2%	3%	1%	6%	1%
None of the above	17%	10%	8%	11%	7%
Average number offered:	2.7	4.2	4.2	3.9	4.3
n =	39	158	79	56	55

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: Strategic insights is the leading consulting offering in each segment, from 45% of tech-led suppliers to more than 70% of each service-led segment; product development and innovation and brand management/strategy are offered by at least half of each service-led segment.

Source: GRIT Report



In each service-led segment, most offer product development & innovation consulting, and half or more offer brand management & strategy consulting.

The biggest changes in consulting offerings among tech-led suppliers from last year are an increase in technology consulting (+11%) and a decrease in those saying they don't offer any consulting services (-18%). Among service-led suppliers with 500+ FTE, three consulting offerings declined by double digits: brand management and strategy (-15%), business strategy (-12%), and strategic insights (-11%).

The only other change of at least 10% occurred within service-led suppliers with 101 to 500 FTE: marketing strategy consulting fell -10%.



CONSULTING SERVICES OFFERED – CHANGE FROM 25A: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Strategic insights	-2%	+7%	+6%	+2%	-11%
Product development/innovation	+4%	+6%	+8%	+2%	+3%
Marketing strategy	-2%	+1%	-2%	-10%	-3%
Customer or user experience (CX/UX)	-1%	+1%	-4%	-2%	-1%
Brand management/strategy	+1%	-2%	+7%	-4%	-15%
Business strategy	+1%	-3%	+5%	-9%	-12%
Marketing communications, advertising, or PR	+1%	-1%	+2%	+2%	-9%
Technology consulting	+11%	+5%	+3%	+6%	-6%
Other consulting services	+2%	+3%	+1%	+6%	+1%
None of the above	-18%	-3%	-8%	-6%	-2%
Average number offered:	+0.3	+0.3	0.3	--	-0.5
n =	39	158	79	56	55

Takeaway: Technology consulting increased +11% among tech-led suppliers from 25A to 26A, but the other big movers were downward: marketing strategy, -10% among service-led suppliers with 101-500 FTE, and brand management/strategy (-15%), business strategy (-12%), and strategic insights (-11%) among those with 500+ FTE.

Source: GRIT Report

Among research services, most tech-led suppliers offer data (54%) and analytical services (53%), while nearly half offer full-service research (46%). In each service-led segment, at least 78% offer full-service research, at least 61% offer analytical services, and most offer research or analysis based on unstructured data.

Except for service-led suppliers with 21 to 100 FTE (48%), most service-led suppliers offer secondary research. Nearly half or more service-led suppliers offer industry-focused research, from 48% of those with ≤20 FTE and with 21 to 100 FTE to 63% of those with 101 to 500 FTE and 60% with 500+ FTE. In general, the average number of research services offered increases with employee size.

RESEARCH SERVICES OFFERED: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Full-service research	46%	78%	85%	93%	83%
Secondary research	17%	57%	48%	53%	64%
Analytical services	53%	66%	77%	80%	61%
Industry-focused research	32%	48%	48%	63%	60%
Research/analysis based on unstructured data	38%	52%	57%	53%	59%
Data services	54%	39%	58%	57%	54%
Syndicated data and/or reports	21%	20%	25%	34%	51%
Applied neuroscience/biometrics	2%	12%	18%	12%	25%
Other research services	2%	1%	--	--	--
None of the above	16%	3%	4%	4%	0%
Average number offered:	2.6	3.7	4.2	4.5	4.6

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: Majorities in each segment offer analytical services, from 53% of tech-led suppliers to 80% of service-led with 101-500 FTE; full-service research and research/analysis based on unstructured data also claim majorities of each service-led segment.

Source: GRIT Report



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Among service-led suppliers with 21-100 FTE, three research offerings increased by double digits and none decreased by that much. Research and analysis based on unstructured data increased +13%, and data and analytical services each increased +11%.

Among service-led suppliers with 101-500 FTE, two research services increased by double digits. Secondary research increased +14% and industry-focused research increased +11%. None decreased that much in this segment, but two did among those with 500+ FTE: analytical services (-16%) and data services (-11%).

RESEARCH SERVICES OFFERED – CHANGE FROM 25A: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Full-service research	-4%	-2%	+2%	+6%	-5%
Secondary research	+7%	+4%	+5%	+14%	+3%
Analytical services	-11%	+3%	+11%	+9%	-16%
Industry-focused research	-3%	-8%	+5%	+11%	-8%
Research/analysis based on unstructured data	-5%	+5%	+13%	--	-1%
Data services	+5%	-1%	+11%	-7%	-11%
Syndicated data and/or reports	+2%	--	-6%	+1%	-4%
Applied neuroscience/biometrics	-2%	+8%	+9%	+5%	-3%
Other research services	--	--	-2%	-2%	-2%
None of the above	+2%	-3%	+1%	+1%	-5%
Average number offered:	-0.1	+0.1	+0.5	+0.4	-0.5

Takeaway: Three research services increased by double digits among service-led suppliers with 21-100 FTE: research and analysis based on unstructured data (+13%) and analytical and data services (+11% each); analytical services fell -16% and data services fell -11% among those with 500+ FTE.

Source: GRIT Report

The supplier landscape is no longer explained well by familiar specialty labels. Size, scale, technology investment, cost structure, and operating model now reveal more about supplier strategy than whether a firm calls itself full-service, consulting-led, tech-led, or research-led. The 101 to 500 FTE service-led segment is especially important because it appears to have found a viable balance of breadth, capability, governance, and growth.

– LM, ed.

Regarding offline data collection services, tech-led suppliers offer 1.7, on average. Service-led suppliers with 101 to 500 FTE offer 3.5, on average, but the other service-led segments offer fewer (2.9 to 3.0). Nearly half of tech-led suppliers offer sampling (47%), as do serviced-led suppliers with 21 to 100 FTE (50%) and most of those with 101 to 500 FTE (58%). In each service-led segment, most offer quantitative data collection, moderating and interviewing, and qualitative data collection. Nearly half or more offer recruiting and pre-recruiting.





OFFLINE FIELD SERVICES OFFERED: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Quantitative data collection (offline)	25%	55%	56%	55%	62%
Moderating/interviewing	35%	62%	56%	72%	60%
Qualitative data collection (offline)	24%	55%	51%	64%	57%
Recruiting/pre-recruiting	29%	50%	52%	62%	47%
Sampling	47%	38%	50%	58%	44%
Interviewing facilities/locations	14%	28%	25%	41%	31%
None of the above	33%	21%	16%	18%	19%
Average number offered:	1.7	2.9	2.9	3.5	3.0
n =	39	158	79	56	55

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: In each service-led segment, majorities offer offline data collection services for quantitative data, moderating/interviewing, qualitative data collection, and recruiting/pre-recruiting.

Source: GRIT Report

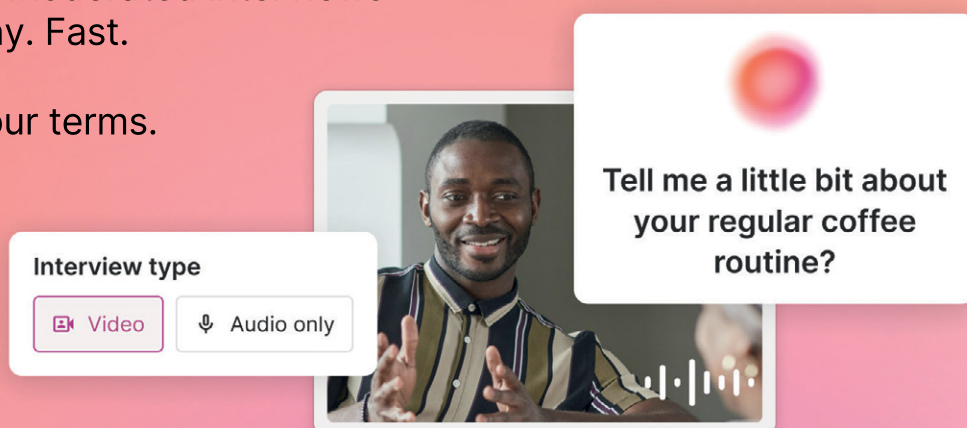
Within service-led suppliers with 101 to 500 FTE, three offline data collection services increased by at least 10% since last year. Moderating and interviewing increased +18%, interviewing facilities and locations increased +14%, and recruiting and pre-recruiting

increased +11%. Among tech-led suppliers, moderating and interviewing increased +10% while offline qualitative data collection fell -10% and quantitative fell -19%. Recruiting and pre-recruiting decreased -13% among service-led suppliers with 500+ FTE.

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Perhaps coincidentally, the average number of offline data collection services decreased by -0.5 among service-led suppliers with 500+ FTE while the average number among those with 101 to 500 FTE increased a like amount (+0.4). Although proving nothing, this

observation is consistent with the theory that some of the largest suppliers are downsizing to reduce fixed staff costs associated with field services. Possibly, this reflects automation enabling more fieldwork to be conducted with fewer staff.

OFFLINE FIELD SERVICES OFFERED – CHANGE FROM 25A: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Quantitative data collection (offline)	-19%	+3%	-3%	+1%	+4%
Moderating/interviewing	+10%	-4%	+3%	+18%	-7%
Qualitative data collection (offline)	-10%	-1%	+2%	+8%	-2%
Recruiting/pre-recruiting	-2%	+6%	+2%	+11%	-13%
Sampling	+3%	+2%	+1%	+7%	-9%
Interviewing facilities/locations	+3%	--	-5%	+14%	+1%
None of the above	+10%	--	-6%	-3%	-2%
Average number offered:	-0.4	-0.1	-0.2	+0.4	-0.5

Takeaway: Among service-led suppliers with 101-500 FTE, moderating/interviewing (+18%), interviewing facilities/locations (+14%), and recruiting/pre-recruiting (+11%) each increased by double digits, while moderating/interviewing increased +10% in the tech-led segment.

Source: GRIT Report

Among technology offerings, most tech-led suppliers provide basic or advanced analytics (68%), collection and/or analysis of unstructured data (65%), online quantitative data collection (65%), and DIY surveys (55%). Nearly half offer online qualitative data collection (48%). Overall, the average tech-led supplier offers 4.2 of these tools and platforms.

The average service-led supplier with 500+ FTE offers nearly as many (3.8), led by basic or advanced

analytics (69%) and online quantitative data collection (59%). It stands out from other service-led suppliers with respect to DIY surveys (37% to 24% for the next-highest segment), DIY sample access (29% to 18%), and synthetic data or synthetic sample (36% to 24%). These three differences could support the hypothesis we just discussed: some of the largest suppliers are leveraging automation to enable more fieldwork to be conducted (or simulated) with fewer staff.

TECHNOLOGY OFFERED: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Basic or advanced analytics	68%	38%	45%	52%	69%
Collection and/or analysis of unstructured data	65%	32%	38%	40%	37%
Online quantitative data collection	65%	39%	54%	58%	59%
DIY surveys	55%	9%	24%	18%	37%
Online qualitative data collection	48%	36%	47%	48%	41%
DIY sample access	40%	4%	18%	16%	29%
Online communities (MROC)	38%	17%	29%	38%	40%
Synthetic data or synthetic sample	20%	8%	15%	24%	36%
Passive data collection and/or analysis	12%	8%	8%	15%	19%
Nonconscious data collection and/or analysis	8%	6%	16%	11%	13%
None of the above	2%	43%	22%	25%	8%
Average number offered:	4.2	2.0	2.9	3.2	3.8
n =	39	158	79	56	55

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

Takeaway: Most tech-led suppliers offer technology for basic or advanced analytics (68%), collection and/or analysis of unstructured data (65%), online quantitative data collection (65%), and DIY surveys (55%); most service-led suppliers with 20+ FTE offer technology for online quantitative data collection.

Source: GRIT Report



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All the biggest changes in technology offerings since last year involve service-led suppliers. Among those with 500+ FTE, three decreased: DIY surveys (-22%), online qualitative data collection (-19%), and collection and/or analysis of unstructured data (-13%). Among those with 101-500 FTE, one increased (synthetic data or synthetic sample, +12%) and one decreased (DIY surveys, -19%). Among those with 21-100 FTE, two decreased: online quantitative data collection (-14%) and basic or advanced analytics (-12%).

Some of the decreases may be due to suppliers changing segments or discontinuing the offerings, but it could also happen that some suppliers have stopped offering them as standalone licenses and packaged them within other services, such as full-service research.

TECHNOLOGY OFFERED – CHANGE FROM 25A: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Basic or advanced analytics	-8%	+1%	-12%	-9%	+2%
Collection and/or analysis of unstructured data	+5%	+5%	-7%	-4%	-13%
Online quantitative data collection	-2%	-3%	-14%	-7%	-7%
DIY surveys	+2%	-4%	+6%	-19%	-22%
Online qualitative data collection	-1%	--	-2%	-2%	-19%
DIY sample access	+1%	-3%	-3%	-4%	-6%
Online communities (MROC)	+9%	-3%	-3%	--	-9%
Synthetic data or synthetic sample	-1%	+4%	+5%	+12%	+5%
Passive data collection and/or analysis	+3%	+2%	-1%	+1%	-9%
Nonconscious data collection and/or analysis	+3%	+3%	+7%	+2%	-7%
None of the above	-1%	+3%	+2%	+11%	-2%
Average number offered:	+0.1	--	-0.2	-0.3	-0.8

Takeaway: Except for a +12% increase in synthetic data among service-led suppliers with 101-500 FTE, all the big changes in technology services were downward, including three among service-led with 500+ FTE: DIY surveys (-22%), online qualitative data collection (-19%), and collection and/or analysis of unstructured data (-13%).

Source: GRIT Report



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SERVED MARKETS BY SEGMENT |

SUPPLIER POV ^[DATA]

Across supplier segments, financial services and CPG are among their top five markets served. Each service-led segment also has healthcare and pharmaceuticals in its top five. Each segment except service-led suppliers with 100 or fewer FTE list technology and telecom in their top five, and each except those with more than 100 FTE list market research, insights, or analytics in their top five.

It's intuitive for technology suppliers to have a strong focus on other insights industry players, but it may be important to keep in mind how much smaller service-led suppliers depend on other suppliers. This insight may influence how we consider the supplier types each segment works with and their criteria for selecting partners (see *Selection Criteria*).

TOP 5 SIGNIFICANT MARKETS: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Financial services	59%	35%	62%	59%	58%
Consumer packaged goods (CPG/ FMCG)	69%	50%	59%	67%	57%
Healthcare & pharmaceuticals	38%	37%	49%	43%	47%
Technology & telecom	55%	21%	37%	50%	47%
Market research, insights, or analytics	60%	38%	44%	32%	36%
Media, entertainment, & sports	47%	18%	21%	37%	42%
Retail & ecommerce	42%	21%	37%	61%	37%
Consumer durables & home products	34%	30%	32%	41%	40%
n =	39	158	79	56	55

Green shading indicates top five market.

Takeaway: CPG/FMCG and financial services are the two most commonly cited significant markets across all supplier segments, and other market research, insights, and analytics providers are top five markets for tech-led and service-led suppliers with 100 or fewer FTE.

Source: GRIT Report



It's intuitive that tech-led suppliers focus on other insights industry players, but much smaller service-led also depend on other suppliers.

On average, service-led suppliers with ≤20 FTE serve the fewest markets (3.6) while tech-led suppliers (5.1) and service-led with 101 to 500 FTE (5.1) and 500+ FTE (5.0) serve the most. Half or more in each segment serve CPG, and most in each segment but those with ≤20 FTE serve financial services. CPG is the only market served by at least half of those with ≤20 FTE.

In addition, most tech-led suppliers serve market research, insights, or analytics (60%) and technology and telecom (55%). Among service-led suppliers with 101 to 500 FTE, most also serve retail and ecommerce (61%), and half serve technology and telecom.



MOST COMMON SIGNIFICANT MARKETS: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Financial services	59%	35%	62%	59%	58%
Consumer packaged goods (CPG/ FMCG)	69%	50%	59%	67%	57%
Healthcare & pharmaceuticals	38%	37%	49%	43%	47%
Technology & telecom	55%	21%	37%	50%	47%
Media, entertainment, & sports	47%	18%	21%	37%	42%
Consumer durables & home products	34%	30%	32%	41%	40%
Retail & ecommerce	42%	21%	37%	61%	37%
Market research, insights, or analytics	60%	38%	44%	32%	36%
Prefer not to answer	2%	2%	1%	2%	6%
Average number of markets:	5.1	3.6	4.5	5.1	5.0
n =	39	158	79	56	55

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage; excludes "other" and "prefer not to answer."

Takeaway: At least half in each segment name CPG/FMCG as a significant market, and, except for service-led suppliers with ≤20 FTE, most in each say financial services is significant.

Source: GRIT Report

Among the less common significant markets, public sector, education, or NFP exceeds 20% in each segment. Hospitality, travel, and leisure exceeds 20% in four segments, peaking at 35% among service-led

suppliers with 500+ FTE. Automotive exceeds 20% in each service-led segment with more than 20 FTE, peaking at 30% among service-led suppliers with 101-500 FTE.

LESS COMMON SIGNIFICANT MARKETS: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Hospitality, travel, & leisure	27%	21%	16%	25%	35%
Automotive	19%	13%	21%	30%	26%
Professional & business services	18%	21%	18%	16%	23%
Public sector, education, or NFP	22%	28%	27%	25%	22%
Transport, logistics, & shipping	10%	7%	11%	9%	18%
Industrial & manufacturing	4%	13%	13%	14%	15%
Other	2%	3%	--	--	--
Prefer not to answer	2%	2%	1%	2%	6%
Average number of markets:	5.1	3.6	4.5	5.1	5.0
n =	39	158	79	56	55

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage; excludes "other" and "prefer not to answer."

Takeaway: Among the lesser-mentioned significant markets, hospitality, travel and leisure is named by 35% of service-led suppliers with 500+ FTE, while at least 20% in each segment name public sector, education, or NFP.

Source: GRIT Report





THE BIG PICTURE [STRATEGIC INTERPRETATION]

Through COVID, the dawn of the *Data Enlightenment*, the disruptive debut of genAI, and the ceaseless forward march of automation, GRIT's supplier segmentation served the industry well, but it's clearly time for a change. Revenue source-based segments have become increasingly unstable because suppliers keep expanding their portfolios, making it harder to make sense of mega-segments and to track specialists.

The full-service research label applies to the majority of service-led suppliers, and a segment that includes most of the audience generally undermines the purpose of segmentation. COVID seemed to have sparked this trend as brand-side staff reductions led to greater reliance on outsourced research managers, and full-service research suppliers became business hubs for specialist suppliers.

This gravitational pull, as well as advances in automation, helped full-service suppliers expand their portfolios of offerings, and the full-service aspect served as the glue that held the portfolio together. "Full-service research" is less homogenous than it once was, and the specialist supplier segments can be too volatile (and small) to report on easily.

The new GRIT supplier segmentation, which debuted in the 2025 *Business & Innovation Report*, splits out tech-led suppliers from service-led, and stratifies service-led by number of full-time employees. Tech-led remains a structurally separate and stable segment, but far from a "pure" one: only 37% of the average tech-led supplier's offerings are platforms or tools.

Service-led suppliers with 500+ FTE are moving away from identities defined by research to develop personas closer to strategic consulting. Many seem to be reengineering their service portfolios toward higher-margin, less labor-intensive offerings in efforts to "right-size" their organizations relative to emerging challenges and opportunities.

Those with 101 to 500 FTE seem to have found the "right-size" sweet spot, possibly through deliberate growth and expansion and possibly through strategic contraction out of the 500+ FTE segment. They tend to have robust offerings across consulting, research, field services, and technology, and, as we'll see in *Business Outlook*, the strongest revenue trend. They appear to have justified their "bigness" relative to their revenue and cost structure.

Those with 21 to 100 FTE appear to be leveraging full-service research as a growth platform while building their technology and analytics capabilities. Those with ≤20 FTE operate in a relatively stable equilibrium with higher specialist concentration and entrepreneurial churn, but also more dependent on selling to the industry itself.



Many of the largest service-led suppliers seem to be reengineering their portfolios toward higher-margin, less labor-intensive offerings.

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Automation plays an important role in these trends. GRIT's six revenue source-based segments can be split into "traditional research" (full-service, field services, and qualitative) versus others (consulting, technology, and data and analytics). Full-service, field, and qualitative research share the burden of built-in pass-through costs: data collection expenses that generate revenue but compress margins. On the other hand, consulting, technology, and data and analytics are more IP- and less labor-intensive without the same pass-through burden.

Automation is improving the cost structure of "traditional research," at least in part, by reducing the headcount needed to execute them. Consequently, it's driving cost-structure changes at the largest suppliers by reducing field service and data collection headcount while enabling smaller suppliers to offer more without adding staff.

The 500+ FTE trends are consistent with this: traditional research is declining as a share of their portfolio while data and analytics are growing, and this looks like a deliberate rebalancing toward higher-margin, lower-overhead revenue. The 101–500 FTE surge in all revenue sources simultaneously is harder to explain by this logic alone, but they are either by growing with automation or have already right-sized via automation. They are now in an industry sweet spot, and time will tell if they evolve into a new model of mega-supplier or whether the sub-500 FTE size remains optimal.

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INSIGHTS' HOTTEST METHODS!

This section previews the seven methodology sections to follow by focusing on which methods from our set of over 50 stand out based on current use and adoption momentum.

WHICH METHODS ARE HAVING A MOMENT? [ORIENTATION]

It's time to play *Insights Hottest Methods!* in which GRIT attempts to highlight key movers and shakers from over 50 methods based on three metrics:

- **Total usage** – the total percentage who use it regularly or occasionally
- **Momentum** – increases or decreases in total usage of at least +/-10% since last year
- **Intensity** – the percentage who use it regularly versus all users

HOW TO READ THIS SECTION

- **Tags; For a purely data focused summary, prioritize the [DATA] subsections.**
 - **[ORIENTATION]** = how to pay attention to this topic
 - **[DATA]** = GRIT survey results
 - **[PERSPECTIVE]** = interpretation or opinion
 - **[STRATEGIC INTERPRETATION]** = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples: 26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Use of five methods increased by double digits in three or more segments. Use of crowdsourcing increased by more than +10% in each segment except brand-side analytics, where it "only" increased by +9%. In previous years, it was simply labeled "crowdsourcing," but we revised it to "crowdsourcing (ideas/problem-solving)" this year, and the clarification may have provide a partial lift.

Another method with a revised label also grew by double digits in five segments. We clarified "synthetic sample" last year to "synthetic data (e.g., synthetic sample, AI personas/digital twins)" this year, which may have helped it increase by +13% or more among brand-side researchers and analytics professionals, service-led suppliers with ≤20 FTE and those with more than 100 FTE. Use of crowdsourcing and synthetic data seem to be increasing, regardless of how we labelled them.

Three other methods increased by more than +10% in three segments while declining that much in one. CATI (+15%), causal analysis (+26%), and mobile ethnography (+19%) each increased at least +10% among service-led suppliers with 101 to 500 FTE as well as in two other segments.

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GROWTH MOMENTUM SINCE LAST YEAR: GRIT SEGMENT (AT LEAST 10% INCREASE IN THREE OR MORE SEGMENTS)

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Synthetic data	+18%	+13%	+1%	+14%	+7%	+18%	+18%
Crowdsourcing	+14%	+9%	+13%	+12%	+17%	+12%	+13%
CATI	+3%	+17%	+11%	+1%	-6%	+15%	-14%
Causal analysis	-5%	-7%	+20%	-7%	-10%	+26%	+11%
Mobile ethnography	-10%	+19%	-4%	-4%	+17%	+19%	-7%

Green shading indicates changes of at least 10%; red shading, decreases of at least 10%.

Takeaway: Synthetic data and crowdsourcing usage each increased +10% or more in five or more segments; three other methods increased at least +10% among service-led suppliers with 101-500 FTE and two other segments while dropping by double digits in one.

Source: GRIT Report and NewtonX

Two methods decreased by at least -10% in three or more segments, and both had label changes. Use of interviewer-administered in-person surveys, formerly “face-to-face interviews,” fell -13% among service-led suppliers with ≤20 FTE, -18% among those with 21 to 100 FTE, and -35% among brand-side researchers. It also fell between -1% and -9% in each other segment.

Use of online text- or SMS-based qual, formerly “chat (text-based) online qual (focus groups or IDIs),” increased +11% among brand-side analytics professionals, but fell -10% among service-led suppliers with 101 to 500 FTE, -17% among brand-side researchers and those with 21 to 100 FTE, and -18% among those with 500+ FTE. We discuss the potential impact of the label changes in the appropriate methodology sections, but these seem to be legitimate decreases in usage when you consider the context within the overall report.

CONTRACTION SINCE LAST YEAR: GRIT SEGMENT (AT LEAST 10% DECREASE IN THREE OR MORE SEGMENTS)

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Interviewer-administered in-person surveys	-35%	-1%	-2%	-13%	-18%	-6%	-10%
Online text- or SMS-based qual	-17%	+11%	-6%	-4%	-17%	-10%	-18%

Green shading indicates changes of at least 10%; red shading, decreases of at least 10%.

Takeaway: Use of interviewer-administered in-person and online text- or SMS-based qual declined by double digits in at least four segments.

Source: GRIT Report and NewtonX





METHOD MOMENTUM AND USAGE LEADERS |

BRAND POV ^[DATA]

Let's take a simple look at momentum on the brand side by counting up the number of double-digit changes in each segment by method family.

Overall, researchers experienced six increases and eight decreases. Surveys, focus groups and IDI's, and observational research suffered the most losses. One survey method increased while three decreased, and two observational research decreased with none increasing. Among focus groups and IDI's, two increased while two decreased. Among sample methods, one increased and one decreased, but one data and analytics and one "other" method increased while none declined.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (BRAND: RESEARCH)

	Increased	Decreased
Surveys	1	3
Focus groups & IDIs	2	2
Sample	1	1
Observational research	0	2
Biometrics & neuroscience	0	0
Data & analytics	1	0
Other methodologies	1	0
Total	6	8

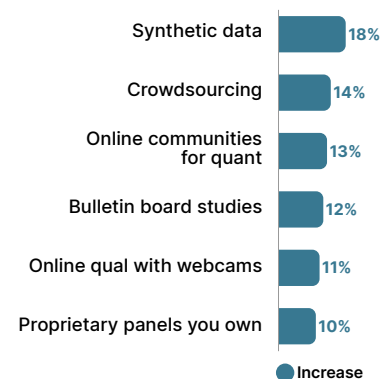
Takeaway: Brand-side researchers saw more methods decrease by double-digits than increase (8 vs. 6), including three decreases in survey methods.

Source: GRIT Report and NewtonX

Two methods for focus groups and IDI's increased among brand-side researchers: online qual with webcams (+11%) and bulletin board studies (+12%). The "survey" method that grew was online communities for quant (+13%), and the sample method that grew was proprietary panels they own (+10%). Crowdsourcing, an "other" method, grew +14%, and synthetic data was the biggest gainer (+18%).

Taken together, the pattern looks less like random gains across unrelated methods and more like brand-side researchers incrementally building a more self-sufficient research infrastructure via less outsourced fielding, more owned audiences, more asynchronous and remote execution. Whether that's driven by budget pressure, dissatisfaction with external vendors, or just the improving accessibility of DIY tools isn't clear from the data, but it could be all three.

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Synthetic data (+18%) and crowdsourcing (+14%) led increases for brand-side researchers, followed by online communities for quant (+13%) and bulletin board studies (+12%).



The pattern looks like researchers incrementally building a self-sufficient infrastructure via less outsourced fielding, more owned audiences, more asynchronous and remote execution.





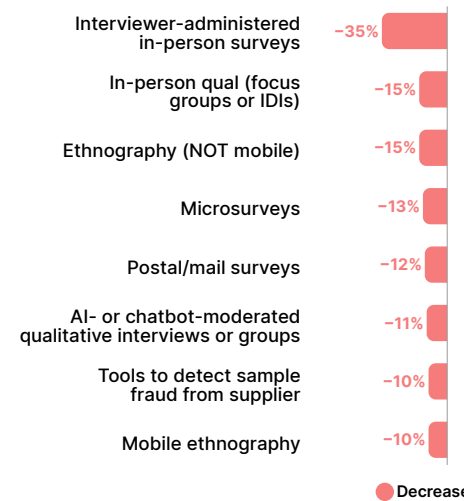
The three “survey” methods with usage drops among brand-side researchers were postal/mail surveys (-12%), microsurveys (-13%), and interviewer-administered in-person surveys (-35%). Two dropped from focus groups and IDI's: AI- or chatbot-moderated qualitative interviews or groups (-11%) and in-person qual (-15%). Two also dropped among observational research: mobile (-10%) and non-mobile ethnography (-15%). Tools to detect sample fraud from suppliers fell -10% as use of their own panels grew.

With this perspective added, it's reasonable to hypothesize that brand-side researchers are deliberately reducing their exposure to externally-mediated research with fewer vendor touchpoints, less physical logistics, more owned infrastructure, more remote and asynchronous execution. The methods growing are largely controllable from a desk. The methods falling generally aren't.

The top ten most-used methods among brand-side researchers include four from survey methods, three from focus group and IDI's, three from data and analytics, and one from sample. Online surveys (90%) are ubiquitous, and about two-thirds use text analytics (68%), online qual with webcams (67%), and proprietary panels from external suppliers (67%).

Among the top ten, online qual with webcams (+11%) and online communities for quant (+13%) are growing; in-person qual (-11%) is the only one declining. In-

MOMENTUM - LARGEST DECREASES IN USE SINCE LAST YEAR (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, use of interviewer-administered in-person surveys declined the most (-35%), followed by in-person qual and ethnography (both -15%).

person qual also has low intensity, fewer regular users than occasional ones, and these two metrics taken together could be signaling decay.

Brand-side researchers' top ten is dominated by methods they have been using for years. The only real movement is online communities for quant and online qual with webcams growing while in-person qual declines, and this relates to the hypothesized trend toward control/self-sufficiency. Otherwise, their methodology portfolio looks established and stable.

TOP 10 METHODS IN USE (BRAND: RESEARCH)

Family	Methodology	% Use	Momentum	Intensity
Survey	Online surveys	90%	-5%	89%
D&A	Text analytics	68%	+8%	55%
FG&IDI	Online qual with webcams	67%	+11%	44%
Sample	Proprietary panels from external supplier	67%	--	57%
D&A	Social media and online content research	63%	+4%	44%
D&A	Data integration	59%	+6%	45%
FG&IDI	In-person qual	59%	-11%	42%
Survey	Mobile first surveys	59%	-5%	60%
Survey	Online communities for quant	58%	+13%	52%
Survey	Mobile surveys (NOT mobile first)	53%	-6%	44%
FG&IDI	Online communities for qual	53%	--	39%

Takeaway: Among brand-side researchers' ten most-used methods, online surveys lead with 90% usage and the highest intensity (89%); online communities for quant (+13%) and online qual with webcams (+11%) have the most momentum.

Source: GRIT Report and NewtonX



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Turning to brand-side analytics professionals, they increased usage of eleven methods by double digits, and did not decrease usage of any. Four survey methods increased, and three each increased among focus groups and IDI's and observational research. One data and analytics method increased by more than +10%.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (BRAND: ANALYTICS)

	Increased	Decreased
Surveys	4	0
Focus groups & IDIs	3	0
Sample	0	0
Observational research	3	0
Biometrics & neuroscience	0	0
Data & analytics	1	0
Other methodologies	0	0
Total	11	0

Takeaway: Brand-side analytics professionals saw 11 increases and no decreases across all method categories, led by surveys (4), focus groups/IDIs, and observational research (3 each).

Source: GRIT Report and NewtonX

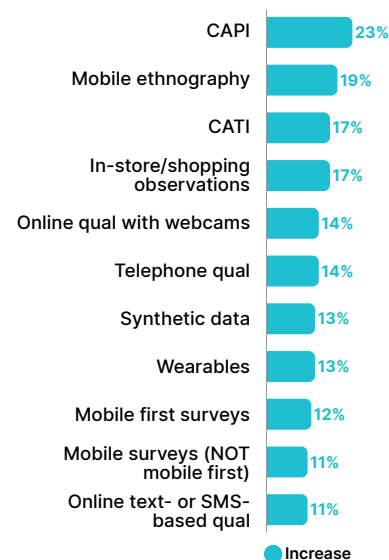
Brand-side analytics professionals increased use of these four "survey" methods: mobile first (+12%) and non-mobile first (+11%) surveys, computer-assisted telephone interviews (CATI, +17%), and computer-assisted personal interviews (CAPI, +23%). The three qual methods that increased were online text- or SMS-based qual (+11%), telephone qual (+14%), and online qual with webcams (+14%).

Three observational research methods increased in use among brand-side analytics: wearables (+13%), in-store/shopping observations (+17%), and mobile ethnography (+19%). In the data and analytics family, use of synthetic data increased (+13%). Analytics professionals did not decrease use of any methods.

Unlike brand-side researchers, whose portfolio looks settled and is selectively contracting, analytics professionals expanded use across five method families without a single notable decline. The gains span structured interviewer-mediated surveys, behavioral observation, and remote qual, which suggest a segment actively broadening its methodological reach rather than consolidating around a core. It's a simple matter of one segment aggressively adding to its portfolio of methods.

Or is it? The analytics segment's average number of methods in use keeps climbing while the research segment's stays flat or contracts slightly. Are analytics professionals becoming more methodologically sophisticated this rapidly? Or is the segment absorbing people who already were? Perhaps teams are being built or reorganized around business problems, such as CX and UX, rather than skills, and the researchers who join those teams bring their methods with them.

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, the fastest-growing methods are CAPI (+23%), mobile ethnography (+19%), CATI (+17%), and in-store/shopping observations (+17%).

Are analytics professionals becoming more methodologically sophisticated this rapidly? Or are they absorbing people who already were?





Among their top ten methods in use, brand-side analytics professionals name five data and analytics methods, four survey research methods, and one "other" method. Each one of the top ten is in use by more than three-fourths of the segment, led by data integration (88%), online surveys (87%), and attribution analytics/single source data (87%).

These ten are well-established as only one has changed more than +/-10% in the last year: mobile first surveys increased +12%. Attribution analytics/single source data came close, at +9%. For five methods,

more than 60% of users do so regularly, headed by online surveys (78%) and Big Data analytics (71%).

Brand-side analytics professionals have expanded use of eleven methods across five families, but very few of those are in their top ten most-used. The top ten is stable and saturated, while the expansion is happening at the edges, in methods outside the top ten. Analytics professionals have a strong foundation, and they're building outward from it, which is different from researchers whose core is stable but whose perimeter is contracting.

TOP 10 METHODS IN USE (BRAND: ANALYTICS)

Family	Methodology	% Use	Momentum	Intensity
D&A	Data integration	88%	-5%	68%
Survey	Online surveys	87%	-5%	78%
D&A	Attribution analytics/single source data	87%	+9%	52%
D&A	Social media and online content research	86%	+5%	62%
D&A	Big Data analytics	86%	-3%	71%
Other	Software or tools marketplaces	85%	+3%	65%
Survey	Microsurveys	82%	+7%	38%
Survey	Interviewer-administered in-person surveys	79%	-1%	42%
D&A	Text analytics	77%	-3%	51%
Survey	Mobile first surveys	76%	+12%	40%

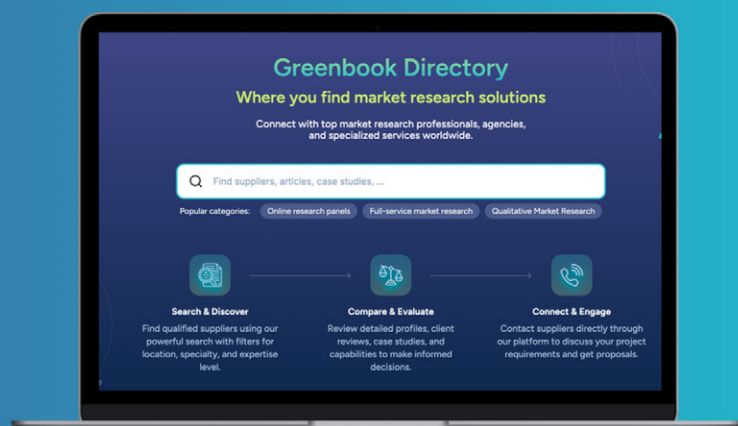
Takeaway: Among brand-side analytics professionals' ten most-used methods, data integration leads with 88% usage, online surveys lead in intensity (78%), and mobile first surveys have the most momentum (+12%).

Source: GRIT Report and NewtonX



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METHOD MOMENTUM AND USAGE LEADERS |

TECH-LED SUPPLIER POV ^[DATA]

Tech-led supplier methodology momentum is mainly going forward: use grew for eleven methodologies and only fell for five. Survey research methods had the most activity, with four methods gaining and one losing. Three data and analytics methods grew, while two methods increased and one decreased among qual and among “other” methodologies. One method decreased on each of observational research and biometrics and neuroscience. None changed in sample.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (TECH-LED)

	Increased	Decreased
Surveys	4	1
Focus groups & IDIs	2	1
Sample	0	0
Observational research	0	1
Biometrics & neuroscience	0	1
Data & analytics	3	0
Other methodologies	2	1
Total	11	5

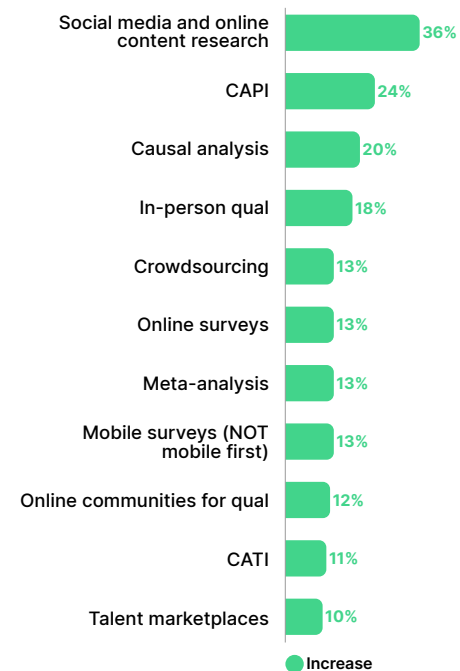
Takeaway: Among tech-led suppliers, 11 methods increased by double digits and 4 decreased, with the most increases in surveys (4) and data and analytics (3).

Source: GRIT Report

Tech-led suppliers increased their use of four survey research methods: CATI (+11%), online surveys (+13%), mobile surveys that are not mobile first (+13%), and CAPI (+24%). The three data and analytics methods that increased are meta-analysis (+13%), causal analysis (+20%), and social media and online content research (+36%). Use of two qual methods increased: online communities for qual (+12%) and in-person qual (+18%). The “other” methodologies that increased are talent marketplaces (+10%) and causal analysis (+20%).

The segment seems to be adding both human-mediated service capabilities and analytical depth simultaneously, which is consistent with the indications from *Evolving Supplier Landscape* regarding tech-led suppliers expanding beyond their core technology identity.

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (TECH-LED)



Source: GRIT Report

Takeaway: Among tech-led suppliers, use of social media and online content research (+36%), CAPI (+24%), and causal analysis (+20) increased the most.



Tech-led suppliers seem to be adding both human-mediated service capabilities and analytical depth simultaneously.





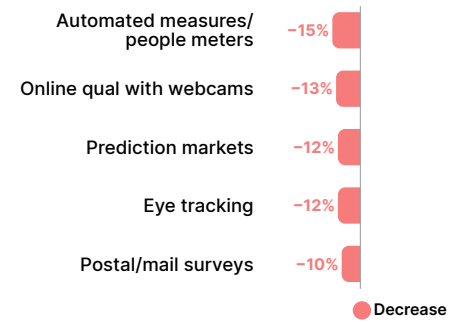
Among tech-led suppliers, use of five methods decreased at least -10% across five different families. Postal/mail surveys dropped -10%; eye tracking, -12%; prediction markets, -12%; online qual with webcams, -13%; and automated measures/people meters, -15%. They seem to be simultaneously pruning specialist and legacy methods while adding analytical depth and human-mediated service capabilities.

Among the top ten methods in use by tech-led suppliers, four are survey research methods, three are sample methods, two are data analytics, and one is an “other” method. Two are almost ubiquitous: online surveys (88%) and text analytics (82%). Four more are in use by two-thirds or more.

Three methods are accelerating. Social media and online content research increased +36%; online surveys, +13%; and non-mobile first mobile surveys, +13%. All except sample marketplaces (27%) have intensity that exceeds 60%, and four exceed 75%.

The tech-led supplier segment is coherent: high-intensity use of infrastructure and data collection methods, with sample access as a practical necessity rather than a strategic focus. The portfolio is compact, deeply used, and organized around enabling other segments' work rather than conducting research end-to-end.

MOMENTUM - LARGEST DECREASES IN USE SINCE LAST YEAR (TECH-LED)



Source: GRIT Report

Takeaway: Among tech-led suppliers, automated measures/people meters (-15%), online qual with webcams (-13%), prediction markets (-12%), eye tracking (-12%), and postal/mail surveys (-10%) decreased by double digits.

The tech-led supplier portfolio is compact, deeply used, and organized around enabling other segments' work.



TOP 10 METHODS IN USE (TECH-LED)

Family	Methodology	% Use	Momentum	Intensity
Survey	Online surveys	88%	+13%	79%
D&A	Text analytics	82%	-1%	62%
Sample	Proprietary panels from external supplier	71%	+2%	69%
Other	Sample marketplaces	70%	+1%	72%
D&A	Social media and online content research	69%	+36%	27%
Sample	In-house tools to detect sample fraud	68%	-4%	84%
Survey	Mobile first surveys	66%	+2%	84%
Sample	Tools to detect sample fraud from supplier	61%	+4%	78%
Survey	Mobile surveys (NOT mobile first)	60%	+13%	62%
Survey	Online communities for quant	57%	+8%	71%

Takeaway: Among tech-led suppliers' ten most-used methods, online surveys leads with 88% usage, in-house tools to detect sample fraud and mobile first surveys are the most intense (84% each), and social media and online content research has the most momentum (+36%).

Source: GRIT Report



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METHOD MOMENTUM AND USAGE LEADERS |

SERVICE-LED: 500+ FTE POV ^[DATA]

Serviced-led suppliers with 500+ FTE seem to be reshuffling the deck. They increased use of nine methods by at least +10% while decreasing use of eleven. Four data and analytics methods increased as well as one each family except survey research, in which seven methods declined. Each other family except “other” methodologies had one method decline.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (SERVICE-LED: 500+ FTE)

	Increased	Decreased
Surveys	0	7
Focus groups & IDIs	1	1
Sample	1	1
Observational research	1	1
Biometrics & neuroscience	1	1
Data & analytics	4	1
Other methodologies	1	0
Total	9	12

Takeaway: Among service-led suppliers with 500+ FTE, 9 methods increased by double digits and 12 decreased, with the most increases in data and analytics (4) and the most decreases in surveys (7).

Source: GRIT Report

Synthetic data and crowdsourcing are the most important cross-segment momentum signals because they show the industry looking for faster, more flexible, and more controllable ways to generate evidence. More broadly, method adoption is becoming a strategy signal: researchers are building self-sufficient, lower-overhead capacity while analytics professionals are expanding across method families.

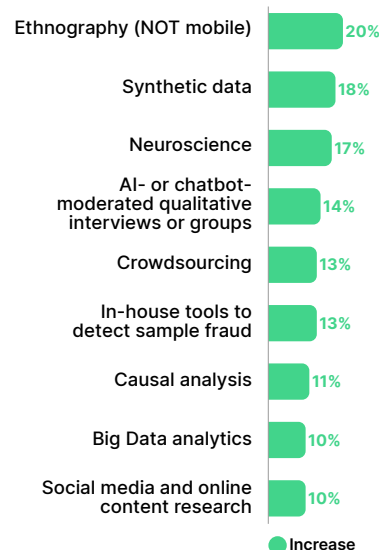
– LM, ed.

Service-led suppliers with 500+ FTE increased use of four data and analytics methodologies: social media and online content research (+10%), Big Data analytics (+10%), causal analysis (+11%), and synthetic data (+18%). From the “other” methodologies family, crowdsourcing may be related (+13%).

The other four methodologies that increased usage among service-led suppliers with 500+ FTE: in-house tools to detect sample fraud (+13%), AI- or chatbot-moderated qualitative interviews or groups (+14%), neuroscience (+17%), and non-mobile ethnography (+20%).

Service-led suppliers with 500+ FTE are expanding in two complementary directions: toward data-at-scale methods and toward methods that deliver deeper or higher-quality insight. This a combination is consistent with their broader repositioning toward analytical value we’ve touched on throughout this report.

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, use of non-mobile ethnography (+20%), synthetic data (+18%), and neuroscience (+17%) increased the most.



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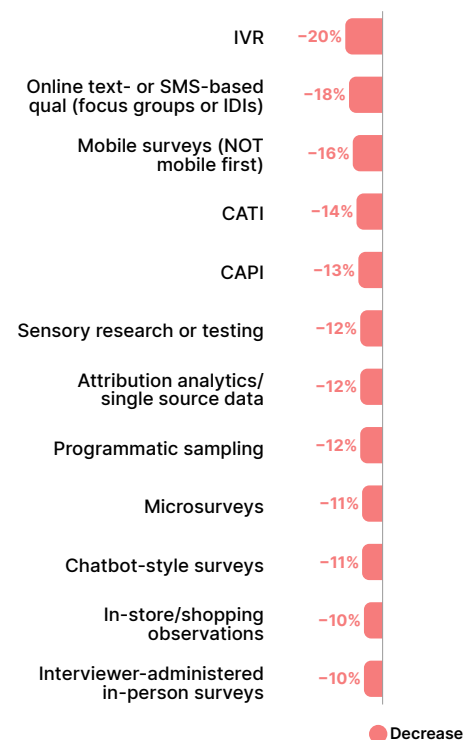
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On the other hand, seven survey methods declined among service-led suppliers with 500+ FTE: interviewer-administered in-person surveys (-10%), chatbot-style surveys (-11%), microsurveys (-11%), CAPI (-13%), CATI (-14%), mobile surveys that are not mobile first (-16%), and interactive voice response (IVR, -20%). Five more declined, each from a different family: in-store/shopping observations (-10%), programmatic sampling (-12%), sensory research or testing (-12%), attribution analytics/single source data (-12%), and online text- or SMS-based qual (-18%).

The seven declining survey methods are all modes of structured data collection that require either fielding infrastructure, participant contact, or operational overhead at scale, methods that large suppliers historically built around field services operations. Their simultaneous decline is consistent with the cost-structure reengineering story from *Evolving Supplier Landscape*: the largest suppliers are actively reducing their dependence on labor-intensive, infrastructure-heavy data collection.

MOMENTUM - LARGEST DECREASES IN USE SINCE LAST YEAR (SERVICE-LED: 500+ FTE)



● Decrease

Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, use of IVR (-20%), online text- or SMS-based qual (-18%), and mobile surveys that are not mobile first (-16%) decreased the most.



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The 500+ FTE segment is deliberately trading breadth for depth and scale, exiting labor-intensive, infrastructure-heavy, and specialist methods while investing in data-at-scale capabilities and high-quality insight methods. It's a strategic portfolio reshaping, and it's reflected in other parts of this report's hypotheses about this segment's broader repositioning.

The service-led supplier with 500+ FTE segment's top ten methods are spread across five different families.

Three are sample-related: proprietary panels from external suppliers (87%), in-house tools to detect sample fraud (81%), and tools to detect sample fraud from suppliers (76%). Two are survey research methods: online surveys (100%) and mobile first surveys (80%). Two are qual methods: online qual with webcams (81%) and in-person qual (74%). Two are data and analytics methods: text analytics (91%)

and social media and online content research (80%). One is from observational research: non-mobile ethnography (74%).

All of them are used by at least 74%, and eight of them have more regular users than occasional ones, led by online surveys (88% intensity). Three of them are growing: non-mobile ethnography (+20%), in-house tools to detect sample fraud (+13%), and social media and online content research (+10%).

The top ten portrait confirms the strategic coherence suggested by the momentum data. The 500+ FTE segment has a stable, deeply embedded core organized around full-service delivery and is selectively adding analytical and observational depth while shedding operational overhead. The portfolio looks like a deliberate business model, not an accumulated history.

TOP 10 METHODS IN USE (SERVICE-LED: 500+ FTE)

Family	Methodology	% Use	Momentum	Intensity
Survey	Online surveys	100%	+4%	88%
D&A	Text analytics	91%	--	67%
Sample	Proprietary panels from external supplier	87%	-4%	68%
FG&IDI	Online qual with webcams	81%	+3%	59%
Sample	In-house tools to detect sample fraud	81%	+13%	79%
Survey	Mobile first surveys	80%	-3%	78%
D&A	Social media and online content research	80%	+10%	46%
Sample	Tools to detect sample fraud from supplier	76%	-5%	68%
FG&IDI	In-person qual	74%	-5%	53%
Obs	Ethnography (NOT mobile)	74%	+20%	33%

Takeaway: Among service-led suppliers with 500+ FTE's ten most-used methods, online surveys leads with 100% and is the most intense (88%), and in-house tools to detect sample fraud has the most momentum (+13%).

Source: GRIT Report



The largest service-led suppliers' core is organized around full-service delivery while they selectively add analytical and observational depth and shed overhead.





METHOD MOMENTUM AND USAGE LEADERS |

SERVICE-LED: 101-500 FTE POV ^[DATA]

As we've seen throughout this report, the service-led supplier with 101 to 500 FTE segment is expanding their portfolios: they increased use of nineteen methods while decreasing only four. Three families have multiple increases and no decreases: data and analytics has five; observational research, three; and sample, two.

Biometrics and neuroscience has one increase and no decreases. Qual research has three increases and two decreases, while survey research has four and one. "Other" methodologies have one and one.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (SERVICE-LED: 101-500 FTE)

	Increased	Decreased
Surveys	4	1
Focus groups & IDIs	3	2
Sample	2	0
Observational research	3	0
Biometrics & neuroscience	1	0
Data & analytics	5	0
Other methodologies	1	1
Total	19	4

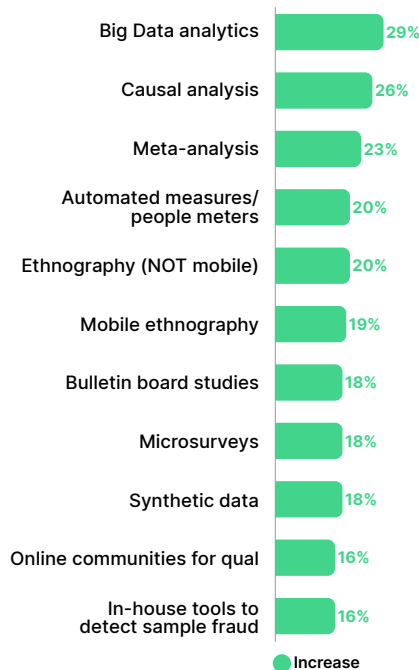
Takeaway: Among service-led suppliers with 101-500 FTE, 19 methods increased by double digits while 4 decreased, with the most increases in data and analytics (5).

Source: GRIT Report

We broke the nineteen increases among service-led with 101 to 500 FTE into two sets: those with changes bigger than +15% and those with smaller increases. There are eleven of the former. Four of them are from data and analytics: Big Data analytics (+29%), causal analysis (+26%), meta-analysis (+23%), and synthetic data (+18%). Three are observational research methods: mobile (+19%) and non-mobile ethnography (+20%) and automated measures/people meters (+20%).

Two are qual research methods: bulletin board studies (+18%) and online communities for qual (+16%). there is one each from survey research and sample: microsurveys (+18%) and in-house tools to detect sample fraud (+16%).

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, use of Big Data analytics (+29%), causal analysis (+26%), and meta-analysis (+23%) increased the most.

Service-led suppliers with 101 to 500 FTE are expanding their portfolios, increasing use of 19 methods while decreasing only 4.



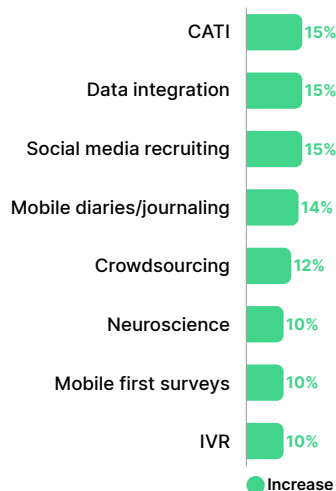


The increases were more moderate for three survey research methods: CATI (+15%), IVR (+10%), and mobile first surveys (+10%). The set also includes data integration (+15%), social media recruiting (+15%), mobile diaries/journaling (+14%), crowdsourcing (+12%), and neuroscience (+10%).

This is the clearest evidence we'll see across the entire methodology review that service-led suppliers with 101 to 500 FTE is in an active investment phase rather than a maintenance phase. The breadth and magnitude together rule out coincidence. Combined with what *Evolving Supplier Landscape* showed about this segment's revenue diversification and the *Business Outlook* data suggesting they lead service-led suppliers in revenue trends, the picture is of a segment that has decided this is its moment to build and is acting on that decision across the board.

In the service-led supplier with 101 to 500 FTE segment, there are only four methods that decreased in use: online qual with webcams (-11%), online text- or SMS-based qual (-10%), sample marketplaces (-10%), and online communities for quant (-10%). They aren't just adding indiscriminately; they are choosing asynchronous over synchronous qual, owned over marketplace sample, and community depth over community scale.

MOMENTUM - ADDITIONAL INCREASES IN USE SINCE LAST YEAR (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, eight methods increased between +10 and +15%.

MOMENTUM - LARGEST DECREASES IN USE SINCE LAST YEAR (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, use of online qual with webcams (-11%), online text- or SMS-based qual (-10%), sample marketplaces (-10%), and online communities for quant (-10%) decreased by double digits.



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The ten most-used methods among service-led suppliers with 101 to 500 FTE include three survey research methods, three sample methods, three qual methods, and one data and analytics method. Each of these exceed 70% use, led by online surveys (100%), proprietary panels from external suppliers (88%), mobile first surveys (86%), and in-house tools to detect sample fraud (85%).

All but two have more regular users than occasional ones. Intensity of use for data integration is only 37% and for bulletin board studies is 48%. Four exceed 75%: online surveys (98%), tools to detect sample fraud from suppliers (88%), in-house tools to detect sample fraud (84%), and proprietary panels from external suppliers (79%).

Five of the top ten increased at least +10%: bulletin board studies (+18%), in-house tools to detect sample fraud (+16%), data integration (+15%), and mobile first surveys (+10%). One decreased: online qual with webcams (-11%).

The service-led supplier with 101 to 500 FTE segment has a genuine operational foundation; it's not all expansion and no stability. The survey and sample core is deeply embedded and highly committed. The capability building is happening on top of a solid base, which makes the investment story more credible. This is a segment that knows what it's doing and is deliberately doing more of it.

TOP 10 METHODS IN USE (SERVICE-LED: 101-500 FTE)

Family	Methodology	% Use	Momentum	Intensity
Survey	Online surveys	100%	+1%	98%
Sample	Proprietary panels from external supplier	88%	+6%	79%
Survey	Mobile first surveys	86%	+10%	68%
Sample	In-house tools to detect sample fraud	85%	+16%	84%
D&A	Data integration	80%	+15%	37%
Survey	Mobile surveys (NOT mobile first)	76%	-4%	57%
FG&IDI	Online qual with webcams	74%	-11%	68%
FG&IDI	Bulletin board studies	73%	+18%	48%
Sample	Tools to detect sample fraud from supplier	73%	+3%	88%
FG&IDI	In-person qual	73%	+4%	69%

Takeaway: Among service-led suppliers with 101-500 FTE, online surveys leads with 100% usage and 98% intensity, and bulletin board studies has the most momentum (+18%) in the top ten.

Source: GRIT Report



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METHOD MOMENTUM AND USAGE LEADERS |

SERVICE-LED: 21-100 FTE POV [DATA]

Service-led suppliers with 21 to 100 FTE have increased use of five methods and decreased four. Two of the increases were in sample, but one also decreased. Focus groups and IDI's and observational research also had one increase and one decrease. "Other" methods had one increase, and survey research and data and analytics each had a decrease.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (SERVICE-LED: 21-100 FTE)

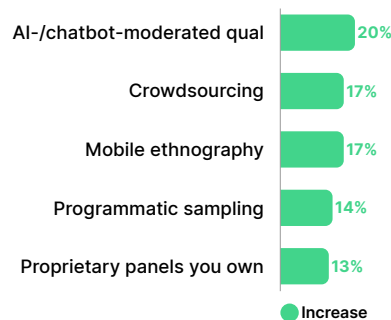
	Increased	Decreased
Surveys	0	1
Focus groups & IDIs	1	1
Sample	2	1
Observational research	1	1
Biometrics & neuroscience	0	0
Data & analytics	0	1
Other methodologies	1	0
Total	5	4

Takeaway: Among service-led suppliers with 21-100 FTE, 5 methods increased by double digits while 4 decreased with increases and decreases spread across categories.

Source: GRIT Report

Among service-led suppliers with 21 to 100 FTE, two sample methods increased: programmatic sampling (+14%) and proprietary panels they own (+13%). AI-/chatbot-moderated qual increased +20%; crowdsourcing, +17%; and mobile ethnography, +17%.

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, use of AI-/chatbot-moderated qual (+20%), crowdsourcing (+17%), and mobile ethnography (+17%) increased most.



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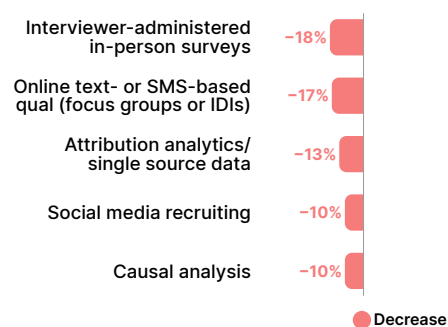
Five methods decreased among service-led suppliers with 21 to 100 FTE: interviewer-administered in-person surveys (-18%), online text- or SMS-based qual (-17%), attribution analytics/single source data (-13%), social media recruiting (-10%), and causal analysis (-10%).

The service-led suppliers with 101 to 500 FTE segment is adding demanding methods across the board; this segment is shedding some of them. The 21 to 100 FTE picture looks less like deliberate strategic repositioning and more like a segment seeking its sustainable level, keeping what works at their scale, letting go of what doesn't, and selectively adding methods that reduce operational burden. These trends may also be symptomatic of a very heterogeneous segment.

Among service-led suppliers with 21 to 100 FTE, the top ten most-used methods are distributed across survey research (3), sample (3), qual research (2), data and analytics (1), and "other" methodologies (1). Online surveys (97%) and proprietary panels from external suppliers (86%) are the clear top tier, followed by text analytics (76%), tools to detect sample fraud from suppliers (74%), online qual with webcams (74%), and in-house tools to detect sample fraud (73%).

For each of these ten, regular users outnumber occasional ones, especially for online surveys (99%) and in-house tools to detect sample fraud (80%). No method moved in either direction by more than +/-9%.

MOMENTUM - LARGEST DECREASES IN USE SINCE LAST YEAR (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, use of interviewer-administered in-person surveys (-18%), online text- or SMS-based qual (-17%), attribution analytics/single source data (-13%), social media recruiting (-10%), and causal analysis (-10%) decreased by double digits.

The contrast with between service-led suppliers with 21 to 100 FTE and those with 101-500 FTE is very clean: same basic portfolio structure, similar family distribution, but one segment is in active investment mode and the other has found its cruising altitude. The size band between them could represent a meaningful threshold in what's operationally sustainable.

TOP 10 METHODS IN USE (SERVICE-LED: 21-100 FTE)

Family	Methodology	% Use	Momentum	Intensity
Survey	Online surveys	97%	-1%	99%
Sample	Proprietary panels from external supplier	86%	+8%	64%
D&A	Text analytics	76%	+4%	59%
Sample	Tools to detect sample fraud from supplier	74%	+9%	72%
FG&IDI	Online qual with webcams (focus groups or IDIs)	74%	+4%	77%
Sample	In-house tools to detect sample fraud	73%	+5%	80%
Survey	Mobile surveys (NOT mobile first)	68%	-1%	64%
Other	Sample marketplaces	68%	+2%	71%
Survey	Mobile first surveys	65%	+1%	76%
FG&IDI	In-person qual (focus groups or IDIs)	60%	+5%	61%

Takeaway: Among service-led suppliers with 21-100 FTE, online surveys leads with 97% usage and 99% intensity, and tools to detect sample fraud from supplier has the most momentum (+9%) in the top ten.

Source: GRIT Report



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METHOD MOMENTUM AND USAGE LEADERS |

SERVICE-LED: ≤20 FTE POV ^[DATA]

There hasn't been much change in methodology use among service-led suppliers with ≤20 FTE. Use of three methods increased, including two "other" methods. Two methods decreased usage.

CHANGES IN USAGE OF AT LEAST 10% BY FAMILY (SERVICE-LED: ≤20 FTE)

	Increased	Decreased
Surveys	0	1
Focus groups & IDIs	0	0
Sample	1	0
Observational research	0	0
Biometrics & neuroscience	0	0
Data & analytics	0	1
Other methodologies	2	0
Total	3	2

Takeaway: Among service-led suppliers with ≤20 FTE, 3 methods increased by double digits while 2 decreased with increases and decreases spread across categories.

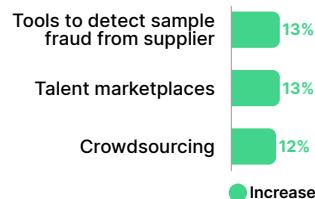
Source: GRIT Report

Among service-led suppliers with ≤20 FTE, tools to detect sample fraud from suppliers increased +13%; talent marketplaces, +13%; and crowdsourcing, +12%.

Among service-led suppliers with ≤20 FTE, the methods that decreased in use are attribution analytics/single source data (-13%), interviewer-administered in-person surveys (-13%), and causal analysis (-10%).

The smallest suppliers seem to be shedding demanding methods and leaning into external access mechanisms. The portfolio is gravitating toward what's sustainable for a small, possibly entrepreneurial operation, including methods that punch above their weight without requiring infrastructure investment. The ≤20 FTE segment seems to be looking for its sustainable level, and that level is defined more by access than by ownership.

MOMENTUM - LARGEST INCREASES IN USE SINCE LAST YEAR (SERVICE-LED: ≤20 FTE)

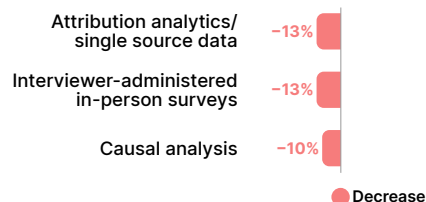


● Increase

Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, use of tools to detect sample fraud from supplier (+13%), talent marketplaces (+13%), and crowdsourcing (+12%) increased the most.

MOMENTUM - LARGEST DECREASES IN USE SINCE LAST YEAR (SERVICE-LED: ≤20 FTE)



● Decrease

Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, use of attribution analytics/single source data (-13%), interviewer-administered in-person surveys (-13%), and causal analysis (-10%) decreased by double digits.

The smallest suppliers are shedding demanding methods and leaning into external access mechanisms, gravitating toward what's sustainable.



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Of the top ten most-used methods among service-led suppliers with ≤ 20 FTE, four are survey research methods, two are sample methods, two are qual methods, one is a data analytics method, and one is an “other” methodology. The leading methodologies are online surveys (83% use), text analytics (76%), and proprietary panels from external suppliers (73%).

For two methods, occasional users outnumber regular ones: mobile first surveys have an intensity of 42%, and mobile surveys that are not mobile first are 43%. Online surveys (77%), online qual with webcams (76%), and tools to detect sample fraud from suppliers (73%) are the most intense.

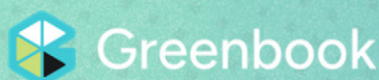
Service-led suppliers with ≤ 20 FTE have the most survey-concentrated profile of any supplier segment. Text analytics are the only data and analytics representative; this is a methodologically narrow portfolio relative to larger segments. It reflects a segment organized around the basics of research delivery: fielding surveys, conducting qual, accessing sample, analyzing text. There's no observational research, no advanced analytics, no specialized methods in the top ten at all.

TOP 10 METHODS IN USE (SERVICE-LED: ≤ 20 FTE)

Family	Methodology	% Use	Momentum	Intensity
Survey	Online surveys	83%	-4%	77%
D&A	Text analytics	76%	+4%	50%
Sample	Proprietary panels from external supplier	73%	+3%	67%
FG&IDI	Online qual with webcams (focus groups or IDIs)	69%	+4%	76%
FG&IDI	In-person qual (focus groups or IDIs)	62%	-2%	56%
Other	Sample marketplaces	59%	+6%	66%
Survey	Mobile surveys (NOT mobile first)	58%	+5%	43%
Sample	Tools to detect sample fraud from supplier	57%	+13%	73%
Survey	Mobile first surveys	56%	+1%	42%
Survey	Interviewer-administered in-person surveys	55%	-13%	51%

Takeaway: Among service-led suppliers with ≤ 20 FTE, online surveys leads with 83% usage and 77% intensity, and tools to detect sample fraud from supplier has the most momentum (+13%) in the top ten.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

Insights' Hottest Methods! precedes seven sections of methodologies broken out by family: *Survey Research*, *Focus Groups & IDI's* (or qual research), *Sample*, *Observational Research*, *Biometrics & Neuroscience*, *Data & Analytics*, and of course, *Other Methodologies*. Those sections will cover over 50 methodologies in detail by segment and within family, and this section gives you the higher level, cross-family view.

So, let's pay homage to the "hottest methods" theme, then get on with recapping the main insights from this section.

Hottest methods: how about crowdsourcing and synthetic data? These are the only methods with genuine cross-segment momentum. Every other method with multiple gains is concentrated in specific segments or specific families. These two increased by double digits in five or more segments each, which makes them the closest thing we have to a universal "hottest method," label changes notwithstanding.

Coldest? Interviewer-administered in-person surveys and online text-based qual seem pretty frigid. In-person surveys fell in five segments; text-based qual fell in four. The cross-family view reveals that these aren't family-specific stories but industry-wide movements, though the reasons likely differ by segment.

The brand-side analytics segment expansion is thought-provoking. Eleven increases, zero decreases, across five families including methods historically associated with researchers. The cross-family view adds context to a question we posed in *Brand-side Teams and Roles*: are researchers and analytics professionals converging or diverging?

The specific methods gaining are not what you'd expect from a segment organically expanding its analytics toolkit. They look like a researcher's toolkit arriving in a new organizational home. Possibly, more brand-side organizations are structuring insights work by business topic or discipline instead of research or analytics skillsets.

Even if some brand-side researchers may be migrating, others are fortifying the castle. In each individual methodology section, the brand-side researcher findings look like normal fluctuation within that family. Online communities for quant going up in the survey section doesn't obviously connect to proprietary panels they own going up in the sample section. Bulletin board studies gaining in the qual section doesn't obviously connect to ethnography declining in the observational section. Synthetic data gaining in data and analytics doesn't obviously connect to fraud detection tools declining in sample. Each piece looked like a local story.

When all families appear on the same dashboard, the pattern becomes visible as a pattern rather than as seven separate observations. Every gaining method shares the characteristic of being executable with minimal external dependency: online communities you manage, panels you own, asynchronous discussion boards, synthetic data that bypasses fielding entirely, and crowdsourcing that taps distributed input without commissioning a study.

Hottest methods: how about the only methods with genuine cross-segment momentum, crowdsourcing and synthetic data?

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Every declining method shares the opposite characteristic: interviewer-administered surveys require fielding staff, in-person qual requires facilities and recruiters, ethnography requires researchers in the field, fraud detection tools from suppliers are only necessary when you're relying on external panels.

On the supplier side, the progression from service-led with ≤ 20 FTE (5 changes in method use) through those with 21 to 100 FTE (9) to those with 101 to 500 FTE (23 changes with 19 increases) to those with 500+ FTE (21) tells a story about where different segments are in their methodological development that no single section could show. The numbers alone make the argument: the industry is not moving uniformly in one direction.

The service-led supplier with 500+ FTE restructuring story is the clearest strategic signal: zero survey method increases against seven survey method decreases, alongside gains concentrated in data-at-scale and depth methods. The 500+ FTE segment has a stable, deeply embedded core organized around full-service delivery and is selectively adding analytical and observational depth while shedding operational overhead.

However, the most important supplier finding is the service-led supplier with 101 to 500 FTE investment story: nineteen increases against just four decreases, with eleven of the increases above +15%, spread across five families including five data and analytics methods. No other segment comes close to this scale of simultaneous expansion.

This view seems to confirm the perspective of this segment we've been developing in *Evolving Supplier Landscape* and other sections. While the largest suppliers restructure to find a more favorable cost structure, service-led suppliers with 101 to 500 FTE may already be there, either as a deliberate growth plan or after a successful downsizing from 500+ FTE.

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WE BUILT A FASTER FACTORY. NOW WHAT ARE WE PRODUCING?

Holland Martini

Chief Insights Officer, GoodQues

When looking for a common thread in the GRIT report's *Hottest Methods*, it's easy to think everyone is optimizing. And that we all need to get on the faster, cheaper, leaner express train. Synthetic data (up) is fast and cheap. DIY tools like online communities (up) are fast and lean.

But look closer and you will find a contradiction that's hard to miss: if everyone is optimizing for things like speed and cost, then why are ethnographies still up across half of the segments? Why is crowd sourcing, an inherently longer and more strategic human-led method, on the rise?

It shows an industry trend of wanting to have our cake and eat it too. We want faster, cheaper, leaner. But perhaps, at the same time, we are all secretly holding on to our "traditionally" longer, deeper, human methods, for the fear that we are optimizing at the expense of good insights.

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Holland Martini is redefining the role of research in business by blending data with creativity, empathy, and emotional intelligence. As co-founder of GoodQues, she challenges traditional qualitative and quantitative research models to make business decisions more human-centered. A sought-after speaker at FastCompany and Social Media Week, Holland is passionate about transforming raw numbers into compelling narratives that inspire action and drive meaningful innovation.

For the past few years, the research industry has been focused on optimizing the "factory." Think of it like a modern car manufacturer: the factory is now AI-enabled, faster, and more agile than ever. But despite all the upgrades to the production line, it's still producing the equivalent of a Model T... or in our case, largely the same basic insights.

And that tension may be exactly why the industry can't fully let go of its more human-centered methods. We want the efficiency of the modern factory, but we also want the breakthrough insight. We want automation without losing intuition. Scale without losing nuance.

The *GRIT Report* data clearly shows we are all grappling with this. For every synthetic panel being adopted, another mobile ethnography is being launched. For every AI workflow being introduced, there's renewed investment in methods built to uncover deeper human understanding.

It's a crucial time for our industry to acknowledge that we need to refocus not just on optimizing the factory, but on optimizing the output itself. We must ask ourselves: How do we take the everyday, model-T insights and turn them into the Rivian of insights? Are we using all of our methods to the best of our abilities? Are we catering the right tools to the right audience? Are we asking the *right questions*?

Take this as an early signal: Service-led suppliers with 500+ FTEs reported a +17% increase in introducing neuroscience into their offerings. It could be that they are looking for a way to do the best of both.

The data is talking. It's time to focus on the quality of the materials that build the car, not just the tools in the factory itself.





SURVEY RESEARCH

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across eleven survey research methods.

ARE ONLINE SURVEYS STILL UBIQUITOUS? [ORIENTATION]

Survey research will be dead in five years, or so we've often heard over the last 20+ years. Don't pop the champagne yet. Or the popcorn. Whichever you plan to pop to celebrate a new era of survey-free research, eventually.

GRIT has tracked use of survey research methods since at least 2020, and we can testify that it hasn't died even once. This is the first of seven *GRIT Insights Practice* sections organized by type of method. Some methods fit their type assignment perfectly and others are approximate fits, but we believe this is the most effective and efficient way to report them. If you don't like how we have assigned a particular method, feel free to compare it to any set of methods you choose. In the survey, these 50+ methods were presented without categorizing them, so these results are independent of how we organize them in the report.

It seems typical to associate "surveys" with "quantitative research," so let's set our table by looking at which of our segments are most quant-heavy. This approach allows us an opportunity to report on our question regarding the percentage of projects that are quant-only, qual-only, or include both.

On the brand side, the average researcher allocates 45% of projects as quant-only compared to 33% for those in analytics. Analytics professionals allocate 39% of their projects as qualiquant compared to 28% of researchers. As we see in *Scope of Insights Impact*, researchers are more likely to work in areas like brand tracking and analytics professionals are more likely to impact user experience (UX), and those activities probably influence their qual-quant project allocations.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

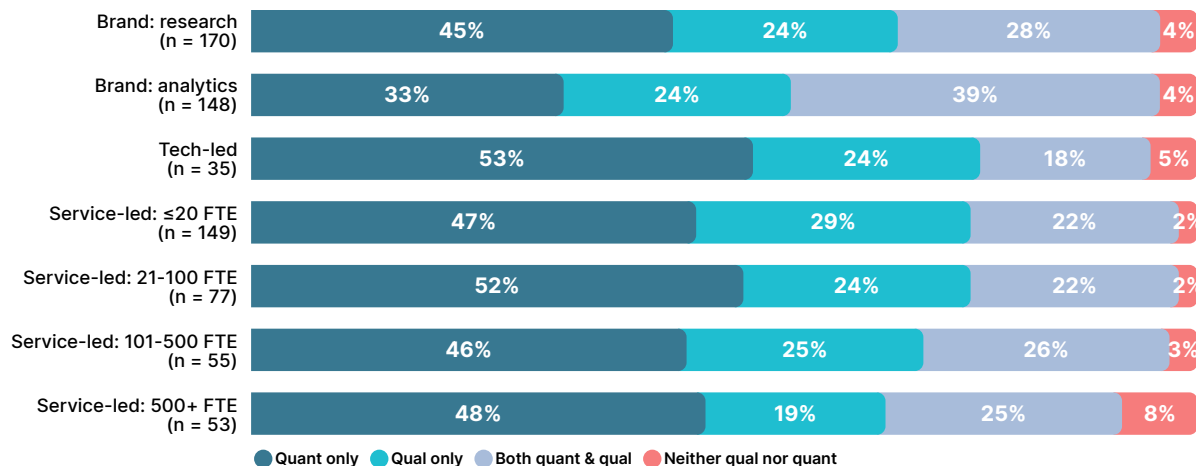
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On the supplier-side, quant-only allocation ranges narrowly from 46% of service-led with 101 to 500 FTE to 53% of tech-led. Qual-only projects are rare among the largest service-led suppliers with 500+ FTE (19%) and more frequent among the smallest with ≤20 FTE

(29%). For the other supplier segments, it ranges from 24% to 25%. Qualiquant is rare for tech-led suppliers (18%), but more frequent among service-led suppliers, ranging from 22% to 26%.

PROJECT ALLOCATION ACROSS QUANT AND QUAL: GRIT SEGMENT



Takeaway: Across segments, 69% to 74% of projects include quant, while qual ranges from 42% (tech-led suppliers) to 63% (brand-side analytics); brand-side analytics has the highest percentage of qualiquant projects (39%).

Online surveys are the most-used survey method in every segment; 83% of service-led suppliers with ≤20 FTE use it at least occasionally up to 100% among those with 100+ FTE. Mobile first is among the top three in each segment but brand-side analytics, where it is still used by 76%. Mobile surveys that are not mobile first are in the top three for tech-led suppliers (60%) and service-led suppliers with 500 or fewer FTE (58% to 76%).

Online communities for quant are among the top three for brand-side researchers (58%) and service-led suppliers with 500+ FTE (70%). Uniquely, brand-side analytics professionals place interviewer-administered in-person surveys (79%) and microsurveys (82%) in their top three most-used.

THREE MOST-USED METHODS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online surveys	90%	87%	88%	83%	97%	100%	100%
Mobile first surveys	59%	76%	66%	56%	65%	86%	80%
Online communities for quant	58%	61%	57%	37%	46%	56%	70%
Mobile surveys (NOT mobile first)	53%	72%	60%	58%	68%	76%	64%
Interviewer-admin in-person	43%	79%	26%	55%	48%	57%	61%
Microsurveys	42%	82%	52%	26%	32%	56%	51%

Green shading indicates top three most-used methodologies.

Takeaway: Online surveys are the most-used survey method in each segment, and mobile first surveys are among the top three in all but brand-side analytics (76%) where microsurveys (79%) and interviewer-admin in-person surveys (82%) are more prominent.

Source: GRIT Report and NewtonX





Use of online surveys has not changed much since last year, except among tech-led suppliers, where it increased +13%. Computer-assisted personal interviews (CAPI) increased more than +20% among brand-side analytics (+23%) and tech-led suppliers (+24%). Computer-assisted telephone interviews (CATI, +17% and +11%, respectively) and mobile surveys that are not mobile first (+11% and +13%) also increased by double-digits in each.

CATI also increased +15% among service-led suppliers with 101-500 FTE, but decreased -14% among service-led suppliers with 500+ FTE. Five other survey methods decreased by double digits in that segment, possibly symptomatic of attempts to reengineer their cost structures and reposition their businesses. Three other survey methods increased among service-led suppliers with 101-500 FTE, possibly influenced via downsizing by last year's service-led suppliers who had 500+ FTE.

CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online communities for quant	+13%	-1%	+8%	-1%	-2%	-10%	-1%
Chatbot-style surveys	+8%	--	+2%	+4%	-1%	+6%	-11%
CAPI	+6%	+23%	+24%	-4%	+5%	+8%	-13%
CATI	+3%	+17%	+11%	+1%	-6%	+15%	-14%
IVR	+3%	+5%	+7%	+4%	+4%	+10%	-20%
Online surveys	-5%	-5%	+13%	-4%	-1%	+1%	+4%
Mobile first surveys	-5%	+12%	+2%	+1%	+1%	+10%	-3%
Mobile surveys (NOT mobile first)	-6%	+11%	+13%	+5%	-1%	-4%	-16%
Postal/mail surveys	-12%	-9%	-10%	-3%	-2%	-1%	+7%
Microsurveys	-13%	+7%	+9%	-7%	+1%	+18%	-11%
Interviewer-admin in-person	-35%	-1%	-2%	-13%	-18%	-6%	-9%

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: CAPI increased at least +5% in five segments, while interviewer-administered in-person surveys fell at least -5% in five segments.

Source: GRIT Report and NewtonX

We'll cover all the trends in the following sub-sections, but first, let's look at how the GRIT survey changed this year so you can assess whether any new trends in use are simply survey artifacts.

Online surveys are not going away; they are embedded infrastructure. The more important story is that survey modes are being re-sorted by cost, scale, structure, and supplier capability, with some labor-intensive modes declining in certain segments while structured and digitally mediated approaches remain highly relevant.

– LM, ed.



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CHANGES FROM 2025 GRIT SURVEY

To better understand changes in results, we present the full label for each method as expressed in this year's and last year's GRIT survey. We upgraded the wording for four methods: "chatbots" are now "chatbot-style surveys;" "face-to-face interviews" are now "interviewer-administers in-person surveys;" "mail surveys" are now "postal/mail surveys;" and "CAPI (Computer-assisted Personal Interviewing)" is now "computer/tablet-assisted in-person surveys (CAPI)."

Of the three, the rephrasing of "face-to-face interviews" may have the most impact on results. Years ago, some methods were labeled "qualitative" and some were labeled "quantitative" in the survey; face-to-face interviews was presented as a quantitative method. In recent years, we've liberated these methods from what could have been a qual versus quant bias, and did not further define face-to-face interviews.

However, in recent years, we've also changed the report structure. We used to have two mega-sections called *Emerging Methods* and *Established Methods*, but these were problematic. First of all, they were too comprehensive to provide much detailed insight.

Second, it required GRIT to determine which methods are "emerging" and which are "established" rather than letting the reader decide based on the data. Besides, there are only so many years a methodology can be labeled "emerging."

Instead of two sections detailing 20+ methods each, we have seven sections with less than a dozen methods each, and these are grouped by type of method. This means that even though we had liberated "face-to-face interviews" from our qual/quant bias in the survey, we needed to be able to categorize it meaningfully in the report. So, we have gone back to the original intention to position it as a quant method and relabeled it "interviewer-administered in-person surveys" so it is consistent across the survey and the report.

Of course, this is a rather significant change and may affect our ability to track it versus past waves. One way to evaluate whether changes in use are artifacts of this change might be to compare trends in interviewer-administered in-person surveys to other in-person methods, like CAPI and in-person qualitative.

2026 SURVEY METHODS

2026 Method	2025 Precedent	2025 Family
CATI (Computer-assisted Telephone Interviewing)	CATI (Computer-assisted Telephone Interviewing)	Surveys
Chatbot-style surveys	Chatbots	Surveys
Computer/tablet-assisted in-person surveys (CAPI)	CAPI (Computer-assisted Personal Interviewing)	Surveys
Interviewer-administered in-person surveys	Face-to-face interviews	Surveys
IVR (Interactive Voice Response)	IVR (Interactive Voice Response)	Surveys
Microsurveys	Microsurveys	Surveys
Mobile first surveys	Mobile first surveys	Surveys
Mobile surveys (NOT mobile first)	Mobile surveys (NOT mobile first)	Surveys
Online communities for quant	Online communities for quant	Surveys
Online surveys	Online surveys	Surveys
Postal/mail surveys	Mail surveys	Surveys

Green indicates method changed from 25A.

Source: GRIT Report and NewtonX

Methods were not classified by type during the survey; we only do that for the report. None of these

eleven survey methods were classified differently in last year's *Insights Practice Report*.



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ATTITUDES AND USAGE TRENDS | BRAND POV [DATA]

Four survey methods are used at least occasionally by most brand-side researchers, dominated by online surveys (90%). The other three are mobile first surveys (59%), online communities for quant (58%), and mobile surveys that are not mobile first (53%).

These four are also used by majorities of brand-side analytics professionals: online surveys (87%), mobile first surveys (76%), online communities for quant (61%), and mobile surveys that are not mobile first (72%). Although each of these is more likely to be used by analytics professionals, only online surveys are among their top three most-used.

Their top three is completed by interviewer-administered in-person surveys (79%) and

microsurveys (82%). Their reliance on these two methods may be related to their focus on product UX via the former and digital UX via the latter. In addition, at least half use CAPI (67%), chatbot-style surveys (64%), and CATI (50%).

Analytics professionals use an average of 7.4 of these methods compared to just 4.6 for researchers. For six of them, the usage gap is more than +30% in favor of analytics, led by microsurveys (+40%), chatbot-style surveys (+37%), interviewer-admin in-person (+36%), and CAPI (+35%). As we've mentioned, this likely reflects which business topics and disciplines they tend to focus on, and these portfolios are suggestive of the differences we noticed in allocation of quant-only and qualiquant projects across segments.

USE OF METHODS/APPROACHES: BRAND SEGMENT

	Research	Analytics	Research – analytics
Online surveys	90%	87%	+3%
Mobile first surveys	59%	76%	-17%
Online communities for quant	58%	61%	-3%
Mobile surveys (NOT mobile first)	53%	72%	-19%
Interviewer-admin in-person	43%	79%	-36%
Microsurveys	42%	82%	-40%
CAPI	32%	67%	-35%
CATI	28%	50%	-22%
Chatbot-style surveys	27%	64%	-37%
IVR	15%	48%	-33%
Postal/mail surveys	15%	49%	-34%
Average number used:	4.6	7.4	-2.8
n (range) =	104-118	84-106	

Green shading indicates top three most-used methodologies.

Takeaway: Brand-side analytics professionals use more survey methods than researchers on average (7.4 vs. 4.6), with the largest gaps in microsurveys (82% vs. 42%), chatbot-style surveys (64% vs. 27%), and interviewer-administered in-person (79% vs. 43%).

Source: GRIT Report and NewtonX



Analytics professionals use an average of 7.4 survey methods compared to just 4.6 for researchers.

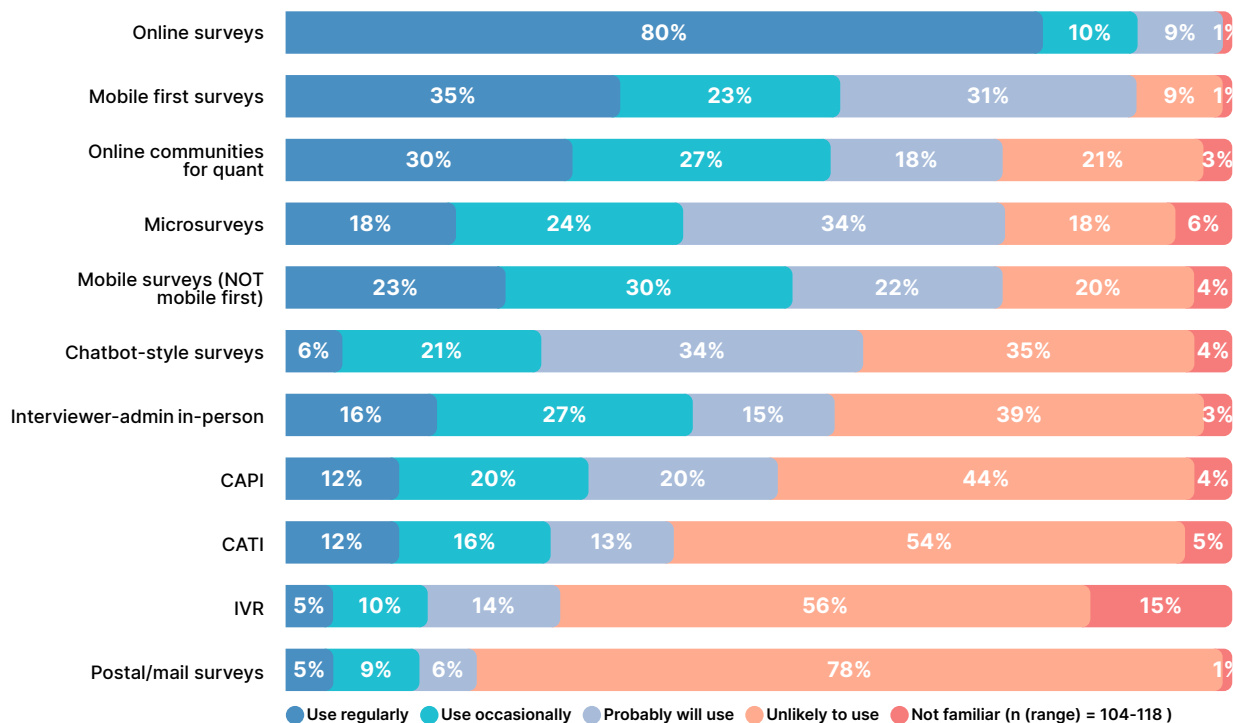
We ask about methods using a “funnel scale,” as we have for the past few years. This year, however, this scale paralyzed one GRIT participant, and they kindly took the time to berate us via email while simultaneously cleaning themselves out of the final data set. This situation serves as a good reminder to always take your meds before attempting to take a survey!



We've discussed which survey methods are most-used among brand-side researchers, and it's useful to also look at "saturation," the percentage of all potential users who currently use the method. Lower saturation suggests more near-term opportunity to increase adoption.

Among brand-side researchers, chatbot-style surveys have the most near-term opportunity for adoption as it is only 44% saturated (61% either use it already or are likely to use it, 27% currently use it; 27% is 44% of 62%). The next least-saturated survey methods are IVR (Interactive Voice Response, 51%) and microsurveys (55%). For contrast, 91% of those who are likely to use online surveys already use them.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the survey methods with the most potential are chatbot-style surveys (only 44% of probable users are current users), IVR (51%), and microsurveys (55%).



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Among brand-side researchers, online surveys (90%) is perennially the most-used survey method, and mobile first surveys (59%) have been top-three for the last three years. Online communities returned to the top three after a three-year hiatus as it increased +14% to 58%.

No other method increased by double-digits, but three decreased that much. Microsurveys fell by -13% while postal/mail surveys, which was just “mail surveys” last year, fell -12% to 15%. We doubt the fall-off was due to the label change.

Interviewer-administered in-person surveys, however, was changed more substantially from “face-to-face interviews,” and it fell -35%, from 78% to just 43%. This could be due to a change in the label, but we’ll reserve judgement until we review the other segments. The most similar survey method, CAPI, is

used by just 32% but hasn’t changed much over five years, and, as we’ll learn in *Focus Groups & IDIs*, in-person qual fell -11%, from 70% to 59%.

Interviewer-administered in-person surveys may have been confounded with in-person qual over recent years, but in-person qual only fell -11%, not nearly -35%. Interviewer-administered in-person surveys aka face-to-face interviews was only used by 38% after a -14% fall in 22A when it was still being presented as a quantitative method. It rose +30% to 68% in 23A when it was not labeled “quantitative,” but was presented in a set with survey methods. It seems possible that this year’s return to close to the 22A level is due to the un-confounding with in-person qual, but it is not conclusive, so don’t make too much of the drop-off unless later circumstantial evidence leads you to think otherwise.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A – 25A
Online surveys	98%	99%	94%	94%	96%	95%	90%	-5%
Mobile first surveys	52%	50%	48%	64%	69%	63%	59%	-4%
Online communities for quant	72%	67%	64%	47%	46%	44%	58%	+14%
Mobile surveys (NOT mobile first)	88%	83%	80%	67%	63%	60%	53%	-7%
Interviewer-admin in-person	56%	52%	38%	68%	62%	78%	43%	-35%
Microsurveys	39%	33%	28%	55%	49%	55%	42%	-13%
CAPI	38%	40%	29%	29%	31%	26%	32%	+6%
CATI	46%	45%	35%	34%	19%	25%	28%	+3%
Chatbot-style surveys	17%	15%	20%	21%	24%	19%	27%	+8%
IVR	18%	21%	13%	13%	11%	12%	15%	+3%
Postal/mail surveys	29%	23%	19%	24%	19%	27%	15%	-12%
Average number used:	5.5	5.3	4.7	5.2	4.9	5.0	4.6	-0.4
n (minimum) =	285-298	207-209	182-188	214	190	121-141	104-118	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among brand-side researchers, online surveys (90%) is perennially the most-used method; use of mobile first surveys increased from 44% to 58% while use of interviewer-administered in-person fell from 78% to 43%, microsurveys fell from 55% to 42%, and postal/mail surveys fell from 27% to 15%.

Source: GRIT Report and NewtonX

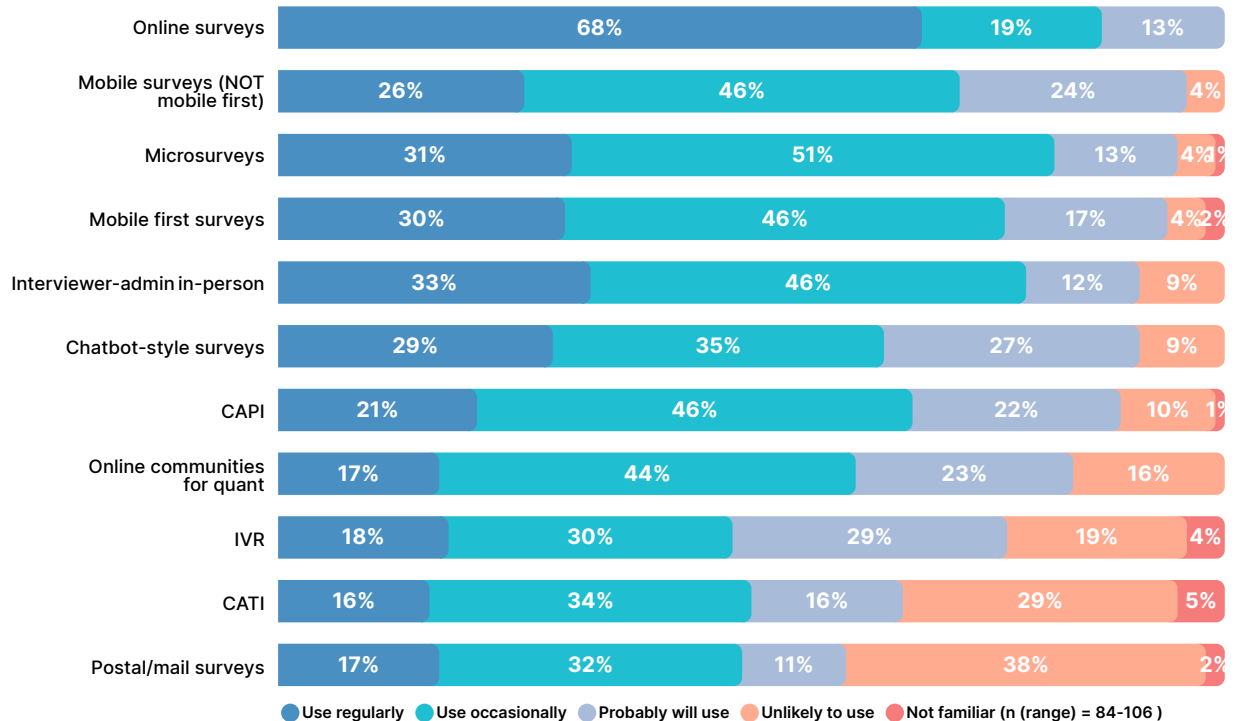




Among brand-side analytics professionals, the least saturated survey method with the most potential for near-term growth is IVR (62% of likely users currently use it.) Each other survey method is at least 70%

saturated. Possibly, analytics professionals are in a position to decide quickly as to whether a method fits their portfolio or not.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, the survey method with the most potential is IVR (62%); for every other method, at least 70% of probable users use them currently.

In each of the four years GRIT has tracked brand-side analytics professionals, online surveys (87%) have been the most-used survey method, and microsurveys (82%) have been in the top three thrice, including this year. Interviewer-administered in-person surveys aka face-to-face interviews (79%) has also been a perennial top three most-used method and has not experienced much fluctuation. From this perspective, it looks like our label change did not have much impact.

Use of four survey methods increased by double digits since last year, led by CAPI (+23%) and CATI (+17%). Mobile first surveys and mobile surveys that are not mobile first each increased +11%. Meanwhile, postal/mail surveys declined by -10%, from 59% to 49%.

Possibly, analytics professionals can decide quickly whether a method fits their portfolio or not.



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USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Online surveys	86%	91%	92%	87%	-5%
Microsurveys	65%	57%	75%	82%	+7%
Interviewer-admin in-person	74%	73%	80%	79%	-1%
Mobile first surveys	54%	60%	65%	76%	+11%
Mobile surveys (NOT mobile first)	58%	54%	61%	72%	+11%
CAPI	30%	35%	44%	67%	+23%
Chatbot-style surveys	43%	50%	64%	64%	--
Online communities for quant	47%	55%	62%	61%	-1%
CATI	34%	36%	33%	50%	+17%
Postal/mail surveys	45%	49%	59%	49%	-10%
IVR	31%	35%	43%	48%	+5%
Average number used:	5.7	6.0	6.8	7.4	+0.6
n =	183	194	95	84-106	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among analytics professionals, online surveys (87%) is perennially the most-used method; use of CAPI increased from 44% to 67%; CATI, from 33% to 50%; mobile first surveys, from 65% to 76%; and mobile surveys (not mobile first), from 61% to 72%. Use of postal/mail surveys fell from 59% to 49%.

Source: GRIT Report and NewtonX

The stability of interviewer-administered in-person surveys versus face-to-face interviews in the analytics segment doesn't prove the two labels had the same meaning for them in each year. It could be that "face-to-face interviews" indicates a different method to them, but coincidentally 80% also used that method last year. It could be that "interviewer-administered in-person surveys" and "face-to-face interviews" are synonymous to them, but not to researchers.

However, it also suggests that maybe the label change doesn't matter as much to researchers as we might have thought. Perhaps the resurgence of online communities is cannibalizing in-person survey methods, possibly in response to budget contractions. In 23A, researchers increased use of face-to-face interviews from 38% to 68%. At the same time, use of online communities for quant fell from 64% to 47%. Perhaps there is a dynamic across the two that matters more than the label change.

GRIT also looks at intensity of use: the percentage of all users who use the method "regularly." Online surveys are used intensely by brand-side researchers (89% regular users) and analytics professionals (78% regular users). Most researchers who use mobile first surveys (60%) and online communities for quant (52%) use them regularly, but this is not the case for analytics (40% and 27%). We get the impression that researchers rely more heavily on a smaller set of methods (think quant-only projects) while analytics professionals have to apply a variety of methods for different purposes (think qualiquant).



Perhaps the resurgence of online communities is cannibalizing in-person survey methods, maybe in response to budget contractions.





Researchers are also more likely to intensely use CATI (43% to 32%). Analytics professionals are more likely to intensely use chatbot-style surveys (45% to 23%).

INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
Online surveys	89%	78%
Mobile first surveys	60%	40%
Online communities for quant	52%	27%
Mobile surveys (NOT mobile first)	44%	37%
CATI	43%	32%
Microsurveys	43%	38%
Interviewer-administered in-person surveys	37%	42%
CAPI	37%	31%
Postal/mail surveys	35%	35%
IVR	34%	38%
Chatbot-style surveys	23%	45%
n (range) =	104-118	91-106

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Most brand-side insights professionals who use online surveys use them regularly; among brand-side researchers, most users of mobile first surveys (60%) and online communities for quant (52%) use them regularly.

Source: GRIT Report and NewtonX

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ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

Online surveys (83% to 100%) and mobile first surveys (56% to 86%) are among the top three most-used in each supplier segment. Mobile first surveys that are not mobile first (58% to 76%) are among the top three in each supplier segment except service-led with 500+ FTE (64%). Instead, their third is online communities for quant (70%). Among service-led suppliers, the percentage using online communities for quant declines with FTE size. Among those with 101 to 500 FTE, it's only 56%; it drops to 46% of those with 21 to 100 FTE; then it declines to 37% for those with ≤20 FTE.

Tech-led suppliers use an average of 5.0 of these survey methods, and the average number used increases with service-led FTE. Those with ≤20 FTE use an average of 4.3, while those with 21 to 100 FTE use 5.2 and those with more than 100 FTE use just over 6.

Majorities in each supplier segment use online surveys and mobile first surveys. Online communities for quant are used by majorities in tech-led (57%), service-led with 101-500 FTE, and those with 500+ FTE. Interviewer-administered in-person surveys are used by majorities or near-majorities in each service-led segment, from 48% of those with 21 to 100 FTE to 61% of those with 500+ FTE. Microsurveys are used by majorities in tech-led (52%), service-led with 101-500 FTE (56%), and those with 500+ FTE (51%).

CAPI is used by majorities in service-led with 101-500 FTE (54%) and those with 500+ FTE (57%). CATI is used by majorities in service-led with 101-500 FTE and those with 500+ FTE (52% each).

USE OF METHODS/APPROACHES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online surveys	88%	83%	97%	100%	100%
Mobile first surveys	66%	56%	65%	86%	80%
Online communities for quant	57%	37%	46%	56%	70%
Mobile surveys (NOT mobile first)	60%	58%	68%	76%	64%
Interviewer-admin in-person	26%	55%	48%	57%	61%
CAPI	43%	38%	48%	54%	57%
CATI	39%	38%	39%	52%	52%
Microsurveys	52%	26%	32%	56%	51%
Chatbot-style surveys	40%	14%	24%	36%	36%
Postal/mail surveys	11%	12%	30%	22%	32%
IVR	22%	9%	21%	20%	17%
Average number used:	5.0	4.3	5.2	6.1	6.2
n (range) =	23-28	93-112	48-55	33-43	30-42

Green shading indicates top three most-used methodologies.

Takeaway: Online and mobile first surveys are among the top three most-used in each supplier segment; mobile surveys that are not mobile first are also in the top three for all segments but service-led suppliers with 500+ FTE where online communities for quant (70%) is third.

Source: GRIT Report





As on the brand-side, most users of online surveys in each supplier segment are regular users, from 77% of service-led with ≤20 FTE to 99% of those with 21 to 100 FTE. Most users of mobile first surveys are regular users among tech-led (84%) and service-led with more than 20 FTE (68% to 78%), and the pattern is parallel for non-mobile first.

For service-led suppliers with more than 20 FTE most users of CATI are regular users (52% to 64%). Most CAPI users are regular users in tech-led (67%), service-led with 21 to 100 FTE (55%), and those with 101 to 500 FTE (53%).

INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online surveys	79%	77%	99%	98%	88%
IVR	10%	10%	32%	0%	82%
Mobile first surveys	84%	42%	76%	68%	78%
Mobile surveys (NOT mobile first)	62%	43%	64%	57%	70%
CATI	22%	20%	64%	52%	52%
Online communities for quant	71%	27%	54%	35%	45%
Microsurveys	39%	26%	34%	27%	44%
Postal/mail surveys	0%	31%	40%	28%	44%
Interviewer-admin in-person	21%	51%	42%	49%	43%
CAPI	67%	37%	55%	53%	41%
Chatbot-style surveys	23%	18%	34%	26%	29%
n (range) =	23-28	93-112	48-55	33-43	30-42

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: In each supplier segment, most users of online surveys use them regularly; the same is true in at least three segments each for mobile first surveys, mobile surveys that are not mobile first, and CATI.

Source: GRIT Report



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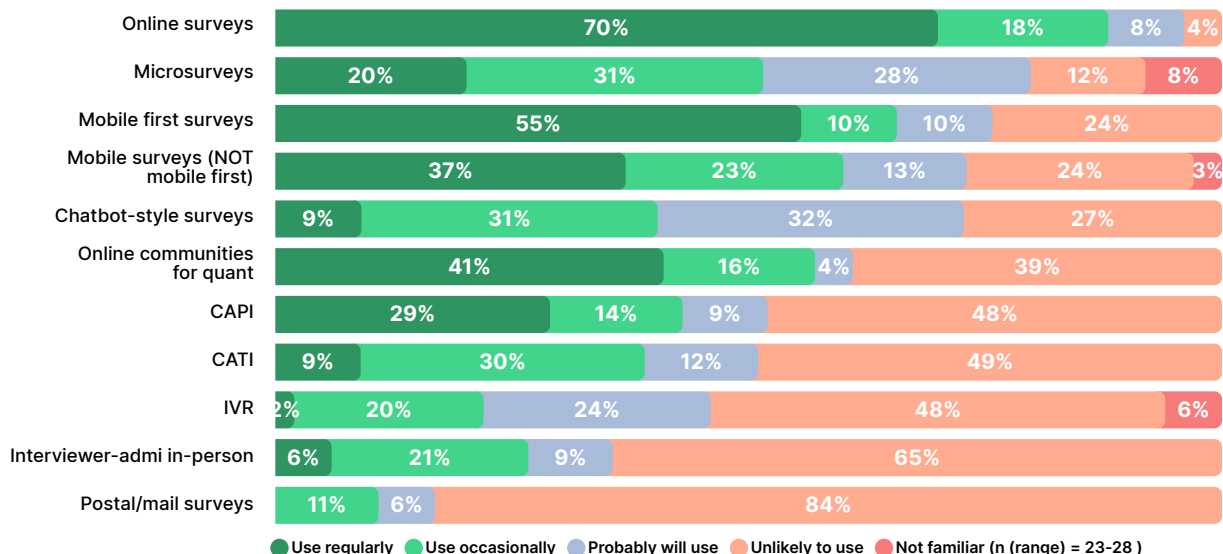


ATTITUDES AND USAGE TRENDS | TECH-LED POV ^[DATA]

Among tech-led suppliers, IVR is the least saturated survey method (48%). Chatbot surveys are the next-

least saturated (55%). For all others survey methods, at least 65% of likely users are current users.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Takeaway: Among tech-led suppliers, the survey method with the most potential is IVR (only 48% who will probably use it currently do), followed by chatbot-style surveys (55%).

Among tech-led suppliers, online surveys (88%) have been the most-used survey method in each year, and mobile first surveys (66%) have also been in the top three each year. Mobile surveys that are not mobile first (60%) return to the top three after a two-year gap.

Four surveys methods increased usage at least +10% since last year, led by CAPI (+24% to 43%). Online surveys increased +13%, mobile surveys that are not mobile first increased +12%, and CATI increased +11% to 39%. Only one declined in usage by double-digits: postal/mail surveys (-10% to 11%).

USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online surveys	91%	91%	86%	89%	87%	75%	88%	+13%
Mobile first surveys	63%	68%	68%	74%	59%	64%	66%	+2%
Mobile surveys (NOT mobile first)	87%	91%	79%	60%	50%	48%	60%	+12%
Online communities for quant	62%	61%	58%	49%	54%	49%	57%	+8%
Microsurveys	36%	46%	35%	47%	37%	43%	52%	+9%
CAPI	40%	20%	24%	34%	35%	19%	43%	+24%
Chatbot-style surveys	14%	28%	27%	21%	26%	38%	40%	+2%
CATI	43%	26%	22%	26%	40%	28%	39%	+11%
Interviewer-admin in-person	30%	26%	20%	37%	40%	28%	26%	-2%
IVR	23%	13%	10%	14%	13%	15%	22%	+7%
Postal/mail surveys	24%	11%	17%	25%	25%	21%	11%	-10%
Average number used:	5.1	4.8	4.4	4.8	4.6	4.3	5.0	+0.7
n (range) =	90-97	46-50	122-125	70	34-44	29-38	23-28	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among tech-led suppliers, online surveys (88%) is perennially the most-used method and mobile first surveys (66%) is also in the top three; use of CAPI increased from 19% to 43%; online surveys, from 75% to 88%; mobile surveys that are not mobile first, 48% to 60%; and CATI, 28% to 39%.

Source: GRIT Report



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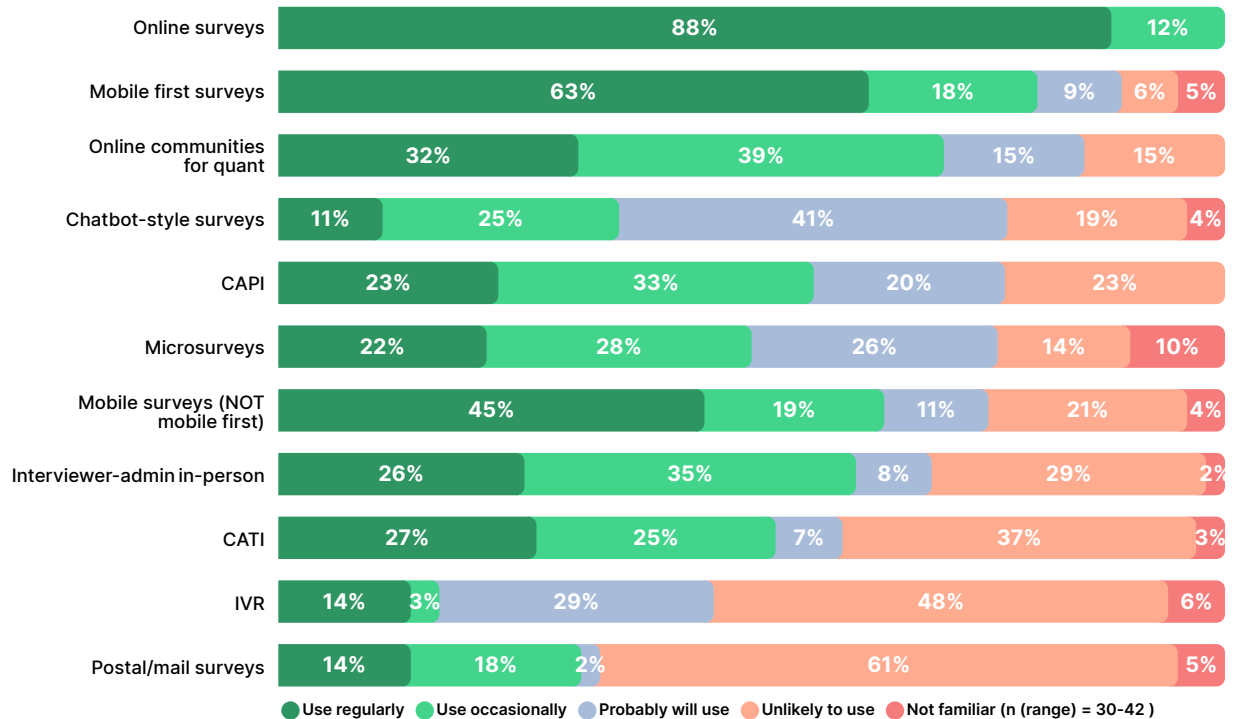
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 500+ FTE POV ^[DATA]

Among service-led suppliers with 500+ FTE, IVR is only 37% saturated and only 46% of users of chatbot-

style surveys use them regularly. All others are at least 66% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, the survey method with the most potential is IVR (only 37% who will probably use it currently do), followed by chatbot-style surveys (46%).

Online surveys (100%) have been the most-used survey method among service-led suppliers with 500+ FTE in each GRIT wave. Mobile first surveys (80%) have been in the top three for four straight years. Online communities for quant (70%) is back in the top three for the first time since 22A, knocking mobile surveys that are not mobile first (64%) out of the top three for the first time.

Use of seven survey methods fell by double digits since last year among service-led suppliers with 500+ FTE. IVR fell the most (-20%), while mobile first surveys that are not mobile first fell -16%. CATI fell -14% and CAPI fell -13%. Microsurveys and chatbot-style surveys each fell -11%, and interviewer-administrated in-person surveys fell 10%. Nothing increased very much.

Online communities for quant is back in the top three for the first time since 22A, knocking mobile surveys that are not mobile first.



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USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online surveys	99%	98%	94%	95%	97%	96%	100%	+4%
Mobile first surveys	75%	68%	68%	73%	72%	83%	80%	-3%
Online communities for quant	78%	69%	79%	60%	68%	72%	70%	-2%
Mobile surveys (NOT mobile first)	96%	93%	91%	74%	73%	80%	64%	-16%
Interviewer-admin in-person	65%	63%	49%	68%	70%	71%	61%	-10%
CAPI	64%	59%	53%	57%	62%	70%	57%	-13%
CATI	69%	64%	59%	60%	65%	66%	52%	-14%
Microsurveys	44%	35%	41%	59%	62%	62%	51%	-11%
Chatbot-style surveys	27%	22%	21%	26%	30%	47%	36%	-11%
Postal/mail surveys	38%	32%	33%	27%	30%	25%	32%	+7%
IVR	38%	30%	31%	18%	30%	37%	17%	-20%
Average number used:	6.9	6.3	6.2	6.2	6.6	7.1	6.2	-0.9
n (range) =	104-106	85-88	117-129	97	58-78	53-71	30-42	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 500+ FTE, online surveys (100%) is perennially the most-used method and mobile first surveys (80%) has been in the top three for four straight years; use of seven survey methods decreased by double digits, led by IVR (37% to 17%) and mobile surveys that are not mobile first (80% to 64%).

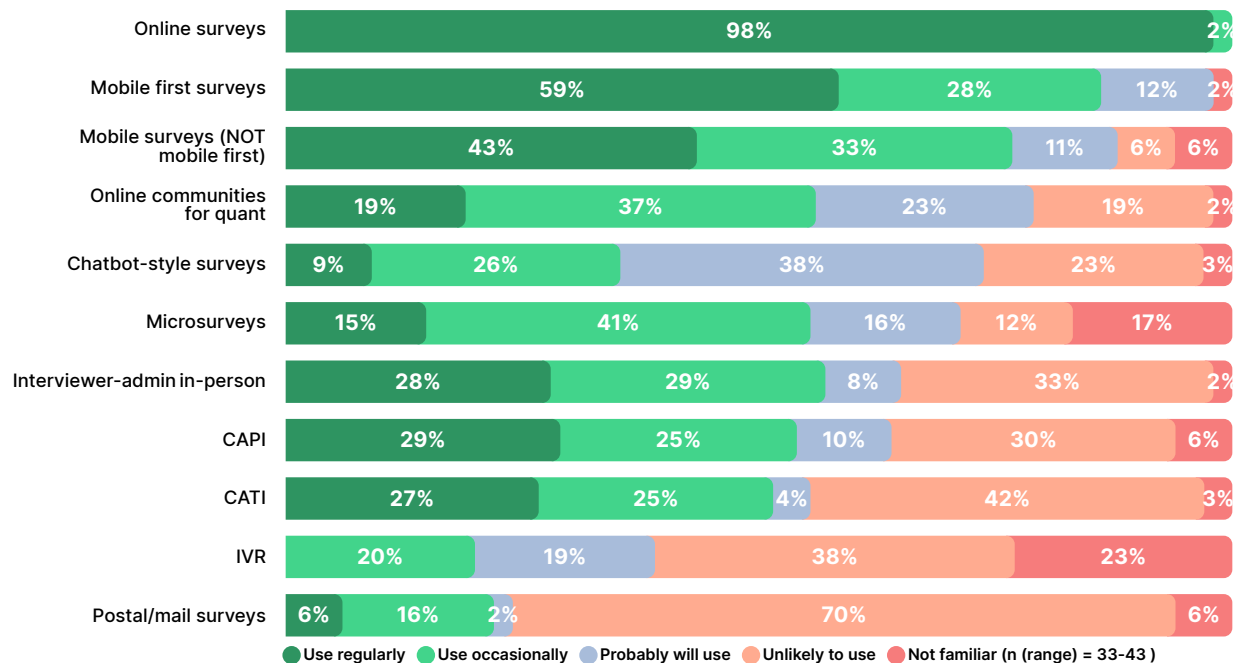
Source: GRIT Report

ATTITUDES AND USAGE TRENDS | SERVICE-LED: 101-500 FTE POV ^[DATA]

Among service-led suppliers with 101 to 500 FTE, all survey methods are at least 70% saturated except for

two. Only 48% of likely users of chatbot-style surveys use them currently. For IVR, it's 51%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, the survey methods with the most potential are IVR (only 51% who will probably use it currently do) and chatbot-style surveys (48%).



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Online surveys (100%) have been the most-used survey method among service-led suppliers with 101 to 500 FTE in each year. Mobile first surveys that are not mobile first (76%) have also been in the top three each year, and mobile first surveys (86%) have been in the top three since 21A.

Four survey methods increased by double digits among service-led suppliers with 101 to 500 FTE

since last year. Microsurveys (56%) increased +19%, followed by CATI (+16% to 52%). Mobile first surveys and IVR (20%) each increased +10%. Online communities for quant fell -10%. Possibly, these changes are due to suppliers crossing the 500 FTE milestone in either direction as the largest suppliers refocus their businesses.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online surveys	95%	99%	94%	98%	98%	99%	100%	+1%
Mobile first surveys	72%	72%	74%	76%	72%	76%	86%	+10%
Mobile surveys (NOT mobile first)	94%	94%	93%	76%	72%	80%	76%	-4%
Interviewer-admin in-person	69%	60%	51%	72%	66%	63%	57%	-6%
Online communities for quant	79%	68%	73%	64%	60%	66%	56%	-10%
Microsurveys	31%	31%	33%	48%	43%	37%	56%	+19%
CAPI	56%	53%	52%	50%	43%	46%	54%	+8%
CATI	66%	64%	65%	59%	33%	36%	52%	+16%
Chatbot-style surveys	19%	15%	18%	12%	26%	30%	36%	+6%
Postal/mail surveys	47%	36%	36%	27%	36%	23%	22%	-1%
IVR	24%	28%	27%	14%	20%	10%	20%	+10%
Average number used:	6.5	6.2	6.2	6.0	5.7	5.7	6.1	+0.4
n (range) =	108	81-89	127-134	102	54-78	45-63	33-43	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 101-500 FTE, online surveys (100%) is perennially the most-used method, mobile surveys that are not mobile first (76%) have also been in the top three every year, and mobile first surveys (86%) have been in the top three for the last six years; use of microsurveys increased from 37% to 56% and CATI increased from 36% to 52%.

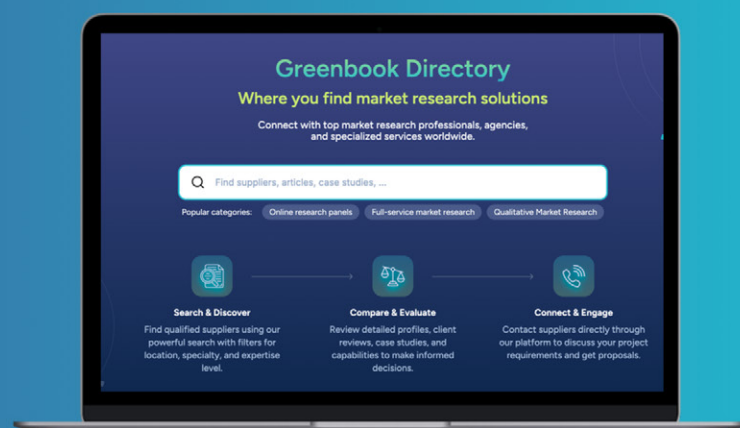
Source: GRIT Report



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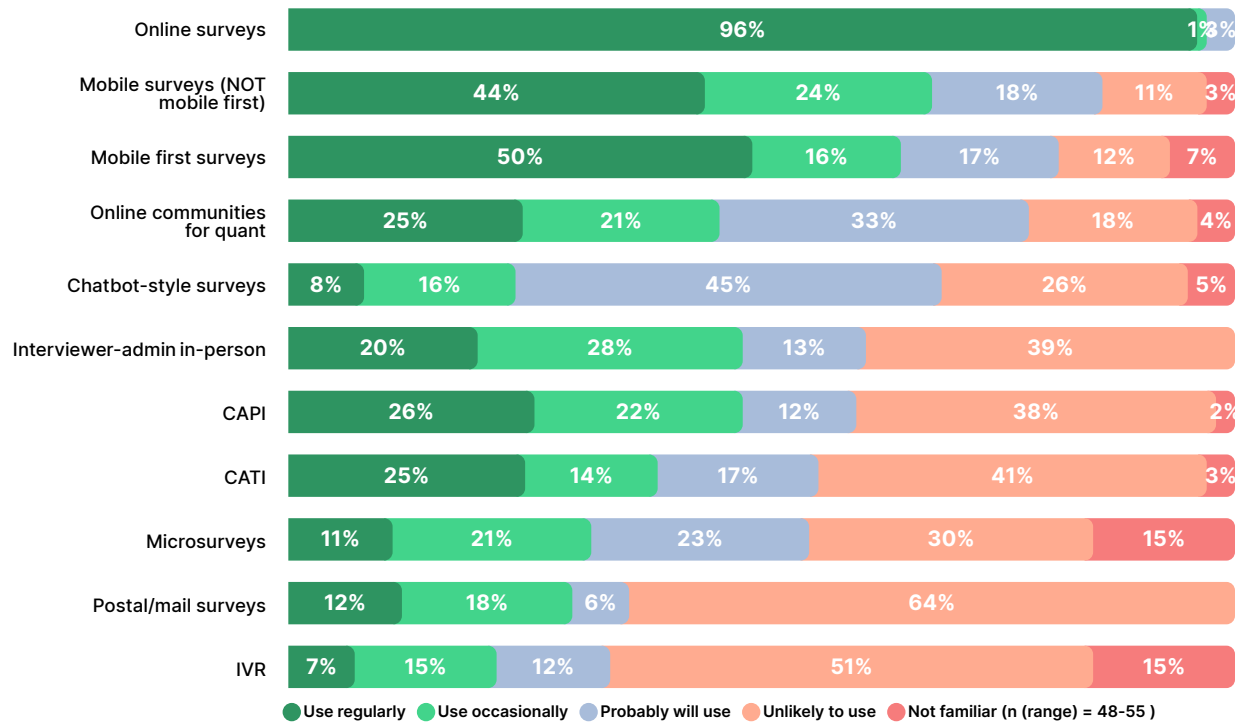
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 21-100 FTE POV [DATA]

Among service-led suppliers with 21 to 100 FTE, chatbot-style surveys are just over one-third saturated (35%). Next least-saturated: online communities

for quant and microsurveys (58% each). Each other method is at least 63% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, the survey methods with the most potential are chatbot-style surveys (only 35% who will probably use it currently do), online communities for quant (58%), and microsurveys (58%).

As with other segments, online surveys (97%) have been the most-used survey method among service-led suppliers with 21 to 100 FTE in each GRIT wave. Mobile first surveys that are not mobile first (68%) have been in the top three in every wave except 24A.

Mobile first surveys (65%) are in the top three for the second time, ending interviewer-administered in-person surveys' (48%) 3-year run. Interviewer-administered in-person surveys fell -17% since last year, the only double-change in either direction. We have to consider the possibility that the change was due, at least in part, to the label change from "face-to-face interviews."

Mobile first surveys are in the top three for the second time, ending interviewer-administered in-person surveys' 3-year run.



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USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online surveys	98%	97%	90%	95%	96%	99%	97%	-2%
Mobile surveys (NOT mobile first)	93%	91%	80%	71%	70%	69%	68%	-1%
Mobile first surveys	64%	62%	56%	65%	72%	64%	65%	+1%
CAPI	53%	51%	50%	50%	55%	43%	48%	+5%
Interviewer-admin in-person	62%	57%	53%	68%	71%	65%	48%	-17%
Online communities for quant	66%	61%	59%	59%	55%	48%	46%	-2%
CATI	58%	63%	60%	60%	63%	45%	39%	-6%
Microsurveys	37%	32%	26%	47%	44%	31%	32%	+1%
Postal/mail surveys	36%	40%	28%	30%	42%	32%	30%	-2%
Chatbot-style surveys	14%	14%	19%	13%	26%	25%	24%	-1%
IVR	26%	23%	24%	24%	17%	17%	21%	+4%
Average number used:	6.0	5.9	5.5	5.8	6.1	5.4	5.2	-0.2
n (range) =	163-169	122-130	142-145	184	90-109	75-93	48-55	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 21-100 FTE, online surveys (97%) is perennially the most-used method, and mobile surveys that are not mobile first (68%) have been in the top three every year but one; use of interviewer-administered in-person fell from 65% to 48%.

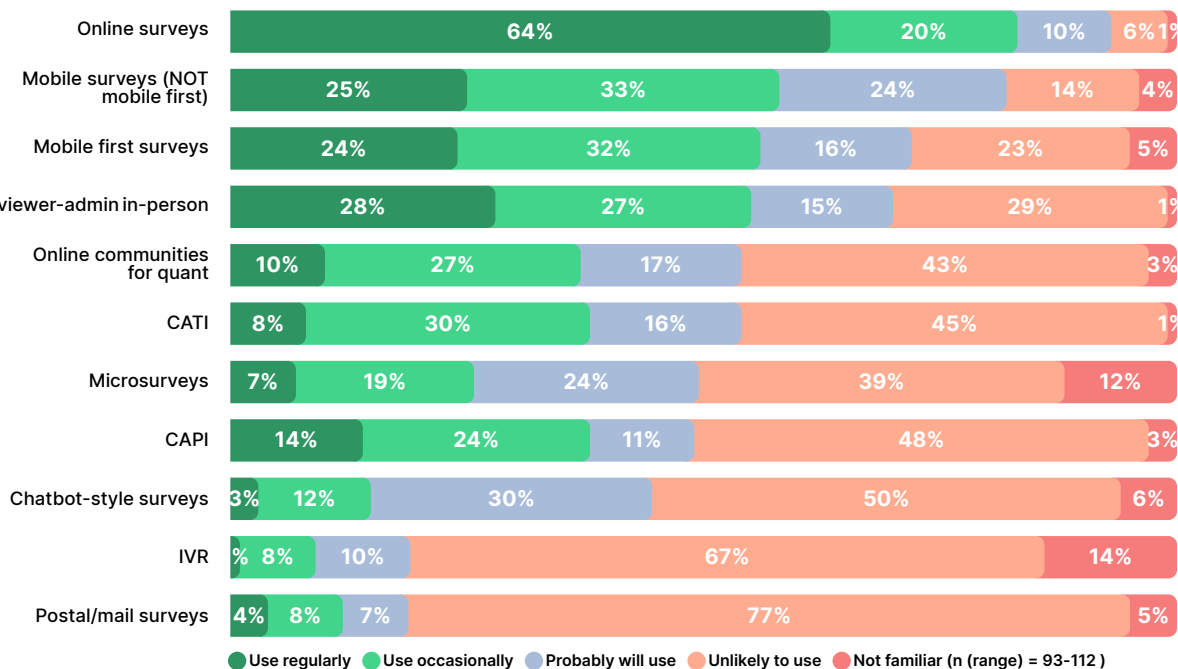
Source: GRIT Report

ATTITUDES AND USAGE TRENDS | SERVICE-LED: ≤20 FTE POV [DATA]

Each survey method is at least 64% saturated among service-led suppliers with ≤20 FTE except for three.

Chatbot-style surveys is only 32% saturated, followed by IVR (48%) and microsurveys (52%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, the survey methods with the most potential are chatbot-style surveys (only 32% who will probably use it currently do), IVR (48%), and microsurveys (52%).



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As with each other segment, online surveys (83%) have been the most-used survey method in every wave. Mobile first surveys (56%) have been in the top three for the past three years, and mobile surveys that are not mobile first (58%) have returned for the first

time since 23A, displacing interviewer-administered in-person surveys (55%). Interviewer-administered in-person surveys fell -13% from last year, the only double-digit change in either direction in this segment.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online surveys	96%	97%	86%	90%	79%	87%	83%	-4%
Mobile surveys (NOT mobile first)	86%	89%	76%	64%	50%	53%	58%	+5%
Mobile first surveys	43%	43%	47%	56%	52%	55%	56%	+1%
Interviewer-admin in-person	60%	53%	44%	74%	64%	68%	55%	-13%
CATI	62%	54%	51%	47%	41%	37%	38%	+1%
CAPI	45%	48%	41%	41%	42%	42%	38%	-4%
Online communities for quant	52%	58%	51%	40%	46%	38%	37%	-1%
Microsurveys	30%	26%	30%	34%	25%	32%	26%	-6%
Chatbot-style surveys	4%	6%	7%	9%	3%	10%	14%	+4%
Postal/mail surveys	25%	25%	21%	20%	11%	15%	12%	-3%
IVR	17%	13%	13%	6%	8%	5%	9%	+4%
Average number used:	5.2	5.1	4.7	4.8	4.2	4.4	4.3	-0.1
n (range) =	267-310	194-221	234-239	271	106-139	124-146	93-112	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with ≤20 FTE, online surveys (83%) is perennially the most-used method, mobile surveys that are not mobile first (58%) have been in the top three every year but two, and mobile first surveys (56%) have been in the top three the last three years; interviewer-administered in-person fell from 68% to 55%.

Source: GRIT Report

THE BIG PICTURE [STRATEGIC INTERPRETATION]

If all GRIT had to report was that online surveys haven't died yet or how we've upgraded the labeling of survey methods, we'd be pretty disappointed. And wrong.

Yes, online surveys remain the most-used method in every segment without exception. Saturation among likely users is 91% for brand-side researchers, which leaves little room to grow. Online surveys are the stable core of survey methods, but some other methods are on the move.

Among brand-side researchers, use of online communities for quant surged +14% to 58%, returning to the top three after a three-year absence. At the same time, use of interviewer-administered in-person surveys plunged -35% to 43% after three years of

60%+ use. This reversed the dynamic of 23A when online communities for quant fell -17% as interviewer-administered in-person surveys jumped from 38% to 68%.

Some of the drop-off in interviewer-administered in-person surveys may be due to our re-labeling of it, but the upsurge in online communities for quant isn't. The 23A dynamic and the fact that interviewer-administered in-person survey usage among brand-side analytics remained around 80% suggest a good part of the researcher's usage decline was real. Perhaps the 23A surge was due to pent-up demand for in-person research from the pandemic, but maybe now, as research budgets shrink, online communities for quant are much more recognized as a lower-cost, scalable alternative to in-person contact.



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Among service-led suppliers with 500+ FTE, online communities for quant (70%) have re-entered the top three most-used after a three-year absence. This is not due to a surge in use so much as a lack of decline. Use of seven survey methods fell by double digits among the largest suppliers, leaving online surveys, mobile first surveys, and online communities for quant as the last survey methods standing.

This pattern is almost certainly connected to the cost-structure reengineering hypothesized in *Evolving Supplier Landscape*; these are likely the same firms reducing headcount and deprioritizing labor-intensive methods. The parallel rise among 101–500 FTE (microsurveys +19%, CATI +16%, mobile first +10%, IVR +10%) is consistent with the hypothesis that some capacity migrated down a size band. The two segments are moving in opposite directions in a way that looks coordinated rather than coincidental.

On the brand-side, the analytics segment stands out as both the most qualiquant (39% of projects) and the heaviest user of methods that straddle the boundary, such as microsurveys, chatbot-style surveys, interviewer-administered in-person, and CAPI. Their average of 7.4 methods used vs. 4.6 for researchers reflects a broader portfolio matched to a broader range of business topics and disciplines, such as UX, CX, and product development (see *Scope of Insights Impact*).

Researchers, by contrast, are more quant-concentrated and more intensely reliant on a smaller set of survey methods: online surveys (89% of users use it regularly), mobile first (60%), online communities for quant (52%). This pattern is worth noting because researchers don't just use fewer methods, they use their core methods more intensely.

Finally, and in contrast to the decline in interviewer-administered in-person surveys in multiple segments, computer-assisted personal interviews (CAPI) are quietly rising. CAPI increased by double digits in two segments, including the largest single-wave increases in the dataset. Relative to interviewer-administered in-person surveys, CAPI is a more structured, tablet-mediated form of in-person data collection, and its rise may reflect a preference for the rigor of in-person with the efficiency of digital capture, as distinct from purely interviewer-led face-to-face interaction.

Although online surveys, the Jason Vorhees/Michael Myers of survey methods, refuse to die, insights professionals on both the demand and supply sides are reconfiguring the rest of their survey method portfolios to better align with their economic realities.

Although online surveys refuse to die, insights professionals on both the demand and supply sides are reconfiguring the rest of their survey method portfolios to better align with their economic realities.



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FOCUS GROUPS & IDI'S

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across nine focus group, IDI, and related qualitative methods.

HOW IS AI CHANGING QUALITATIVE RESEARCH? [ORIENTATION]

In 20A, the average number of qual methods used ranged from 5.1 (brand-side research, tech-led, service-led with ≤ 20 FTE) to 6.7 (service-led with 101 to 500 FTE). Currently, the range in these segments runs from 3.1 (tech-led) to 5.6 (service-led

with 500+ FTE). The average number of qual methods used has decreased in each of these segments. (*When the brand-side analytics segment was introduced in 23A, they averaged 4.6 qual methods, and they've increased modestly to 5.2 since then.*)

Since 20A, use of in-person qual, mobile diaries/ journaling, and telephone qual have each fallen by more than -10% in each of the six 20A segments. Online communities for qual and online text- or SMS-based qual have declined by more than -10% in five segments. In the other direction, AI-/chatbot-moderated qual has increased more than +10% in five segments, and mobile qual and online text- or SMS-based qual have increased that much in one each.

In other words, the methods that seem to be relatively steady or growing since 20A are online qual with webcams, mobile qual, bulletin board studies, and AI-/ chatbot-moderated qual. But that doesn't mean the others are dead.

Currently, in-person qual is among the top three most-used in each segment despite its every-segment slide since 20A. Online qual with webcams is top-three in each segment but brand-side analytics (63%), and online communities for qual is top-three except for two segments. Insights professionals may be consolidating their arsenals, but in a variety of ways.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

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THREE MOST-USED METHODS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online qual with webcams	67%	63%	39%	69%	74%	74%	81%
In-person qual	59%	73%	39%	62%	60%	73%	74%
Online communities for qual	53%	67%	45%	45%	55%	70%	72%
Telephone qual	31%	64%	25%	35%	48%	52%	43%
Mobile qual	41%	50%	41%	46%	52%	61%	63%
Bulletin board studies	36%	50%	31%	37%	51%	73%	56%
n (range) =	104-133	85-105	20-27	88-109	46-56	33-39	30-45

Green shading indicates top three most-used methodologies.

Takeaway: In-person qual is a top-three method in each segment, online qual with webcams is top-three in all but brand-side analytics (63%), and online communities for qual is top-three in five segments.

Source: GRIT Report and NewtonX

Compared to last year, bulletin board studies have increased at least +5% in four segments, and online communities for qual, AI- or chatbot-moderated qualitative interviews or groups, and in-person qual

have increased that much in three. Meanwhile, online text- or SMS-based qual has decreased at least -5% in four segments, and mobile diaries/journaling has done the same in three.

CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Bulletin board studies	+12%	+4%	+7%	-2%	-2%	+18%	+6%
Online qual with webcams	+11%	+14%	-13%	+4%	+4%	-11%	+3%
Online communities for qual	0%	+6%	+12%	-2%	-2%	+16%	-7%
Online text- or SMS-based qual	-1%	+11%	-6%	-4%	-17%	-10%	-18%
Mobile qual	-2%	+3%	+1%	-2%	-7%	+5%	-5%
Telephone qual	-8%	+14%	+1%	-5%	+8%	-8%	+1%
Mobile diaries/journaling	-9%	+2%	+8%	-9%	-3%	+14%	-9%
AI-/chatbot-moderated qual	-11%	-9%	0%	+1%	+20%	+5%	+14%
In-person qual	-11%	+9%	+18%	-2%	+5%	+4%	-5%
n (range) =	104-133	85-105	20-27	88-109	46-56	33-39	30-45

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: Usage of bulletin board studies (online discussion boards) increased at least +5% in four segments while online text- or SMS-based qual fell at least -5% in four; in-person qual, AI- or chatbot-moderated qual, and online communities for qual each increased at least +5% in three segments.

Source: GRIT Report and NewtonX



Insights professionals are consolidating their qual methodologies, perhaps around AI-/chatbot-moderated qual.

It certainly looks like insights professionals are consolidating their qual methodologies, perhaps around AI-/chatbot-moderated qual. The average number of methods has been declining across the board while AI-/chatbot-moderated qual has enjoyed increasing adoption in multiple segments. However, despite the overall decline in the number of methods used, each method still seems to have some kind of core base of committed users.



CHANGES FROM 2025 GRIT SURVEY

Compared to last year's survey, we've upgraded the labels of two methods and added a new method based on a previous one. "Bulletin board studies" is now "Bulletin board studies (online discussion boards)," and "Chat (text-based) online qual (focus groups or IDIs)" is now "Online text- or SMS-based qual (focus groups or IDIs)." We don't expect these changes to have a dramatic impact on results.

We also added "AI- or chatbot-moderated qualitative interviews or groups (online)" to better reflect current methodologies. For years, we asked about "automated interviewing via AI systems," but we think this addition and "chatbot-style surveys" covers this topic unambiguously.

2026 FOCUS GROUP & IDI METHODS

2026 Method	2025 Precedent	2025 Family
AI- or chatbot-moderated qualitative interviews or groups (online)	NEW (partly anticipated by 'Automated interviewing via AI systems')	N/A
Bulletin board studies (online discussion boards)	Bulletin board studies	Observational
In-person qual (focus groups or IDIs)	In-person qual (focus groups or IDIs)	Focus Groups & IDIs
Mobile diaries/journaling	Mobile diaries/journaling	Observational
Mobile qual (focus groups or IDIs)	Mobile qual (focus groups or IDIs)	Focus Groups & IDIs
Online communities for qual	Online communities for qual	Focus Groups & IDIs
Online qual with webcams (focus groups or IDIs)	Online qual with webcams (focus groups or IDIs)	Focus Groups & IDIs
Online text- or SMS-based qual (focus groups or IDIs)	Chat (text-based) online qual (focus groups or IDIs)	Focus Groups & IDIs
Telephone qual (focus groups or IDIs)	Telephone qual (focus groups or IDIs)	Focus Groups & IDIs

Green indicates method changed from 25A.

Source: GRIT Report and NewtonX

Qualitative research is consolidating, not disappearing.
Online qual with webcams, in-person qual, and online communities remain durable anchors, while AI- and chatbot-moderated approaches are becoming the next layer to watch. The leadership task is to preserve human interpretation while using automation to extend reach and efficiency without eroding trust.
– LM, ed.

Methods were not classified by type during the survey; we only do that for the report. Of these nine qualitative methods, bulletin board studies (online discussion boards) and mobile diaries/journaling were classified as *Observational Research* methods in last year's *Insights Practice Report*.





ATTITUDES AND USAGE TRENDS | BRAND POV ^[DATA]

Most in both brand-side segments use online qual with webcams (67% of researchers, 63% of analytics), in-person qual (59% and 73%), and online communities for qual (53% and 67%). In addition, most of the analytics segment use telephone qual (64%), online text- or SMS-based qual (59%), and AI-/chatbot-moderated qual (55%). Half use mobile qual and bulletin board studies (50% each).

On average, the analytics segment uses 5.2 of these methods compared to 3.9 among researchers. All the gaps lean toward analytics, led by telephone qual

(+33%, 64% to 31%), online text- or SMS-based qual (+27%, 59% to 32%), and AI-/chatbot-moderated qual (+22%, 55% to 33%). In addition, there is a +14% gap toward analytics for in-person qual, online communities for qual, and bulletin board studies (50% to 36%).

In *Survey Methods*, we see that 63% of projects in the analytics segment involve qual, on average, compared to 52% for the research segment, and this may be consistent with using more qual methods.

USE OF METHODS/APPROACHES: BRAND SEGMENT BRAND

	Research	Analytics	Research - analytics
Online qual with webcams	67%	63%	+4%
In-person qual	59%	73%	-14%
Online communities for qual	53%	67%	-14%
Mobile qual	41%	50%	-9%
Bulletin board studies	36%	50%	-14%
Mobile diaries/journaling	36%	42%	-6%
AI-/chatbot-moderated qual	33%	55%	-22%
Online text- or SMS-based qual	32%	59%	-27%
Telephone qual	31%	64%	-33%
Average number used:	3.9	5.2	-1.3
n (range) =	104-133	85-105	

Green shading indicates top three most-used methodologies.

Takeaway: Brand-side analytics professionals use more methods for focus groups and IDIs, on average, than researchers (5.2 vs. 3.9), with the largest gaps in telephone qual (64% vs. 31%), online text- or SMS-based qual (59% vs. 32%), and AI-/chatbot-moderated qual (55% vs. 33%).

Source: GRIT Report and NewtonX

Among brand-side researchers, all but two methods are more than 60% saturated. For AI- or chatbot-moderated qualitative interviews or groups, 48% of like users currently use it. For online text- or SMS-based qual, it's 57%.

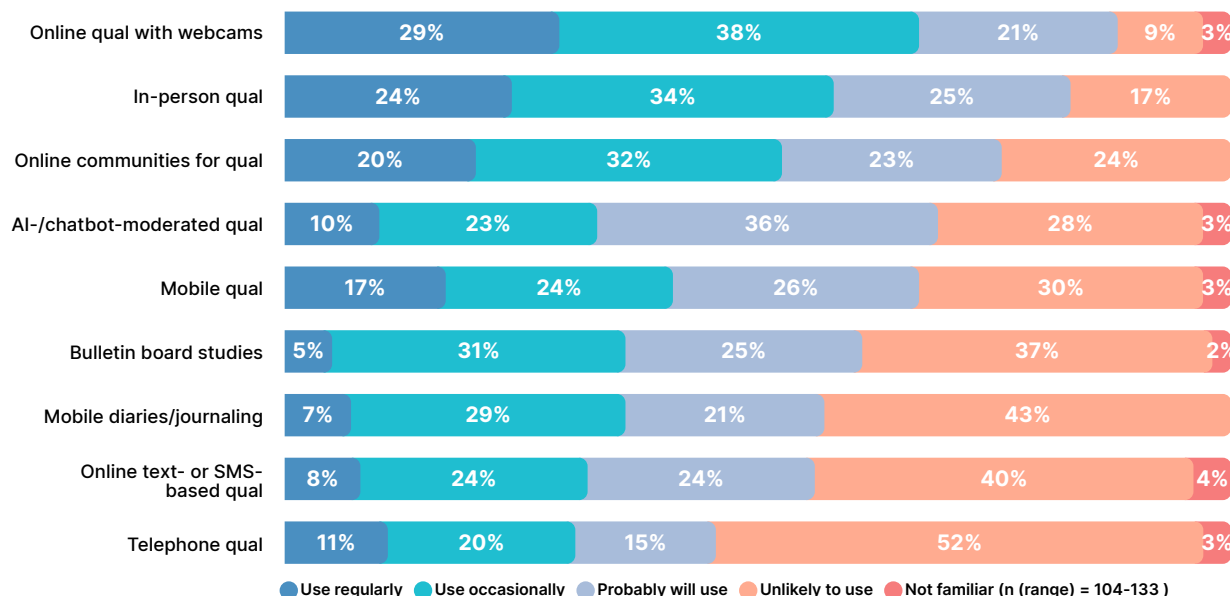


Most in both brand-segments use online qual with webcams, in-person qual, and online communities for qual.





INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the focus group and IDI methods with the most potential is AI- or chatbot-moderated qual (only 48% of probable users are current users).

The top three methods for qual have not varied among brand-side researchers in any of our six GRIT waves. Online qual with webcams (67%) is currently first, followed by in-person qual (59%), and online communities for qual (53%). Over those six years, their percentages of users have fluctuated. Online qual with webcams peaked in 21A at 85%, but fell to 56% last year. In-person qual peaked at 93% just before the pandemic in 20A, and has gradually fallen to 59%. Online communities for qual is down -21% from its 21A peak.

Two methodologies have increased use by double digits since least year: bulletin board studies grew +12% to 36% while online qual with webcams rallied +11%. On the downside, AI-/chatbot-moderated qual fell -12% to 33%, and in-person qual fell -11%. Overall, the average number of qual methods used has fallen from 5.1 in 20A and 21A to just 3.9 currently.



Two methodologies have increased use by double digits since least year: bulletin board studies and online qual with webcams.



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USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Online qual with webcams	68%	85%	78%	78%	73%	56%	67%	+11%
In-person qual	93%	81%	65%	72%	69%	70%	59%	-11%
Online communities for qual	73%	74%	65%	57%	56%	53%	53%	--
Mobile qual	44%	35%	41%	53%	54%	43%	41%	-2%
Bulletin board studies	45%	48%	41%	37%	25%	24%	36%	+12%
Mobile diaries/journaling	65%	62%	55%	42%	31%	45%	36%	-9%
AI-/chatbot-moderated qual	17%	15%	20%	19%	24%	45%	33%	-12%
Online text- or SMS-based qual	51%	50%	46%	35%	44%	33%	32%	-1%
Telephone qual	57%	65%	46%	47%	32%	39%	31%	-8%
Average number used:	5.1	5.1	4.6	4.4	4.1	4.1	3.9	-0.2
n (range) =	298	207	182	214	190	119-146	104-133	

Green shading indicates top three methodologies for that GRIT wave.

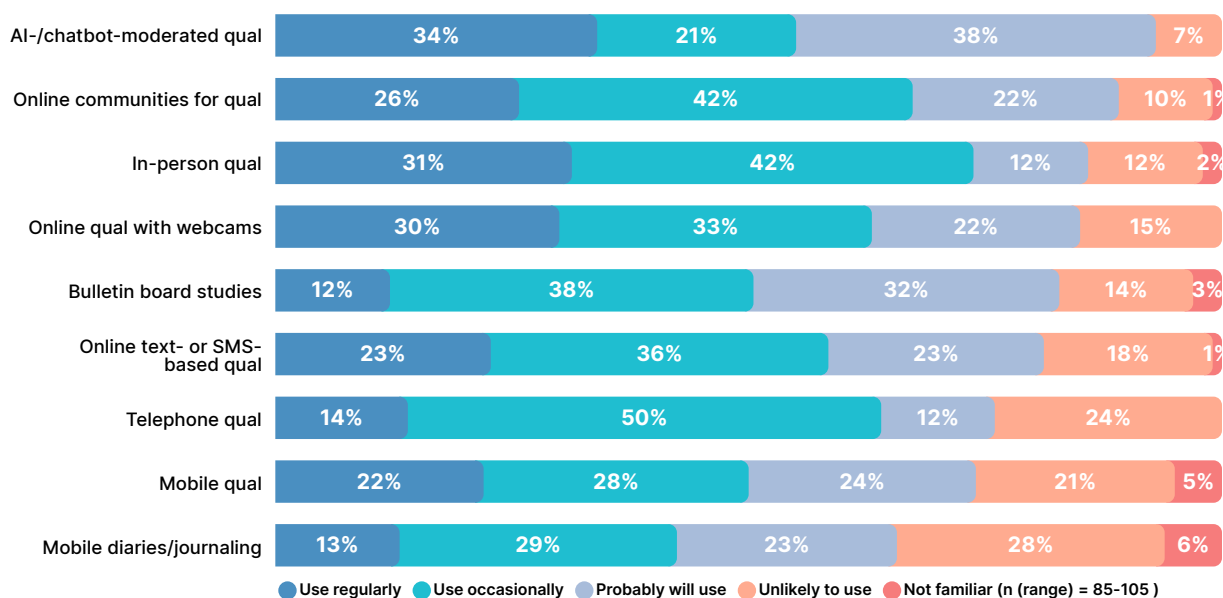
Takeaway: Among brand-side researchers, online qual with webcams (67%), in-person qual (59%), and online communities for qual (53%) are perennially top-three methods; use of bulletin board studies increased from 24% to 36% while AI-/chatbot-moderated qual fell from 45% to 33% and in-person qual dropped from 70% to 59%.

Source: GRIT Report and NewtonX

In the brand-side analytics segment, all but one qual method are at least 60% saturated, and that one is just barely less. AI- or chatbot-moderated qualitative

interviews or groups are used by 59% of those who are likely users. In the analytics segment, there doesn't seem to be much of a lag between interest and use.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, the focus group and IDI methods with the most potential are AI- or chatbot-moderated qual (only 59% of probable users are current users) and bulletin board studies (61%).





In-person qual (73%) has been the top qual method for brand-side analytics professionals in each GRIT wave. Online communities for qual (67%) has been in the top three the past three years. Telephone qual (64%) has moved back into the top three for the first time since 23A, replacing AI-/chatbot-moderated qual (55%).

Three qual methods have increased use by double digits since last year while none have declined that much. Telephone qual and online qual with webcams (63%) each increased +14%, and online text- or SMS-based qual increased +11%, to 59%.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
In-person qual	73%	68%	64%	73%	+9%
Online communities for qual	52%	64%	61%	67%	+6%
Telephone qual	54%	50%	50%	64%	+14%
Online qual with webcams	64%	46%	49%	63%	+14%
Online text- or SMS-based qual	52%	56%	48%	59%	+11%
AI-/chatbot-moderated qual	44%	50%	64%	55%	-9%
Mobile qual	52%	54%	47%	50%	+3%
Bulletin board studies	36%	28%	46%	50%	+4%
Mobile diaries/journaling	32%	37%	40%	42%	+2%
Average number used:	4.6	4.5	4.7	5.2	+0.5
n (range) =	182	194	99-116	85-105	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among brand-side analytics professionals, in-person qual (73%) and online communities for qual (67%) have been top-three methods for each of the past three years; use of online qual with webcams increased from 49% to 63% and telephone qual grew from 50% to 64%.

Source: GRIT Report and NewtonX



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Across brand-side segments, there is only one instance of method with more regular users than occasional ones: AI-/chatbot-moderated qual among analytics (62% of users use it regularly). Despite the fact that analytics professionals are twice as likely to use telephone qual, research users are more likely to

use it regularly (35% to 22%). For four other methods, analytics users are more likely to use it regularly than research users: AI-/chatbot-moderated qual (62% to 30%), online text- or SMS-based qual (40% to 25%), mobile diaries/journaling (32% to 20%), and bulletin board studies (25% to 14%).

INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
Online qual with webcams	44%	48%
In-person qual	42%	42%
Mobile qual	41%	44%
Online communities for qual	39%	38%
Telephone qual	35%	22%
AI-/chatbot-moderated qual	30%	62%
Online text- or SMS-based qual	25%	40%
Mobile diaries/journaling	20%	32%
Bulletin board studies	14%	25%
n (range) =	104-133	85-105

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Most brand-side analytics professionals who use AI-/chatbot-moderated qual use it regularly (62%).

Source: GRIT Report and NewtonX

ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

On the supplier side, online qual with webcams is among the top three most-used in each segment, from 39% of tech-led to 81% among service-led suppliers with 500+ FTE. It exceeds 60% in each service-led segment, as does in-person qual, which is also in each service-led segment's top three.

Online communities for qual is in the top three most-used for tech-led (45%), service-led suppliers with 21 to 100 FTE (55%), and those with 500+ FTE (72%). Mobile qual is in the top three most-used for tech-led (41%) and service-led suppliers with ≤20 FTE (46%), and bulletin board studies are in the top three for service-led with 101 to 500 FTE (73%).

Service-led suppliers with 101 to 500 FTE (5.3) and with 500+ FTE (5.6) use the most methods, on average, and tech-led suppliers (3.1) and service-led suppliers with ≤20 FTE (3.6) use the fewest.



Online communities for qual is in the top three most-used for tech-led, service-led suppliers with 21 to 100 FTE, and those with 500+ FTE.





USE OF METHODS/APPROACHES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online qual with webcams	39%	69%	74%	74%	81%
In-person qual	39%	62%	60%	73%	74%
Online communities for qual	45%	45%	55%	70%	72%
Mobile diaries/journaling	35%	33%	44%	68%	63%
Mobile qual	41%	46%	52%	61%	63%
AI-/chatbot-moderated qual	38%	11%	45%	35%	61%
Bulletin board studies	31%	37%	51%	73%	56%
Telephone qual	25%	35%	48%	52%	43%
Online text- or SMS-based qual	17%	26%	30%	29%	43%
Average number used:	3.1	3.6	4.6	5.3	5.6
n (range) =	20-27	88-109	46-56	33-39	30-45

Green shading indicates top three most-used methodologies.

Takeaway: Online qual with webcams is among the top three most-used in each supplier segment; in-person qual also in the top three for all segments but tech-led suppliers (39%).

Source: GRIT Report

For online qual with webcams, most users are regular users in each segment, from 59% of service-led suppliers with 500+ FTE to 77% of those with 21 to 500 FTE. Except for service-led suppliers with ≤20 FTE (27%), at least half of users of online communities for qual use them regularly, from 50% of

those with 21 to 500 FTE to 66% of those with 101 to 500 FTE. For all but tech-led suppliers (34%), most users of in-person qual are regular users, from 53% of service-led suppliers with 500+ FTE to 69% of those with 101 to 500 FTE.

INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Online qual with webcams	61%	76%	77%	68%	59%
Online communities for qual	57%	27%	50%	66%	57%
In-person qual	34%	56%	61%	69%	53%
Bulletin board studies	31%	38%	33%	48%	51%
Mobile diaries/journaling	61%	31%	38%	28%	46%
Telephone qual	25%	41%	55%	18%	44%
Mobile qual	33%	33%	70%	52%	42%
AI-/chatbot-moderated qual	37%	36%	42%	30%	40%
Online text- or SMS-based qual	59%	23%	42%	32%	34%
n (range) =	20-27	88-109	46-56	33-39	30-45

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: In each supplier segment, most users of online qual with webcams use them regularly; the same is true in four segments each for online communities for qual and in-person qual.

Source: GRIT Report



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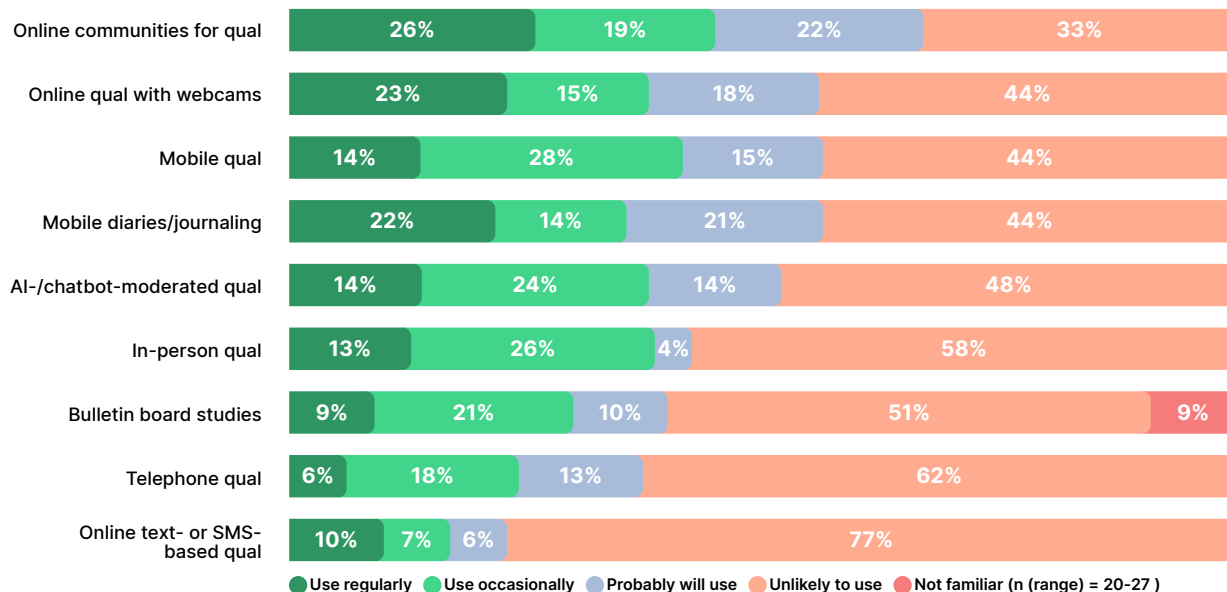


ATTITUDES AND USAGE TRENDS | TECH-LED POV ^[DATA]

For each qual method, at least 60% of likely tech-led supplier users currently use them. The least saturated

are mobile diaries/journaling (63%) and telephone qual (65%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Source: GRIT Report

Takeaway: Among tech-led suppliers, the focus group and IDI methods with the most potential are mobile diaries/journaling (only 63% who will probably use it currently do), followed by telephone qual (65%).

Among tech-led suppliers, online qual with webcams (39%) has been in the top three since 23A, but other methods have been more volatile. This year's top qual method, online communities for qual (45%), has been out of the top three in three different waves and is a far cry from its peak of 81% in 20A and 71% in 21A. Mobile qual (41%) has also been outside the top three in three different years, and it's down from its peak of 50% in 23A. In-person qual, tied for third at 39%, is in the top three for the first time, but also down from its peak of 50% in 20A.

Two methods increased by double digits among tech-led suppliers and one declined that much. In-person qual increased +18%, and online communities for qual grew +12%. Online qual with webcams fell -13%. The average number of qual methods used rose slightly from 2.8 to 3.1, but it's still two methods below its peak of 5.1 in 20A.

This year's top qual method for tech-led suppliers, online communities for qual has been out of their top 3 in 3 different waves and is a far cry from its peak.



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USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Online communities for qual	81%	71%	27%	44%	39%	33%	45%	+12%
Mobile qual	44%	48%	48%	50%	34%	40%	41%	+1%
Online qual with webcams	69%	71%	22%	57%	52%	52%	39%	-13%
In-person qual	50%	40%	26%	32%	38%	21%	39%	+18%
AI-/chatbot-moderated qual	14%	28%	40%	21%	26%	38%	38%	--
Mobile diaries/journaling	74%	71%	3.4	54%	32%	28%	35%	+7%
Bulletin board studies	67%	49%	27%	31%	32%	23%	31%	+8%
Telephone qual	50%	31%	48%	31%	30%	23%	25%	+2%
Online text- or SMS-based qual	61%	54%	22%	41%	39%	23%	17%	-6%
Average number used	5.1	4.6	3.4	3.6	3.2	2.8	3.1	+0.3
n (range) =	54-97	35-50	122-125	70	30-43	28-40	20-27	

Green shading indicates top three methodologies for that GRIT wave.

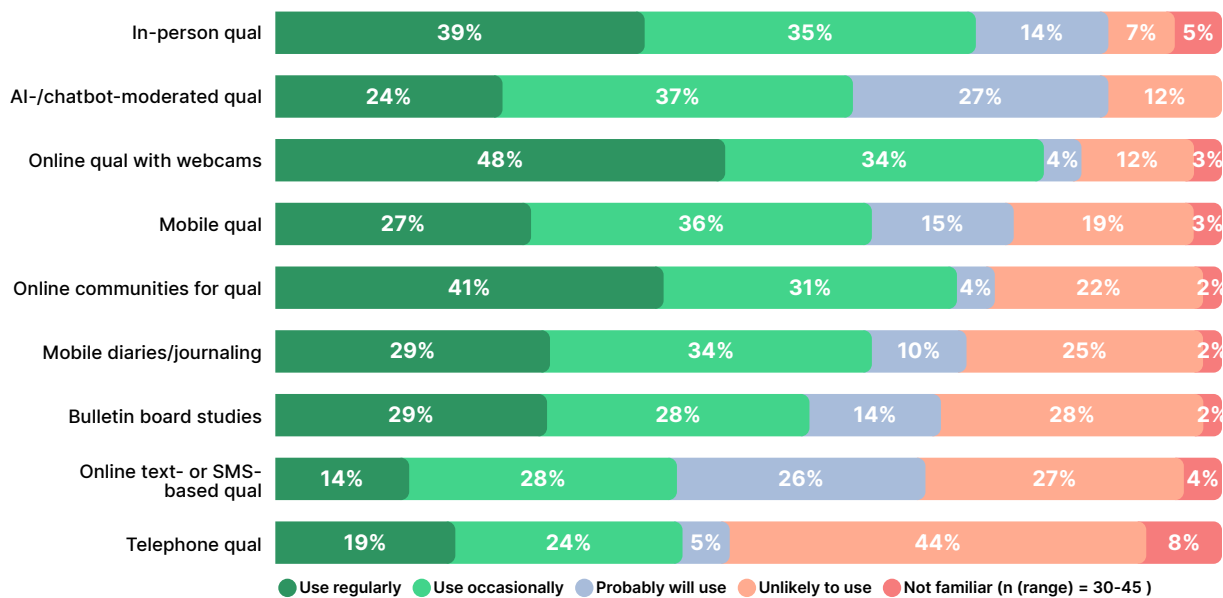
Takeaway: Among tech-led suppliers, online qual with webcams (45%) has been among the three most-used for the last four years, mobile qual (41%) has been for the past two; use of in-person qual increased from 21% to 39% while online qual with webcams fell from 52% to 39%.

Source: GRIT Report

ATTITUDES AND USAGE TRENDS | SERVICE-LED: 500+ FTE POV [DATA]

Among service-led suppliers with 500+ FTE, most qual methods are at least 80% saturated. Only online text- or SMS-based qual (62%) and online text- or SMS-based qual (69%) are below that mark.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, the focus group and IDI method with the most potential is online text- or SMS-based qual (only 62% who will probably use it currently do).



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Service-led suppliers with 500+ FTE's use of qual methods has been much more stable than for tech-led suppliers. Online communities for qual (72%) has been among the three most-used in each year, and online qual with webcams (81%) has also been except for 20A. In-person qual (74%) has been in the top three in each year except 22A and 24A.

Use of one method increased by double digits and one decreased that much among service-led suppliers with 500+ FTE. AI-/chatbot-moderated qual jumped +14% to 61%, while online text- or SMS-based qual fell -18% to 43%. The average number used is 5.6, consistent with its 5.8 mark in the two preceding years.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Online qual with webcams	79%	72%	71%	72%	79%	78%	81%	+3%
In-person qual	92%	72%	60%	67%	74%	79%	74%	-5%
Online communities for qual	81%	79%	72%	66%	77%	79%	72%	-7%
Mobile diaries/journaling	82%	70%	64%	52%	68%	72%	63%	-9%
Mobile qual	44%	54%	44%	54%	76%	68%	63%	-5%
AI-/chatbot-moderated qual	27%	22%	21%	26%	30%	47%	61%	+14%
Bulletin board studies	65%	52%	50%	52%	60%	51%	56%	+5%
Telephone qual	79%	62%	56%	57%	69%	42%	43%	+1%
Online text- or SMS-based qual	73%	69%	53%	41%	45%	61%	43%	-18%
Average number used:	6.2	5.5	4.9	4.9	5.8	5.8	5.6	--
n (range) =	84-106	71-85	117-129	97	60-74	51-72	30-45	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 500+ FTE, online communities for qual (72%) is a perennial top three most-used method and online qual with webcams (81%) has been in the top three for six straight years; use AI-/chatbot-moderated qual increased from 47% to 61% while online text- or SMS-based qual fell from 61% to 43%.

Source: GRIT Report



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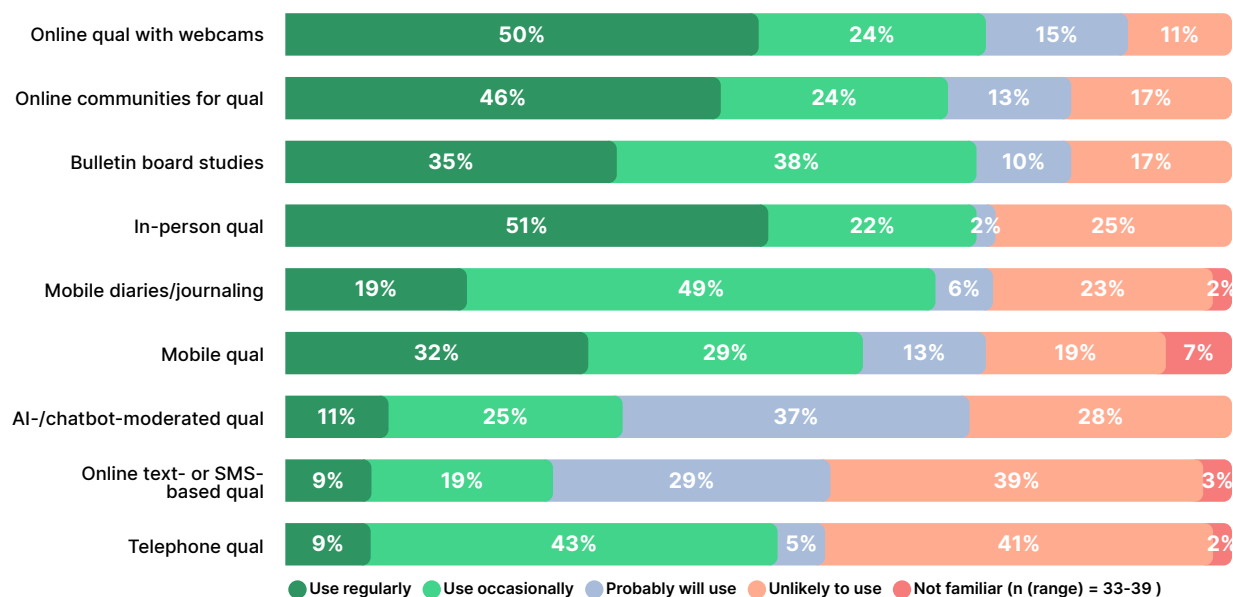
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 101-500 FTE POV ^[DATA]

All but two qual methods are at least 80% saturated among service-led suppliers with 101 to 500 FTE. There seems to be near-term opportunities to increase

users for AI- or chatbot-moderated qualitative interviews or groups and online text- or SMS-based qual (49% for each).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, the focus group and IDI methods with the most potential are AI- or chatbot-moderated qualitative interviews or groups (only 49% who will probably use it currently do) and online text- or SMS-based qual (also 49%).

Online qual with webcams (74%) has been among the top three most-used in each year among service-led suppliers with 101 to 500 FTE, as has in-person qual (73%), save for 22A. Bulletin board studies (73%) cracked the top three for the first time, displacing telephone qual (52%) which made the top three for the first time last year.

Among service-led suppliers with 101 to 500 FTE, three qual methods increased use by double digits since last year, and two fell by at least -10%. Bulletin board studies increased +18%, online communities for qual grew +16% to 70%, and mobile diaries/journaling rose +14% to 68%. Meanwhile, online qual with webcams fell -11%, and online text- or SMS-based qual dropped -10% to 29%. The average number used (5.3) is within its range over the preceding four years (5.0 to 5.6) but lower than its 20A high of 6.7.

Among service-led with 101 to 500 FTE, 3 qual methods increased use by double digits since: bulletin board studies, online communities, and mobile diaries/journaling.



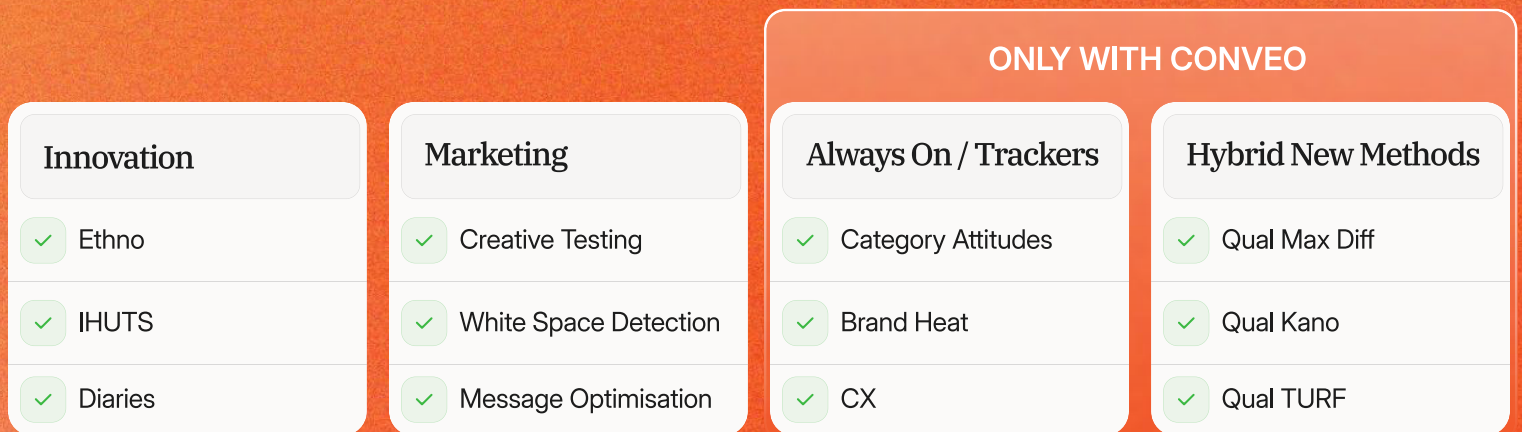
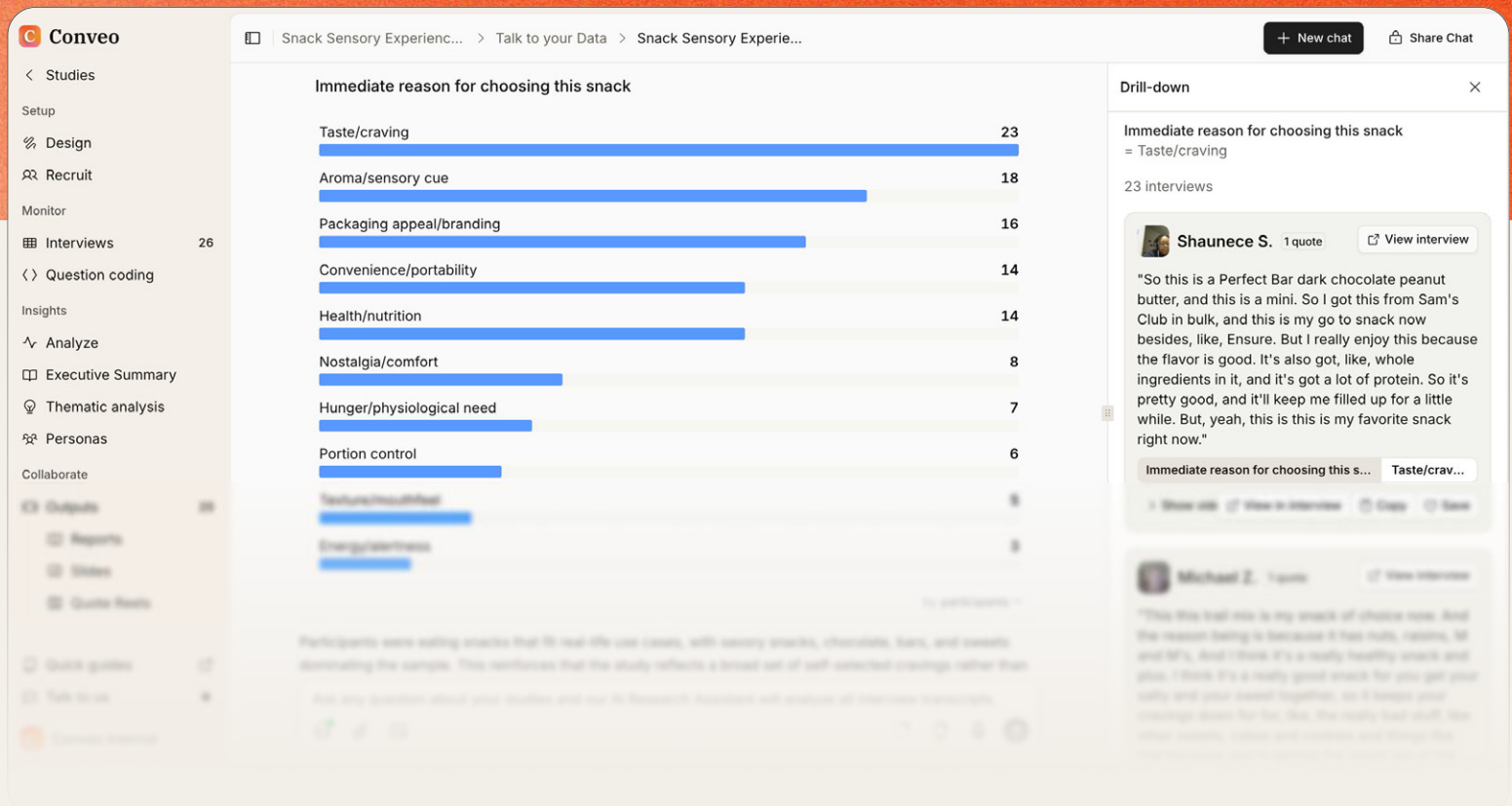
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AI research: conversational and observational.

Run AI-moderated interviews that fuel business growth with proactive, deep customer understanding.

Conveo | Snack Sensory Experienc... > Talk to your Data > Snack Sensory Experienc...

Immediate reason for choosing this snack

Reason	Count
Taste/craving	23
Aroma/sensory cue	18
Packaging appeal/branding	16
Convenience/portability	14
Health/nutrition	14
Nostalgia/comfort	8
Hunger/physiological need	7
Portion control	6
Texture/mouthfeel	5
Energy/alertness	3

Participants were eating snacks that fit real-life use cases, with savory snacks, chocolate, bars, and sweets dominating the sample. This reinforces that the study reflects a broad set of self-selected cravings rather than...

Ask any question about your studies and our AI Research Assistant will analyze all interview transcripts.

Drill-down

Immediate reason for choosing this snack
= Taste/craving

23 interviews

Shaunece S. 1 quote View interview

"So this is a Perfect Bar dark chocolate peanut butter, and this is a mini. So I got this from Sam's Club in bulk, and this is my go to snack now besides, like, Ensure. But I really enjoy this because the flavor is good. It's also got, like, whole ingredients in it, and it's got a lot of protein. So it's pretty good, and it'll keep me filled up for a little while. But, yeah, this is this is my favorite snack right now."

Immediate reason for choosing this s... Taste/crav...

Show all View interview Copy Save

Michael Z. 1 quote View interview

"This bar had me in my snack of choice now. And the reason being is because it has nuts, marsh, M&M's, and I think it's a really healthy snack and plus, I think it's a really good snack for you get your fatty and your sweet together, so it keeps your cravings down for the day, the really best stuff. Not other snacks, candy and cookies and things like that because they're not really the best stuff of the day."



USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online qual with webcams	89%	88%	70%	83%	71%	85%	74%	-11%
Bulletin board studies	73%	67%	57%	63%	59%	55%	73%	+18%
In-person qual	95%	84%	61%	79%	70%	69%	73%	+4%
Online communities for qual	88%	76%	69%	71%	63%	54%	70%	+16%
Mobile diaries/journaling	85%	78%	62%	70%	54%	54%	68%	+14%
Mobile qual	66%	56%	62%	67%	66%	56%	61%	+5%
Telephone qual	83%	74%	55%	67%	51%	60%	52%	-8%
AI-/chatbot-moderated qual	19%	15%	18%	48%	26%	30%	35%	+5%
Online text- or SMS-based qual	73%	70%	45%	12%	42%	39%	29%	-10%
Average number used:	6.7	6.1	5.0	5.6	5.0	5.0	5.3	+0.3
n (range) =	99-108	76-89	127-134	102	60-75	48-59	33-39	

Green shading indicates top three methodologies for that GRIT wave.

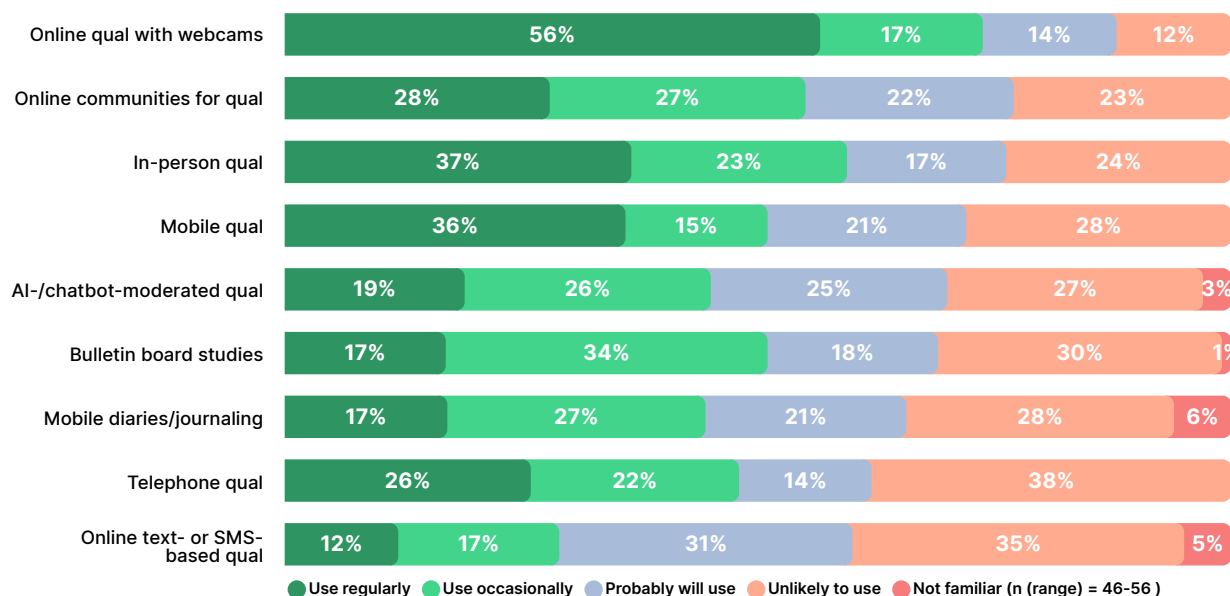
Takeaway: Among service-led suppliers with 101-500 FTE, online qual with webcams (74%) is perennially a top-three method, and in-person qual (73%) has been in the top three every year but one; use of bulletin board studies increased from 55% to 73%; online communities for qual, 54% to 70%; and mobile diaries/journaling, 54% to 68%.

Source: GRIT Report

ATTITUDES AND USAGE TRENDS | SERVICE-LED: 21-100 FTE POV [DATA]

Among service-led suppliers with 21 to 100 FTE, all qual methods are more than 60% saturated except online text- or SMS-based qual (49%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, the focus group and IDI method with the most potential is online text- or SMS-based qual (only 49% who will probably use it currently do).



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Online qual with webcams (74%) has been a top three most-used method among service-led suppliers with 21 to 100 FTE since 21A. In-person qual (60%), has been in the top three each year except last year. Online communities for qual (55%) has been in the top three since last year.

Among service-led suppliers with 21 to 100 FTE, one method increased use by double digits and one decreased that much. AI-/chatbot-moderated qual jumped +20% to 45%, and online text- or SMS-based qual fell -16% to 30%. The average number of methods used is currently 4.6, similar to last year's 4.5. However, prior to last year, it was more than five during each GRIT wave.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Online qual with webcams	68%	86%	78%	82%	78%	70%	74%	+4%
In-person qual	93%	74%	70%	76%	72%	55%	60%	+5%
Online communities for qual	69%	70%	69%	68%	63%	57%	55%	-2%
Mobile qual	50%	62%	56%	71%	68%	59%	52%	-7%
Bulletin board studies	56%	56%	49%	51%	47%	53%	51%	-2%
Telephone qual	77%	72%	58%	66%	64%	40%	48%	+8%
AI-/chatbot-moderated qual	14%	14%	19%	42%	26%	25%	45%	+20%
Mobile diaries/journaling	78%	73%	70%	61%	63%	47%	44%	-3%
Online text- or SMS-based qual	49%	48%	51%	41%	54%	46%	30%	-16%
Average number used:	5.5	5.6	5.2	5.6	5.3	4.5	4.6	+0.1
n (range) =	150-169	112-130	142-145	183	93-108	75-91	46-56	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 21-100 FTE, online qual with webcams (74%) has been among the top three most-used methods for six years, and in-person qual (60%) has been in the top three every year but one; use of AI-/chatbot-moderated qual rose from 25% to 45% while online text- or SMS-based qual fell from 46% to 30%.

Source: GRIT Report

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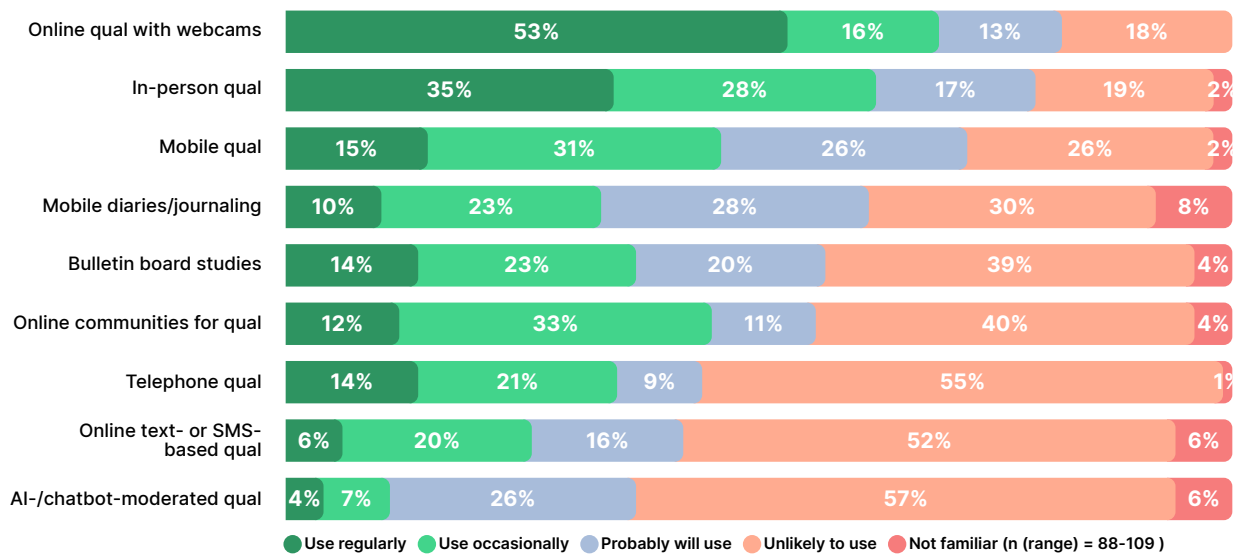
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: ≤20 FTE POV ^[DATA]

Among service-led suppliers with ≤20 FTE, all qual methods but two are more than 60% saturated. The most near-term opportunity for growth is AI- or

chatbot-moderated qualitative interviews or groups as only 30% of likely users do so currently. For mobile diaries/journaling, it's 54%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, the focus group and IDI method with the most potential is AI- or chatbot-moderated qual (only 30% who will probably use it currently do).

Online qual with webcams (69%) and in-person qual (62%) have been among the top three most-used for service-led suppliers with ≤20 FTE in all seven tracked waves. Mobile qual (46%) was also in the top three last year. Telephone qual (35%) was in the top three

from 20A through 23A, beginning at 82% and falling out of the top three with 50% in 24A. No methods changed by double digits in either direction since last year. The average number of qual methods used has gradually declined from 5.2 in 21A to 3.6 currently.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Online qual with webcams	70%	84%	74%	83%	72%	65%	69%	+4%
In-person qual	96%	84%	69%	81%	66%	64%	62%	-2%
Mobile qual	43%	39%	41%	63%	48%	49%	46%	-2%
Online communities for qual	59%	63%	55%	60%	50%	47%	45%	-9%
Bulletin board studies	49%	58%	49%	46%	35%	40%	37%	-3%
Telephone qual	82%	69%	59%	65%	50%	40%	35%	+4%
Mobile diaries/journaling	66%	65%	56%	52%	39%	42%	33%	-3%
Online text- or SMS-based qual	43%	50%	33%	34%	32%	30%	26%	-5%
AI-/chatbot-moderated qual	4%	6%	7%	9%	3%	10%	11%	+1%
Average number used:	5.1	5.2	4.4	4.9	3.9	3.9	3.6	-0.3
n (range) =	270-310	185-221	234-239	271	114-133	135-154	88-109	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with ≤20 FTE, online qual with webcams (69%) and in-person qual (62%) are perennially among the three most-used methods, and mobile qual (46%) has been for the past two years.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

Except for the brand-side analytics segment, the average qual method portfolio size is contracting, in some cases dramatically. Since the first tracked GRIT wave, the tech-led portfolio dropped from 5.1 to 3.1 methods; service-led suppliers with ≤ 20 FTE, from 5.1 to 3.6; and brand-side researchers, from 5.1 to 3.9. Service-led suppliers with 101 to 500 FTE (6.7 to 5.3) and those with 500+ FTE (6.2 to 5.6) also declined, just not as much. These contractions reflect consolidation of individual portfolios into fewer methods, but not a decline in qual overall.

Despite this contraction, three methods remain structurally durable. Online qual with webcams and in-person qual are in the top three across virtually every segment. Online communities for qual is top-three in five of seven. These three methods also enjoy high intensity; e.g., most users of online qual with webcams use it regularly across all supplier segments. Together, they represent the established qual infrastructure that has survived significant turbulence. In-person qual has held on despite a long decline from its 20A peak, but it still claims top-three usage everywhere.

At the same time, AI-/chatbot-moderated qual is emerging: usage has increased at least +10% in each segment since 20A. However, it declined about -10% in both brand-side segments since last year although rising or maintaining in most supplier segments. Even if brand-side insights professionals are wavering on AI-/chatbot-moderated qual, many suppliers are betting on it.

Looking more closely, brand-side analytics professionals may be readier than they look. The intensity signal is striking: 62% of AI-/chatbot-moderated qual users use it regularly, the only qual method where regular users outnumber occasional users on the brand side. This is a strong commitment signal from a segment that uses many methods.

Also, saturation for AI-/chatbot-moderated qual is consistently low: 48% among brand-side researchers, 30% among service-led suppliers with ≤ 20 FTE, 49% among those with 101 to 500 FTE. This is the most consistent near-term adoption opportunity among qual methods, similar to IVR and chatbot-style surveys in *Survey Research*.

On the flip-side, we have the decline of online text- or SMS-based qual. It fell by double digits in five segments this wave, and the juxtaposition with AI-/chatbot-moderated qual's growth in the same segments is suggestive. Text-based asynchronous qual may be getting displaced by AI-moderated formats that accomplish similar goals with more analytical capability attached. If so, this is a substitution story, not just category contraction.

Double-digit increases in the use of bulletin board studies among brand-side researchers and service-led suppliers with 101 to 500 FTE, plus smaller gains among service-led suppliers with 500+ FTE and tech-led are unexpected given the overall contraction narrative. On the surface, these gains seem to run counter to the text-based qual decline, but the distinction may be asynchronous community discussion (bulletin boards) versus synchronous or individual text-based interviews. The former may be benefiting from AI-assisted moderation and analysis tools that make them more scalable.

Text-based asynchronous qual may be getting displaced by AI-moderated formats that accomplish similar goals with more analytical capability attached.

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Brand-side analytics professionals are growing their portfolio rather than contracting with the highest intensity for AI-/chatbot-moderated qual.

One more noteworthy development: the growth of the qual method portfolio among brand-side analytics professionals.

They are growing their portfolio rather than contracting and show the highest intensity for AI-/chatbot-moderated qual. Their combination of high telephone qual use, high text-based qual use, and high in-person use looks like a segment applying qual across diverse UX, CX, and product contexts. Their saturation levels are also consistently high; they adopt quickly once a method is on their radar. This segment could be a leading indicator of where qual is headed.

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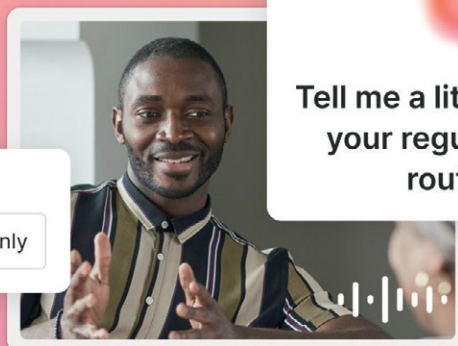
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your regular coffee
routine?



SAMPLE

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across seven methods related to sample.

WHICH SAMPLING METHODS ARE RISING? [ORIENTATION]

GRIT tracks use of fraud detection and use of panels, both from external suppliers and in-house versions. We also look at programmatic sample, social media recruiting, and river or web-intercept sampling.

In every GRIT segment, proprietary panels from external suppliers are among the three most-used sample methods. In every supplier segment, tools to detect sample fraud from suppliers and in-house tools to detect sample fraud are among their top three. In both brand-side segments, social media recruiting is top-three. Proprietary panels they own (49%) are among the top three most-used for brand-side researchers; among analytics professionals, the top three is completed by programmatic sampling (54%).

Service-led suppliers with more than 20 FTE use at least 4.1 methods on average; no other segment uses more than 3.6.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Sample has become a trust infrastructure issue rather than a procurement detail. The rise of fraud detection tools, owned panels, and more controlled sample management reflects an industry trying to regain confidence in the quality and provenance of the data on which everything else depends.

– LM, ed.

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THREE MOST-USED METHODS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Proprietary panels from external supplier	67%	55%	71%	73%	86%	88%	87%
Proprietary panels you own	49%	52%	24%	17%	58%	56%	64%
Social media recruiting	30%	63%	30%	32%	42%	40%	52%
Tools to detect sample fraud from supplier	27%	52%	61%	57%	74%	73%	76%
In-house tools to detect sample fraud	24%	53%	68%	45%	73%	85%	81%
Programmatic sampling	23%	54%	47%	21%	50%	34%	54%
Average number of methodologies used:	2.4	3.6	3.3	2.6	4.1	4.1	4.6
n =	176	152	39	158	79	56	55

Green shading indicates top three most-used methodologies.

Takeaway: Proprietary panels from an external supplier are the most-used sample method in each segment, and tools to detect sample fraud from a supplier and in-house tools to detect sample fraud are among the top three in each supplier segment; social media recruiting is in the top three in each brand-side segment.

Source: GRIT Report and NewtonX

Programmatic sampling and social media recruiting increased at least +5% in three segments each. Among brand-side research and service-led suppliers

with 21-100 FTE, proprietary panels they own increased at least +10%.

CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Proprietary panels you own	+10%	0%	-3%	-8%	+13%	+1%	-3%
River or web-intercept sampling	+5%	+4%	-7%	-4%	-4%	+7%	-7%
In-house tools to detect sample fraud	+4%	-2%	-4%	-4%	+5%	+16%	-4%
Programmatic sampling	+2%	+1%	+9%	-7%	+14%	-8%	+9%
Social media recruiting	+1%	-3%	+5%	-5%	-10%	+15%	+5%
Proprietary panels from external supplier	0%	+4%	+2%	+3%	+8%	+6%	+2%
Tools to detect sample fraud from supplier	-10%	+4%	+4%	+13%	+9%	+3%	+4%

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: Programmatic sampling and social media recruiting increased at least +5% in three segments each; proprietary panels they own increased at least +10% in brand-side research and service-led suppliers with 21-100 FTE.

Source: GRIT Report and NewtonX

While there doesn't seem to be a dominant trend, some segments are showing increased interest in having their own panels. Later, we'll see the most untapped potential is among "alternative" sampling methods.



While not a dominant trend, some segments are increasingly interested in having their own panels.



CHANGES FROM 2025 GRIT SURVEY

We didn't change any of the sample method labels from last year, but it may help to have the full wording that was used in the survey available to compare to

the abbreviated versions in the tables and charts. We dropped blockchain and Mechanical Turk.

2026 SAMPLE METHODS

2026 Method	2025 Precedent	2025 Family
Programmatic sampling	Programmatic sampling	Sample
Social media recruiting	Social media recruiting	Sample
River or web-intercept sampling	River or web-intercept sampling	Sample
Proprietary panels from external supplier	Proprietary panels from external supplier	Sample
Proprietary panels you own	Proprietary panels you own	Sample
Tools to detect sample fraud from supplier	Tools to detect sample fraud from supplier	Sample
In-house tools to detect sample fraud	In-house tools to detect sample fraud	Sample
<i>Green indicates method changed from 25A.</i>		

Source: GRIT Report

Methods were not classified by type or “family” during the survey; we only do that for the report.

ATTITUDES AND USAGE TRENDS | BRAND POV ^[DATA]

Each of our sample methods are used at least occasionally by most brand-side analytics professionals except river or web-intercept sampling (36%). These range from 52% (proprietary panels they own, tools to detect sample fraud from suppliers) to 63% (social media recruiting). Among researchers, only proprietary panels from external suppliers are used by a majority (67%).

Brand-side researchers use an average of only 2.4 of these methods compared to 3.6 for analytics professionals. All the gaps favor analytics professionals, led by social media recruiting (+33%, 63% to 30%), programmatic sampling (+31%, 54% to 23%), in-house tools to detect sample fraud (+29%, 53% to 24%), and tools to detect sample fraud from suppliers (52% to 27%).

USE OF METHODS/APPROACHES: BRAND SEGMENT

	Research	Analytics	Research – analytics
Proprietary panels from external supplier	67%	55%	+12%
Proprietary panels you own	49%	52%	-3%
Social media recruiting	30%	63%	-33%
Tools to detect sample fraud from supplier	27%	52%	-25%
In-house tools to detect sample fraud	24%	53%	-29%
Programmatic sampling	23%	54%	-31%
River or web-intercept sampling	22%	36%	-14%
Average number of sample methodologies used:	2.4	3.6	-1.2
n =	176	152	

Green shading indicates top three most-used methodologies.

Takeaway: Brand-side analytics professionals use more sample methods than researchers on average (3.6 to 2.4), with the largest gaps in social media recruiting (63% to 30%), programmatic sampling (54% to 23%), in-house tools to detect sample fraud (53% to 24%), and tools to detect sample fraud from suppliers (52% to 27%).

Source: GRIT Report and NewtonX

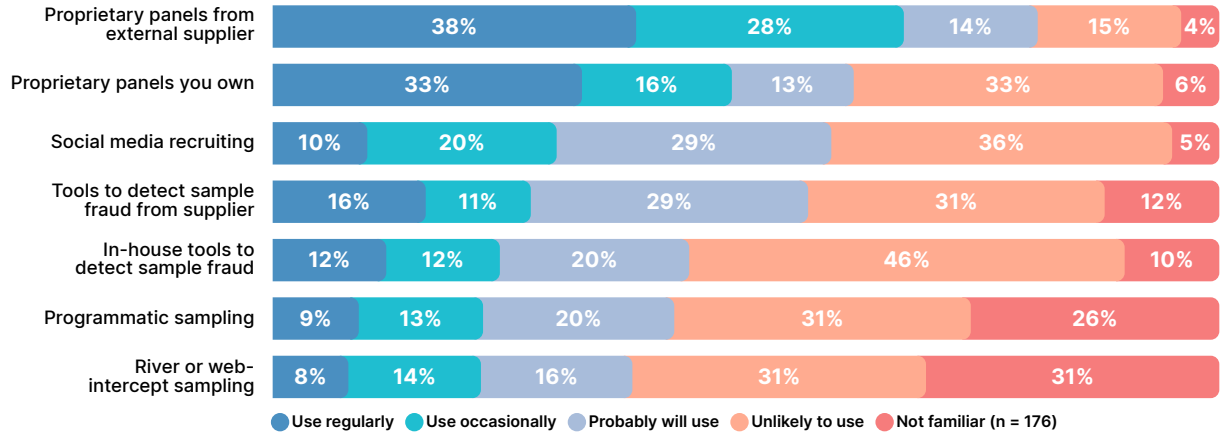




Among brand-side researchers, the least saturated sample method is tools to detect sample fraud from suppliers; only 48% of likely users are current users. Social media recruiting (51%) and programmatic

sampling (53%) are nearly as low. In-house tools to detect sample fraud (55%) and river or web-intercept sampling (58%) are the other two that are less than 60% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the sample methods with the most potential are tools to detect sample fraud from supplier (only 48% of probable users currently do), social media recruiting (51%), and programmatic sampling (53%).

Proprietary panels from external suppliers (67%) and proprietary panels they own (49%) have been in the top three most-used methods among brand-side researcher since we split them apart in 23A. Proprietary panels they own grew +10% since last year. Social media recruiting (30%) is currently third,

replacing tools to detect fraud from suppliers (27%), which fell -10% from last year.

The average number of sample methods used has been consistently between 2.4 and 2.7 since 23A, but looks lower in previous waves because we tested fewer methods.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A – 25A
Proprietary panels	68%	68%	63%	79%	--	--	--	--
Proprietary panels from external supplier	--	--	--	70%	69%	67%	67%	--
Proprietary panels you own	--	--	--	44%	47%	39%	49%	+10%
Alternatives to panel samples	--	29%	23%	53%	--	--	--	--
Social media recruiting	--	--	--	39%	35%	28%	30%	+2%
River or web-intercept sampling	--	--	--	17%	20%	17%	22%	+5%
Programmatic sampling	--	--	--	22%	19%	21%	23%	+2%
Tools to detect sample fraud	--	--	--	42%	--	--	--	--
Tools to detect sample fraud from supplier	--	--	--	34%	40%	37%	27%	-10%
In-house tools to detect sample fraud	--	--	--	26%	26%	21%	24%	+3%
Average number used:	0.7	1.0	0.9	2.5	2.7	2.4	2.4	--
n (range) =	298	207	182-188	214	108-122	107-129	176	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among brand-side researchers, proprietary panels from an external supplier (67%) and proprietary panels they own (49%) have been among the three most-used methods since 23A; use of proprietary panels they own increased from 39% to 49% while use of tools to detect sample fraud from a supplier fell from 37% to 27%.

Source: GRIT Report and NewtonX



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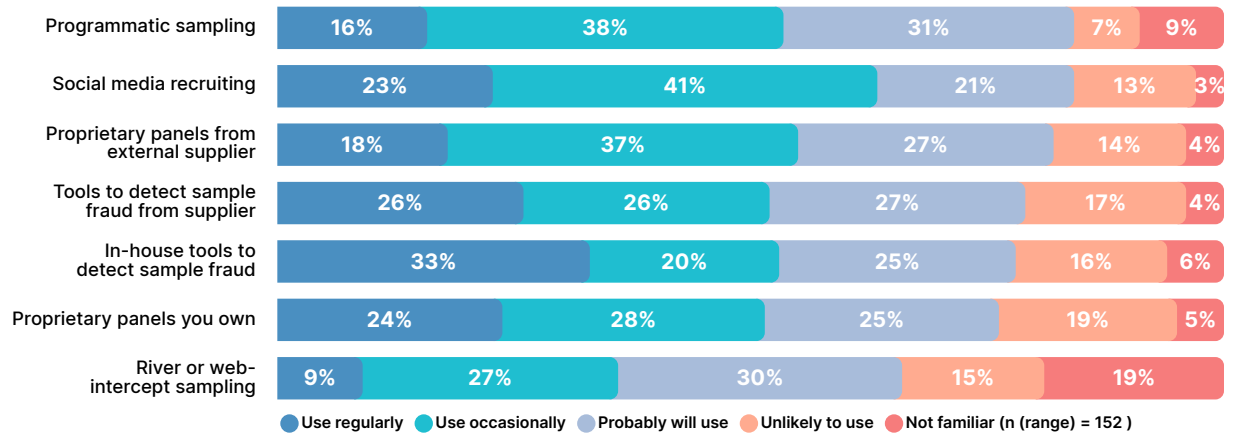
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For all but one sample method, at least 60% of likely users among brand-side analytics professionals are current users. River or web-intercept sampling has

the most near-term potential for adoption as it is only 54% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Takeaway: Among brand-side analytics professionals, the sample method with the most potential is river or web-intercept sampling (only 54% of probable users currently do).

Among brand-side analytics professionals, social media recruiting (63%) is a perennial top three most-used method, and programmatic sampling (54%) has been in the top three for three of four years. Currently, proprietary panels from external suppliers (55%) are

third, nudging out in-house tools to detect sample fraud (53%). Although not much has changed since last year, the average number of methods used is up the last two years over the previous two (3.6 to 3.1 and 3.2).

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Alternatives to panel samples	77%	--	--	--	--
Social media recruiting	58%	49%	66%	63%	-3%
Programmatic sampling	50%	47%	53%	54%	+1%
River or web-intercept sampling	26%	23%	32%	36%	+4%
Proprietary panels	68%	--	--	--	--
Proprietary panels from external supplier	54%	47%	51%	55%	+4%
Proprietary panels you own	42%	51%	51%	52%	+1%
Tools to detect sample fraud	52%	--	--	--	--
In-house tools to detect sample fraud	43%	41%	55%	53%	-2%
Tools to detect sample fraud from supplier	42%	50%	48%	52%	+4%
Average number used:	3.2	3.1	3.6	3.6	--
n (range) =	182	109-124	90-120	152	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among brand-side analytics professionals, social media recruiting (63%) is a perennial top three most-used method, and programmatic sampling (54%) has been in the top three for three of four years.

Source: GRIT Report and NewtonX





Among brand-side researchers, most users of proprietary panels they own (68%), tools to detect sample fraud from suppliers (59%), and proprietary panels from external suppliers (57%) are regular users. Nearly half of users of in-house tools to detect

sample fraud (49%) use them regularly. Analytics professionals use in-house tools to detect sample fraud (62%) and tools to detect sample fraud from suppliers (51%) most intensely.

INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
Proprietary panels you own	68%	46%
Tools to detect sample fraud from supplier	59%	51%
Proprietary panels from external supplier	57%	32%
In-house tools to detect sample fraud	49%	62%
Programmatic sampling	42%	29%
River or web-intercept sampling	37%	24%
Social media recruiting	32%	36%
n =	176	152

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Most brand-side researchers who use proprietary panels they own (68%), tools to detect sample fraud from a supplier (59%), and proprietary panels from an external supplier (57%) use them regularly; among brand-side analytics professionals, most users of in-house tools to detect sample fraud (62%) and supplier tools to detect fraud use them regularly (51%).

Source: GRIT Report and NewtonX

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ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

For the most part, suppliers are more engaged with tools to detect fraud and panels than they are with “alternative” sampling methods.

Proprietary panels from external suppliers, in-house tools to detect sample fraud, and tools to detect sample fraud from suppliers are the top three most-used sample methods in each supplier segment. Further, most service-led suppliers with more than 20 FTE use proprietary panels they own, from 56%

of those with 101 to 500 FTE to 64% of those with 500+ FTE. At least half of service-led suppliers with 21 to 100 FTE (50%) and those with 500+ FTE (54%) use programmatic sampling, and most with 500+ FTE use social media recruiting (52%).

Each service-led segment with more than 20 FTE uses more than four sample methods, on average. Tech-led suppliers only use 3.6, and those with ≤20 FTE use 2.6.

USE OF METHODS/APPROACHES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Proprietary panels from external supplier	71%	73%	86%	88%	87%
In-house tools to detect sample fraud	68%	45%	73%	85%	81%
Tools to detect sample fraud from supplier	61%	57%	74%	73%	76%
Proprietary panels you own	24%	17%	58%	56%	64%
Programmatic sampling	47%	21%	50%	34%	54%
Social media recruiting	30%	32%	42%	40%	52%
River or web-intercept sampling	29%	19%	31%	29%	49%
Average number used:	3.3	2.6	4.1	4.1	4.6
n (range) =	39	158	79	56	55

Green shading indicates top three most-used methodologies.

Takeaway: In each supplier segment, the top three most-used methods are proprietary panels from an external supplier, in-house tools to detect sample fraud, and tools to detect sample fraud from a supplier.

Source: GRIT Report

Proprietary panels from suppliers, in-house tools to detect sample fraud, and supplier tools to detect sample fraud are the top three most-used methods in each segment.

In each supplier segment, at least 75% of users of in-house tools to detect sample fraud use them regularly, as do more than 55% of those with their own panels; it makes sense they would use their own tools frequently.

Also in each segment, most users regularly use tools to detect sample fraud from suppliers (more than two-thirds) and proprietary panels from external suppliers (more than 60%). Most users of programmatic sampling use it regularly among service-led suppliers with 101 to 500 FTE (54%) and those with 500+ FTE (51%), as well as tech-led (53%).





INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
In-house tools to detect sample fraud	84%	75%	80%	84%	79%
Proprietary panels you own	93%	57%	84%	88%	69%
Proprietary panels from external supplier	69%	67%	64%	79%	68%
Tools to detect sample fraud from supplier	78%	73%	72%	88%	68%
Programmatic sampling	52%	27%	47%	54%	51%
Social media recruiting	38%	24%	30%	48%	40%
River or web-intercept sampling	50%	18%	44%	33%	30%
n (range) =	39	158	79	56	55

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: In each supplier segment, most users of in-house tools to detect sample fraud, proprietary panels they own, proprietary panels from an external supplier, and tools to detect sample fraud from a supplier use them regularly.

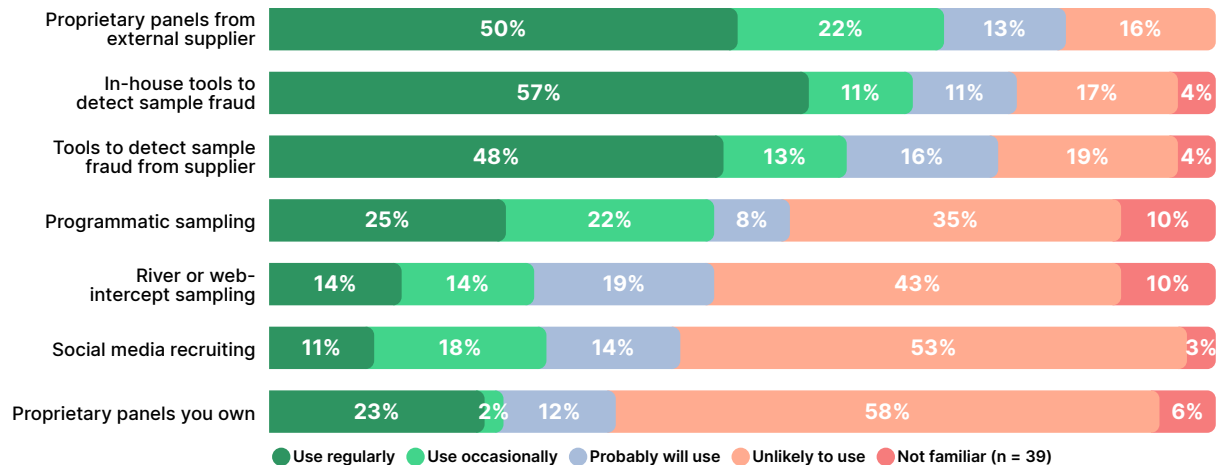
Source: GRIT Report

ATTITUDES AND USAGE TRENDS | TECH-LED POV [DATA]

Among tech-led suppliers, each sample method is at least 60% saturated. The most near-term opportunity

for adoption is river or web-intercept sampling; 60% of likely users do so regularly.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Source: GRIT Report

Takeaway: Among tech-led suppliers, the sample method with the most potential is river or web-intercept sampling (only 60% who will probably use it currently do).





Proprietary panels from external suppliers (71%) and in-house tools to detect sample fraud (68%) have been among tech-led suppliers' top three most-used since they were split up in 23A. Tools to detect sample fraud from suppliers (61%) has been in the top three for three of four years.

Nothing has changed by double digits in the past year, but proprietary panels they own dipped slightly further (-3% to 24%) after it lost more than half its users following the peak year of 24A (56% to 27%). Since 23A, the average number of sample methods used has declined from 3.8 to 3.3.

USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Proprietary panels	68%	65%	64%	81%	--	--	--	--
Proprietary panels from external supplier	--	--	--	76%	76%	69%	71%	+2%
Proprietary panels you own	--	--	--	39%	56%	27%	24%	-3%
Tools to detect sample fraud	--	--	--	67%	--	--	--	--
In-house tools to detect sample fraud	--	--	--	56%	65%	73%	68%	-5%
Tools to detect sample fraud from supplier	--	--	--	60%	55%	57%	61%	+4%
Alternatives to panel samples	--	26%	22%	79%	--	--	--	--
Programmatic sampling	--	--	--	55%	45%	38%	47%	+9%
Social media recruiting	--	--	--	48%	31%	25%	30%	+5%
River or web-intercept sampling	--	--	--	49%	37%	36%	29%	-7%
Average number used:	0.7	0.9	0.9	3.8	3.6	3.3	3.3	--
n (range) =	90	46-50	122-125	70	28-42	29-34	39	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among tech-led suppliers, proprietary panels from an external supplier (71%) and in-house tools to detect sample fraud (68%) are perennially among the three most-used methods, and tools to detect sample fraud from supplier (61%) has been in the top three for three of the past four years.

Source: GRIT Report



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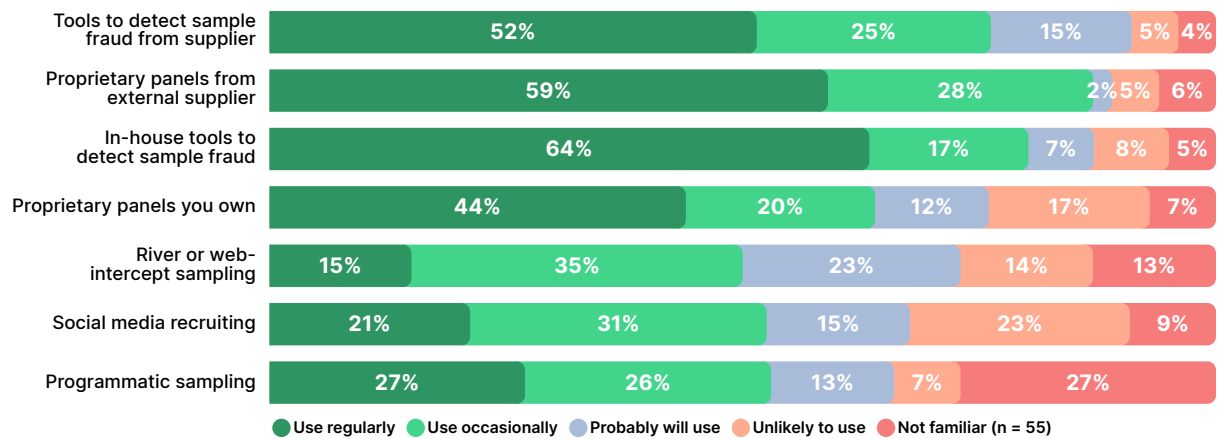
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SERVICE-LED: 500+ FTE POV ^[DATA]

Among service-led suppliers with 500+ FTE, more than two-thirds of likely users of each sample method already use them. River or web-intercept sampling is

the least saturated (68%); each other method is more than 75% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, the sample method with the most potential is river or web-intercept sampling (only 68% who will probably use it currently do); each other method is at least 78% saturated.

Service-led suppliers with 500+ FTE perennially cite proprietary panels from external suppliers (87%), in-house tools to detect sample fraud (81%), and tools to detect sample fraud from suppliers (76%) as top-three methods. Since last year, use of in-house tools

to detect sample fraud increased +13% while use of programmatic sample fell -11% to 54%. They use an average of 4.6 methods; the range has been 4.4 to 4.8 since 23A.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Proprietary panels	86%	88%	84%	92%	--	--	--	--
Proprietary panels from external supplier	--	--	--	84%	79%	91%	87%	-4%
Proprietary panels you own	--	--	--	73%	65%	64%	64%	--
Tools to detect sample fraud	--	--	--	84%	--	--	--	--
In-house tools to detect sample fraud	--	--	--	78%	69%	68%	81%	+13%
Tools to detect sample fraud from supplier	--	--	--	73%	75%	82%	76%	-6%
Alternatives to panel samples	--	40%	44%	76%	--	--	--	--
Programmatic sampling	--	--	--	55%	61%	65%	54%	-11%
Social media recruiting	--	--	--	56%	46%	56%	52%	-4%
River or web-intercept sampling	--	--	--	59%	44%	43%	49%	+6%
Average number used:	0.9	1.3	1.3	4.8	4.4	4.7	4.6	-0.1
n (range) =	104	85-88	117-129	97	56-65	52-61	55	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 500+ FTE, proprietary panels from an external supplier (87%), in-house tools to detect sample fraud (81%), and tools to detect sample fraud from a supplier (76%) are perennially the three most-used methods; use of in-house tools to detect sample fraud increased from 68% to 81% and use of programmatic sampling fell from 65% to 54%.

Source: GRIT Report



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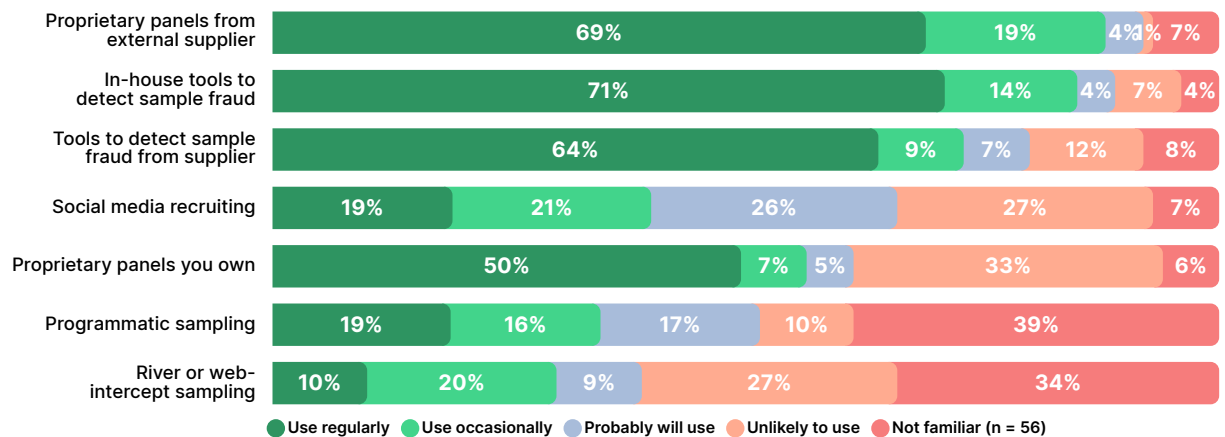
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SERVICE-LED: 101-500 FTE POV ^[DATA]

All sample methods are at least 60% saturated for service-led suppliers with 101 to 500 FTE. Social media recruiting (61%) has the most near-

term opportunity, followed by programmatic sampling (66%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, the sample method with the most potential is social media recruiting (only 61% who will probably use it currently do).

Among service-led suppliers with 101 to 500 FTE, proprietary panels from external suppliers (88%), in-house tools to detect sample fraud (85%), and tools to detect sample fraud from suppliers (73%) are perennially the top three most-used sample methods.

Since last year, usage of two methods increased by double digits: in-house tools to detect sample fraud (+16%) and social media recruiting (+15%). Consequently, the average number of sample methods used increased from 3.6 to 4.1.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Proprietary panels	78%	78%	76%	93%	--	--	--	--
Proprietary panels from external supplier	--	--	--	86%	70%	81%	88%	+7%
Proprietary panels you own	--	--	--	50%	51%	55%	56%	+1%
Tools to detect sample fraud	--	--	--	87%	--	--	--	--
In-house tools to detect sample fraud	--	--	--	81%	71%	69%	85%	+16%
Tools to detect sample fraud from supplier	--	--	--	74%	66%	69%	73%	+4%
Alternatives to panel samples	--	37%	32%	74%	--	--	--	--
Social media recruiting	--	--	--	58%	45%	25%	40%	+15%
Programmatic sampling	--	--	--	51%	41%	42%	34%	-8%
River or web-intercept sampling	--	--	--	40%	32%	22%	29%	+7%
Average number used:	0.8	1.1	1.1	4.4	3.8	3.6	4.1	+0.5
n (range) =	108	81-89	127-134	102	58-72	49-62	56	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 101-500 FTE, proprietary panels from an external supplier (88%), in-house tools to detect sample fraud (85%), and tools to detect sample fraud from a supplier (73%) are perennially the three most-used methods; use of in-house tools to detect sample fraud increased from 69% to 85%, and social media recruiting increased from 25% to 40%.

Source: GRIT Report



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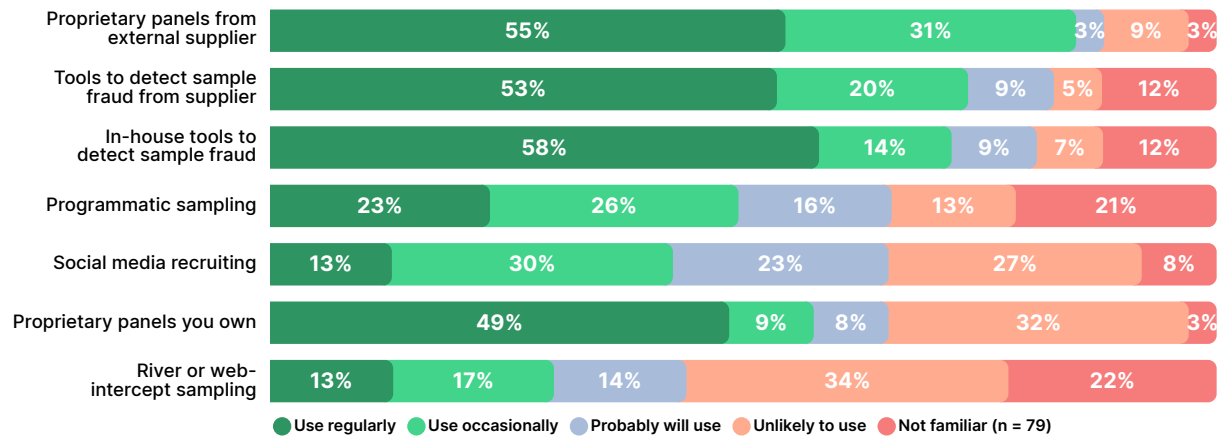


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SERVICE-LED: 21-100 FTE POV ^[DATA]

All sample methods are also at least 60% saturated for service-led suppliers with 21 to 500 FTE. Social media recruiting (65%) has the most near-term opportunity, followed by river or web-intercept sampling (69%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, the sample method with the most potential is social media recruiting (only 65% who will probably use it currently do); each other method is at least 69% saturated.

For service-led suppliers with 21 to 500 FTE, the top three most-used methods in each year since 23A have been proprietary panels from external suppliers (86%), tools to detect sample fraud from suppliers (74%), and in-house tools to detect sample fraud (73%).

Programmatic sampling grew +15% since last year to 50%, and proprietary panels they own increased by +14% to 58%. Social media recruiting decreased from -10% from 52% to 42%. At 4.1 now, the average number of sample methods used has ranged from 3.8 to 3.9.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Proprietary panels	67%	80%	77%	89%	--	--	--	--
Proprietary panels from external supplier	--	--	--	79%	76%	78%	86%	+8%
Proprietary panels you own	--	--	--	55%	51%	44%	58%	+14%
Tools to detect sample fraud	--	--	--	73%	--	--	--	--
Tools to detect sample fraud from supplier	--	--	--	56%	59%	65%	74%	+9%
In-house tools to detect sample fraud	--	--	--	65%	73%	68%	73%	+5%
Alternatives to panel samples	--	33%	38%	73%	--	--	--	--
Programmatic sampling	--	--	--	36%	45%	35%	50%	+15%
Social media recruiting	--	--	--	55%	54%	52%	42%	-10%
River or web-intercept sampling	--	--	--	36%	28%	34%	31%	-3%
Average number used:	0.7	1.1	1.1	3.8	3.9	3.8	4.1	+0.3
n (range) =	163	122-130	142-145	184	82-104	79-84	79	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 21-100 FTE, proprietary panels from an external supplier (86%), in-house tools to detect sample fraud (73%), and tools to detect sample fraud from a supplier (74%) are perennially the three most-used methods; use of social media recruiting increased from 35% to 50%, proprietary panels they own increased from 44% to 58%, and social media recruiting decreased from 52% to 42%.

Source: GRIT Report



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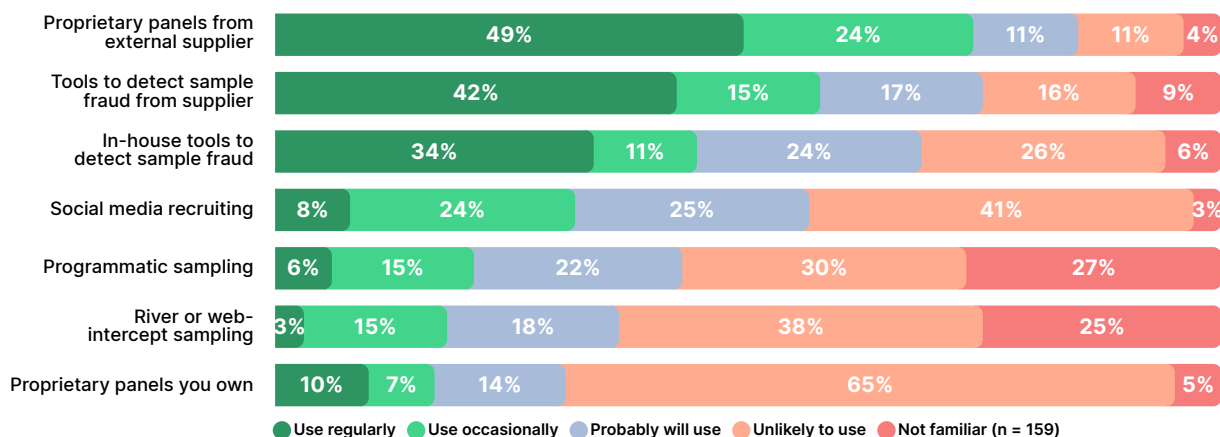
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SERVICE-LED: ≤20 FTE POV ^[DATA]

Among service-led suppliers with ≤20 FTE, four methods are less than 60% saturated. The most near-term opportunities for adoption are programmatic

sampling (49%), river or web-intercept sampling (51%), social media recruiting (56%), and proprietary panels they own (56%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, the sample methods with the most potential are programmatic sampling (only 49% who will probably use it currently do), river or web-intercept sampling (51%), social media recruiting (56%) and proprietary panels they own (56%).

Proprietary panels from external suppliers (73%) have been a top three most-used sample method for service-led suppliers with ≤20 FTE since 23A. Tools to detect sample fraud from suppliers (57%), up +12%

since last year, has been in the top three since 24A, and in-house tools to detect sample fraud (45%) have been since last year. The average number of methods used is 2.6, down from 3.1 in 23A.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Proprietary panels	67%	74%	64%	78%	--	--	--	--
Proprietary panels from external supplier	--	--	--	73%	67%	70%	73%	+3%
Proprietary panels you own	--	--	--	29%	23%	25%	17%	-8%
Tools to detect sample fraud	--	--	--	63%	--	--	--	--
Tools to detect sample fraud from supplier	--	--	--	48%	45%	45%	57%	+12%
In-house tools to detect sample fraud	--	--	--	51%	42%	49%	45%	-4%
Alternatives to panel samples	--	25%	22%	70%	--	--	--	--
Social media recruiting	--	--	--	56%	44%	36%	32%	-4%
Programmatic sampling	--	--	--	27%	31%	28%	21%	-7%
River or web-intercept sampling	--	--	--	23%	21%	22%	19%	-3%
Average number used:	0.7	1.0	0.9	3.1	2.7	2.8	2.6	-0.2
n (range) =	267	194-221	234-239	271	110-138	124-149	158	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with ≤20 FTE, proprietary panels from an external supplier (73%) is perennially the most-used method, tools to detect sample fraud from supplier (57%) have been in the top three for the last three years, and in-house tools to detect sample fraud (45%) have been in the top three for three of four years; use of tools to detect sample fraud from supplier increased from 45% to 57%.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

GRIT's seven sample methods clearly separate into two tiers: proprietary panels from external suppliers and fraud detection tools, both supplier-provided and in-house, and "alternative" sampling methods. Panels and fraud detection tools dominate usage in virtually every segment; they are the established infrastructure of sample practice. The "alternative" methods — programmatic sampling, social media recruiting, river/web-intercept — occupy a consistently lower tier of adoption, especially among brand-side researchers and smaller suppliers.

The fraud detection story is dynamic. Adoption of in-house tools to detect sample fraud increased by double digits among service-led suppliers with 101 to 500 FTE and those with 500+ FTE. Supplier tools increased slightly among service-led suppliers with 101 to 500 FTE, and more among those with 20 FTE or fewer and those with 500+ FTE. Intensity for fraud detection tools is consistently high across all segments: most users of both in-house and supplier fraud tools use them regularly, often at 70–88% intensity.

This is not a method people use occasionally; it's embedded infrastructure. The cross-segment momentum suggests ongoing concern about sample quality is actively driving investment, not just baseline maintenance.

Tech-led suppliers don't appear to be building owned audiences the way larger service-led suppliers do. Their sample strategy seems to be about enabling and verifying access to panels through fraud tools and external panel relationships rather than owning the sample asset themselves. They are heavy users of both in-house and supplier fraud tools, which fits their role as infrastructure providers to the industry.

However, their use of proprietary panels they own is less than half that of service-led suppliers with more than 20 FTE, where it ranges from 56% to 64%. It's been declining after spiking to 56% in 24A, having fallen sharply since. Perhaps 24A was a year in which some suppliers invested in panels then transitioned into a service-led segment. The current level suggests owned panels aren't central to how today's tech-led suppliers operate.

Interest in in-house panels may be growing. Among brand-side researchers, proprietary panels they own grew +10% to 49%, the largest single-wave change among brand segments. Among service-led suppliers with 21 to 100 FTE, they grew +14% to 58%. This could reflect a desire for more control over sample quality, cost containment pressure pushing clients to build owned audiences, or platform infrastructure making panel management more accessible. Given the simultaneous drop in supplier fraud tool use among researchers (-10%), it's possible some researchers are substituting owned panels they control directly for external panels that require third-party fraud detection.

Programmatic sampling shows cross-segment divergence. It grew +15% among service-led suppliers with 21 to 100 FTE and +9% among those with 500+ FTE and tech-led, but fell -8% among service-led suppliers with 101 to 500 FTE and -7% among those with ≤20 FTE.

This could reflect a desire for more control over sample quality, cost pressure pushing clients to build owned audiences, or platforms making panel management more accessible.

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Its divergence may reflect that programmatic sampling's value proposition differs by size context, such as an automation benefit for larger volume users that's less compelling for smaller project-based firms. Among service-led 500+ FTE, it actually fell from a high of 65% to 54% in the same wave that in-house fraud tools jumped +13%, which could reflect a shift away from programmatic sourcing toward more controlled sample management.

Finally, the gap between researchers (2.4 methods on average) and analytics professionals (3.6) is proportionally large for a seven-method category. Analytics professionals are dramatically more likely to use every non-panel method. This is consistent with analytics professionals managing more complex, multi-source data environments. Their higher use of fraud detection tools in particular suggests they're working with data flows where quality verification is embedded in the workflow rather than a project-by-project consideration. Researchers, by contrast, concentrate heavily on external panels and their own panels, with notably lower engagement across everything else.



Analytics professionals are much more likely to use every non-panel method, consistent with their managing more complex, multi-source data environments.



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INSIGHTS DEPEND ON HUMAN PARTICIPATION AND TRUST

Janice Caston

EVP Marketing, Dynata

Ellen Romer

Director Data Strategy, Dynata

The latest GRIT 2026 data makes one thing clear and it may surprise some in an industry preoccupied with experimentation and “the latest and greatest.”

The foundation of modern research remains strikingly consistent. Proprietary panels from trusted external suppliers and robust fraud detection tools continue to dominate usage across brand, supplier, and tech-led segments. In an environment defined by growing data complexity, AI acceleration, and mounting pressure on insight teams to move faster, quality-led infrastructure has not diminished in importance. It has become more essential.

Across every GRIT segment, proprietary panels from external suppliers rank among the three most-

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used sampling methods, reinforcing their role as the backbone of research today. At the same time, fraud detection, both supplier-provided and in-house, is deeply embedded into workflows. More than 70% of suppliers rely on data quality tools regularly. This reflects an industry-wide recognition that data integrity must be actively protected, not assumed, especially as automation and AI increase scale and speed.

What is evolving, quietly but meaningfully, is how organizations balance control, trust, and accountability. Among brand-side researchers, use of proprietary panels they own increased by 10 percentage points year over year, the largest shift across brand segments, with mid-sized service-led suppliers showing similar momentum. Notably, this shift coincides with a decline in reliance on supplier-provided fraud tools among researchers, suggesting a move toward direct stewardship rather than outsourced oversight.

This context matters as synthetic data and AI-generated approaches gain traction. *GRIT data suggests that as automation scales, participation quality becomes more consequential – not less – because any weakness upstream carries further.* While these technologies may change parts of the ecosystem, the GRIT data underscores a critical truth: insights ultimately depend on human participation and trust. How consumers are recruited, screened, rewarded, and protected directly affects data quality.

At Dynata, our point of view is clear: the future of insights will not be built by replacing real people, but by using AI to amplify rather than obscure human-driven research rooted in high-fidelity infrastructure and the direct stewardship of participant privacy. This foundation transforms complex data flows into the utility of verified insights, ensuring quality remains anchored in validated identities and transparent participation to drive measurable business impact.





OBSERVATIONAL RESEARCH

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across six observational research methods.

ARE OBSERVATIONAL METHODS GOING MAINSTREAM? [ORIENTATION]

The insights industry doesn't seem to have a unified perspective on observational research methods.

There is no observational research method that is among the three most-used in every segment. In-store shopping observation is in the top three for

each segment but service-led suppliers with 500+FTE (48%). Passive metering is in the top three for brand-side researchers (31%) and analytics professionals (56%) as well as service-led suppliers with 500+FTE (55%). Mobile ethnography is among the three most-used in each supplier segment, but not in brand-side segments.

Except for brand-side analytics, non-mobile ethnography is in every segment's top three. Instead, analytics has automated measures/people meters (64%).

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "L.M., ed." are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Observational research is concentrating around the segments and use cases where behavior, experience, and analytics create the most value. If capability is moving from research teams to analytics teams, leaders need to decide whether that is an intentional realignment or an unplanned shift that creates blind spots in the broader insights portfolio.

– LM, ed.



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THREE MOST-USED METHODS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Passive metering	31%	56%	18%	11%	16%	21%	55%
In-store/shopping observations	24%	53%	25%	39%	39%	46%	48%
Ethnography (NOT mobile)	23%	35%	23%	44%	44%	59%	74%
Mobile ethnography	22%	48%	26%	31%	59%	64%	52%
Automated measures/people meters	21%	64%	6%	11%	12%	30%	34%
Average number used:	1.4	2.9	1.1	1.4	1.9	2.4	2.9
n (range) =	107-129	96-105	21-26	91-108	45-61	31-41	30-35

Green shading indicates top three most-used methodologies.

Takeaway: In-store/shopping observations are a top three most-used observational method in each segment except service-led suppliers with 500+ FTE; non-mobile ethnography is top-three in each segment except brand-side analytics; and mobile ethnography is top-three in each supplier segment.

Source: GRIT Report and NewtonX

The observational research trends seem to be more related to segments than to specific methods.

Among brand-side analytics, every method increased by more than +5%. On the research side, wearables and automated measures/people meters nudged upward, but in-store/shopping observations, mobile ethnography, and non-mobile ethnography fell. These somewhat complementary trends make us think of the question we posed in *Brand-side Roles and Teams*: are the segments diverging or converging? For example, to better execute on disciplines like CX, have some researchers transitioned to analytics and taken observational methods with them?

Among service-led suppliers with 101 to 500 FTE, use of each method except wearables grew at least +5%, and mobile ethnography grew +17% among those with 21 to 100 FTE. Service-led suppliers with ≤20 FTE mainly ran in place, tech-led receded, service-led with 500+ FTE also receded except for a +20% gain in non-mobile ethnography, and those with 21 to 500 FTE focused a bit more on ethnography of any kind. Similar to what we've seen *Evolving Supplier Landscape*, service-led suppliers with 21 to 500 FTE seem to be expanding their offering portfolios, but it's curious to see those with 500+ FTE accelerating more toward non-mobile ethnography than toward mobile.

CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Wearables	+9%	+13%	-2%	-1%	+1%	+1%	-1%
Automated measures/people meters	+6%	+8%	-15%	-1%	+2%	+20%	-4%
In-store/shopping observations	-7%	+17%	-2%	-9%	+1%	+5%	-10%
Mobile ethnography	-10%	+19%	-4%	-4%	+17%	+19%	-7%
Ethnography (NOT mobile)	-15%	+9%	-4%	-1%	+7%	+20%	+20%
n (range) =	107-129	96-105	21-26	91-108	45-61	31-41	30-35

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: Mobile ethnography increased by at least +10% in three segments while non-mobile increased over +5% in four.

Source: GRIT Report and NewtonX

Ethnography seems to be growing on the supplier side even as brand-side researchers seem to be backing away from it. It looks like brand-side segments are

diverging over use of observational methods while mid-sized service-led suppliers are building on it.



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CHANGES FROM 2025 GRIT SURVEY

We've made changes to our observational methods. We moved "bulletin board studies (online discussion boards)" and "mobile diaries/journaling" to *Focus Groups & IDI's* with other qual methods.

We also combined "Internet of Things (IoT)" and "sensor/usage/telemetry" into "passive metering

(sensors, usage data, telemetry, IoT)." Until 23A, we asked about "passive data measurement (e.g., wearables, sensor/usage/telemetry, or Internet of Things)," but we split it into "wearables" and the other two methods. Now, we've recombined sensors and IoT but kept wearables separate as we've streamlined our methods set.

2026 OBSERVATIONAL METHODS

2026 Method	2025 Precedent	2025 Family
Automated measures/people meters	Automated measures/people meters	Observational
Ethnography (NOT mobile)	Ethnography (NOT mobile)	Observational
In-store/shopping observations	In-store/shopping observations	Observational
Mobile ethnography	Mobile ethnography	Observational
Passive metering (sensors, usage data, telemetry, IoT)	Sensor/usage/telemetry + Internet of Things (IoT) (merged)	Observational
Wearables	Wearables	Observational

Green indicates method changed from 25A.

Source: GRIT Report

Methods were not classified by type during the survey; we only do that for the report.

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ATTITUDES AND USAGE TRENDS | BRAND POV [DATA]

Most brand-side analytics professionals use automated measures/people meters (64%), passive metering (56%), and in-store/shopping observations (53%), and nearly half use mobile ethnography (48%). On the research side, no observational method even approaches a majority. Their top three are passive metering (31%), in-store/shopping observations (24%), and ethnography that's not mobile (23%).

On average, analytics professionals use twice as many observational methods as researchers (2.9 to 1.4). The biggest gaps lean toward analytics: automated measures/people meters (+43%), in-store/shopping observations (+29%), mobile ethnography (+26%), and passive metering (+25%).

USE OF METHODS/APPROACHES: BRAND SEGMENT

	Research	Analytics	Research – analytics
Passive metering	31%	56%	-25%
In-store/shopping observations	24%	53%	-29%
Ethnography (NOT mobile)	23%	35%	-12%
Mobile ethnography	22%	48%	-26%
Automated measures/people meters	21%	64%	-43%
Wearables	15%	31%	-16%
Average number used	1.4	2.9	-1.5
n (range) =	107-129	96-105	

Green shading indicates top three most-used methodologies.

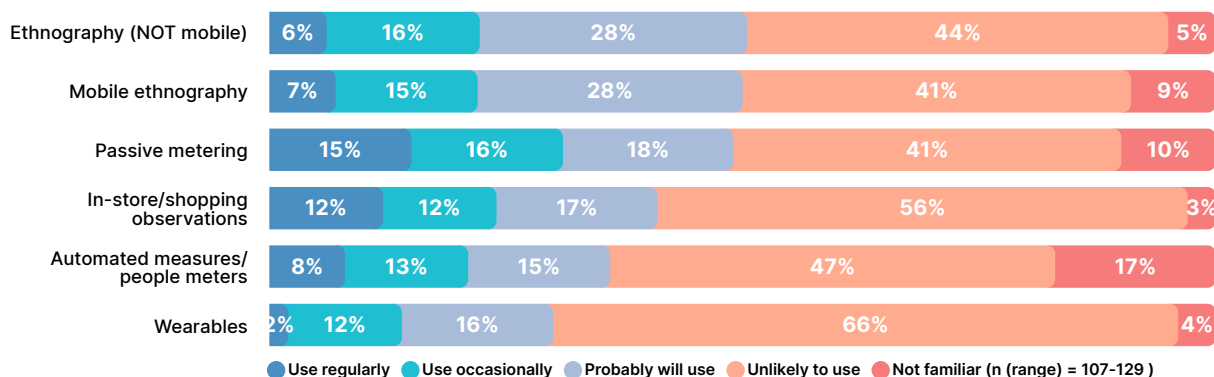
Takeaway: Brand-side analytics professionals use more observational methods than researchers on average (2.9 to 1.4), with the largest gaps in automated measures/people meters (64% to 21%), in-store/shopping observations (53% to 24%), mobile ethnography (48% to 22%), and passive metering (56% to 31%).

Source: GRIT Report and NewtonX

Brand-side research represents some opportunities to increase near-term adoption because three methods are less than 50% saturated. Less than half of the

probable users of mobile ethnography (43%), non-mobile ethnography (44%), and wearables (48%) currently use them.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the observational methods with the most potential are mobile ethnography (only 43% of probable users currently do), non-mobile ethnography (44%), and wearables (48%).



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Although passive metering is the leading observational method among brand-side researchers, fewer than one-third use it. Neither it nor its components have been among the top three before, and it pushed mobile ethnography (22%) out for the first time.

Non-mobile ethnography (23%) has been in the top three every year since it was introduced in 23A, and in-store/shopping observations (24%) has been in the top three since 20A.

Non-mobile ethnography remained in the top three despite a -14% drop since last year and -21% over three years. In-store/shopping observations fell -8% since last year, and it's now about half what it was in 20A (47%).

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A – 25A
Passive metering	14%	13%	14%	28%	--	--	31%	--
Sensor/usage/telemetry	--	--	--	12%	18%	12%	--	--
Internet of Things (IoT)	--	--	--	16%	19%	9%	--	--
Wearables	--	--	--	13%	12%	6%	15%	+9%
Ethnography (NOT mobile)	--	--	--	44%	39%	37%	23%	-14%
In-store/shopping observations	47%	45%	38%	38%	31%	32%	24%	-8%
Mobile ethnography	36%	29%	31%	34%	32%	31%	22%	-9%
Automated measures/people meters	21%	24%	21%	12%	20%	15%	21%	+6%
Average number used:	1.2	1.1	1.0	1.7	1.7	1.4	1.4	--
n = (range)	298	209	182	214	113-135	122-141	107-129	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

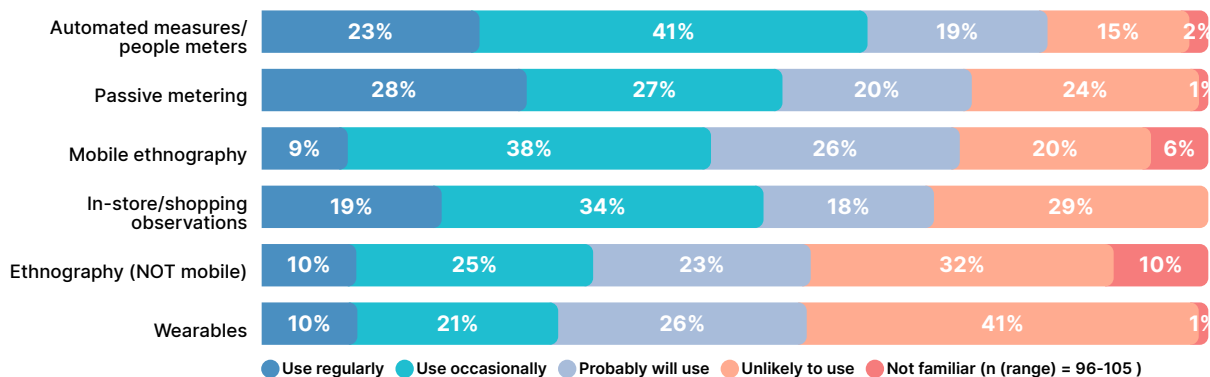
Takeaway: Among brand-side researchers, non-mobile ethnography (23%) and in-store/shopping observations (24%) have been top three most-used methods each year; use of non-mobile ethnography fell from 37% to 23%.

Source: GRIT Report and NewtonX

Unlike brand-side researchers, most of the probable users of observational research methods in analytics already use them. The biggest near-time adoption

opportunity is wearables (54%); all others are more than 60% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, the observational method with the most potential is wearables (only 54% of probable users currently do).



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Among brand-side analytics professionals, automated measures/people meters (64%) and some version of passive metering (56%) have been in the top three most-used each year since the segment was introduced in 23A. In-store/shopping observations (53%) has alternated crests and troughs over that time. It's increased +17% since 25A after dropping the same amount last year.

Wearables increased +12% to 31% since last year, and mobile ethnography jumped +20% to 48%. Despite reducing the number of GRIT methods from seven to six, the average number used increased slightly from 2.6 to 2.9.

The volatility across brand-side segments regarding use of observational methods seems like some kind of cross-pollination. Maybe this is symptomatic of some researchers crossing over into the analytics segment due to the evolution of disciplines like CX.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Automated measures/people meters	42%	53%	56%	64%	+8%
Passive metering	48%	--	--	56%	--
Internet of Things (IoT)	39%	51%	48%	--	--
Sensor/usage/telemetry	29%	42%	45%	--	--
Wearables	20%	24%	19%	31%	+12%
In-store/shopping observations	38%	53%	36%	53%	+17%
Mobile ethnography	27%	30%	28%	48%	+20%
Ethnography (NOT mobile)	25%	32%	27%	35%	+8%
Average number used:	2.2	2.9	2.6	2.9	+0.3
n = (range)	182	114-132	99-129	96-105	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among brand-side analytics professionals, automated measures/people meters (64%) is a perennial top three most-used method, as are different versions of passive metering (56%); use of mobile ethnography increased from 28% to 48%; in-store/shopping observations, from 36% to 53%; and wearables from 19% to 31%.

Source: GRIT Report and NewtonX

Observational methods as a set may be better suited for occasional rather than regular use. About half of users in each brand-side segment use passive metering regularly (48% of research

and 51% of analytics), and 49% of research users of in-store/shopping observation use it regularly. The other observational methods are at least 60% occasional use.

INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
In-store/shopping observations	49%	37%
Passive metering (sensors, usage data, telemetry, IoT)	48%	51%
Automated measures/people meters	40%	36%
Mobile ethnography	31%	20%
Ethnography (NOT mobile)	28%	29%
Wearables	16%	32%
n (range) =	107-129	96-105

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Most brand-side analytics professionals who use passive metering use it regularly (51%), as do nearly half of researchers (48%); nearly half of researchers who use in-store/shopping observations (49%) use them regularly.

Source: GRIT Report and NewtonX



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ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

On the supplier side, non-mobile and mobile ethnography are among the three most-used observational methods in each segment. In-store/shopping observations is also in the top three in each segment except service-led suppliers with 500+ FTE, in which it is replaced by passive metering (55%).

Tech-led suppliers use only 1.1. observational methods on average. In the service-led segments, the average number used consistently increases by 0.5 with each break, from 1.4 for those with ≤20 FTE to 2.9 for those with 500+ FTE.

USE OF METHODS/APPROACHES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Ethnography (NOT mobile)	23%	44%	44%	59%	74%
Passive metering	18%	11%	16%	21%	55%
Mobile ethnography	26%	31%	59%	64%	52%
In-store/shopping observations	25%	39%	39%	46%	48%
Automated measures/people meters	6%	11%	12%	30%	34%
Wearables	12%	6%	15%	16%	23%
Average number used:	1.1	1.4	1.9	2.4	2.9
n = (range)	21-26	91-108	45-61	31-41	30-35

Green shading indicates top three most-used methodologies.

Takeaway: In each supplier segment, mobile and non-mobile ethnography are among the top three most-used observational methods; passive metering (55%) is in the top three for service-led suppliers with 500+ FTE, and in-store/shopping observations is in the top three in each other segment.

Source: GRIT Report

Most users of automated measures/people meters among tech-led suppliers (100%) and service-led

suppliers with 21 to 100 FTE (59%) and 500+ FTE (58%) use them regularly.

INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Automated measures/people meters	100%	15%	59%	13%	58%
Wearables	21%	29%	39%	0%	47%
Passive metering	0%	18%	26%	0%	39%
In-store/shopping observations	63%	34%	43%	23%	34%
Ethnography (NOT mobile)	0%	28%	24%	23%	33%
Mobile ethnography	55%	32%	36%	41%	33%
n = (range)	21-26	91-108	45-61	31-41	30-35

Intensity = regular use / total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Most users of automated measures/people meters among tech-led suppliers (100%) and service-led suppliers with 21-100 FTE (59%) and 500+ FTE (58%) use them regularly.

Source: GRIT Report



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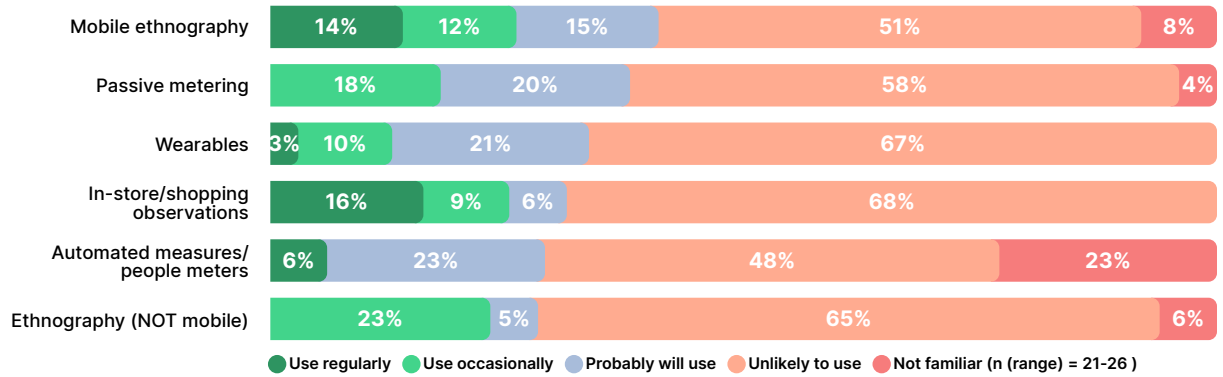


ATTITUDES AND USAGE TRENDS | TECH-LED POV ^[DATA]

Among tech-led suppliers, only 21% of probable users of automated measures/people meters currently use them. Two other observational methods with

low saturation are wearables (37%) and passive metering (47%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Takeaway: Among tech-led suppliers, the observational methods with the most potential are automated measures/people meters (only 21% who will probably use it currently do), wearables (37%), and passive metering (47%).

Among tech-led suppliers, in-store/shopping observations (25%) has been among the three most-used in each wave since 20A, although fewer than half use it now as used it then (65%). Non-mobile ethnography (23%) has been in top three for three

of four years, and mobile ethnography (26%) has been in the top three for five of seven waves. Use of automated measures/people meters fell -15% since last year to 6%, one-fifth of the users it has in 20A (32%).

USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Mobile ethnography	37%	28%	23%	39%	14%	30%	26%	-4%
In-store/shopping observations	65%	43%	24%	33%	20%	28%	25%	-2%
Ethnography (NOT mobile)	--	--	--	30%	17%	27%	23%	-4%
Passive metering	18%	10%	21%	28%	9%	--	18%	--
Internet of Things (IoT)	--	--	--	14%	18%	20%	--	--
Sensor/usage/telemetry	--	--	--	17%	15%	14%	--	--
Wearables	--	--	--	12%	5%	14%	12%	-2%
Automated measures/people meters	32%	26%	28%	31%	22%	21%	6%	-15%
Average number used:	1.5	1.1	1.0	1.7	1.1	1.5	1.1	-0.4
n =	54-97	35-50	122-125	70	35-44	28-40	21-26	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among tech-led suppliers, in-store/shopping observations (25%) is perennially among the three most-used methods; use of automated measures/people meters fell from 21% to 6%.

Source: GRIT Report



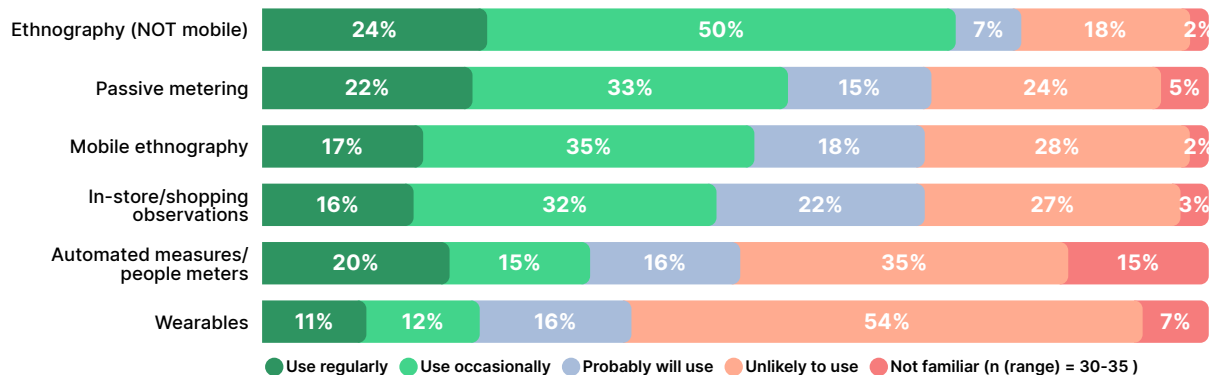


ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 500+ FTE POV ^[DATA]

Each observational method is used by at least 60% of probable users among service-led suppliers with 500+FTE, except wearables (59%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Takeaway: Among service-led suppliers with 500+ FTE, the observational method with the most potential is wearables (only 59% who will probably use it currently do); each other method is at least 68% saturated.

Among service-led suppliers with 500+ FTE, non-mobile ethnography (74%) has been in the top three most-used observational methods since it was introduced in 23A. Mobile ethnography (52%) has been in the top three since 21A. Passive metering

(55%) is in the top three, and has been above 40% since 23A. Since last year, non-mobile ethnography increased +20%, and in-store shopping observations fell -10% to 48% and out of the top three.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Ethnography (NOT mobile)	--	--	--	53%	59%	54%	74%	+20%
Passive metering	48%	26%	36%	46%	42%	--	55%	--
Internet of Things (IoT)	--	--	--	31%	19%	35%	--	--
Sensor/usage/telemetry	--	--	--	29%	30%	30%	--	--
Wearables	--	--	--	23%	18%	24%	23%	-1%
Mobile ethnography	47%	38%	39%	46%	47%	59%	52%	-7%
In-store/shopping observations	71%	55%	50%	50%	48%	58%	48%	-10%
Automated measures/people meters	49%	35%	43%	32%	30%	38%	34%	-4%
Average number used:	2.2	1.5	1.7	2.6	2.5	3.0	2.9	-0.1
n =	84-106	71-88	117-129	97	60-72	51-72	30-35	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 500+ FTE, mobile (52%) and non-mobile ethnography (74%) are perennially among the three most-used methods since 23A; use of mobile ethnography increased from 54% to 74% and use of in-store/shopping observations fell from 58% to 48%.

Source: GRIT Report



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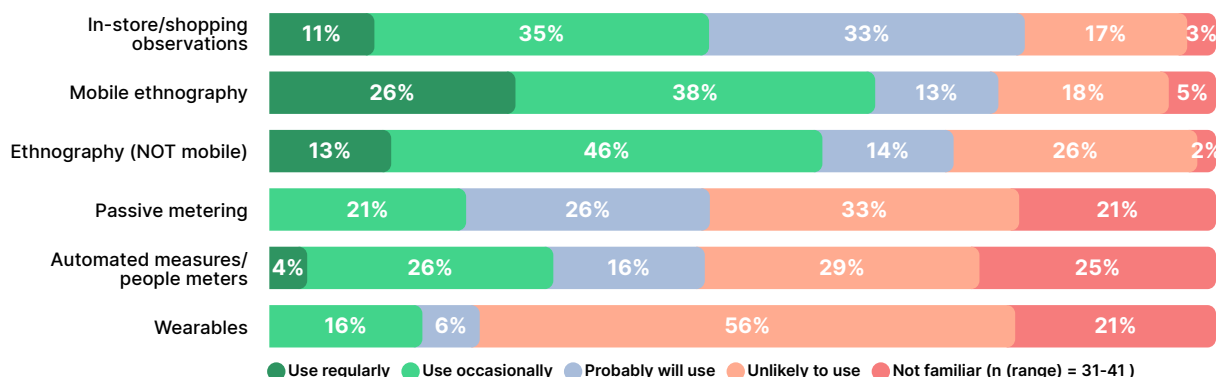
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 101-500 FTE POV ^[DATA]

Among service-led suppliers with 101 to 500 FTE, only 45% of probable users of passive metering using it

currently. After that, in-store/shopping observations is 58% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, the observational method with the most potential is passive metering (only 45% who will probably use it currently do).

Currently, 64% of service-led suppliers with 101 to 500 FTE use mobile ethnography, their leading observational method; it's been in the top three in every wave. In-store/shopping observations (46%) has also been in their top three each year. Non-mobile ethnography (59%) has been in their top three since it was introduced in 23A.

Since last year, use of three observational methods has increased around +20%. Non-mobile ethnography and automated measures/people meters (30%) each increased +20%, and mobile ethnography increased +19%. Despite contracting the number of GRIT observational methods from seven to six, their average number of observational methods used increased from 1.9 to 2.4.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Mobile ethnography	57%	47%	53%	61%	41%	45%	64%	+19%
Ethnography (NOT mobile)	--	--	--	60%	40%	39%	59%	+20%
In-store/shopping observations	74%	66%	46%	54%	54%	40%	46%	+6%
Automated measures/people meters	26%	21%	28%	10%	24%	10%	30%	+20%
Passive metering	31%	19%	25%	26%	39%	--	21%	--
Internet of Things (IoT)	--	--	--	12%	26%	25%	--	--
Sensor/usage/telemetry	--	--	--	15%	16%	12%	--	--
Wearables	--	--	--	15%	21%	16%	16%	--
Average number used:	1.9	1.5	1.5	2.3	2.2	1.9	2.4	+0.5
n =	99-108	76-89	127-134	102	65-74	46-62	31-41	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 101-500 FTE, mobile (64%) and non-mobile ethnography (59%) plus in-store/shopping observations (46%) are perennially the top three most-used observational methods; use of non-mobile ethnography increased from 39% to 59%; automated measures/people meters, 10% to 30%; and mobile ethnography, 45% to 64%.

Source: GRIT Report



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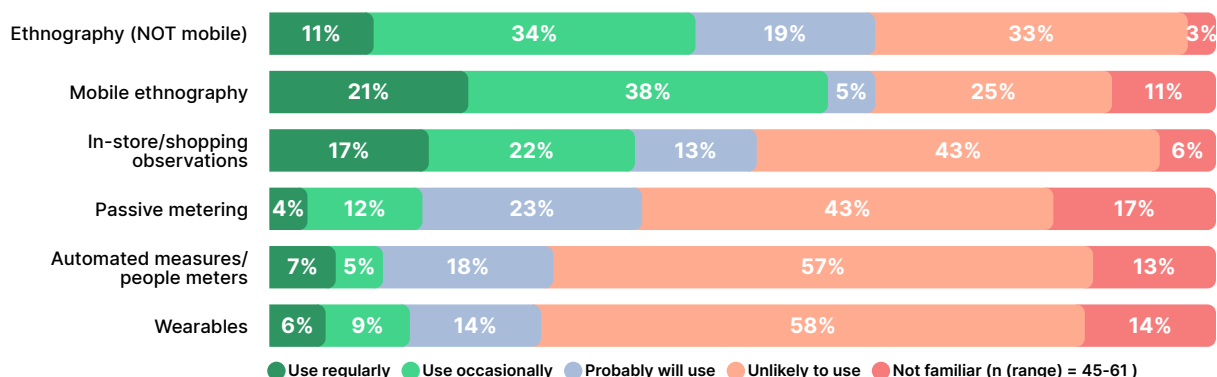
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 21-100 FTE POV ^[DATA]

Among service-led suppliers with 21 to 100 FTE, two observational methods have more probable users than current ones: automated measures/people meters

are 40% saturated, and passive metering is 42% saturated. Wearables are only 51% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Takeaway: Among service-led suppliers with 21-100 FTE, the observational methods with the most potential are automated measures/people meters (only 40% who will probably use it currently do) and passive metering (42%).

Mobile ethnography (59%), non-mobile ethnography (44%), and in-store/shopping observations (39%) are perennial top-three methods among service-led suppliers with 21 to 100 FTE. Mobile ethnography use

grew +17% since last year. Despite contracting the number of GRIT observational methods from seven to six, their average number of observational methods used increased slightly from 1.6 to 1.9.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Mobile ethnography	49%	48%	43%	49%	51%	42%	59%	+17%
Ethnography (NOT mobile)	--	--	--	50%	49%	37%	44%	+7%
In-store/shopping observations	71%	54%	50%	57%	50%	37%	39%	+2%
Passive metering	22%	21%	18%	28%	45%	--	16%	--
Internet of Things (IoT)	--	--	--	20%	23%	11%	--	--
Sensor/usage/telemetry	--	--	--	13%	21%	10%	--	--
Wearables	--	--	--	17%	19%	14%	15%	+1%
Automated measures/people meters	21%	29%	26%	24%	17%	10%	12%	+2%
Average number used:	1.6	1.5	1.4	2.3	2.3	1.6	1.9	+0.3
n =	150-169	112-130	142-145	184	88-109	78-91	45-61	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 21-100 FTE, mobile (59%) and non-mobile ethnography (44%) plus in-store/shopping observations (39%) are perennial top three most-used observational methods; use of mobile ethnography increased from 42% to 59%.

Source: GRIT Report



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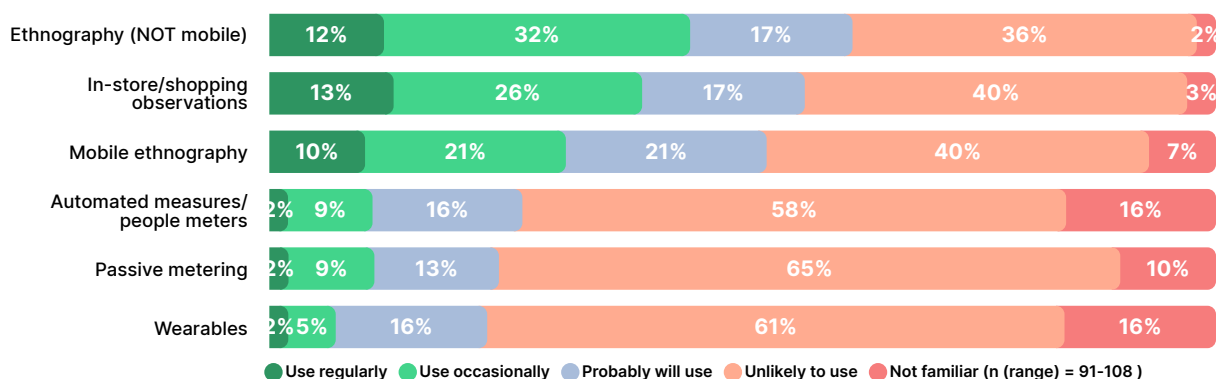


ATTITUDES AND USAGE TRENDS |

SERVICE-LED: ≤20 FTE POV ^[DATA]

Wearables are only 28% saturated among service-led suppliers with ≤20 FTE, automated measures/people meters only 40%, and passive metering only 46%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Takeaway: Among service-led suppliers with ≤20 FTE, the observational methods with the most potential are wearables (only 28% who will probably use it currently do), automated measures/people meters (40%), and passive metering (46%).

Non-mobile ethnography (44%), in-store/shopping observations (39%), and mobile ethnography (31%), are perennial top-three methods among service-led

suppliers with ≤20 FTE. Peaking at 62% in 20A, in-store/shopping observations gradually declined to its current level.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Ethnography (NOT mobile)	--	--	--	51%	40%	45%	44%	-1%
In-store/shopping observations	62%	58%	45%	52%	38%	48%	39%	-9%
Mobile ethnography	35%	36%	39%	45%	34%	35%	31%	-4%
Automated measures/people meters	13%	15%	16%	9%	10%	11%	11%	--
Passive metering	9%	13%	12%	17%	21%	--	11%	--
Internet of Things (IoT)	--	--	--	11%	14%	14%	--	--
Sensor/usage/telemetry	--	--	--	6%	10%	11%	--	--
Wearables	--	--	--	9%	5%	8%	6%	-2%
Average number used:	1.2	1.2	1.1	1.8	1.5	1.7	1.4	-0.3
n =	54-97	185-221	234-239	271	116-130	133-150	91-108	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with ≤20 FTE, mobile (31%) and non-mobile ethnography (44%) plus in-store/shopping observations (39%) are perennial top three most-used observational methods.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

Each methodology family we've covered so far – survey, qual, and sample – has at least one method that functions as a mainstream workhorse; online surveys, online qual with webcams, external proprietary panels. These anchor their respective families with high adoption, high intensity, and broad cross-segment use.

Observational research has no equivalent anchor. Its methods are inherently occasional-use; they are deployed for specific purposes rather than embedded in routine practice. This is a structural characteristic of the category, possibly of its maturity, not a sign of decline.

While it may look like some observational research methods are declining, what's changing is the distribution of users. Brand-side researchers and tech-led suppliers are pulling back, but the segments that have the greatest functional need for observational work, such as brand-side analytics, service-led mid-to-large suppliers – particularly those serving CX, UX, and shopper-oriented disciplines — are expanding their use.

The user base is concentrating in pockets where observational research does its most distinctive work, while those who don't have a strong rationale for it are shedding it or migrating. For example, if brand-side CX and UX insight work is being restructured, these new centers of gravity may pull observational research along with them.

So, the ceiling may be lower than for surveys or qual, but the methods aren't descending to it; they may have risen to it. A key question is whether we are seeing a re-sorting of users into a new equilibrium, or if this is a transitional phase as passive data and automated measurement gradually absorb some of what ethnography and in-store observation currently do.

Brand-side researchers and analytics professionals are moving in opposite directions on virtually every observational method. Among analytics professionals, every method increased by more than +5% since last year, led by mobile ethnography (+19%), in-store/shopping observations (+17%), wearables (+12%), and automated measures/people meters (+8%). Among researchers, the same methods mostly declined. The net result is that analytics professionals use twice as many observational methods on average as researchers.

We hypothesize that some researchers may be transitioning into the analytics segment as CX and UX work grows, taking observational methods and other methods with them, but that's not provable from this data. What's clear is that the analytics segment is becoming more observationally engaged while the research segment is pulling back, and this maps cleanly onto their differing business topic concentrations, such as brand tracking versus digital/product experience (see *Scope of Insights Impact*).

On the supplier side, the clearest single trend is the expansion of ethnography, both mobile and non-mobile, among mid-size and large service-led suppliers. Among service-led suppliers with 21 to 100 FTE, mobile ethnography grew +17%. Among those with 101 to 500 FTE, mobile ethnography jumped +19%, and non-mobile, +20%. Among those with 500+ FTE, non-mobile ethnography

Brand-side researchers and analytics professionals are moving in opposite directions on virtually every observational method.

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jumped +20%. Ethnography is expanding in the supplier segments that are generally adding capabilities. Whether this reflects client demand, AI-enabled efficiency in ethnographic analysis, or portfolio-building strategy isn't clear from the data alone, but the breadth of the trend across size bands is notable.

Tech-led suppliers average only 1.1 observational methods, the lowest of any segment, and their usage of automated measures/people meters collapsed from 32% in 20A to just 6% currently, a striking decline for a method that seems aligned with their technical capabilities. Tech-led suppliers may be enablers of automated measurement rather than practitioners of it, building the tools that other segments use rather than deploying them for client work directly.

Passive metering and automated measures/people meters show a pronounced size-based pattern. Among service-led ≤ 20 FTE, both are under 15% and saturation is low. Among service-led 21–100 FTE, both remain low in adoption with the lowest saturation of any segment for these methods. These methods require infrastructure investment or platform access that smaller suppliers may not have.

By contrast, service-led suppliers with 500+ FTE use passive metering at 55%, highest of any segment, and automated measures at 34%, second only to brand-side analytics. The latter also uses automated measures at 64%, the highest of any segment for any observational method. The implication is that these are scale-sensitive methods: they require either significant organizational investment or a client environment where the data already exists.

Wearables appear in every segment but never break through to meaningful adoption. Current use ranges from 6% (service-led suppliers with ≤ 20 FTE) to 31% (brand-side analytics), and saturation is low across the board. The intent to use is consistently present but not converting. Wearables may represent the category's "perpetual emerging method" — well understood in concept, limited in practice by cost, participant burden, or data integration complexity.

In-store/shopping observation has been declining gradually for years. Among brand-side researchers, in-store/shopping observations peaked at 47% in 20A and has fallen to 24% — roughly half. Among service-led with ≤ 20 FTE, it peaked at 62% in 20A and has fallen to 39%. The declines are gradual and consistent, not a single-year shock. The long decline likely reflects a combination of factors: pandemic-era disruption that never fully reversed, the rise of passive data substitutes, and the cost of fielding in-store observation at scale. The gain in the brand-side analytics segment may reflect growth in shopper analytics specifically, which fits their business topic profile.

Observational research methods are scale-sensitive: they require either significant organizational investment or a client environment where the data already exists.



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BIOMETRICS & NEUROSCIENCE

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across six biometrics and neuroscience methods.

IS NOW THE TIME FOR BIOMETRICS AND NEUROSCIENCE? [ORIENTATION]

Back before GRIT began to report methodologies by type or family, we had just two categories: “established” and “emerging.” We track too many methodologies to report them in just two categories, but the bigger issue was with the categories

themselves. How long can a methodology be “emerging” before we have to admit it’s probably gone as far as it’s going to go? Biometrics and neuroscience are cases in point; are they still “emerging” or are they simply “what they are”?

Consequently, we leave the decision as to what’s “established” and what’s “emerging” up to you and just stick to reporting trends by families. Emotion and affect analytics, new to GRIT this year, is among the top three most-used in every segment. Eye tracking, which has been around since the beginning, is in the top three in all segments but brand-side analytics (27%).

Sensory research or testing is in the top three among brand-side analytics (37%), service-led suppliers with ≤20 FTE (23%), those with 21 to 100 FTE (37%), and those with 101 to 500 FTE (33%). Neuroscience is a top-three method for service-led suppliers with 500+ FTE (41%) and tech-led (14%), and biometrics is in the top three for analytics (39%).

Aside from service-led suppliers with more than 100 FTE, no method reaches 40% use in any segment. Emotion and affect analytics hit 50% among service-led suppliers with 101 to 500 FTE and 45% among those with 500+ FTE. Eye tracking hits 43% use among those with 101 to 500 FTE and 47% among those with 500+ FTE. In the only other case of a method eclipsing 40%, neuroscience reaches 41% within those with 500+ FTE.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
- **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
- **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
- **Editor call-outs**
 - Boxes labeled **Editor’s note:** or **Editor’s POV:** and signed “**L.M., ed.**” are editorial opinions, **not data.**
- **Takeaway:** a one-line summary appears under tables and charts.

→ See Design, Methodology & Sample for full context.



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THREE MOST-USED BIOMETRIC & NEUROSCIENCE METHODS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Eye tracking	29%	27%	13%	10%	35%	43%	47%
Emotion & affect analytics	25%	39%	32%	20%	38%	50%	45%
Facial coding/facial expression analysis	19%	25%	13%	9%	26%	33%	39%
Sensory research or testing	19%	37%	11%	23%	37%	33%	29%
Biometric measures	14%	39%	5%	6%	13%	19%	27%
Neuroscience	11%	28%	14%	7%	19%	23%	41%
n (range) =	108-120	89-103	25-26	101-106	44-53	33-38	33-46

Green shading indicates top three most-used methodologies.

Takeaway: Emotion and affect analytics is a top three most-used method in each segment; eye tracking is in the top three in each segment except for brand-side analytics (27%).

Source: GRIT Report and NewtonX

Since last year, use of neuroscience increased at least +5% in five segments, including +17% among service-led suppliers with 500+ FTE. Use of eye tracking

fell -12% among tech-led suppliers, as did sensory research or testing among service-led suppliers with 500+ FTE.

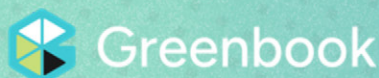
CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Facial coding/facial expression analysis	+4%	+5%	-3%	0%	+6%	+4%	-6%
Eye tracking	+2%	-5%	-12%	-2%	+9%	+4%	+2%
Sensory research or testing	+1%	-1%	-1%	-5%	+4%	+5%	-12%
Neuroscience	0%	+8%	+5%	1%	+5%	+10%	+17%
n (range) =	108-120	89-103	25-26	101-106	44-53	33-38	33-46

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: Neuroscience increased by at least +5% in five segments.

Source: GRIT Report and NewtonX



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CHANGES FROM 2025 GRIT SURVEY

Since last year, we've made some changes to our biometrics and neuroscience methods. We modified the label for "facial coding/facial expression analysis" from "facial coding and analysis." We've combined "galvanic skin response (GSR)" and "heart rate variability (HRV)" as "biometric measures (e.g., GSR, HRV)." These had been split out in 23A from the original "biometrics."

We've added "emotion & affect analytics (e.g., across video, audio, text, biometrics)." We also moved "sensory research or testing" here from "other methods."

Methods were not classified by type or "family" during the survey; we only do that for the report.

2026 BIO & NEURO SCIENCE METHODS

2026 Method	2025 Precedent	2025 Family
Biometric measures (e.g., GSR, HRV)	Galvanic skin response (GSR) + Heart rate variability (HRV) (merged)	Bio & Neuro Sciences
Emotion & affect analytics (e.g., across video, audio, text, biometrics)	NEW 2026	N/A
Eye tracking	Eye tracking	Bio & Neuro Sciences
Facial coding/facial expression analysis	Facial coding and analysis	Bio & Neuro Sciences
Neuroscience (measures of neural activity)	Neuroscience (measures of neural activity)	Bio & Neuro Sciences
Sensory research or testing	Sensory research or testing	Other Methods

Green indicates method changed from 25A.

Source: GRIT Report and NewtonX

ATTITUDES AND USAGE TRENDS | BRAND POV ^[DATA]

Brand-side analytics professionals use more biometric and neuroscience methods, on average, than researchers (1.9 to 1.2). The biggest gaps are biometric measures (39% analytics to 14%

research), sensory research or testing (37% to 19%), neuroscience (28% to 11%), and emotion and affect analytics (39% to 25%).

USE OF METHODS/APPROACHES: BRAND SEGMENT

	Research	Analytics	Research - analytics
Eye tracking	29%	27%	+2%
Emotion & affect analytics	25%	39%	-14%
Facial coding/facial expression analysis	19%	25%	-6%
Sensory research or testing	19%	37%	-18%
Biometric measures	14%	39%	-25%
Neuroscience	11%	28%	-17%
Average number used:	1.2	1.9	-0.7
n (range) =	108-120	89-103	

Green shading indicates top three most-used methodologies.

Takeaway: Brand-side analytics professionals use more biometric and neuroscience methods than researchers on average (1.9 vs. 1.2), with the largest gaps in biometric measures (39% vs. 14%), sensory research or testing (37% vs. 19%), and neuroscience (28% vs. 11%).

Source: GRIT Report and NewtonX



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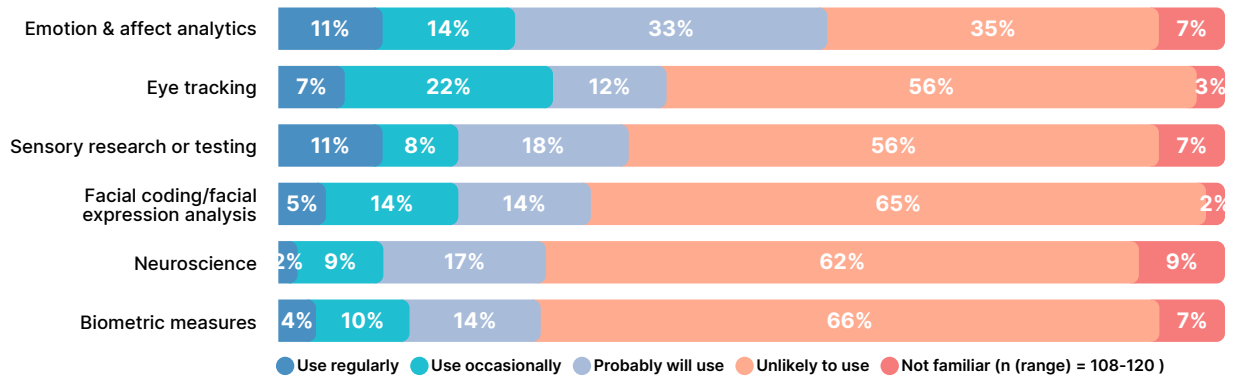
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Although 71% of probable users of eye tracking among brand-side researchers currently use it, the other methods are much less saturated. Neuroscience is 40% saturated and emotion and affect analytics is

43% saturated. In the next tier, biometric measures are 50% saturated; sensory research or testing, 52%; and facial coding/facial expression analysis, 58%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the biometric or neuroscience methods with the most potential are neuroscience (only 40% of probable users currently do) and emotion & affect analytics (43%).

Among brand-side researchers, eye tracking (29%) has been among the three most-used in each wave. Sensory research or testing and facial coding/analysis, tied at 19%, have been in the top three since 23A (and

before for facial coding). Emotion and affect analytics (25%) debuted in second place. In 20A and 21A, about one-third used neuroscience, but that has dwindled to 11% today.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Eye tracking	36%	33%	35%	30%	27%	28%	29%	+1%
Emotion & affect analytics	--	--	--	--	--	--	25%	--
Sensory research or testing	--	--	--	27%	28%	18%	19%	+1%
Facial coding/facial expression analysis	23%	19%	23%	26%	22%	15%	19%	+4%
Biometric measures	14%	27%	19%	10%	--	--	14%	--
Galvanic skin response (GSR)	--	--	--	7%	3%	2%	--	--
Heart rate variability (HRV)	--	--	--	7%	9%	1%	--	--
Neuroscience	31%	32%	28%	20%	15%	13%	11%	-2%
Average number used:	1.0	1.1	1.0	1.2	1.0	0.8	1.2	+0.4
n (range) =	298	207	182-188	214	114-130	123-132	108-120	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among brand-side researchers, eye tracking (29%) and sensory research or testing (19%) have been top three most-used methods each year, and facial coding/facial expression analysis (19%) has been top-three for five of six years.

Source: GRIT Report and NewtonX

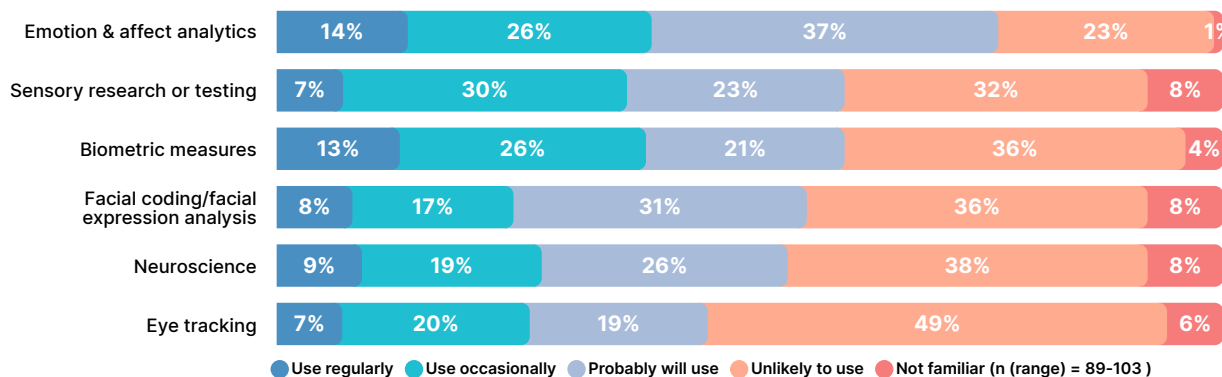
These methods are a little more saturated among brand-side analytics professionals. Facial coding/facial expression analysis (44%) is the only one with more

probable users than current ones. Emotion and affect analytics is 51% saturated; neuroscience, 52%; and eye tracking, 59%.





INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, the biometric or neuroscience method with the most near-term potential is facial coding/facial expression analysis (only 44% of probable users currently do).

Emotion and affect analysis debuted within brand-side analytics professionals tied with biometric measures (39% each) for the most-used position. Just behind them, sensory research and testing (37%) is third and has been in the top three each year since analytics

was added as a segment in 23A. Biometric measures is hard to track due to its GRIT history, but it looks like it took a big jump this year. Neuroscience is +10% higher than it was when it debuted in 23A (28%).

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Emotion & affect analytics	--	--	--	39%	--
Biometric measures	13%	--	--	39%	--
Heart rate variability (HRV)	12%	10%	12%	--	--
Galvanic skin response (GSR)	7%	10%	8%	--	--
Sensory research or testing	28%	44%	37%	37%	--
Neuroscience	18%	20%	20%	28%	+8%
Eye tracking	27%	30%	32%	27%	-5%
Facial coding/facial expression analysis	20%	23%	20%	25%	+5%
Average number used:	1.1	1.4	1.3	1.9	+0.6
n (range) =	182	122-132	106-114	89-103	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among brand-side analytics professionals, sensory research or testing (37%) is a perennial top three most-used method; biometric measures (39%) and emotion and affect analytics (39%) are also in the top three.

Source: GRIT Report and NewtonX



Emotion and affect analysis debuted within brand-side analytics professionals tied with biometric measures for most-used.





Among brand-side researchers, most users of sensory research or testing are regular users (56%). Researcher users of emotion and affect analytics are mostly occasional, but their 42% regular users is

the only other case across segments that exceeds one-third. These are not everyday methods, even for analytics professionals.

INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
Sensory research or testing	56%	19%
Emotion & affect analytics	42%	35%
Biometric measures	28%	33%
Facial coding/facial expression analysis	27%	30%
Eye tracking	25%	25%
Neuroscience	21%	32%
n (range) =	108-120	89-103
<i>Intensity = regular use/total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.</i>		
<i>Takeaway: Most brand-side researchers who use sensory research or testing use it regularly (56%).</i>		

Source: GRIT Report and NewtonX

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ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

Emotion and affect analytics are among every supplier segment's top three biometric or neuroscience methods and especially significant for service-led suppliers with 21 to 100 FTE (38%), those with 101 to 500 FTE (50%), and those with 500+ FTE (45%). Eye tracking is also in each segment's top three, especially present in those same three segments, reaching 35%, 43%, and 47%, respectively.

Sensory research or testing is in the top three for each service-led supplier segment except those with 500+ FTE (29%), ranging from 23% for those with ≤20 FTE to 37% for those with 21 to 100 FTE. Neuroscience is top three for tech-led suppliers (14%) and service-led suppliers with 500+ FTE (41%). Facial coding/facial expression analysis is in the top three most-used for service-led suppliers with 101 to 500 FTE (33%), tied with sensory research or testing.

Tech-led suppliers (0.9) and service-led suppliers with ≤20 FTE (0.8) use the fewest biometric and neuroscience methods, and service-led suppliers with 101 to 500 FTE (2.0) and those with 500+ FTE (2.3) use the most. In the last *Insights Practice Report*, we hypothesized that practically anyone who wants to understand humans could benefit from using biometrics and neuroscience, so why don't they?

We speculated that use could be suppressed by the cost and learning curve (or perceptions of them). Perhaps the suppliers who can achieve economies of scale across many clients are adopting these methods and will eventually spread them to more users. Perhaps they are trying to mine the vein of brand-side analytics professionals who are finding ways to apply these techniques. Have larger service-led companies taken over the development of these methods from tech-led suppliers?

USE OF METHODS/APPROACHES; SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Eye tracking	13%	10%	35%	43%	47%
Emotion & affect analytics	32%	20%	38%	50%	45%
Neuroscience	14%	7%	19%	23%	41%
Facial coding/facial expression analysis	13%	9%	26%	33%	39%
Sensory research or testing	11%	23%	37%	33%	29%
Biometric measures	5%	6%	13%	19%	27%
Average number used:	0.9	0.8	1.7	2.0	2.3
n = (range)	25-26	101-106	44-53	33-38	33-46

Green shading indicates top three most-used methodologies.

Takeaway: In each supplier segment, eye tracking and emotion and affect analytics are among the top three most-used biometrics or neuroscience methods.

Source: GRIT Report

The most intense supplier-side users of biometrics and neuroscience methods are mid-sized service-led. Three methods have more regular users than occasional ones among those with 21 to 100 FTE: biometric measures (65%), sensory research or testing (56%), and neuroscience (51%). Service-led suppliers with 101 to 500 FTE have equal or nearly equal numbers of regular and occasional users of facial coding/facial expression analysis (50%) and eye tracking (48%).



Are larger service-led companies taking over the development of biometric and neuroscience methods from tech-led suppliers?



Possibly, automation of these methods has not found a consistent audience on the brand-side, but suppliers

who can invest in it are leveraging it as a pillar of their services.

INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Facial coding/facial expression analysis	22%	19%	44%	50%	42%
Neuroscience	19%	0%	51%	22%	37%
Emotion & affect analytics	16%	19%	39%	33%	33%
Sensory research or testing	26%	36%	56%	26%	32%
Biometric measures	0%	30%	65%	10%	31%
Eye tracking	0%	25%	33%	48%	30%
n = (range)	25-26	101-106	44-53	33-38	33-46

Intensity = regular use/total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Among service-led suppliers with 21-100 FTE, most users of biometric measures (65%), sensory research or testing (56%), and neuroscience (51%) use them regularly.

Source: GRIT Report



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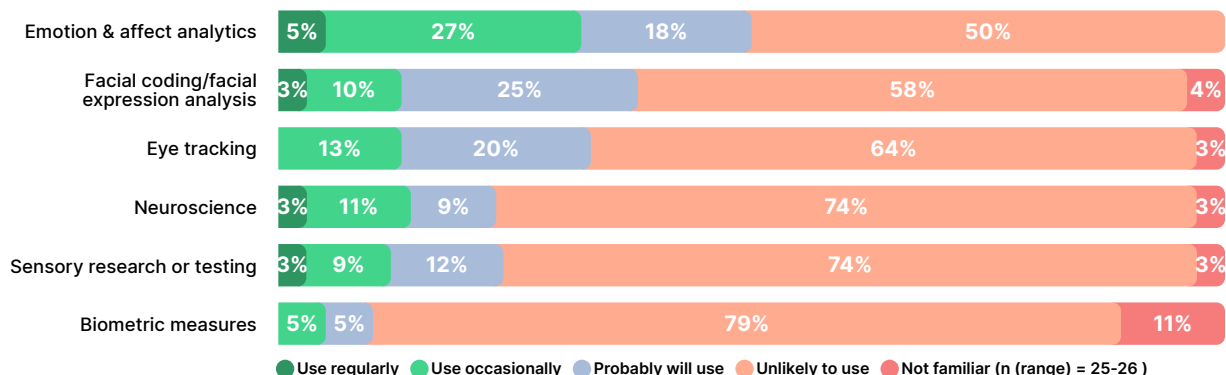


ATTITUDES AND USAGE TRENDS | TECH-LED POV ^[DATA]

Among tech-led suppliers, four biometric or neuroscience methods have near-term opportunity for adoption because there are at least as many probable users as current ones. Facial coding/facial

expression analysis is 34% saturated; eye tracking, 40%; biometric measures, 48%; and sensory research or testing, 50%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Source: GRIT Report

Takeaway: Among tech-led suppliers, the biometrics or neuroscience methods with the most potential are facial coding/facial expression analysis (only 34% who will probably use it currently do), eye tracking (40%), and biometric measures (48%).

Eye tracking and facial coding are tied for third most-used among tech-led supplier (13%) have been perennially in the top three every wave. Neuroscience (14%) replaced heart rate variability (HRV) which was absorbed back into biometric measures (5%) in the top three. Emotion and affect analytics debuted in the top spot (32%).

Eye tracking fell -12% since last year after peaking at 38% in 24A. Facial coding/facial expression analysis is half what it was in 24A. Sensory research or testing is less than half what it was in 24A. Neuroscience is -10% below what it was in 20A. We can't prove it, but it looks like when tech-led biometrics and neuroscience peak, they may get absorbed into service-led segments.

USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Emotion & affect analytics	--	--	--	--	--	--	32%	--
Neuroscience	24%	20%	19%	9%	24%	9%	14%	+5%
Eye tracking	15%	20%	22%	31%	38%	25%	13%	-12%
Facial coding/facial expression analysis	12%	24%	21%	22%	26%	16%	13%	-3%
Sensory research or testing	--	--	--	14%	25%	13%	11%	-2%
Biometric measures	5%	11%	13%	13%	--	--	5%	--
Heart rate variability (HRV)	--	--	--	10%	19%	16%	--	--
Galvanic skin response (GSR)	--	--	--	10%	9%	8%	--	--
Average number used:	0.6	0.7	0.8	1.0	1.4	0.9	0.9	--
n (range) =	97	46-50	122-125	70	32-47	27-37	25-26	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among tech-led suppliers, eye tracking (13%) and facial coding/facial expression analysis (13%) are perennially among the three most-used methods; use of eye tracking fell from 25% to 13%.

Source: GRIT Report



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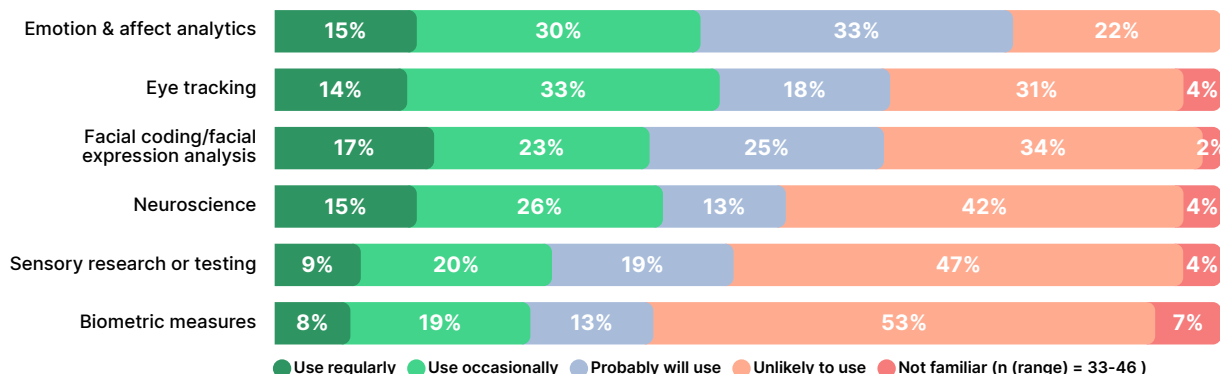
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 500+ FTE POV ^[DATA]

For service-led suppliers with 500+ FTE, each biometric or neuroscience method is at least 60%

saturated but one. Emotion and affect analytics is “only” 58% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, the biometric or neuroscience method with the most potential is emotion and affect analytics (only 58% who will probably use it currently do); each other method is at least 61% saturated.

Among service-led suppliers with 500+ FTE, eye tracking (47%) has been a top-three most-used biometric or neuroscience method every year. Emotion and affect analytics (45%) debuted in second place. Neuroscience (41%) returned to the top three after a two-year hiatus, displacing facial coding/facial expression analysis (39%).

Neuroscience gained +17% users since last year. Sensory research or testing (29%) fell -13%. Possibly, the largest suppliers are building scalable offerings around biometrics and neuroscience, but turning away from sensory research or testing because it applies to a narrower set of needs.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Eye tracking	56%	36%	54%	48%	52%	44%	47%	+3%
Emotion & affect analytics	--	--	--	--	--	--	45%	--
Neuroscience	50%	36%	49%	39%	30%	24%	41%	+17%
Facial coding/facial expression analysis	44%	31%	41%	46%	43%	45%	39%	-6%
Sensory research or testing	--	--	--	32%	35%	42%	29%	-13%
Biometric measures	24%	32%	40%	19%	--	--	27%	--
Heart rate variability (HRV)	--	--	--	15%	18%	14%	--	--
Galvanic skin response (GSR)	--	--	--	13%	15%	9%	--	--
Average number used:	1.2	1.0	1.3	1.9	1.4	1.3	1.8	+0.5
n (range) =	106	85-88	117-129	97	60-73	59-67	33-46	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 500+ FTE, eye tracking (47%) is perennially the most-used method, and neuroscience (41%) has been among the top three in four of six years; use of neuroscience increased from 24% to 41% and use of sensory research or testing fell from 42% to 29%.

Source: GRIT Report



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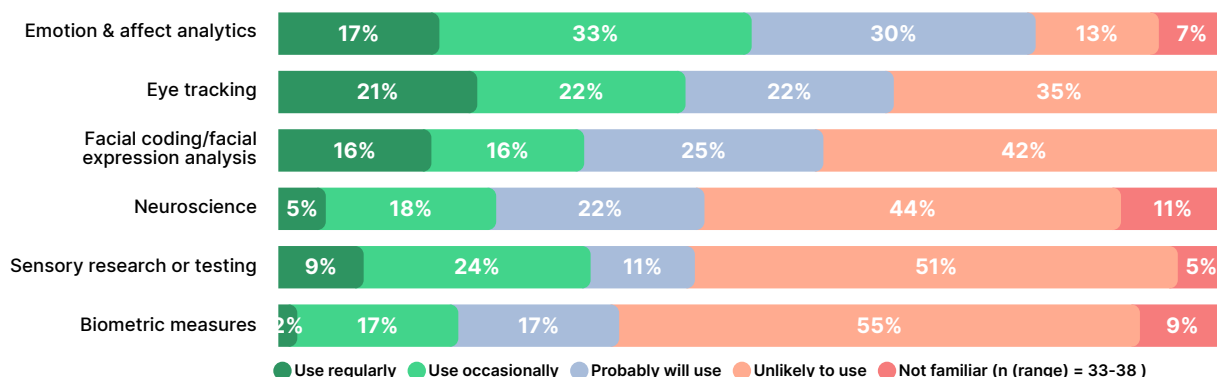
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 101-500 FTE POV ^[DATA]

Among service-led suppliers with 101 to 500 FTE, all biometrics and neuroscience methods are more than 60% saturated except three, but each of those is at

least 50% saturated. These are neuroscience (51%), biometric measures (53%), and facial coding/facial expression analysis (56%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Takeaway: Among service-led suppliers with 101-500 FTE, the biometrics or neuroscience method with the most potential is neuroscience (only 51% who will probably use it currently do).

As with service-led suppliers with 500+ FTE, emotion and affect analytics (50%) debuted as the most-used method among those with 101 to 500 FTE, and eye tracking (43%) is a perennial top-three method. Neuroscience (23%) returned to the top three after a three-year hiatus. Emotion and affect analytics and neuroscience pushed facial coding/facial expression

analysis and sensory research or testing out of the top three for the first time since 21A.

Neuroscience use increased +10% since last year; eye tracking is -14% lower than in its first appearance in 20A.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Emotion & affect analytics	--	--	--	--	--	--	50%	--
Eye tracking	57%	49%	46%	48%	31%	39%	43%	+4%
Neuroscience	45%	35%	30%	14%	20%	13%	23%	+10%
Facial coding/facial expression analysis	35%	20%	33%	30%	32%	29%	33%	+4%
Sensory research or testing	--	--	--	33%	29%	27%	33%	+6%
Biometric measures	20%	25%	27%	7%	--	--	19%	--
Heart rate variability (HRV)	--	--	--	5%	9%	8%	--	--
Galvanic skin response (GSR)	--	--	--	4%	9%	3%	--	--
Average number used:	1.6	1.3	1.4	1.3	1.3	1.2	2.0	+0.8
n (range) =	108	81-89	127-134	102	93-104	48-62	33-38	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 101-500 FTE, eye tracking (43%) is perennially among the top three most-used biometrics or neuroscience methods; use of neuroscience increased from 13% to 23%.

Source: GRIT Report



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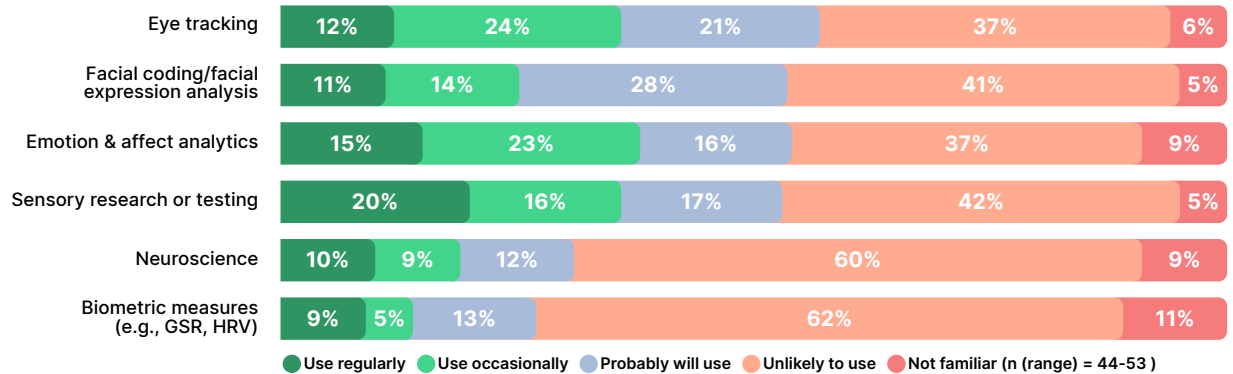
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 21-100 FTE POV ^[DATA]

Every biometrics and neuroscience method is more than 60% saturated except two. Facial coding/facial

expression analysis is 48% saturated, and biometric measures is 51%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, the biometrics or neuroscience method with the most potential is facial coding/facial expression analysis (only 48% who will probably use it currently do).

As in other segments, emotion and affect analytics (38%) debuted as the most-used biometric or neuroscience method for service-led suppliers with 21 to 100 FTE, displacing perennial top-three method, facial coding/facial expression analysis (26%). Sensory research or testing (37%) is a close second and perennially in the top three since it was introduced in 23A. Another perennial, eye tracking, is third at 35%.

Nothing changed by double digits since last year, but sensory research or testing is +14% higher than in 24A, and neuroscience is -10% lower than in 20A.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Emotion & affect analytics	--	--	--	--	--	--	38%	--
Sensory research or testing	--	--	--	25%	23%	33%	37%	+4%
Eye tracking	36%	32%	36%	37%	34%	26%	35%	+9%
Facial coding/facial expression analysis	20%	24%	20%	27%	29%	20%	26%	+6%
Neuroscience	29%	27%	26%	17%	13%	14%	19%	+5%
Biometric measures	14%	25%	19%	11%	--	--	13%	--
Heart rate variability (HRV)	--	--	--	8%	11%	5%	--	--
Galvanic skin response (GSR)	--	--	--	8%	10%	6%	--	--
Average number used:	1.0	1.1	1.0	1.2	1.2	1.0	1.7	+0.7
n (range) =	169	122-130	142-145	184	86-104	81-95	44-53	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with 21-100 FTE, eye tracking (35%) is perennially among the top three most-used biometrics or neuroscience methods.

Source: GRIT Report



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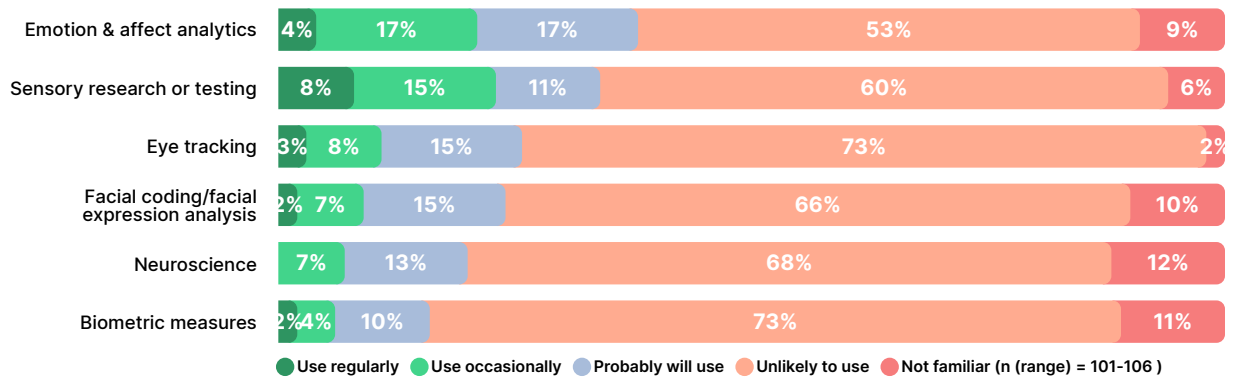
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: ≤20 FTE POV ^[DATA]

Among service-led suppliers with ≤20 FTE, only sensory research or testing (68%) is more than 60% saturated. The most opportunity for near-term

adoption are neuroscience (34% saturated), biometric measures (36%), facial coding/facial expression analysis (38%), and eye tracking (41%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, the biometrics or neuroscience methods with the most potential are neuroscience (34% saturated), biometric measures (36%), facial coding/facial expression analysis (38%), and eye tracking (41%).

Emotion and affect analytics (20%) debuted in the second most-used spot among service-led suppliers with ≤20 FTE, and sensory research and testing (23%) remained in the top three for the fourth straight year. Eye tracking is third-most used, but only by 10% and

nearly a third of what it was in 21A (29%). Since 21A, neuroscience (7%) is less than one-third of what it was in 21A. Biometrics and neuroscience has clearly become a larger supplier's game, regardless of interest from smaller suppliers.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Sensory research or testing	--	--	--	26%	21%	28%	23%	-5%
Emotion & affect analytics	--	--	--	--	--	--	20%	--
Eye tracking	24%	29%	25%	29%	21%	12%	10%	-2%
Facial coding/facial expression analysis	6%	17%	15%	14%	12%	9%	9%	--
Neuroscience	16%	24%	22%	16%	12%	6%	7%	+1%
Biometric measures	5%	16%	14%	7%	--	--	6%	--
Heart rate variability (HRV)	--	--	--	5%	1%	1%	--	--
Galvanic skin response (GSR)	--	--	--	7%	4%	1%	--	--
Average number used:	0.5	0.9	0.8	1.0	0.5	0.3	0.5	+0.2
n (range) =	310	194-221	234-239	271	118-133	134-160	101-106	

Green shading indicates top three methodologies for that GRIT wave.

Net percentages cannot be calculated since 24A due to randomization of questions.

Takeaway: Among service-led suppliers with ≤20 FTE, Sensory research or testing (23%) has been among the top three most-used biometrics or neuroscience methods each year.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

Biometrics and neuroscience are undergoing a structural consolidation. It's not a decline and not a mainstream breakthrough, but a sorting into the hands of those who can make it work at scale.

As we've mentioned in previous *GRIT Reports*, there seems to be a gap between the theoretical applicability of these methods and practical accessibility. In principle, these methods apply to almost any human-facing research question. The segments expanding use are precisely those with the infrastructure to close that gap: service-led suppliers with 101 to 500 FTE and those with 500+ FTE are growing across nearly every method, intensity among mid-size supplier users is high, and neuroscience is recovering specifically in those segments as it continues to erode among smaller suppliers and tech-led ones.

This isn't random: it suggests that what's limiting adoption isn't awareness or interest but the operational requirements of deploying these methods reliably and cost-effectively. Will larger suppliers scaling these methods eventually make them more accessible to the broader market, or will the economics favor keeping them as differentiated offerings? The fact that smaller suppliers are exiting while larger ones are investing suggests the gap may be widening before it narrows, if it narrows at all.

The debut of emotion and affect analytics may represent the first biometrics-adjacent method that's beginning to cross the accessibility threshold. AI-mediated analysis of video, audio, and text requires far less specialized hardware or physical infrastructure than EEG or eye tracking labs. If that's what's driving its strong debut, it could be an early signal that the cost and complexity barrier is starting to lower for at least some methods in this family.

The pattern for sensory research is distinct from the other methods. It indexes toward mid-size service-led suppliers rather than toward the largest. Among service-led suppliers with 500+ FTE, it fell -13% to 29%, perhaps because these methods — product testing, taste, scent, tactile evaluation — require physical execution at scale that doesn't benefit as clearly from the automated or AI-mediated infrastructure that larger suppliers are building around biometrics and neuroscience.

Among brand researchers, the intensity is notably high at 56% regular users, the highest in the brand segments. This suggests that the relatively small number of researchers who use it are deeply committed to it, likely because their work, such as CPG, food, and beverage, depends on it.

Emotion and affect analytics may be the most important accessibility breakthrough in this category because it lowers some of the historical infrastructure barriers associated with biometrics and neuroscience. Even so, the broader capability still favors organizations with scale, methodological discipline, and the ability to translate complex signals into usable business meaning.

– LM, ed.



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DATA & ANALYTICS

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across nine methods related to data and analytics.

HOW ARE DATA AND ANALYTICS GROWING ACROSS INSIGHTS? [ORIENTATION]

Back in 2020 or possibly earlier, GRIT characterized text analytics as a “gateway drug” for data and analytics, made accessible via an abundance of text data and emerging tools to analyze it. The pandemic increased the need to make better use of all data,

and technology has continually spread the ability to do so to more insights professionals, even before AI took over.

Today, text analytics is used by more than 60% of insights professionals in each segment and is among the three most-used in each segment except brand-side analytics (77%). Data integration is among the top three for each segment except tech-led suppliers (54%). Social media and online content research, formerly “social media analytics” and “monitoring blogs,” is among the top three in each segment except service-led suppliers with ≤20 FTE (29%) and those with 101 to 500 FTE (55%).

Big Data analytics is among the three most-used for brand-side analytics (86%; tied with social media) and service-led suppliers with 101 to 500 FTE (63%). Causal analysis is among the top three for tech-led suppliers (56%) and service-led suppliers with ≤20 FTE (35%). Finally, attribution analytics/single source data (87%) is uniquely among the top three for brand-side analytics.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor’s note:** or **Editor’s POV:** and signed “**L.M., ed.**” are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Social media & online content research is among the top three in each segment except service-led suppliers with ≤20 FTE and those with 101 to 500 FTE.

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THREE MOST-USED DATA & ANALYTICS METHODS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Text analytics	68%	77%	82%	61%	76%	70%	91%
Social media and online content research	63%	86%	69%	29%	55%	55%	80%
Data integration	59%	88%	54%	44%	52%	80%	72%
Big Data analytics	46%	86%	48%	31%	39%	63%	70%
Attribution analytics/single source data	35%	87%	43%	21%	29%	52%	53%
Causal analysis	34%	74%	56%	35%	44%	63%	64%
n (range) =	93-117	82-109	16-27	87-103	41-53	27-40	27-38

Green shading indicates top three most-used methodologies.

Takeaway: Text analytics is a top three most-used data and analytics method in each segment except brand-side analytics (77%), and data integration is top-three in all but tech-led suppliers (54%); social media and online content research is top-three in all except service-led suppliers with ≤20 FTE (29%) and with 101-500 FTE (55%).

Source: GRIT Report and NewtonX

Data and analytics methods continue to grow. Since last year, use of synthetic data has increased by double digits in four segments: brand-side researchers (+18%), brand-side analytics (+13%), service-led suppliers with ≤20 FTE (+14%), and those with 101 to 500 FTE (+18%). Social media and online content

research increased +36% among tech-led suppliers and service-led suppliers with 500+ FTE. Causal analysis increased by at least +20% among tech-led suppliers (+20%), service-led suppliers with 500+ FTE (+20%), and those with 101 to 500 FTE (+26%).

CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Synthetic data	+18%	+13%	+1%	+14%	+7%	+18%	+1%
Text analytics	+8%	-3%	-1%	-2%	+4%	-2%	-1%
Data integration	+6%	-5%	-7%	-5%	-9%	+15%	-7%
Social media and online content research	+4%	+5%	+36%	-1%	+5%	+8%	+36%
Meta-analysis	-4%	-5%	+13%	+2%	+1%	+23%	+13%
Causal analysis	-5%	-7%	+20%	-7%	-10%	+26%	+20%
Big Data analytics	-7%	-3%	-8%	-3%	-1%	+29%	-8%
Attribution analytics/single source data	-9%	+9%	+8%	-16%	-13%	+6%	+8%
n (range) =	93-117	82-109	16-27	87-103	41-53	27-40	27-38

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: Synthetic data increased by at least +10% in four segments.

Source: GRIT Report and NewtonX



Since last year, use of synthetic data has increased by double digits in four segments.

Use of data and analytics methods continues to spread, and growth is not limited to newly emerged methods like synthetic data. This growth springs from the junction of data abundance, automation, and need.



CHANGES FROM 2025 GRIT SURVEY

We've made a couple of changes to our set of data and analytics methods since last year. We took "social media analytics" and "monitoring blogs" (from observational research methods) and merged them as "social media and online content research."

We elaborated on "synthetic sample:" it's now "synthetic data (e.g., synthetic sample, AI personas/digital twins)." We also added "video analytics/computer vision for research."

2026 DATA & ANALYTICS METHODS

2026 Method	2025 Precedent	2025 Family
Attribution analytics/single source data	Attribution analytics/single source data	Data & Analytics
Big Data analytics	Big Data analytics	Data & Analytics
Causal analysis	Causal analysis	Data & Analytics
Data integration	Data integration	Data & Analytics
Meta-analysis	Meta-analysis	Data & Analytics
Social media and online content research	Social media analytics + Monitoring blogs (merged)	Data & Analytics, Observational
Synthetic data (e.g., synthetic sample, AI personas/digital twins)	Synthetic sample	Data & Analytics
Text analytics	Text analytics	Data & Analytics
Video analytics/computer vision for research	NEW 2026	N/A

Green indicates method changed from 25A.

Source: GRIT Report

Methods were not classified by type or "family" during the survey; we only do that for the report.

ATTITUDES AND USAGE TRENDS | BRAND POV ^[DATA]

In both brand-side segments, most use text analytics (68% research and 77% analytics), social media and online content research (63% and 86%), and data integration (59% and 88%). Nearly half in the research segment use Big Data analytics (46%), but all nine methods are used by most in the analytics segment.

The analytics segment averages 6.7 methods used compared to 3.8 among researchers. Attribution analytics/single source data is used by 87% and Big Data analytics are used by 86%. The largest segment gap is +52% for attribution analytics/single source data, followed by video analytics/computer vision for research (+41%), Big Data analytics (+40%), and causal analysis (+40%).

After that, the gap for synthetic data is +31%; data integration, +29%; meta-analysis, +25%; and social media and online content research (+23%).



In both brand-side segments, most use text analytics, social media & online content research, and data integration.



USE OF METHODS/APPROACHES: BRAND SEGMENT

	Research	Analytics	Research - analytics
Text analytics	68%	77%	-9%
Social media and online content research	63%	86%	-23%
Data integration	59%	88%	-29%
Big Data analytics	46%	86%	-40%
Meta-analysis	38%	63%	-25%
Attribution analytics/single source data	35%	87%	-52%
Causal analysis	34%	74%	-40%
Synthetic data	26%	57%	-31%
Video analytics/computer vision for research	15%	56%	-41%
Average number used:	3.8	6.7	-2.9
n (range) =	93-117	82-109	

Green shading indicates top three most-used methodologies.

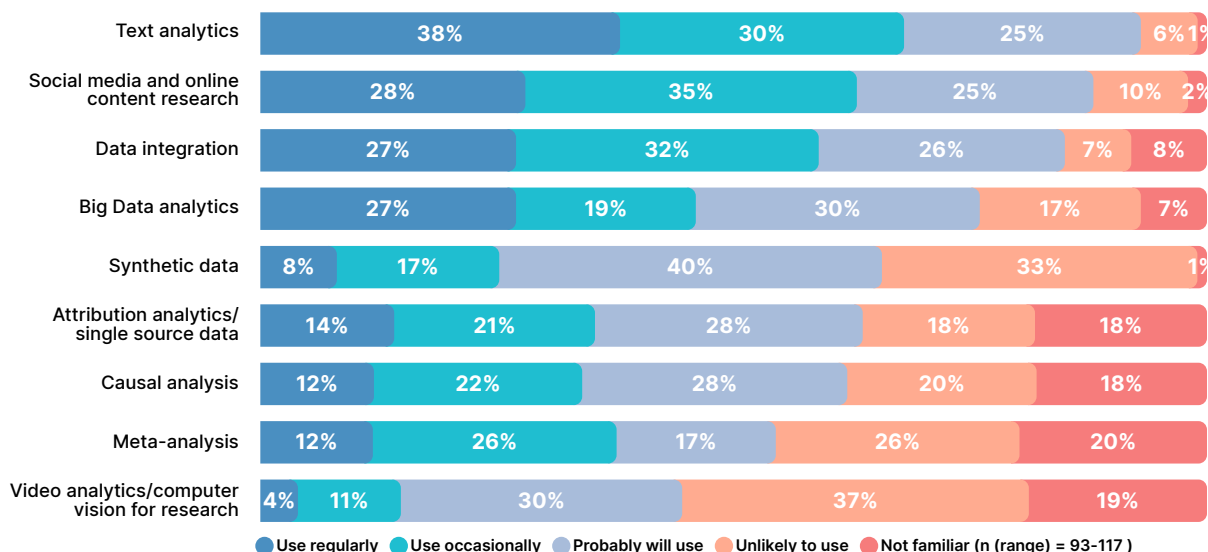
Takeaway: Brand-side analytics professionals use more data and analytics methods than researchers on average (6.7 vs. 3.8), with the largest gaps in attribution analytics/single source data (87% vs. 35%), Big Data analytics (86% vs. 46%), video analytics/computer vision for research (56% vs. 15%), and causal analysis (74% to 34%).

Source: GRIT Report and NewtonX

Among brand-side researchers, the greatest near-term opportunities for adoption are video analytics/computer vision for research (only 33% of probable users currently use it) and synthetic data (39%).

Two others are less than 60% saturated: attribution analytics/single source data and causal analysis (55% each).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the data and analytics methods with the most potential are video analytics/computer vision for research (only 33% of probable users currently do) and synthetic data (39%).

Text analytics (68%) has been a top-three most-used data and analytics method among brand-side researchers in each wave. Social media and online content research (63%) have also been in every wave except 24A. Data integration (59%) has been in the top three since 22A.

Since last year, use of synthetic data increased +18% to 26%. Since 24A, attribution analytics/single source data has fallen -23% to 35% and causal analysis has dropped -10% to 34%.



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USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Text analytics	53%	47%	49%	63%	60%	60%	68%	+8%
Social media and online content research	68%	58%	53%	66%	57%	59%	63%	+4%
Data integration	--	38%	47%	65%	63%	53%	59%	+6%
Big Data analytics	58%	43%	36%	46%	49%	53%	46%	-7%
Meta-analysis	--	--	--	31%	40%	42%	38%	-4%
Attribution analytics/single source data	23%	23%	20%	39%	58%	44%	35%	-9%
Causal analysis	33%	37%	30%	53%	44%	38%	34%	-4%
Synthetic data	--	--	--	--	8%	8%	26%	+18%
Video analytics/computer vision for research	--	--	--	--	--	--	15%	--
Average number used:	2.3	2.5	2.4	3.6	3.8	3.6	3.8	+0.2
n (range) =	298	207	182	214	190	107-137	93-117	

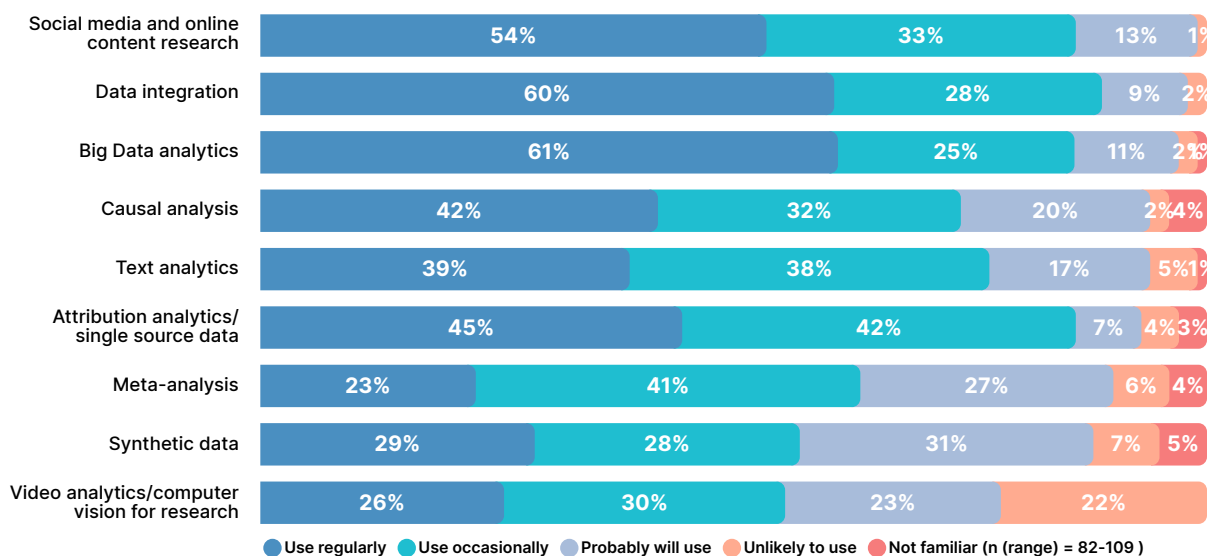
Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among brand-side researchers, text analytics (68%) is a perennial top three most-used data and analytics method, and social media and online content research (63%) and data integration (59%) have been in each year but one; use of synthetic data has increased from 8% to 26%.

Source: GRIT Report and NewtonX

The brand-side analytics segment is much more engaged with these methods; each of them is more than 60% saturated. The least saturated method is synthetic data (64%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, the data and analytics method with the most potential is synthetic data (only 64% of probable users currently do); each other method is at least 70% saturated.





Data integration (88%) and Big Data analytics (86%) have been in the brand-side analytics professionals' three most-used since the segment was introduced in 23A. Social media and online content research (86%) is tied for third and was third last year. Attribution analytics/single source data (87%) returned to the top three after a two-year absence.

Use of synthetic data grew +14%, building on last year's +8% increase; it's up to 57% from 35% in two years. Big Data is up +11% since 23A, social media and online content research is up +20% since then, and attribution analytics/single source data is up +19% in two years. Overall, the average number of data and analytics methods used is up from 5.0 in 23A to 6.7, although two methods have been added to the set in that time.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Data integration	88%	87%	94%	88%	-6%
Attribution analytics/single source data	71%	68%	78%	87%	+9%
Social media and online content research	66%	67%	82%	86%	+4%
Big Data analytics	75%	80%	89%	86%	-3%
Text analytics	68%	74%	80%	77%	-3%
Causal analysis	68%	58%	81%	74%	-7%
Meta-analysis	61%	63%	68%	63%	-5%
Synthetic data	--	35%	43%	57%	+14%
Video analytics/computer vision for research	--	--	--	56%	--
Average number used:	5.0	5.3	6.1	6.7	+0.6
n (range) =	182	194	103-130	82-109	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among brand-side analytics professionals, data integration (88%) and Big Data analytics (86%) are perennial top three most-used methods; use of synthetic data increased from 43% to 57%.

Source: GRIT Report and NewtonX

Data and analytics methods are stratifying into baseline infrastructure and frontier capability. Text analytics and data integration are becoming table stakes, while synthetic data, causal analysis, Big Data analytics, video analytics, and meta-analysis increasingly define the next level of competitive maturity. Brand-side analytics continues to show where the destination may be for the broader insights function.

– LM, ed.

For seven of the nine methods, more than half of brand-side analytics users use them regularly. The exceptions are meta-analysis (36%) and video analytics/computer vision for research (46%). Among researchers, most users of Big Data analytics (58%) and text analytics (55%) use them regularly.



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INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
Big Data analytics	58%	71%
Text analytics	55%	51%
Data integration	45%	68%
Social media and online content research	44%	62%
Attribution analytics/single source data	40%	52%
Causal analysis	34%	57%
Synthetic data	32%	50%
Meta-analysis	32%	36%
Video analytics/computer vision for research	24%	46%
n (range) =	93-117	82-109

Intensity = regular use/total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: Most brand-side insights professionals who use Big Data analytics use it regularly (58% of researchers and 71% of analytics), and the same is true for text analytics (55% and 51%, respectively); for analytics professionals, at least half of their use of five other methods is regular use.

Source: GRIT Report and NewtonX

ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

Most in each supplier segment use text analytics, and it's among the three most-used for each. Data integration is among the top three for each segment except tech-led suppliers (54%), and social media and online content research is in the top three for all but service-led suppliers with ≤20 FTE (29%) and those with 101 to 500 FTE (55%). Causal analysis is in the top three for tech-led suppliers (56%) and service-led suppliers with ≤20 FTE (35%).

Use of data and analytics methods increases with service-led supplier employee size, from 2.8 for those with ≤20 FTE to 5.7 for those with 500+ FTE. Tech-led suppliers are in the middle (4.5).



Most in each supplier segment use text analytics, and it's among the three most-used for each.



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USE OF METHODS/APPROACHES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Text analytics	82%	61%	76%	70%	91%
Social media and online content research	69%	29%	55%	55%	80%
Data integration	54%	44%	52%	80%	72%
Big Data analytics	48%	31%	39%	63%	70%
Causal analysis	56%	35%	44%	63%	64%
Meta-analysis	49%	32%	34%	62%	54%
Attribution analytics/single source data	43%	21%	29%	52%	53%
Synthetic data	22%	16%	16%	34%	44%
Video analytics/computer vision for research	24%	12%	28%	28%	42%
Average number used:	4.5	2.8	3.7	5.1	5.7
n (range) =	16-27	87-103	41-53	27-40	27-38

Green shading indicates top three most-used methodologies.

Takeaway: In each supplier segment, text analytics is the most-used data and analytics method; Data integration is in the top three in each segment except tech-led suppliers.

Source: GRIT Report

In each supplier segment, at least half of users of text analytics use it regularly, from 50% of service-led suppliers with ≤20 FTE to 68% of those with 101 to 500 FTE. For three segments, most users of meta-analysis use it regularly: tech-led (67%), service-led suppliers with 101 to 500 FTE (56%), and those

with 500+ FTE (53%). In fact, among tech-led and service-led suppliers with 500+ FTE, five methods have more regular users than occasional ones, and four methods have more regular than occasional users among those with 101 to 500 FTE.

INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Text analytics	62%	50%	59%	68%	67%
Big Data analytics	50%	29%	50%	28%	63%
Data integration	42%	42%	48%	37%	56%
Causal analysis	73%	40%	38%	47%	53%
Meta-analysis	67%	35%	47%	56%	53%
Synthetic data	44%	18%	30%	14%	49%
Social media and online content research	27%	25%	30%	54%	46%
Video analytics/computer vision for research	62%	47%	42%	54%	42%
Attribution analytics/single source data	67%	23%	50%	43%	33%
n (range) =	16-27	87-103	41-53	27-40	27-38

Intensity = regular use/total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: At least half of the users of text analytics in each segment use it regularly.

Source: GRIT Report



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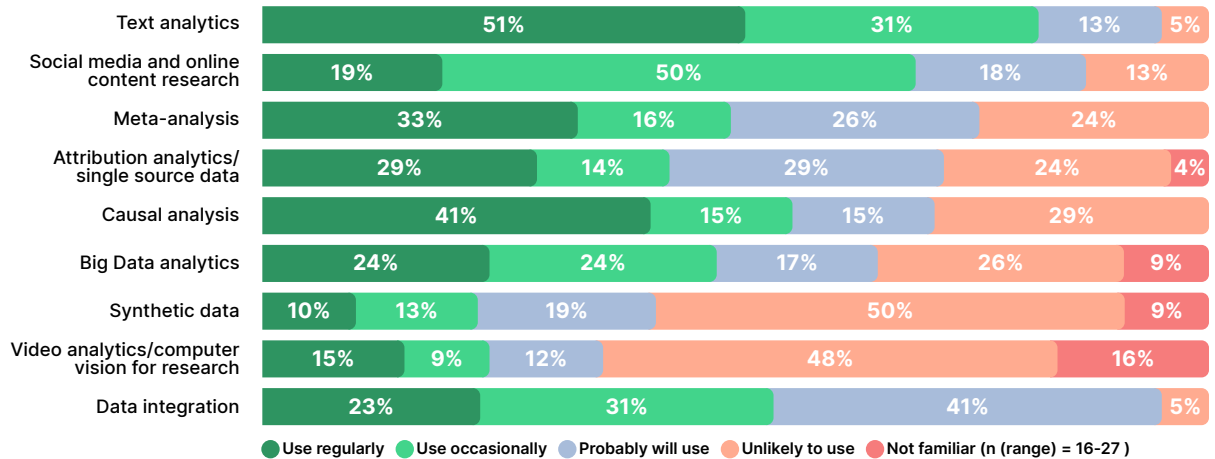


ATTITUDES AND USAGE TRENDS | TECH-LED POV [DATA]

Among tech-led suppliers, each data and analytics method has more current users than probable ones.

The least saturated methods are synthetic data (54%) and data integration (57%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Source: GRIT Report

Takeaway: Among tech-led suppliers, the data and analytics methods with the most potential are synthetic data (only 54% who will probably use it currently do), and data integration (57%).

Text analytics (82%) has been among the top three most-used methods for tech-led suppliers in every GRIT wave. Social media and online content research (69%), a merged concept replacing “social media analytics” and “monitoring blogs,” is back in the top three for the first time since 20A. Causal analysis (56%) makes its first appearance in the top three, nudging out data integration (54%).

Social media and online content research, which was modified from last year, increased +36%. Use of causal analysis (+20%) and meta-analysis (+12%, to 49%) also grew. Overall, text analytics has grown +29% since 20A, causal analysis has grown +33% since then, and attribution analytics/single source data (43%) is +20% higher.

USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Text analytics	53%	76%	62%	78%	68%	83%	82%	-1%
Social media and online content research	68%	40%	39%	46%	41%	33%	69%	+36%
Causal analysis	23%	26%	32%	41%	33%	36%	56%	+20%
Data integration	--	60%	59%	80%	72%	61%	54%	-7%
Meta-analysis	--	--	--	35%	46%	37%	49%	+12%
Big Data analytics	39%	48%	43%	40%	66%	56%	48%	-8%
Attribution analytics/single source data	23%	34%	30%	46%	44%	35%	43%	+8%
Video analytics/computer vision for research	--	--	--	--	--	--	24%	--
Synthetic data	--	--	--	--	16%	22%	22%	--
Average number used:	2.1	2.8	2.6	3.7	3.9	3.6	4.5	+0.9
n (range) =	97	50	122-125	70	35-40	30-37	16-27	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among tech-led suppliers, text analytics (82%) is perennially among the most-used methods; use of social media and online content research rose from 33% to 69%; causal analysis, 36% to 56%; and meta-analysis, 37% to 49%.

Source: GRIT Report



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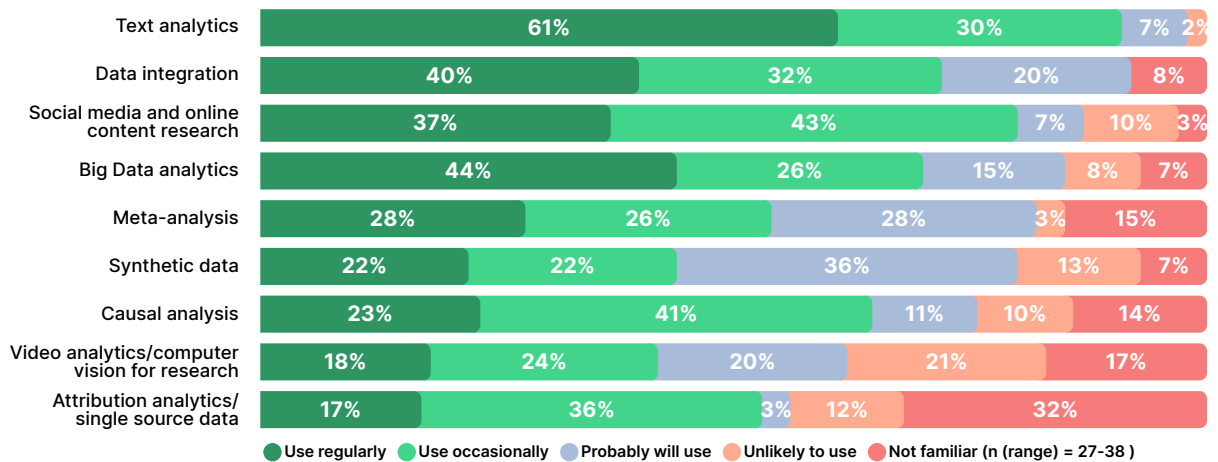
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 500+ FTE POV ^[DATA]

Similar to tech-led suppliers, each data and analytics method has more current users than probable ones among service-led suppliers with 500+ FTE. Synthetic

data (55%) is the only method for which saturation is less than 66%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, the data and analytics method with the most potential is synthetic data (only 55% who will probably use it currently do); each other method is at least 66% saturated.

Data integration (72%) has been among the three most-used data and analytics methods among service-led suppliers with 500+ FTE since it was introduced in 21A. Text analytics (91%) and social media and online content research (80%) have each been among the top three in all but one wave each.

Synthetic data (44%) increased +18% since last year; causal analysis (64%), +11%; and Big Data analytics (70%) and social media and online content research, +10% each. Use of attribution analytics/single source data fell -12%, to 53%; however, it's still +21% higher than in 20A.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Text analytics	75%	66%	62%	77%	71%	91%	91%	--
Social media and online content research	72%	53%	56%	68%	71%	70%	80%	+10%
Data integration	--	62%	69%	71%	76%	77%	72%	-5%
Big Data analytics	68%	55%	54%	64%	72%	60%	70%	+10%
Causal analysis	45%	41%	45%	57%	45%	53%	64%	+11%
Meta-analysis	--	--	--	56%	49%	56%	54%	-2%
Attribution analytics/single source data	32%	49%	45%	58%	47%	65%	53%	-12%
Synthetic data	--	--	--	--	21%	26%	44%	+18%
Video analytics/computer vision for research	--	--	--	--	--	--	42%	--
Average number used:	2.9	3.3	3.3	4.5	4.5	5.0	5.7	+0.7
n (range) =	106	85	117-129	97	63-79	58-69	27-38	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 500+ FTE, data integration (72%) is perennially among the three most-used methods, text analytics (91%) and social media and online content research (80%) have been in all but one year; use of synthetic data increased from 26% to 44%; causal analysis, 53% to 64%; Big Data analytics, 60% to 70%; and social media and online content, 70% to 80%. Attribution analytics/single source data use fell from 65% to 53%.

Source: GRIT Report



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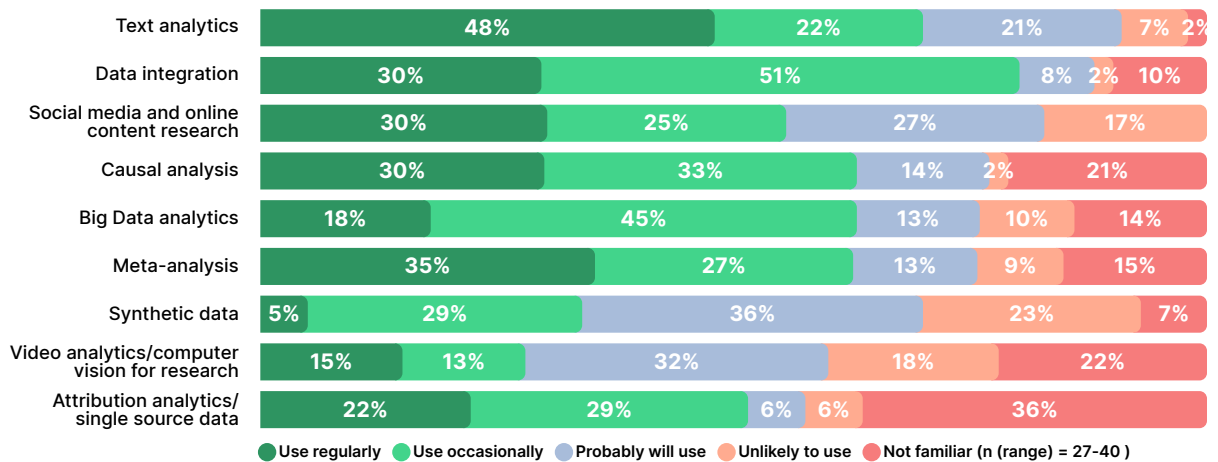
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 101-500 FTE POV ^[DATA]

Among service-led suppliers with 101 to 500 FTE, two data and analytics methods are less than 60% saturated. For video analytics/computer vision for

research, 46% of probable users currently use it. Synthetic data is 48% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, the data and analytics methods with the most potential are video analytics/computer vision for research (only 46% who will probably use it currently do) and synthetic data (48%).

Among service-led suppliers with 101 to 500 FTE, text analytics (70%) has been among the three most-used data and analytics methods each wave, and data integration (80%) has been since it was introduced in 21A. Big Data analytics (63%) is back in the top three for the first time since 20A after a +28% rebound this year.

In all, use of five methods increased by double digits this year, including two others that increased by more than 20%. Use of causal analysis (63%) jumped +26% and meta-analysis (62%) increased +23%. Synthetic data (34%) increased +18%, and data integration increased +15%.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Data integration	--	66%	62%	79%	83%	65%	80%	+15%
Text analytics	59%	58%	64%	73%	70%	73%	70%	-3%
Big Data analytics	62%	43%	41%	47%	59%	35%	63%	+28%
Causal analysis	36%	39%	29%	55%	55%	37%	63%	+26%
Meta-analysis	--	--	--	47%	45%	39%	62%	+23%
Social media and online content research	57%	60%	49%	54%	53%	48%	55%	+7%
Attribution analytics/single source data	32%	34%	34%	50%	69%	46%	52%	+6%
Synthetic data	--	--	--	--	19%	16%	34%	+18%
Video analytics/computer vision for research	--	--	--	--	--	--	28%	--
Average number used:	2.5	3.0	2.8	4.1	4.5	3.6	5.1	+1.5
n (range) =	108	89	127-134	102	69-74	46-61	27-40	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 101-500 FTE, data integration (80%) and text analytics (70%) are perennially among the top three most-used data and analytics methods; use of Big Data analytics increased from 35% to 63%; causal analysis, 37% to 63%; meta-analysis, 39% to 62%; synthetic data, 16% to 34%; and data integration, 65% to 80%.

Source: GRIT Report



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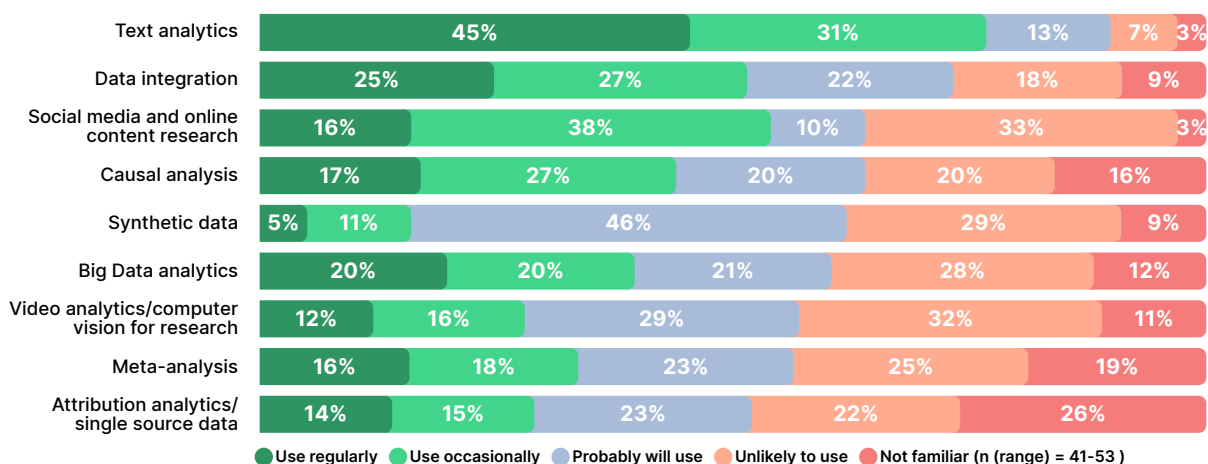
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 21-100 FTE POV ^[DATA]

All but three data and analytics methods are at least 60% saturated among service-led suppliers with 21 to 100 FTE. Only 26% of probable users of synthetic data

use it currently. Video analytics/computer vision for research is currently used by 50% of probable users; attribution analytics/single source data, by 56%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, the data and analytics methods with the most potential is synthetic data (only 26% who will probably use it currently do).

Among service-led suppliers with 21 to 100 FTE, text analytics (76%) has been among the three most-used data and analytics methods each wave, and data integration (52%) has been since it was introduced in 21A. Social media and online content research (55%) is back in the top three after a three-year absence.

Two methods declined by double digits since last year: attribution analytics/single source data (-13%, to 29%) and causal analysis (-10%, to 44%). Overall, text analytics grew from 52% to 76% since 20A, and causal analysis increased from 26% to 44% in that time.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Text analytics	52%	48%	52%	67%	70%	73%	76%	+3%
Social media and online content research	46%	35%	39%	50%	39%	50%	55%	+5%
Data integration	--	48%	56%	71%	63%	60%	52%	-8%
Causal analysis	26%	30%	31%	55%	42%	54%	44%	-10%
Big Data analytics	35%	34%	37%	38%	42%	40%	39%	-1%
Meta-analysis	--	--	--	40%	42%	33%	34%	+1%
Attribution analytics/single source data	18%	25%	27%	49%	44%	42%	29%	-13%
Video analytics/computer vision for research	--	--	--	--	--	--	28%	--
Synthetic data	--	--	--	--	14%	9%	16%	+7%
Average number used:	1.8	2.2	2.4	3.7	3.6	3.6	3.7	+0.1
n (range) =	169	130	142-145	184	98-118	74-93	41-53	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 21-100 FTE, text analytics (76%) and data integration (52%) are perennial top three most-used data and analytics methods; use of attribution analytics/single source data fell from 42% to 29% and causal analysis fell from 54% to 44%.

Source: GRIT Report



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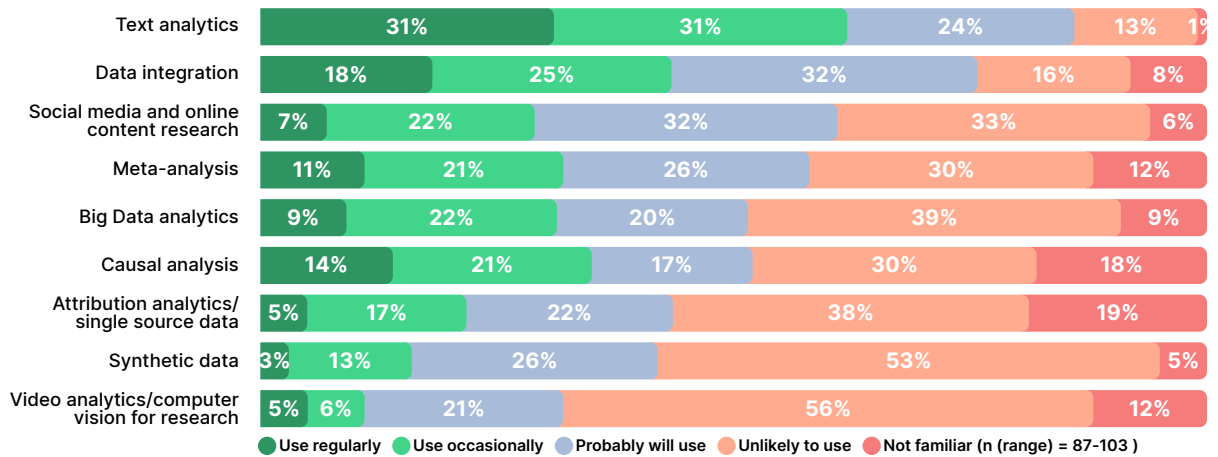
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: ≤20 FTE POV ^[DATA]

Among service-led suppliers with ≤20 FTE, six data and analytics methods are less than 60% saturated, and probable users outnumber current users for four of them. These four are video analytics/computer

vision for research (36%), synthetic data (38%), social media and online content research (48%), and attribution analytics/single source data (49%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Takeaway: Among service-led suppliers with ≤20 FTE, the data and analytics methods with the most potential are video analytics/computer vision for research (only 36% who will probably use it currently do) and synthetic data (38%).

Among service-led suppliers with ≤20 FTE, text analytics (61%) has been among the three most-used data and analytics methods each wave, and data integration (44%) has been since it was introduced in 21A. Causal analysis (35%) has been among the top three each year except 22A.

Text analytics has grown from 37% in 20A to 61% currently. Data integration is up +12% since 21A, and synthetic data (16%) is up +13% since last year. Attribution analytics/single source data (21%) has fallen -17% since 25A.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Text analytics	37%	38%	43%	56%	56%	63%	61%	-2%
Data integration	--	32%	35%	56%	42%	49%	44%	-5%
Causal analysis	26%	31%	30%	49%	38%	41%	35%	-6%
Meta-analysis	--	--	--	36%	28%	30%	32%	+2%
Big Data analytics	24%	27%	26%	37%	37%	34%	31%	-3%
Social media and online content research	34%	31%	32%	45%	32%	30%	29%	-1%
Attribution analytics/single source data	13%	16%	18%	38%	28%	38%	21%	-17%
Synthetic data	--	--	--	--	5%	3%	16%	+13%
Video analytics/computer vision for research	--	--	--	--	--	--	12%	--
Average number used:	1.3	1.7	1.8	3.2	2.7	2.9	2.8	-0.1
n (range) =	97	221	234-239	271	108-140	140-156	87-103	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with ≤20 FTE, text analytics (61%) and data integration (44%) are perennial top three most-used data and analytics methods, and causal analysis (35%) has been every year but one; use of synthetic data increased from 3% to 16% while attribution analytics/single source data fell from 38% to 21%.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

Data and analytics methods are transitioning from specialties to an infrastructure layer. Some methods have already become infrastructure, others are actively diffusing, a few are just beginning their adoption curves, and some may be concentrating rather than spreading. The industry is not uniformly moving in one direction; it's stratifying, with the most analytically capable segments pulling further ahead while the gap to smaller and less specialized segments widens on the more demanding methods.

Two methods, text analytics and data integration, have already completed that transition. They're no longer growing dramatically: they don't need to because they're embedded. Their presence everywhere, at high intensity, is the baseline against which to benchmark other data and analytics methods.

One layer up from that baseline, methods like causal analysis, Big Data analytics, and meta-analysis are in an intermediate state. They are well-established in larger and more analytically sophisticated segments, but still gaining adoption in others.

Synthetic data and video analytics occupy a frontier layer where the transition is just beginning. Synthetic data grew by double digits in four segments this wave and has been growing consistently since it entered tracking. Expanding its label to include AI personas and digital twins likely contributed, but even accounting for that, the trajectory is meaningful. Saturation is low across all segments indicating that growth has runway regardless of the label effect.

The brand-side research/analytics segment gap for synthetic data indicates that analytics professionals are clearly ahead of researchers on a method with obvious research applications. Widespread adoption by researchers may be a more a matter of "when" than "if."

Video analytics/computer vision has made a promising GRIT debut, but it's a new entry and hard to assess. The saturation numbers are low across most segments, the "probably will use" rates are strong, and the intensity among early users is high. Low current adoption, meaningful intent, and high intensity among adopters resembles early-stage AI-moderated qual and synthetic data in prior waves.

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Causal analysis grew substantially among tech-led suppliers, service-led with 500+ FTE, and those with 101 to 500 FTE in a single wave, and it has grown in nearly every segment where it can be tracked since 20A. Intensity is high where adoption is high, and this is consistent with causal analysis being a method that requires commitment to adopt but becomes embedded once adopted. The decline among smaller service-led suppliers in the same wave that use among larger suppliers grew sharply may reflect a capability-gap effect similar to what we observed in biometrics and neuroscience. The method seems to be concentrating in segments with the analytical infrastructure to sustain it.

By contrast, the attribution analytics story cuts against this otherwise upward narrative. Its decline among smaller suppliers alongside its strength among analytics professionals suggests that some methods don't diffuse; they consolidate instead. Where data infrastructure is rich and integrated, attribution analytics thrives. Where it isn't, the method loses relevance rather than spreading. However, these trends may also reflect greater access to DIY tools which enable brand-side professionals to execute it when they need it.

Running underneath all of this is the brand-side analytics segment as a leading indicator. At 6.7 methods used on average, near-universal adoption of most methods, and high regular-use intensity across the board, this segment looks like where the rest of the industry is heading. What analytics professionals use routinely today, larger suppliers are building toward, and smaller suppliers are watching.

The most active movers are service-led suppliers with 101 to 500 FTE. Consistent with the capability-expansion story from *Evolving Supplier Landscape* and from earlier methodology sections, use of five methods increased by double digits. These suppliers appear to be deliberately building out an advanced analytics portfolio, not just growing organically. The fact that causal analysis and meta-analysis, both analytically demanding methods, are among the biggest gainers suggests this is a deliberate strategic decision to move up the analytical value chain, not simply chasing client demand.



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ADDING A FURTHER PERSPECTIVE: THE CONSUMPTION LAYER

Torbjorn Andersson

Global Senior Vice President & GM - Delivery & Market Research, Forsta

This is a strong analysis of how the methods are diffusing, and I agree with the central thesis: data and analytics is shifting from a specialist discipline to an infrastructure layer. And the clearest divide in the industry is no longer between AI adopters and non-adopters, but between organizations building integrated analytics ecosystems, enhanced by all types of AI, and those still operating project-by-project.

I'd like to add that I don't believe you can talk about data and analytics without including the most impactful step of the research process, the consumption layer. The section describes in depth which methods are used and how they mature, and I believe that the most significant change relating to this still lies ahead. The next natural change is a fundamental shift in how the resulting insights are delivered to and received by people.

My thesis is that data will be consumed differently going forward. Increasingly in text and conversation form, with sharp, precise conclusions, rather than

leaving the user to interpret tables and charts. Reports and dashboards will become a complement rather than the primary entry point. This follows the report's logic: as methods become infrastructure — always on, embedded, high-volume — the bottleneck moves from “which method” to “how does a human interpret all of this quickly and correctly.” At that point, a conversational layer becomes the natural next abstraction.

I see clear progression. ‘Chatting’ with data is the new entry point — it lowers the threshold and lets anyone ask a question and get a direct answer. Graphical reports then come into play as the next step to better reveal cause and effect and the relationships within the data. And over time, we'll gain access to more advanced visual models that help us interpret and read data in ways we don't today.

But I want to be clear about one decisive precondition. The value of “chat with data” stands or falls on the AI models fully understanding the context, being consistent, and not creating more confusion than a clear, human-authored guideline would. A model that answers the same question differently, or that misses the business context, is more dangerous than a traditional report because it inspires confidence without earning it. The entry point must therefore be built on a foundation of contextual understanding and consistency; otherwise, we risk automating the noise rather than cutting through it.

In short: the report convincingly shows that the methods are becoming infrastructure. I'd complement that picture by arguing that the human interface is the next battleground — and that whoever solves context and consistency in the chat layer will own how data is consumed going forward.

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Tobi's knowledge and passion for technology and market research resulted in the birth of Dapresy, which merged with Forsta in 2020. In founding Dapresy, Tobi paved the way for online data presentation systems to visualize Market Research data. He has dedicated his professional career to research and data visualization and is a recognized expert in the field, having consulted with hundreds of companies on innovative research and visualization processes.





OTHER METHODOLOGIES

In this section, we explore use, adoption momentum, intensity of use, and saturation of potential across nine methods or approaches related to insights that do not fit cleanly into survey, focus groups and IDI's, sample, observational research, biometrics or neuroscience, or data and analytics.

WHAT ELSE GROWS BEYOND THE CORE? [ORIENTATION]

What's left after *Survey Research, Focus Groups & IDI's, Sample, Observational Research, Biometrics & Neuroscience*, and *Data & Analytics*? What about behavioral economics models, crowdsourcing, prediction markets, research gamification, semiotics and cultural decoding, VR/AR/XR for research, and various marketplaces?

These transcend methods and approaches covered in the previous sections and defy easy categorization. GRIT had to choose between adding more sections, cramming the others even fuller, or labeling these "other." The label doesn't do then justice, so let's move on to the methods and approaches themselves.

Of these nine, sample markets are among the three most-used in each segment, and software or tools marketplaces are in the top three in all but service-led suppliers with 101 to 500 FTE (36%). Talent marketplaces are among the top three for brand-side analytics (70%), tech-led (46%), and service-led suppliers with ≤ 20 FTE (36%).

Service-led suppliers with 21 to 100 FTE (38%) and those with 101 to 500 FTE (44%) have behavioral economic models among their three most-used, and those with 101 to 500 FTE (45%) and with 500+ FTE (48%) number research gamification among their top three "other" methods. Uniquely, prediction markets barely make the top three for brand-side researchers (30%) ahead of behavioral economics models (29%) and talent marketplaces (27%).

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "L.M., ed." are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Sample markets are among the three most-used in each segment, and software or tools marketplaces are in the top three in all but service-led suppliers with 101 to 500 FTE.



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THREE MOST-USED “OTHER” METHODOLOGIES: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Software or tools marketplaces	50%	85%	54%	54%	54%	36%	54%
Sample marketplaces	46%	69%	70%	59%	68%	62%	68%
Prediction markets	30%	66%	21%	16%	21%	34%	43%
Behavioral economics models	29%	66%	26%	30%	38%	44%	44%
Talent marketplaces	27%	70%	46%	36%	32%	38%	45%
Research gamification	18%	56%	44%	21%	35%	45%	48%
n (range) =	105-176	82-152	26-39	96-158	44-79	33-56	32-55

Green shading indicates top three most-used methodologies.

Takeaway: Sample marketplaces are a top three most-used “other” method in each segment, and software or tools marketplaces is among the top three in each supplier segment except service-led suppliers with 101-500 FTE (36%).

Source: GRIT Report and NewtonX

Use of crowdsourcing increased by double digits in each segment except brand-side analytics where it increased +9%. We expanded the label from simply “crowdsourcing” to “crowdsourcing (ideas/problem-solving),” and that may have had something to do with the across-the-board increases. Sample

marketplaces, software or tools marketplaces, and talent marketplaces each increased more than +5% in three segments, although sample marketplaces and software or tools marketplaces each declined that much in one other segment and talent marketplaces dropped in three.

CHANGE IN USE OF METHODS/APPROACHES SINCE 25A: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Crowdsourcing	+14%	+9%	+13%	+12%	+17%	+12%	+13%
Research gamification	+1%	+6%	+4%	-6%	0%	+9%	-9%
Sample marketplaces	-1%	+9%	+1%	+6%	+2%	-10%	+7%
Prediction markets	-1%	-3%	-12%	-5%	-7%	+3%	+1%
Software or tools marketplaces	-3%	+3%	-1%	+9%	+6%	-9%	+8%
Behavioral economics models	-4%	+5%	+3%	-8%	-3%	+2%	-7%
Talent marketplaces	-6%	-6%	+10%	+13%	-5%	+2%	+6%
n (range) =	105-176	82-152	26-39	96-158	44-79	33-56	32-55

Green indicates relatively larger increases; red indicates relatively larger decreases. Color scale applies across all segments.

Takeaway: Crowdsourcing increased at least +5% in each segment, while each type of marketplace increased in three segments while declining in at least one.

Source: GRIT Report and NewtonX

In *Managing Insights*, we'll look at how agentic AI is being used, and that may cast these popular marketplaces in a different light.





CHANGES FROM 2025 GRIT SURVEY

When looking at the year-over-years trends, note that we have changed one label since last year and combined two items. We elaborated on “crowdsourcing” by adding “(ideas/problem solving)”

and consolidated “VE/VR” and “AI or VR/AR/XR for CX/UX design” as “VR/AR/XR for research (e.g., concept, shopper, environment testing).” We’ve also added “semiotics/cultural decoding.”

2026 OTHER METHODS

2026 Method	2025 Precedent	2025 Family
Behavioral economics models	Behavioral economics models	Other Methods
Crowdsourcing (ideas/problem-solving)	Crowdsourcing	Other Methods
Marketplaces for sample	Marketplaces for sample	Other Methods
Marketplaces for software or tools	Marketplaces for software or tools	Other Methods
Marketplaces for talent	Marketplaces for talent	Other Methods
Prediction markets	Prediction markets	Other Methods
Research gamification	Research gamification	Other Methods
Semiotics/cultural decoding	NEW 2026	N/A
VR/AR/XR for research (e.g., concept, shopper, environment testing)	VE/VR + AI or VR/AR/XR for CX/UX design (consolidated)	Other Methods

Green indicates method changed from 25A.

Source: GRIT Report

Methods were not classified by type during the survey; we only do that for the report.

ATTITUDES AND USAGE TRENDS | BRAND POV [DATA]

Brand-side analytics professionals use twice as many of these methods or approaches as those on the research side (5.4 to 2.7). Each of them is used by most analytics professionals except VR/AR/XR for research, which is used by nearly half (47%), and semiotics/cultural decoding (28%). Two-thirds or more use software or tools marketplaces (85%), talent marketplaces (70%), sample marketplaces (69%), and prediction markets and behavioral economics models (66% each).

On the research side, half use software or tools marketplaces (50%), and their three most-used are completed by sample marketplaces (46%) and prediction markets (30%).

Six gaps of at least +30% separate analytics professionals from researchers, all tilting toward analytics. These are talent marketplaces (+43%), research gamification (+38%), behavioral economics models (+37%), prediction markets (+36%), software or tools marketplaces (+35%), and crowdsourcing (+30%).



On the research side, half use software or tools marketplaces, and their three most-used are completed by sample marketplaces and prediction markets.



USE OF METHODS/APPROACHES: BRAND SEGMENT

	Research	Analytics	Research - analytics
Software or tools marketplaces	50%	85%	-35%
Sample marketplaces	46%	69%	-23%
Prediction markets	30%	66%	-36%
Behavioral economics models	29%	66%	-37%
VR/AR/XR for research	27%	47%	-20%
Talent marketplaces	27%	70%	-43%
Crowdsourcing	23%	53%	-30%
Semiotics/cultural decoding	19%	28%	-9%
Research gamification	18%	56%	-38%
Average number used:	2.7	5.4	-2.7
n (range) =	105-176	82-152	

Green shading indicates top three most-used methodologies.

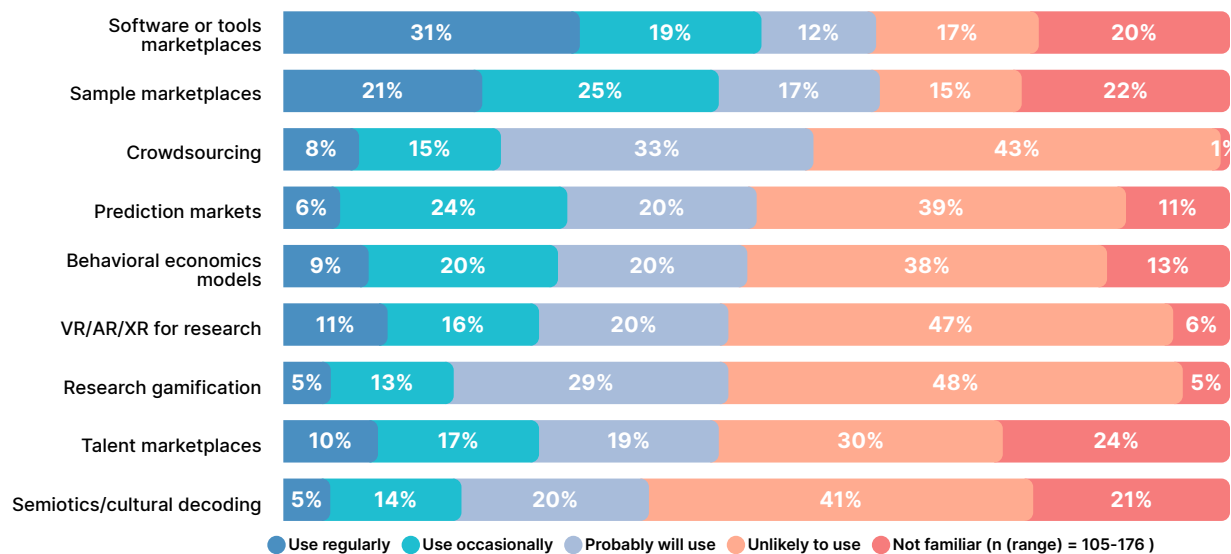
Takeaway: Brand-side analytics professionals use more “other” methods than researchers on average (5.4 vs. 2.7), with the largest gaps in talent marketplaces (70% vs. 27%), research gamification (56% vs. 18%), behavioral economics models (66% to 29%), prediction markets (66% vs. 30%), and software or tools marketplaces (85% vs. 50%).

Source: GRIT Report and NewtonX

Among researchers, less than half of probable users currently use three of these. Research gamification is

38% saturated; crowdsourcing, 41%; and semiotics/cultural decoding, 49%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the “other” methods with the most potential are research gamification (only 38% of probable users currently do) and crowdsourcing (41%).

Among brand-side researchers, marketplaces for software or tools (50%) and sample (46%) are in the top three most-used for the second year running after the aggregate “marketplaces” had been since 23A.

In 22A, “marketplaces” was only used by 15%, but now software/tools and sample have tripled that, and talent marketplaces (27%) have nearly doubled that amount.





Prediction markets (30%) nudged into the top three after a one-year absence, narrowly displacing behavioral economics models (29%) which had been in the top three in every previous wave. Crowdsourcing increased +13% to 23%, and this could be due to the label change or it may be a return to “normal.” Before a -12% drop to 10% last year, it had ranged from 17% to 22% for five years.

The average number of these used by researchers is 2.7 of nine. It's higher than the 2.0 from 24A and prior waves, but those waves had only seven items.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A - 25A
Marketplaces	18%	19%	15%	33%	54%	--	--	--
Software or tools marketplaces	--	--	--	--	--	54%	50%	-4%
Sample marketplaces	--	--	--	--	--	46%	46%	--
Talent marketplaces	--	--	--	--	--	32%	27%	-5%
Prediction markets	22%	18%	19%	35%	31%	31%	30%	-1%
Behavioral economics models	26%	32%	27%	35%	40%	33%	29%	-4%
VR/AR/XR for research	--	--	--	--	--	--	27%	--
AI or VR/AR/XR for CX/UX design	60%	29%	20%	29%	26%	19%	--	--
VE/VR	12%	14%	13%	10%	11%	8%	--	--
Crowdsourcing	18%	21%	17%	20%	22%	10%	23%	+13%
Semiotics/cultural decoding	--	--	--	--	--	--	19%	--
Research gamification	21%	18%	15%	25%	20%	17%	18%	+1%
Average number used:	1.8	1.5	1.3	1.9	2.0	2.5	2.7	+0.2
n (range) =	298	207	182	214	110-137	116-202	105-176	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among brand-side researchers, software or tools marketplaces (50%), sample marketplaces (46%), and prediction markets are the top three “other” methods; use of crowdsourcing increased from 10% to 23%.

Source: GRIT Report and NewtonX

There is less opportunity for near-term adoption among brand-side analytics professionals as eight of nine of these items are more than 60% saturated. The best target for growth is semiotics/cultural decoding for which 43% of probable users use it currently.

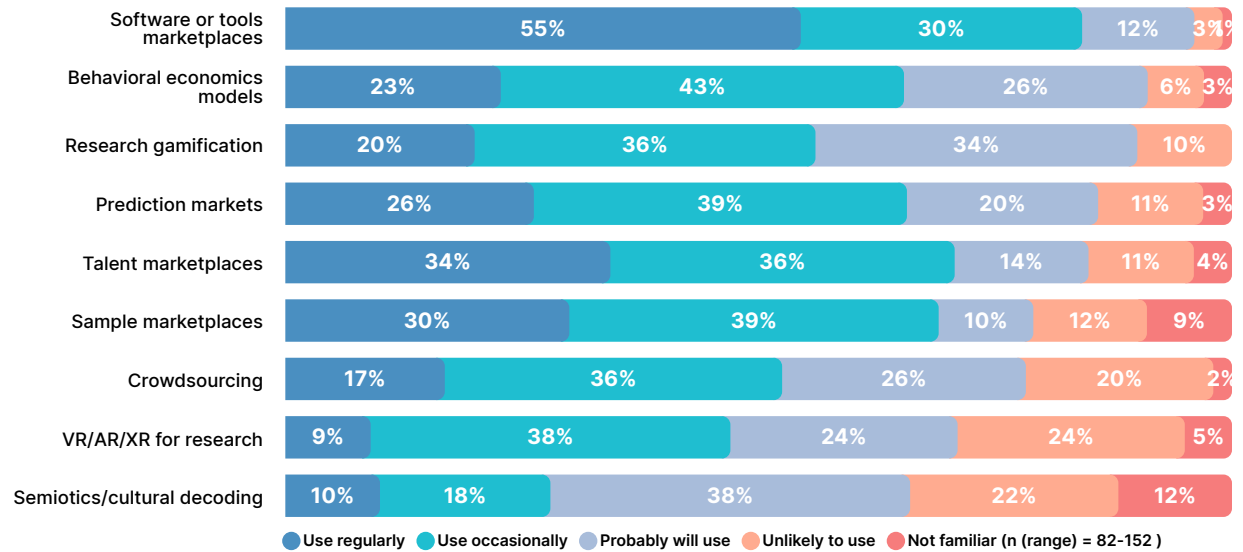


Use of crowdsourcing by brand-side researchers increased +13% to 23%, which could represent a return to “normal.”





INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (BRAND: ANALYTICS)



Takeaway: Among brand-side analytics professionals, the “other” method with the most potential is semiotics/cultural decoding (only 43% of probable users currently do).

Marketplaces have been a perennial favorite for brand-side analytics professionals, and marketplaces for software or tools (85%) and talent (70%) have been in the top three since we split it out. Sample marketplaces (69%) are now third after ending the three-year run for prediction markets (66%).

Nothing moved by double digits since last year, but research gamification (56%) has grown +17% since 23A, and crowdsourcing (53%) has grown +12% since then.

USE OF METHODS/APPROACHES: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Marketplaces	60%	71%	--	--	--
Software or tools marketplaces	--	--	82%	85%	+3%
Talent marketplaces	--	--	76%	70%	-6%
Sample marketplaces	--	--	60%	69%	+9%
Prediction markets	60%	67%	69%	66%	-3%
Behavioral economics models	58%	53%	61%	66%	+5%
VR/AR/XR for research	--	--	--	47%	--
VE/VR	22%	40%	31%	--	--
AI or VR/AR/XR for CX/UX design	52%	31%	55%	--	--
Research gamification	39%	46%	49%	56%	+7%
Crowdsourcing	41%	43%	44%	53%	+9%
Semiotics/cultural decoding	--	--	--	28%	--
Average number used:	3.3	3.5	5.3	5.4	+0.1
n (range) =	182	84-127	101-177	82-152	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among brand-side analytics professionals, marketplaces for software or tools (85%), talent (70%), and sample (69%) are the most-used “other” methods.

Source: GRIT Report and NewtonX



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Most users of marketplaces for software or tools are regular users among brand-side researchers (62%) and analytics professionals (65%). Nearly half of analytics users of talent marketplaces use them regularly (49%).

Brand-side researchers are more likely to be intense users of VR/AR/XR for research (41% to 19%). Analytics users of prediction markets (40% to 21%) and talent marketplaces (49% to 37%) are more likely to use them regularly.

INTENSITY OF USE: BRAND SEGMENT

	Research	Analytics
Software or tools marketplaces	62%	65%
Sample marketplaces	46%	44%
VR/AR/XR for research	41%	19%
Talent marketplaces	37%	49%
Crowdsourcing	36%	32%
Behavioral economics models	30%	35%
Research gamification	27%	35%
Semiotics/cultural decoding	27%	35%
Prediction markets	21%	40%
n (range) =	105-176	82-152
<i>Intensity = regular use/total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.</i>		
<i>Takeaway: Most brand-side insights professionals who use software or tools marketplaces (62% for researchers, 65% for analytics) use them regularly.</i>		

Source: GRIT Report and NewtonX

ATTITUDES AND USAGE TRENDS | SUPPLIER POV ^[DATA]

On the supplier-side, sample marketplaces are the most used of these nine items in each segment and used by majorities. Software or tools marketplaces are used by 54% in each segment except service-led suppliers with 101 to 500 FTE (36%). Talent marketplaces are among the three most used for tech-led (46%) and service-led suppliers with ≤20 FTE (36%).

Research gamification is among the three most-used for service-led suppliers with 101 to 500 FTE (45%) and those with 500+ FTE (48%). Behavioral economics models are in the top three for service-led suppliers with 21 to 100 FTE (38%) and those with 101 to 500 FTE (44%).



Research gamification is among the 3 most-used for service-led with 100+ FTE; behavioral economics models are in the top 3 for those with 21 to 500 FTE.



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USE OF METHODS/APPROACHES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Sample marketplaces	70%	59%	68%	62%	68%
Software or tools marketplaces	54%	54%	54%	36%	54%
Research gamification	44%	21%	35%	45%	48%
Talent marketplaces	46%	36%	32%	38%	45%
Semiotics/cultural decoding	20%	25%	17%	42%	44%
Behavioral economics models	26%	30%	38%	44%	44%
Prediction markets	21%	16%	21%	34%	43%
Crowdsourcing	36%	22%	29%	28%	41%
VR/AR/XR for research	30%	14%	28%	21%	26%
Average number used:	3.5	2.8	3.2	3.5	4.1
n (range) =	26-39	96-158	44-79	33-56	32-55

Green shading indicates top three most-used methodologies.

Takeaway: In each supplier segment, sample marketplaces is the most-used "other" method, and software or tools marketplaces is among the top three in all but service-led suppliers with 101-500 FTE (36%).

Source: GRIT Report

Of all users of sample marketplaces in each supplier segment, at least two-thirds use them regularly. About half or more of users of marketplaces for software or tools in each segment use them regularly.

In addition to these two, tech-led supplier users also tend to be regular users of VR/AR/XR for research (62%), behavioral economics models (62%), prediction markets (55%), and talent marketplaces (49%). Users among service-led suppliers with 21 to 100 FTE tend to be intense with respect to semiotics/cultural decoding (73%), talent marketplaces (64%), and behavioral economics models (61%).

INTENSITY OF USE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Sample marketplaces	72%	66%	71%	70%	66%
Software or tools marketplaces	59%	50%	49%	50%	61%
VR/AR/XR for research	62%	38%	46%	0%	45%
Research gamification	36%	33%	40%	32%	44%
Crowdsourcing	0%	15%	45%	22%	41%
Behavioral economics models	62%	41%	61%	44%	33%
Talent marketplaces	49%	30%	64%	34%	31%
Prediction markets	55%	16%	54%	33%	22%
Semiotics/cultural decoding	11%	19%	73%	27%	14%
n (range) =	26-39	96-158	44-79	33-56	32-55

Intensity = regular use/total use. Green indicates relatively higher intensity; red indicates relatively lower intensity. Color scale applies across both segments.

Takeaway: In each supplier segment, two-thirds or more of users of sample marketplaces use them regularly.

Source: GRIT Report



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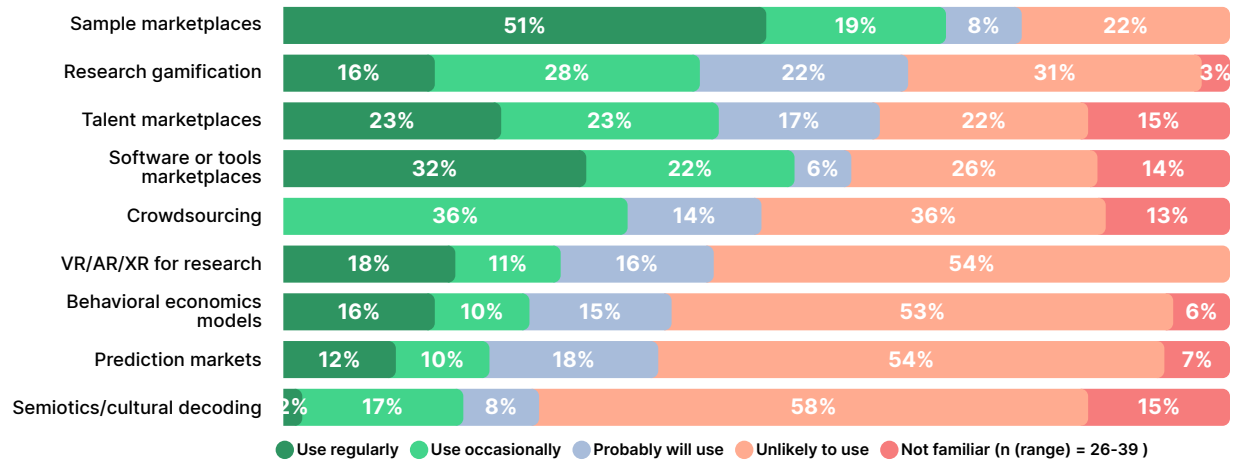


ATTITUDES AND USAGE TRENDS | TECH-LED POV ^[DATA]

Probable users of these methods among tech-led suppliers tend to use them already, as saturation

exceeds 60% for all but one. Prediction markets are only 55% saturated.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (TECH-LED)



Takeaway: Among tech-led suppliers, the "other" method with the most potential is prediction markets (only 55% who will probably use it currently do); each other method has a saturation of at least 63%.

The three most-used "other" methods for tech-led suppliers are marketplaces for sample (70%), software or tools (54%), and talent (46%).

Marketplaces for sample and software or tools can be considered perennially leaders; before the split, "marketplaces" was always in the top three. Talent displaced the retired AI or VR/AR/XR for CX/UX

design (now combined with VE/VR as "VR/AR/XR for research," 30%).

Talent marketplaces increased +11% since last year, and crowdsourcing jumped +13% to 36%. Prediction markets fell -13% to 21%.

USE OF METHODS/APPROACHES: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Marketplaces	38%	48%	43%	59%	68%	--	--	--
Sample marketplaces	--	--	--	--	--	69%	70%	+1%
Software or tools marketplaces	--	--	--	--	--	55%	54%	-1%
Talent marketplaces	--	--	--	--	--	35%	46%	+11%
Research gamification	31%	42%	30%	52%	28%	41%	44%	+3%
Crowdsourcing	13%	22%	9%	26%	29%	23%	36%	+13%
VR/AR/XR for research	--	--	--	--	--	--	30%	--
AI or VR/AR/XR for CX/UX design	54%	54%	45%	42%	28%	50%	--	--
VE/VR	4%	4%	6%	16%	10%	10%	--	--
Behavioral economics models	14%	18%	24%	36%	22%	23%	26%	+3%
Prediction markets	15%	18%	13%	30%	36%	34%	21%	-13%
Semiotics/cultural decoding	--	--	--	--	--	--	20%	--
Average number used:	1.7	2.1	1.7	2.6	2.2	3.4	3.5	+0.1
n (range) =	97	50	122	70	32-42	29-38	26-39	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among tech-led suppliers, marketplaces for sample (74%), software or tools (54%), and talent (46%) are the most-used "other" methods; use of crowdsourcing increased from 23% to 36% and talent marketplaces increased from 35% to 46% while prediction markets fell from 34% to 21%.

Source: GRIT Report



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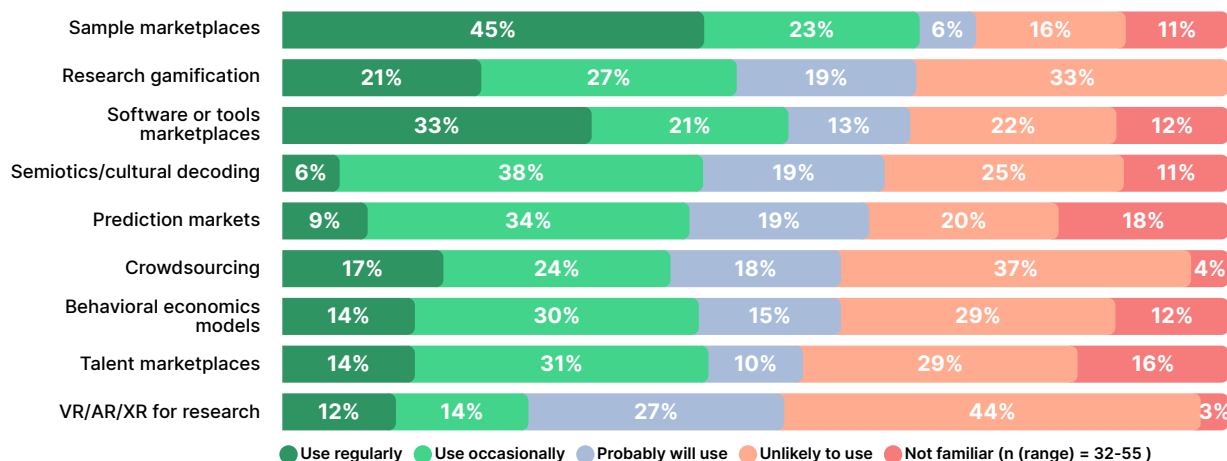
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 500+ FTE POV ^[DATA]

Among service-led suppliers with 500+ FTE, each of these “other” methods is at least 69% saturated.

However, only 49% of probable VR/AR/XR for research users currently use it.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 500+ FTE, the “other” method with the most potential is VR/AR/XR for research (only 49% who will probably use it currently do); each other method is at least 69% saturated.

Marketplaces as an aggregate had been in the top three most-used for service-led suppliers with 500+ FTE from 21A to 24A, growing from 32% to 70% over that time. Currently, 68% use sample marketplaces and 54% use marketplaces for software or tools. Research gamification (48%) completes the top three after having been there for four of the previous six waves.

Crowdsourcing increased +13% to 41% since last year, returning to its 24A magnitude (38%). Nothing else changed by double digits, but prediction markets usage continues to exceed by 40% since its 21A to 24A tripling from 16% to 48%.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Marketplaces	37%	32%	50%	47%	70%	--	--	--
Sample marketplaces	--	--	--	--	--	61%	68%	+7%
Software or tools marketplaces	--	--	--	--	--	46%	54%	+8%
Talent marketplaces	--	--	--	--	--	38%	45%	+7%
Research gamification	44%	31%	38%	42%	40%	57%	48%	-9%
Crowdsourcing	28%	16%	21%	33%	38%	28%	41%	+13%
Behavioral economics models	46%	29%	45%	52%	44%	51%	44%	-7%
Semiotics/cultural decoding	--	--	--	--	--	--	44%	--
Prediction markets	27%	16%	23%	36%	48%	42%	43%	+1%
VR/AR/XR for research	--	--	--	--	--	--	26%	--
AI or VR/AR/XR for CX/UX design	66%	44%	46%	34%	36%	57%	--	--
VE/VR	33%	16%	19%	26%	25%	35%	--	--
Average number used:	1.6	1.1	1.5	1.7	1.9	2.8	3.4	+0.6
n (range) =	106	85	117	97	45-71	59-68	32-55	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 500+ FTE, sample marketplaces (68%), software or tools marketplaces (54%), and research gamification (48%) are the three most-used “other” methods; use of crowdsourcing increased from 28% to 41%.

Source: GRIT Report



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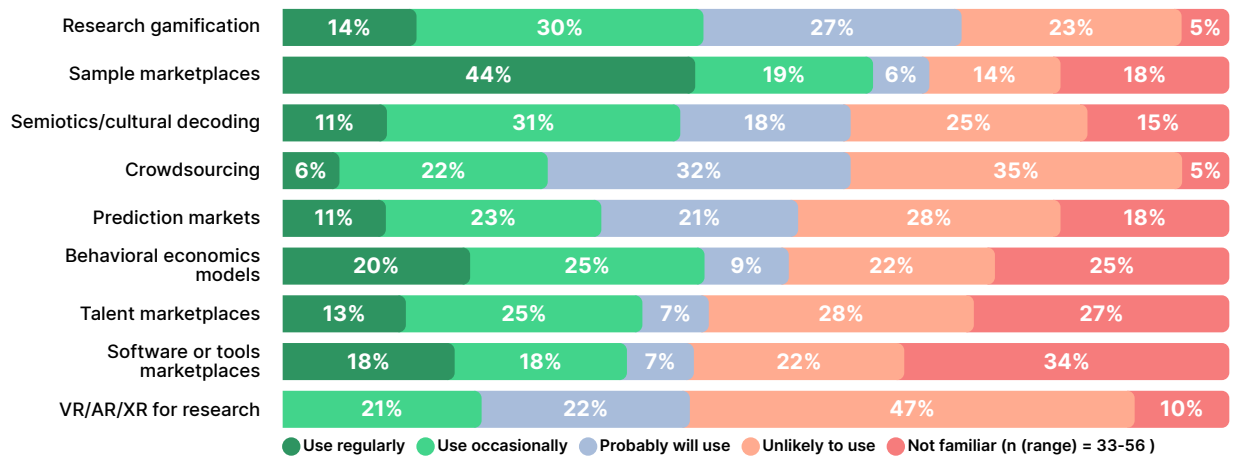
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 101-500 FTE POV ^[DATA]

Among service-led suppliers with 101 to 500 FTE, all but two of these are more than 60% saturated, and five are more than 80% saturated.

The best opportunities for near term adoption are crowdsourcing (47%) and VR/AR/XR for research (48%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 101-500 FTE, the "other" methods with the most potential are crowdsourcing (only 47% who will probably use it currently do) and VR/AR/XR for research (48%).

Behavioral economics models (44%) are among the top three most-used for service-led suppliers with 101 to 500 FTE and have been every year except 22A. Research gamification (45%) returned to the top three after missing it for two years, displacing marketplaces for software or tools (36%). Sample marketplaces (62%) remained on top despite a -10% drop.

Use of marketplaces for software or tools also fell -10% since last year. Crowdsourcing grew +12% to 28%, and research gamification increased +10% to 45%.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Marketplaces	31%	30%	48%	35%	69%	--	--	--
Sample marketplaces	--	--	--	--	--	72%	62%	-10%
Software or tools marketplaces	--	--	--	--	--	46%	36%	-10%
Talent marketplaces	--	--	--	--	--	35%	38%	+3%
Research gamification	30%	33%	34%	40%	31%	35%	45%	+10%
Behavioral economics models	41%	38%	31%	52%	48%	43%	44%	+1%
Semiotics/cultural decoding	--	--	--	--	--	--	42%	--
Prediction markets	19%	25%	22%	40%	35%	30%	34%	+4%
Crowdsourcing	29%	15%	17%	20%	24%	16%	28%	+12%
VR/AR/XR for research	--	--	--	--	--	--	21%	--
AI or VR/AR/XR for CX/UX design	71%	35%	36%	35%	39%	41%	--	--
VE/VR	20%	13%	20%	18%	17%	11%	--	--
Average number used:	2.4	1.9	2.1	2.4	2.6	3.3	3.5	+0.2
n (range) =	108	89	134	102	45-79	51-59	33-56	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 101-500 FTE, sample marketplaces (62%), research gamification (45%), and behavioral economics models (44%) are the three most-used "other" methods; use of crowdsourcing increased from 16% to 28%.

Source: GRIT Report



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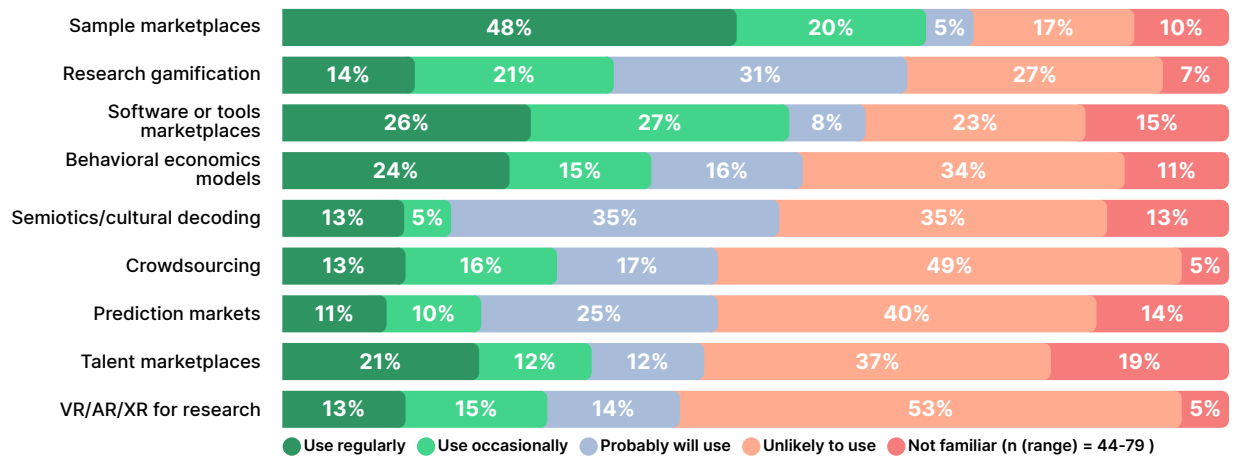
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: 21-100 FTE POV ^[DATA]

Among service-led suppliers with 21 to 100 FTE, all but three of these are more than 60% saturated. The most near-term opportunity to convert probable users is

for semiotics/cultural decoding (33%), then prediction markets (46%) and research gamification (54%).

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with 21-100 FTE, the “other” methods with the most potential are semiotics/cultural decoding (only 33% who will probably use it currently do) and prediction markets (46%).

Behavioral economics models (38%) are among the three most-used for service-led suppliers with 21 to 100 FTE as in every preceding year. Marketplaces for sample (68%) and for software or tools (54%) continue

in the top three from last year, carrying forward the position of the aggregate “marketplaces” from 21A to 24A. Crowdsourcing increased +16% to 29% from last year.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Marketplaces	23%	32%	39%	48%	70%	--	--	--
Sample marketplaces	--	--	--	--	--	66%	68%	+2%
Software or tools marketplaces	--	--	--	--	--	47%	54%	+7%
Talent marketplaces	--	--	--	--	--	37%	32%	-5%
Behavioral economics models	35%	37%	35%	49%	41%	42%	38%	-4%
Research gamification	26%	30%	30%	38%	35%	35%	35%	--
Crowdsourcing	17%	15%	16%	21%	19%	13%	29%	+16%
VR/AR/XR for research	--	--	--	--	--	--	28%	--
AI or VR/AR/XR for CX/UX design	54%	31%	35%	30%	28%	29%	--	--
VE/VR	15%	13%	18%	14%	21%	11%	--	--
Prediction markets	17%	24%	16%	37%	32%	29%	21%	-8%
Semiotics/cultural decoding	--	--	--	--	--	--	17%	--
Average number used:	1.9	1.8	1.9	2.4	2.4	3.1	3.2	+0.1
n (range) =	169	130	142	184	62-112	79-100	44-79	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with 21-100 FTE, sample marketplaces (68%), software or tools marketplaces (54%), and behavioral economics models (38%) are the three most-used “other” methods, and behavioral economics models have been there each year; use of crowdsourcing increased from 13% to 29%.

Source: GRIT Report



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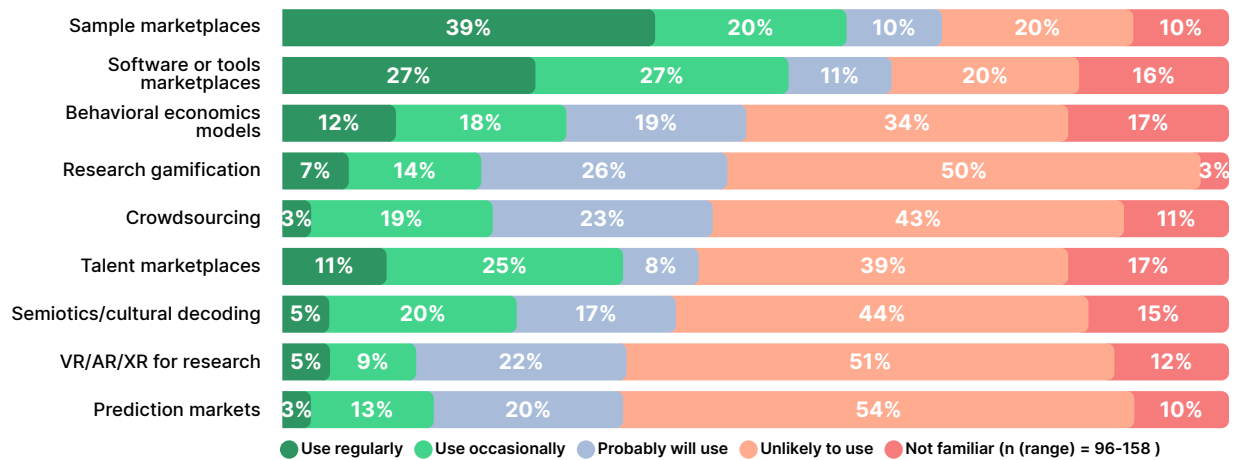
ATTITUDES AND USAGE TRENDS |

SERVICE-LED: ≤20 FTE POV ^[DATA]

Among service-led suppliers with ≤20 FTE, three of these have more probable users than current ones. VR/AR/XR for research is only 38% saturated; research

gamification and prediction markets, 44%; and crowdsourcing, 49%.

INTENTION/ATTITUDE TOWARD METHOD OR APPROACH (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, the “other” methods with the most potential are VR/AR/XR for research (only 38% who will probably use it currently do), research gamification (44%), and prediction markets (49%).

The top three “other” methods for service-led suppliers with ≤20 FTE are marketplaces for sample (59%), software or tools (54%), and talent (36%). Sample and software were in the top three last year,

and talent has ended behavioral economics models’ (30%) six-year run. Use of talent marketplaces increased +13% from last year, and crowdsourcing increased +12% to 22%.

USE OF METHODS/APPROACHES: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Marketplaces	14%	18%	22%	33%	44%	--	--	--
Sample marketplaces	--	--	--	--	--	54%	59%	+5%
Software or tools marketplaces	--	--	--	--	--	45%	54%	+9%
Talent marketplaces	--	--	--	--	--	23%	36%	+13%
Behavioral economics models	28%	23%	30%	42%	29%	39%	30%	-9%
Semiotics/cultural decoding	--	--	--	--	--	--	25%	--
Crowdsourcing	14%	12%	15%	17%	12%	10%	22%	+12%
Research gamification	20%	23%	23%	34%	28%	27%	21%	-6%
Prediction markets	15%	14%	15%	25%	23%	20%	16%	-4%
VR/AR/XR for research	--	--	--	--	--	--	14%	--
AI or VR/AR/XR for CX/UX design	47%	20%	21%	22%	18%	17%	--	--
VE/VR	5%	5%	9%	9%	3%	6%	--	--
Average number used:	1.4	1.1	1.3	1.8	1.6	2.4	2.8	+0.4
n (range) =	310	221	234	271	77-142	136-155	96-158	

Green shading indicates top three methodologies for that GRIT wave.

Takeaway: Among service-led suppliers with ≤20 FTE, marketplaces for sample (59%), software or tools (54%), and talent (36%) are the most-used “other” methods; use of talent marketplaces increased from 23% to 36% and crowdsourcing increased from 10% to 22%.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

In this section, we've reviewed nine methods or approaches representing marketplaces and specialized methods. Let's recap them in those two sets.

Marketplaces for sample and for software/tools marketplaces function as the workhorse methods: they're top-three in nearly every segment, heavily used, and highly intensely used. They're the "online surveys" of this category: not exciting, not declining, just embedded. Talent marketplaces are growing into a similar position, particularly among brand-side analytics and smaller suppliers, where they've recently displaced behavioral economics models from top-three positions they'd held for years.

Later, we'll look at trends in agentic AI, automation, and outsourcing (see *Managing Insights* and *Investing in Insights*). Considering those findings, marketplaces appear to serve different strategic functions by segment. For smaller suppliers they're primary access infrastructure. For larger suppliers they're supplementary to owned capabilities. For brand-side analytics professionals they may be transitional; heavily used now, but this is the segment that most expects agentic mediation to eventually reshape how purchases are made.

As we'll see in *Managing Insights*, using agentic AI to select or shortlist suppliers and partners for research and analytics is the least common current application of it across all segments. Yet 66% of brand-side analytics professionals agree that automated/ agentic systems will mediate most insights services purchases, compared to only 37% of researchers. If that belief plays out, it has direct implications for how sample, software, and talent marketplaces function. They become less about human browsing and selection and more about machine-readable catalogs. The segments that most believe this are also the heaviest marketplace users today.

Turning to methods, GRIT added semiotics/cultural decoding to this section especially after noticing consistent verbatim mentions in previous surveys. As a new entry, we can't tell if it's growing or not, but the saturation numbers are notably low, indicating there are more probable users than current ones and therefore more near-term opportunity to drive adoption. In tandem with meaningful "probably will use" rates, this suggests genuine latent interest rather than non-adoption related to lack of familiarity.

VR/AR/XR for research (our consolidation of items from prior GRIT waves) shows a familiar pattern: meaningful "probably will use" rates but low current adoption, and low saturation across most segments. The method has been on the radar for years under various labels (e.g., "VE/VR," "AI or VR/AR/XR for CX/UX design") without ever achieving mainstream traction. The consolidation this wave makes clean tracking impossible, but the pattern is consistent with prior waves: the barrier appears to be implementation cost or complexity, not awareness or interest.

The increased reported use of crowdsourcing seems to represent a return to form boosted by a labeling artifact. The change from simply "crowdsourcing" to "crowdsourcing (ideas/problem-solving)" likely clarified the item for some who weren't sure the original label applied to them, and this could have inflated reports of adoption.

Marketplaces for sample, software, tools, and talent are becoming the access layer for insights work. The forward-looking question is whether these remain human-browsed environments or evolve into machine-readable infrastructure as agentic systems begin mediating discovery, selection, and procurement.

– LM, ed.



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However, there is a case for a real return: before the anomalous -12% drop to 10% last year among brand researchers, crowdsourcing had ranged from 17% to 22% for five consecutive years, and it's now right back in that range at 23%. The same pattern holds on the supplier side: service-led with 500+ FTE is at 41%, matching its 24A level; those with 21 to 100 FTE is at 29%, recovering toward its historical range. It seems last year's drop was the anomaly, and this wave represents normalization, with the label change potentially helping.

Behavioral economics models, research gamification, and prediction markets cluster together not just in the data but conceptually. They represent the application of decision science frameworks to insights work, and their adoption tracks closely with segments that have the analytical orientation to use them.

Behavioral economics models have the most consistent story. They've been a perennial top-three fixture for years among service-led suppliers with 21 to 500 FTE, longer than almost any other method in this category. Among brand-side analytics, they're at 66% and growing. Among brand-side researchers, they've held in the high 20%s to low 30%s for years without a clear trend in either direction. The pattern suggests these are genuinely embedded in certain workflows, particularly among mid-size suppliers and analytics-oriented brand professionals, rather than aspirational or experimental. Intensity is moderate, which is consistent with project-specific rather than continuous use.

Research gamification tells a similar but slightly less settled story. Among service-led suppliers with 500+ FTE and those with 101 to 500 FTE, it's in the top three and growing. Among brand-side analytics it's reached 56% after a multi-year climb from 39% in 23A. It appears to be following behavioral economics models up the adoption curve with a lag of a few years, and the segments where it's gaining are the same ones. Whether it will plateau at a similar level or continue climbing isn't clear yet.

Prediction markets are the most volatile of the three and the hardest to read. They peaked from 23A to 24A in several segments and have since softened, while remaining above their earlier historical levels. Among brand-side analytics they've stayed in the mid-60%s. Among suppliers the pattern is less consistent. It's not a clear growth story or a clear decline, but more of an unsettled method that certain segments find useful without it becoming routine for anyone. The intensity numbers are generally lower than for behavioral economics models, which may reflect that prediction markets require a specific type of research question that doesn't arise frequently.

Taking a segment perspective, service-led suppliers with 21 to 100 FTE and those with 101 to 500 FTE are adding value-added methods on top of the marketplace baseline that everyone shares. The 21 to 500 FTE band shows the most appetite for methodological breadth within this category, combining marketplace infrastructure with analytical and engagement-oriented approaches that the smallest and largest segments rely on less. Among those with ≤20 FTE, the top three are all marketplaces. Among those with 500+ FTE, it's two marketplaces plus research gamification. The middle two size bands are where behavioral economics and gamification have their strongest foothold.

Of all segments, the brand-side analytics segment is the most engaged with nearly everything here. They use an average of 5.4 of nine methods, nearly double researchers' 2.7. Eight of nine are used by majorities. The gaps are widest for methods that require analytical infrastructure or sophisticated workflow integration: talent marketplaces (+43%), research gamification (+38%), behavioral economics models (+37%), prediction markets (+36%). This segment is also highly saturated, meaning they adopt quickly.

Behavioral economics, research gamification, and prediction markets represent the application of decision science to insights work, and adoption tracks closely with analytically-orientation segments.



THE QUIET INFRASTRUCTURE BEHIND MODERN INSIGHTS

Laura Pulito

Vice President of Research, Recollective Inc.

Qualitative research has always been a craft of choices. Which method, which participants, which questions, which moments to lean into. As outlined in the latest *GRIT report*, those choices are looking very different depending on who is making them. Brand-side analytics professionals are now using an average of 5.4 of the nine “other” methods GRIT tracks, while brand-side researchers are using just 2.7. That gap tells a story.

At Recollective, we feel that this isn’t researchers falling behind - it’s researchers being more deliberate. The methods analytics teams are layering on, talent marketplaces, prediction markets, gamification and behavioral economics models, are built for breadth and scale. The methods qual researchers reach for are built for depth. These are not the same job and the tools that serve them should not be the same either.

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Laura Pulito, VP of Research at Recollective Inc., brings over a decade of market research experience. Having worked on both client and supplier sides, she specializes in digital research methods, including insight communities. Laura’s expertise spans various brands and sectors, helping clients and agencies innovate research through emerging technologies and answer challenging business questions.

This is the shift we see playing out across the industry. Researchers are not chasing every new marketplace or framework that promises faster, cheaper or better. They are intentionally choosing solutions that help them hear participants more clearly and surface meaning that holds up over time. The platforms that they rely on are the ones that make depth easier to achieve and can consolidate those findings all within one centralized location.

That is the work Recollective was built for. We support both asynchronous and live engagement in one place so researchers can choose the right format for their objective rather than the other way around. We give teams a centralized environment to layer studies, query findings over time and build on what they have already learned instead of starting from scratch with every new project. And we keep improving the platform with intention, not adding features for the sake of it but listening to researchers and building what actually moves the work forward. We are not trying to turn qual into analytics. We are trying to make qual feel more like qual without the friction so researchers can focus on the parts that matter.

The 2.7 number is not a gap to close. It is a choice researchers are making about where to invest their attention and it is the right one. At Recollective, our goal is to support that choice with technology built around the researcher’s craft, not against it. The future of qual is not about doing more. It is about doing what qual has always done best, better.

Please let me know if you need anything else from us.





MANAGING INSIGHTS

This section discusses current use of and attitudes toward agentic AI as it relates to the insights workflow.

WHERE IS AGENTIC AI AND WHERE IS IT GOING? [ORIENTATION]

For the 2026 *Insights Practice Report*, GRIT decided that automation was too prevalent to continue as a standalone topic and that “use of AI” was so 2025.

Instead, we focused on *agentic* AI and defined it explicitly:

“*Agentic AI*” is any AI system that can carry out or orchestrate multi-step tasks with limited human prompting. Is your organization currently using agentic AI for...?

We offered very simple answer choices: Yes, No, Don’t know.

The decision to use agentic AI is a key one for insights management, and it can also represent a delegation of some insights management to automation. We found that agentic AI has indeed arrived, and, at the time of the survey anyway, usage was still differentiated enough to be interesting to analyze.

We asked about agentic AI usage for seven different tasks, and brand-side analytics professionals use it for half of them, on average (3.6), followed by tech-led suppliers (3.3). The average number used is 1.9 among service-led suppliers with ≤20 FTE and 1.8 for those with 21 to 100 FTE, then climbs to 2.4 for those with 101 to 500 FTE and 2.7 for those with 500+ FTE. Brand-side researchers are in the middle (2.3).

Although adoption rates vary, the top three applications of agentic AI are the same in each segment: preparing and integrating data, analyzing or modeling data, and creating or updating reports, dashboards, or summaries.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
- **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
- **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
- **Editor call-outs**
 - Boxes labeled **Editor’s note:** or **Editor’s POV:** and signed “**L.M., ed.**” are editorial opinions, **not data**.
- **Takeaway:** a one-line summary appears under tables and charts.

→ See Design, Methodology & Sample for full context.



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Use of agentic AI for preparing and integrating data ranges from 35% of service-led suppliers with ≤ 20 FTE to 81% of tech-led suppliers. Use for analyzing or modeling data ranges from 43% among service-led suppliers with 21 to 100 FTE to 76% of tech-led suppliers, and for creating/updating reports, dashboards, or summaries ranges from 42% for service-led suppliers with 21 to 100 FTE to 71% for brand-side analytics and service-led suppliers with 100 to 500 FTE.

Outside of the top three, a majority of brand-side analytics professionals use agentic AI for monitoring for issues and alerts (55%) as do nearly half of tech-led suppliers (48%).

CURRENT USE OF AGENTIC AI: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤ 20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Analyzing or modeling data	62%	71%	76%	44%	43%	57%	59%
Creating or updating reports, dashboards, or summaries	50%	71%	64%	44%	42%	71%	56%
Preparing and integrating data	43%	73%	81%	35%	41%	57%	50%
Monitoring for issues and alerts	29%	55%	48%	20%	21%	19%	25%
Running surveys, interviews, or qualitative sessions	24%	30%	23%	19%	21%	16%	34%
Recruiting, sampling, or routing participants	11%	30%	19%	13%	13%	19%	26%
Selecting/shortlisting suppliers/partners for research/analytics	10%	29%	14%	9%	4%	3%	17%
Average number of uses:	2.3	3.6	3.3	1.9	1.8	2.4	2.7
n =	88	77	20	80	36	29	29

Green shading indicates top three most-used methodologies.

Takeaway: In each segment, the top three most frequent applications for agentic AI are analyzing or modeling data (ranging from 43% to 76%), creating or updating reports, dashboards, or summaries (42% to 71%), and preparing and integrating data (35% to 81%).

Source: GRIT Report and NewtonX

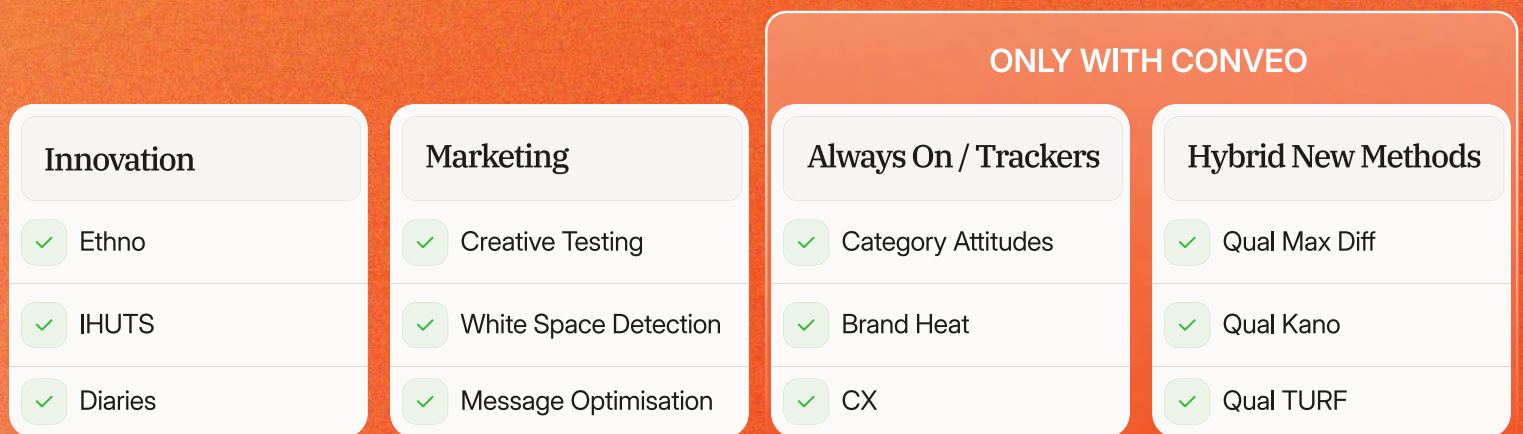
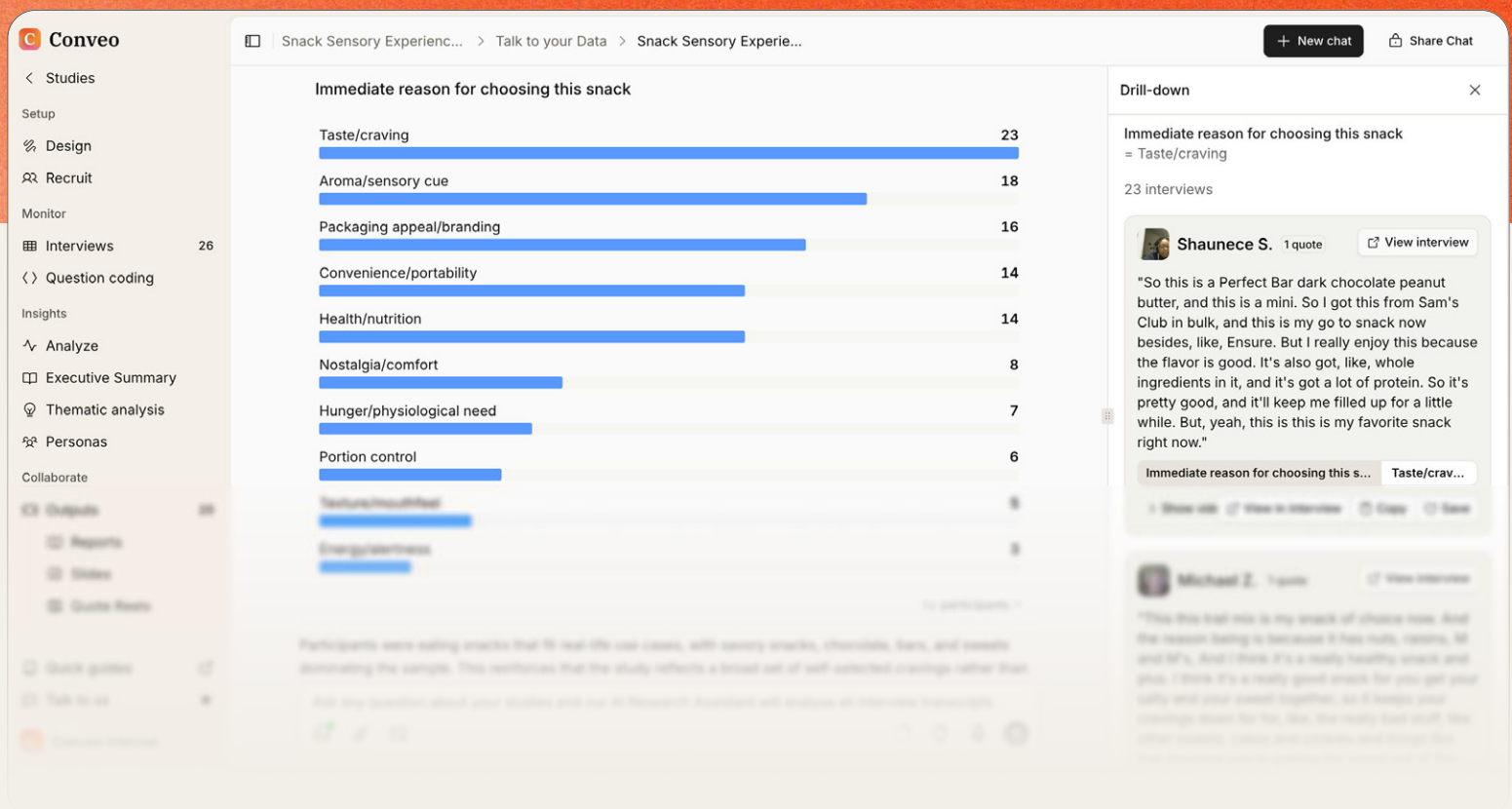
How do they feel about it? Except for service-led suppliers with ≤ 20 FTE (39%) most in each segment completely or mostly agree organizations that don't leverage agentic AI will be left behind. At the same time, most in brand-side analytics (59%), tech-led suppliers (53%), service-led suppliers with ≤ 20 FTE (54%), and those with 21 to 100 FTE (64%) completely or mostly agree discussions about agentic AI dramatically overstate its adoption and impact.

In other words, the two groups that are most engaged with agentic AI believe its impact and adoption are overstated, but so do the two groups that are least engaged. Across *GRIT Reports*, we often see that the most AI-engaged groups are also the most critical and skeptical; however, we worry the less-engaged groups might not be progressing past initial doubt to full-blown discovery. The segment that is most concerned about the adoption of AI/agentic tools forcing smaller, service-focused firms out of the market is arguably the most knowledgeable about agentic AI: brand-side analytics (51%).



AI research: conversational and observational.

Run AI-moderated interviews that fuel business growth with proactive, deep customer understanding.

Conveo

Snack Sensory Experience > Talk to your Data > Snack Sensory Experie...

Immediate reason for choosing this snack

Reason	Count
Taste/craving	23
Aroma/sensory cue	18
Packaging appeal/branding	16
Convenience/portability	14
Health/nutrition	14
Nostalgia/comfort	8
Hunger/physiological need	7
Portion control	6
Texture/mouthfeel	5
Energy/alertness	3

Participants were eating snacks that fit real-life use cases, with savory snacks, chocolate, bars, and sweets dominating the sample. This reinforces that the study reflects a broad set of self-selected cravings rather than...

Ask any question about your studies and our AI Research Assistant will analyze all interview transcripts.

Drill-down

Immediate reason for choosing this snack
= Taste/craving

23 interviews

Shaunece S. 1 quote View interview

"So this is a Perfect Bar dark chocolate peanut butter, and this is a mini. So I got this from Sam's Club in bulk, and this is my go to snack now besides, like, Ensure. But I really enjoy this because the flavor is good. It's also got, like, whole ingredients in it, and it's got a lot of protein. So it's pretty good, and it'll keep me filled up for a little while. But, yeah, this is this is my favorite snack right now."

Immediate reason for choosing this s... Taste/crav...

Show all View interview Copy Save

Michael Z. 1 quote View interview

"This bar had me in my snack of choice now. And the reason being is because it has nuts, marsh, M&M's, and I think it's a really healthy snack and plus, I think it's a really good snack for you get your fatty and your sweet together, so it keeps your cravings down for the day, the really best stuff. Not other snacks, candy and cookies and things like that because they're not really the best stuff of the day."



ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Organizations that don't leverage agentic AI will be left behind	57%	68%	71%	39%	57%	60%	70%
Discussions about agentic AI dramatically overstate its adoption and impact	44%	59%	53%	54%	64%	49%	43%
Automated/agentic systems will mediate most insights services purchases	37%	66%	43%	19%	31%	36%	50%
Adoption of AI/agentic tools will force smaller, service-focused firms out	34%	51%	19%	20%	28%	31%	37%
n =	88	77	20	80	36	29	29

Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

Takeaway: Except for service-led suppliers with ≤20 FTE, most in each segment completely or mostly agree organizations that don't leverage agentic AI will be left behind, and most in brand-side analytics (59%), tech-led suppliers (53%), service-led suppliers with ≤20 FTE (54%), and those with 21-100 FTE (64%) agree discussions about agentic AI dramatically overstate its adoption and impact.

Source: GRIT Report and NewtonX

GRIT asked participants about seven activities related to insights management in which they might have a formal role, and influencing policies for AI/automation and synthetic data did not make the top three in any segment. Most in brand-side analytics (65%) and among service-led suppliers with ≤20 FTE (72%) say they have a formal role, but only 40% (service-led with 100 to 500 FTE) to 49% (tech-led suppliers) claim the same in any other segment.

We'll find that insight professionals tend to have formal roles in deciding which suppliers or partners to work with, which technology, platforms, or tools to acquire, and how much work is outsourced versus done in-house, but they do not tend to have a formal role in whether or how agentic AI is used in these activities.

[The complete wording used in the survey for the attitude statements:

- Within the next few years, automated or agentic systems will mediate most research/insights services purchases.
- Adoption of AI and agentic tools will force many smaller, service-focused firms out of the market.
- Organizations that don't leverage agentic AI to revolutionize how insights work is bought and delivered will be left behind.
- Industry discussions about agentic AI dramatically overstate its current adoption and impact.]

Except for service-led suppliers with ≤20 FTE, most in each segment agree organizations that don't leverage agentic AI will be left behind.



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FORMAL ROLES IN AI/AUTOMATION POLICY [DATA]

GRIT asked participants about seven activities related to insights management in which they might have a formal role, and, generally speaking, those in smaller, more generalist organizations tend to wear the most top hats. Those from tech-led suppliers (3.6) and larger service-led suppliers with 101 to 500 FTE (3.4) and 500+ FTE (3.5) have the fewest formal roles. The smallest service-led suppliers have the most (5.2), followed by brand-side analytics professionals (4.6). Brand-side researchers (4.3) and service-led suppliers with 21 to 100 FTE (4.1) are in the middle.

In each segment, most have a formal role in choosing which suppliers or partners to work with, from 59% of service-led suppliers with 101 to 500 FTE to 83% of those with ≤ 20 FTE. Except for the two segments with the largest suppliers, most in each segment also have a formal role in choosing which technology, platforms, or tools to acquire, from 52% of tech-led suppliers to 85% of brand-side analytics professionals. In every supplier segment, most have a formal role in deciding staffing or team structure, from 55% of service-led suppliers with 500+ FTE to 75% of those with ≤ 20 FTE, and it's among their top three formal roles.

In each segment except tech-led (47%), most GRIT participants have a formal role in choosing which methods staff should learn and apply, but it is only in the top three for service-led suppliers with 101 to 500 FTE (57%) and those with 500+ FTE (58%). Among brand-side researchers, 65% claim deciding how much work is outsourced versus done in-house as a formal role, which puts it in their top three. On the analytics side, 67% have a formal role deciding budgets for insights, analytics, and research, which puts it among their top three.

Those with a formal role in policies for AI/automation and synthetic data reach majorities among brand-side analytics professionals (65%) and service-led suppliers with ≤ 20 FTE (72%), but it is the only activity not among the top three formal roles for any segment. So, while GRIT participants have several formal decision-making roles and many of them are shared across segments, they seem to have the least influence on shaping policies for the use of AI/automation and synthetic data in insights work.

HAVE FORMAL ROLE IN DECISIONS: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤ 20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Suppliers or partners to work with	79%	72%	62%	83%	72%	59%	66%
Technology, platforms, or tools to acquire	76%	85%	52%	75%	65%	48%	43%
How much work is outsourced vs done in-house	65%	55%	47%	69%	47%	39%	38%
Budgets for insights, analytics, and research	62%	67%	45%	69%	56%	40%	45%
Which methods staff should learn and apply	61%	52%	47%	74%	58%	57%	58%
Staffing or team structure	45%	59%	59%	75%	64%	61%	55%
Policies for AI/automation and synthetic data	41%	65%	49%	72%	45%	40%	43%
None of these	4%	0%	8%	2%	11%	20%	14%
Average number of formal roles:	4.3	4.6	3.6	5.2	4.1	3.4	3.5
n =	176	152	39	158	79	56	55

Green shading indicates top three most frequent roles.

Takeaway: Supplier/partner selection is among the top three formal decision-making roles in each segment, as is staffing or team structure in each supplier segment. Except for service-led suppliers with more than 100 FTE, deciding which technology, platforms, or tools to acquire is one of the top three roles.

Source: GRIT Report and NewtonX



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AGENTIC AI USE AND ATTITUDES | BRAND POV [DATA]

Of our seven decision areas, brand-side researchers (4.3) and analytics professionals (4.6) have formal roles in similar numbers of them, but the biggest gap is for policies regarding AI/automation and synthetic data. Among analytics, 65% have a formal role compared to 41% of researchers. It's the fourth most common role among analytics but last for researchers.

The next largest gap, formal role in staffing or team structure, leans toward analytics (59% to 45%). Researchers are somewhat more likely to have formal roles in how much work is outsourced versus done in-house (65% to 55%). Otherwise, the segments have similar profiles with respect to formal roles.

HAVE FORMAL ROLE IN DECISIONS: BRAND SEGMENT

	Research	Analytics	Research - analytics
Suppliers or partners to work with	79%	72%	+7%
Technology, platforms, or tools to acquire	76%	85%	-9%
How much work is outsourced vs done in-house	65%	55%	+10%
Budgets for insights, analytics, and research	62%	67%	-5%
Which methods staff should learn and apply	61%	52%	+9%
Staffing or team structure	45%	59%	-14%
Policies for AI/automation and synthetic data	41%	65%	-24%
None of these	4%	0%	+4%
Average number of formal roles:	4.3	4.6	-3%
n =	176	152	

Green shading indicates top three most-used methodologies.

Takeaway: Brand-side researchers are more likely than analytics professionals to have a formal role in how much work is outsourced (65% to 55%), and analytics professionals are more likely to have a formal role in policies for AI/automation and synthetic data (65% to 41%) and staffing or team structure (59% to 45%).

Source: GRIT Report and NewtonX

Of the seven tasks we presented, analytics professionals use agentic AI for about half of them (3.6), on average, compared to just 2.3 for researchers. In each segment, half or more use it for analyzing or modeling data and for creating or updating reports, dashboards, or summaries, but the gaps favor analytics: 71% to 62% for the former, and a wider 71% to 50% gap for the latter.

Although preparing and integrating data is among the top three agentic AI tasks in each segment, it's used by a strong majority in the analytics segment (73%) compared to just 43% of researchers. Monitoring for issues and alerts is another majority task for agentic AI among analytics (55%), but only 29% for researchers.



In each segment, half or more use agentic AI for analyzing or modeling data and for creating or updating reports, dashboards, or summaries.





Although use of agentic AI for recruiting, sampling, or routing participants and for selecting/shortlisting suppliers/partners for research/analytics reaches only 30% and 29%, respectively, among analytics professionals, that's +19% more than among

researchers for both tasks. The smallest gap between segments occurs for running surveys, interviews, or qualitative sessions, 30% for analytics and 24% for research.

CURRENT USE OF AGENTIC AI: BRAND SEGMENT

	Research	Analytics	Research - analytics
Analyzing or modeling data	62%	71%	-9%
Creating or updating reports, dashboards, or summaries	50%	71%	-21%
Preparing and integrating data	43%	73%	-30%
Monitoring for issues and alerts	29%	55%	-26%
Running surveys, interviews, or qualitative sessions	24%	30%	-6%
Recruiting, sampling, or routing participants	11%	30%	-19%
Selecting/shortlisting suppliers/partners for research/analytics	10%	29%	-19%
Average number of uses:	2.3	3.6	-1.3
n =	88	77	

Green shading indicates top three most-used methodologies.

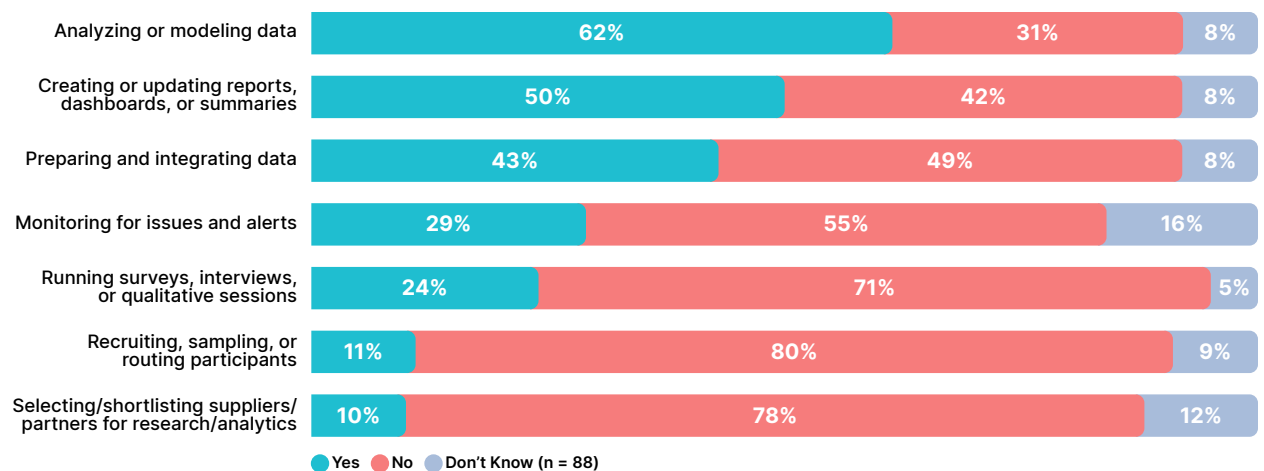
Takeaway: Brand-side analytics professionals are substantially more likely than researchers to currently use agentic AI across all tasks, with the largest gaps in preparing and integrating data (73% vs. 43%) and monitoring for issues and alerts (55% vs. 29%).

Source: GRIT Report and NewtonX

When we introduced this question, we wanted to pay attention to how many GRIT participants expressed knowledge of the use of agentic AI versus those who don't know. We expected the "don't know" rates

might be high, but, among researchers, it only ranges up to 16% for monitoring issues and alerts, an area that might not involve them, and 12% for selecting suppliers, a decision for which 79% claim a formal role.

CURRENT USE OF AGENTIC AI (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers are most likely to report use of agentic AI for analyzing or modeling data (62%), creating or updating reports, dashboards, or summaries (50%), and preparing and integrating data (43%).

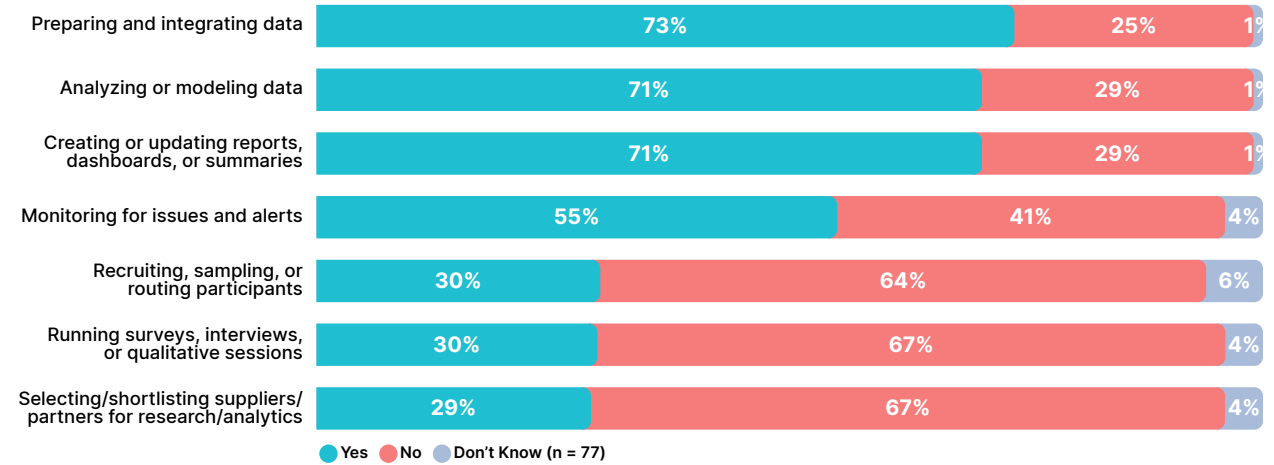




The “don’t know” rates are very small among the analytics segment. They max out at 6% for recruiting, sampling, or routing participants. The low “don’t

know” rates suggest participants may have genuine visibility into how agentic AI is being used in their organizations, not just their own personal use.

CURRENT USE OF AGENTIC AI (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are most likely to report use of agentic AI for preparing and integrating data (73%), analyzing or modeling data (71%), creating or updating reports, dashboards, or summaries (71%), and monitoring for issues and alerts (55%).

The two brand-side segments diverge at least somewhat on our four attitude statements, although most completely or mostly agree organizations that don’t leverage agentic AI will be left behind (68% among analytics to 57% for researchers). The largest gap occurs for automated/agentic systems will mediate most insights services purchases (66% analytics to 37% research). Currently, only 29% of the analytics segment uses agentic AI for selecting/shortlisting suppliers/partners for research/analytics, but they seem to expect that to change.

Most brand-side analytics professionals agree adoption of AI/agentic tools will force smaller, service-focused firms out of the market (51% to 34%) but also discussions about agentic AI dramatically overstate its adoption and impact (59% to 44%). They are the most likely to agree both that organizations will be left behind *and* that adoption is overstated. It’s not contradictory, it’s a considered position that suggests “this is real and consequential, but the current conversation is ahead of the reality.”

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE: BRAND SEGMENT

	Research	Analytics	Research - analytics
Organizations that don't leverage agentic AI will be left behind	57%	68%	-11%
Discussions about agentic AI dramatically overstate its adoption and impact	44%	59%	-15%
Automated/agentic systems will mediate most insights services purchases	37%	66%	-29%
Adoption of AI/agentic tools will force smaller, service-focused firms out	34%	51%	-17%
n =	88	77	

Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

Takeaway: Brand-side analytics professionals are more likely than researchers to completely or mostly agree automated/agentic systems will mediate most insights services purchases (66% to 37%) and adoption of AI/agentic tools will force smaller, service-focused firms out of the market (51% to 34%).

Source: GRIT Report and NewtonX



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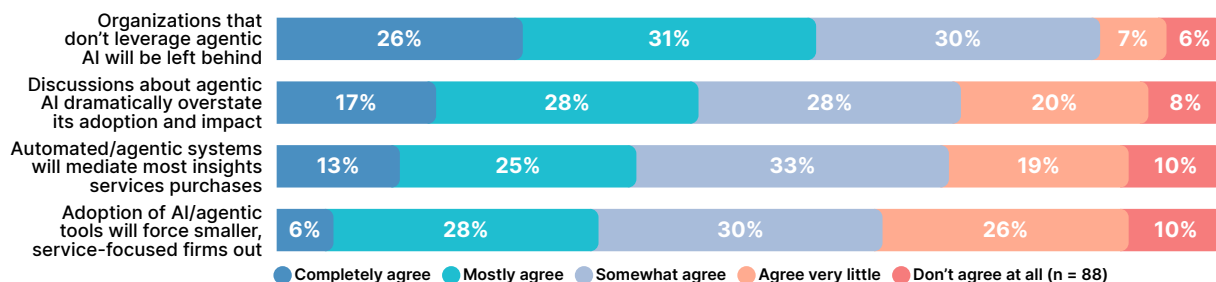
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Most brand-side researchers completely or mostly agree organizations that don't leverage agentic AI will be left behind, and, unlike the other statements, the

percentage who "completely" agree (26%) approaches those who "mostly" agree (31%).

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (BRAND: RESEARCH)



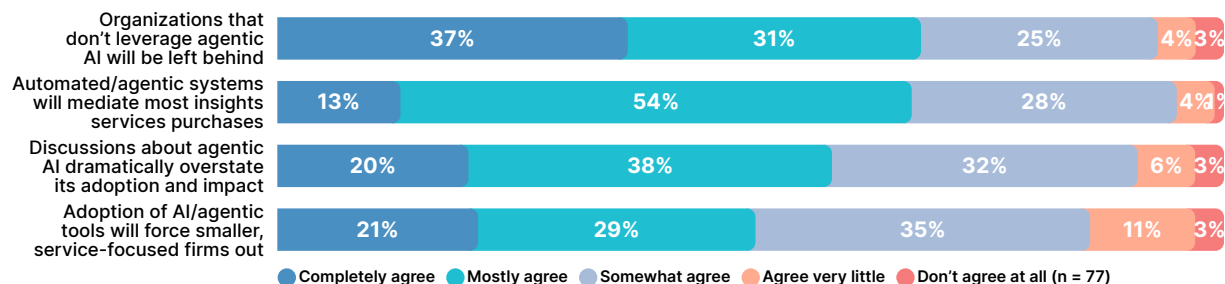
Source: GRIT Report and NewtonX

Takeaway: Most brand-side researchers completely or mostly agree organizations that don't leverage agentic AI will be left behind (57%).

Although most brand-side analytics professionals completely or mostly agree with each of the four statements, "completely" agree only outpaces "mostly" for organizations that don't leverage agentic AI will be left behind (37% to 31%). Agreement regarding

automated/agentic systems will mediate most insights services purchases seems much more tentative (13% "completely" agree to 54% "mostly"). They believe the direction but not the timeline or the magnitude yet.

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Most brand-side analytics professionals completely or mostly agree organizations that don't leverage agentic AI will be left behind (68%), automated/agentic systems will mediate most insights services purchases (67%), and discussions about agentic AI dramatically overstate its adoption and impact (58%).



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AGENTIC AI USE AND ATTITUDES | SUPPLIER POV ^[DATA]

In every supplier segment, majorities have formal roles in decisions regarding which suppliers or partners to work with, from 59% of service-led suppliers with 101 to 500 FTE to 83% of those with ≤ 20 FTE. The same is true for staffing or team structure, from 55% for service-led suppliers with 500+ FTE to 75% of those with ≤ 20 FTE.

At the largest service-led suppliers, the other top-three formal decision role is which methods staff should learn and apply, 57% for those with 101 to 500 FTE and 58% for those with 500+ FTE. For smaller and tech-led suppliers, it's which technology, platforms, or tools to acquire (52% tech-led, 75% service-led suppliers with ≤ 20 FTE, and 65% of those with 21 to 100 FTE). Other than this difference in emphasis, the segments rank these roles in similar ways.

HAVE FORMAL ROLE IN DECISIONS: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤ 20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Suppliers or partners to work with	62%	83%	72%	59%	66%
Which methods staff should learn and apply	47%	74%	58%	57%	58%
Staffing or team structure	59%	75%	64%	61%	55%
Budgets for insights, analytics, and research	45%	69%	56%	40%	45%
Policies for AI/automation and synthetic data	49%	72%	45%	40%	43%
Technology, platforms, or tools to acquire	52%	75%	65%	48%	43%
How much work is outsourced vs done in-house	47%	69%	47%	39%	38%
None of these	8%	2%	11%	20%	14%
Average number of formal roles:	3.6	5.2	4.1	3.4	3.5
n =	39	158	79	56	55

Green shading indicates top three most frequent roles.

Takeaway: Across supplier segments, the top three formal decision roles include selecting suppliers and partners and staffing or team structure. For service-led suppliers with more than 100 FTE, deciding which methods staff should learn and apply is in the top three, while deciding which technology, platforms, or tools to acquire is in the top three in each other segment.



In every supplier segment, majorities have formal roles regarding which suppliers or partners to work with; the same is true for staffing or team structure.

While tech-led suppliers use agentic AI for the most tasks, on average (3.3), and larger service-led suppliers use it for more tasks than smaller ones, the three most common uses are the same across segments: analyzing or modeling data, creating or updating reports, dashboards, or summaries, and preparing and integrating data. Tech-led suppliers range from 64% for creating or updating deliverables to 81% for preparing and integrating data, while service-led segments tend to be less engaged.



In the two smaller service-led segments, use of agentic AI for these three tasks ranges from 35% for preparing and integrating data among those with ≤20 FTE to 44% for each of the other two tasks in the same segment. In the larger segments, usage ranges from 50% for preparing and integrating data among those with 500+ FTE to 71% for creating or updating deliverables for those with 101 to 500 FTE.

When the ranking is stable but the levels vary this much, it suggests the industry has converged on what agentic AI is for even if segments are at very different stages of doing it. At least, it seems to have converged for the moment.

CURRENT USE OF AGENTIC AI: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Analyzing or modeling data	76%	44%	43%	57%	59%
Creating or updating reports, dashboards, or summaries	64%	44%	42%	71%	56%
Preparing and integrating data	81%	35%	41%	57%	50%
Running surveys, interviews, or qualitative sessions	23%	19%	21%	16%	34%
Recruiting, sampling, or routing participants	19%	13%	13%	19%	26%
Monitoring for issues and alerts	48%	20%	21%	19%	25%
Selecting/shortlisting suppliers/partners for research/analytics	14%	9%	4%	3%	17%
Average number of uses:	3.3	1.9	1.8	2.4	2.7
n =	20	80	36	29	29

Green shading indicates top three most frequent uses.

Takeaway: The top three current uses for agentic AI are the same in each segment: analyzing or modeling data (ranging from 43% to 76%), creating or updating reports, dashboards, or summaries (42% to 71%), and preparing and integrating data (35% to 81%).

Source: GRIT Report

Except for the smallest service-led suppliers (39%), most in each supplier segment completely or mostly agree organizations that don't leverage agentic AI will be left behind. Agreement ranges from 57% of service-led suppliers with 21 to 100 FTE to 70% for those with 500+ FTE and 71% for tech-led suppliers.

However, they don't seem to believe this will differentially (and negatively) impact smaller suppliers. Agreement with the statement increases with service-led supplier size, but the percentage who completely or mostly agree only ranges from 20% for the smallest suppliers to 37% for the largest. Whereas in some of the methodology sections we've seen that larger suppliers may be more able to afford to offer certain kinds of sophisticated methods, it doesn't seem like suppliers expect smaller suppliers to be frozen out of agentic AI gains. Perhaps it is seen as a leveler.

The rankings are stable but levels vary: the industry's converged on what agentic AI is for even if segments are at very different stages of adopting it.



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We saw that 66% of brand-side analytics professionals completely or mostly agree automated/agentive systems will mediate most insights services purchases, but this only seems to be on the radar for the largest service-led suppliers (50%) and, to a lesser extent, tech-led suppliers (43%). We'd expect very large service-led suppliers and tech-led suppliers to be keen on this topic, but smaller service-led suppliers may want to explore it further.

Suppliers have adopted agentive AI for some tasks and some see it having a huge impact in the future. Even so, most tech-led suppliers (53%), service-led suppliers with ≤20 FTE (54%), and those with 21 to 100 FTE (64%) completely or mostly agree discussions about agentive AI dramatically overstate its adoption and impact. Most agree there's a lot of smoke, but who sees "smoke and mirrors" and who sees "smoke and fire"?

The larger service-led suppliers may feel the heat more than other suppliers. Although not much less, those with 101 to 500 FTE (49%) are less confident in the overstatement proposition than tech-led or smaller service-led suppliers. When we look at those with 500+ FTE, though, their lowly 43% agreement stands out and looks like a trend next to the 101 to 500 FTE segment. They are probably more involved in discussions of how agentive AI will mediate insights services purchases, so they may be standing a bit closer to the fire than the other supplier segments.

Their lower agreement with overstatement combined with their higher agreement that organizations will be left behind makes them the segment with the most internally consistent and urgent view of agentive AI, believing both that it's consequential and that the discourse may undersell rather than oversell it.

ATTITUDES TOWARD AGENTIVE AI - COMPLETELY/MOSTLY AGREE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Organizations that don't leverage agentive AI will be left behind	71%	39%	57%	60%	70%
Automated/agentive systems will mediate most insights services purchases	43%	19%	31%	36%	50%
Discussions about agentive AI dramatically overstate its adoption and impact	53%	54%	64%	49%	43%
Adoption of AI/agentive tools will force smaller, service-focused firms out	19%	20%	28%	31%	37%
n =	20	80	36	29	29

Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

Takeaway: Except for service-led suppliers with ≤20 FTE (39%), the majority in each segment completely or mostly agree organizations that don't leverage agentive AI will be left behind, from 57% of service-led with 21-100 FTE to 71% of tech-led; most tech-led (53%) and service-led suppliers with ≤20 FTE (54%) and 21-100 FTE (64%) completely or mostly agree discussions about agentive AI dramatically overstate its adoption and impact.

Source: GRIT Report



Most agree there's a lot of smoke around agentive AI, but who sees "smoke and mirrors" and who sees "smoke and fire"?



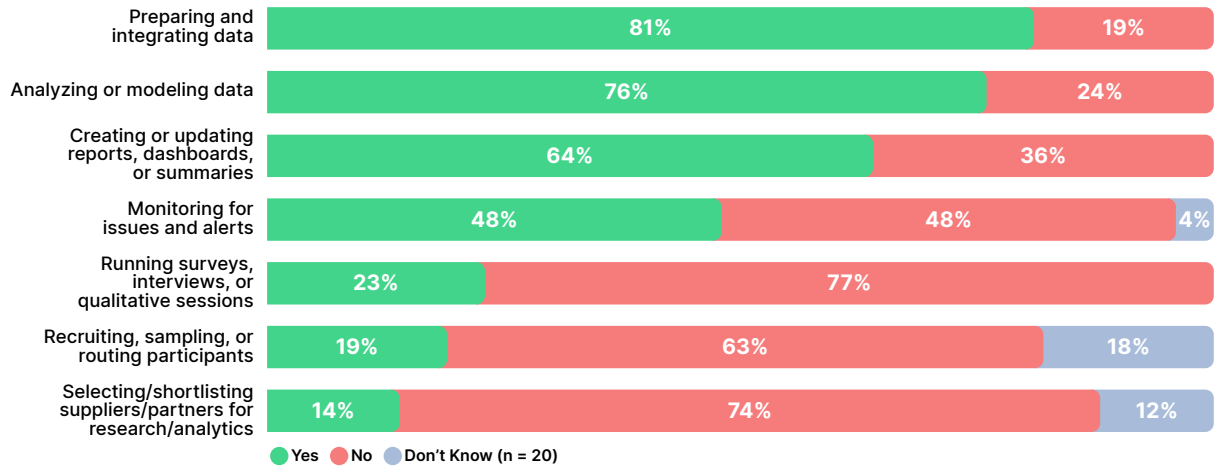


AGENTIC AI USE AND ATTITUDES | TECH-LED POV ^[DATA]

Regarding use of agentic AI, tech-led suppliers seem to be clear about where it is used and not used. “Don’t know” only reaches 12% for selecting/shortlisting

suppliers/partners for research/analytics and 18% for recruiting, sampling, or routing participants.

CURRENT USE OF AGENTIC AI (TECH-LED)



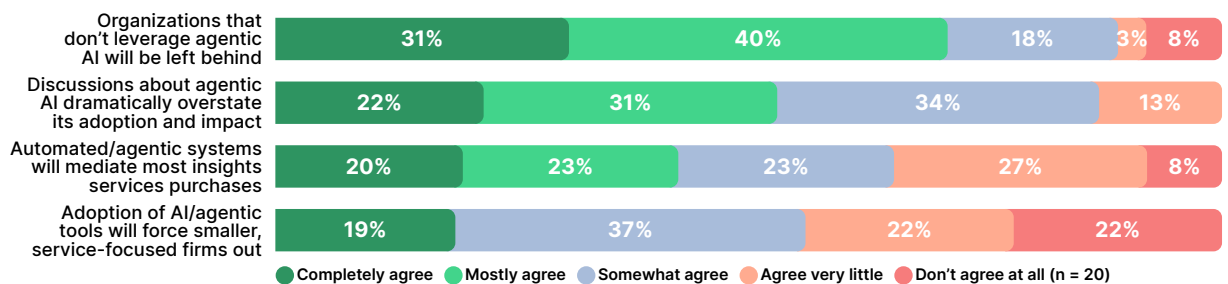
Source: GRIT Report

Takeaway: Tech-led suppliers are most likely to report use of agentic AI for preparing and integrating data (81%), analyzing or modeling data (76%), and creating or updating reports, dashboards, or summaries (64%).

Among tech-led suppliers, 35% agree very little or not at all that automated/agentic systems will mediate most insights services purchases, and 44% feel that

way about adoption of AI/agentic tools forcing smaller, service-focused firms out of the market.

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (TECH-LED)



Source: GRIT Report

Takeaway: Most tech-led suppliers completely or mostly agree organizations that don't leverage agentic AI will be left behind (71%) and discussions about agentic AI dramatically overstate its adoption and impact (53%).



Most tech-led suppliers completely or mostly agree organizations that don't leverage agentic AI will be left behind.





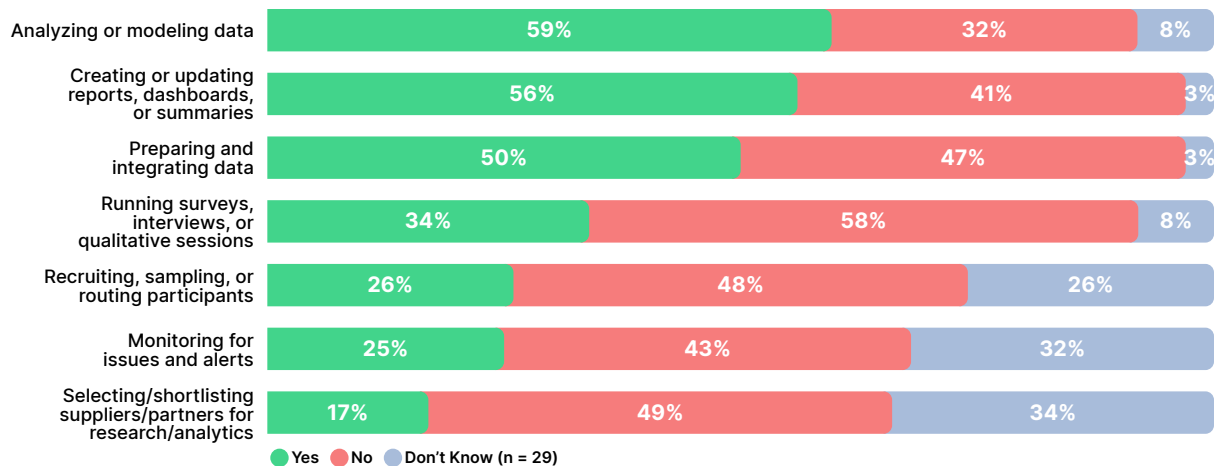
AGENTIC AI USE AND ATTITUDES |

SERVICE-LED: 500+ FTE [DATA]

Regarding use of agentic AI, service-led suppliers with 500+ FTE seem to have some doubt about where it is used and not used. “Don’t know” reaches 34% for

selecting/shortlisting suppliers/partners for research/analytics, 32% for monitoring for issues and alerts, and 26% for recruiting, sampling, or routing participants.

CURRENT USE OF AGENTIC AI (SERVICE-LED: 500+ FTE)

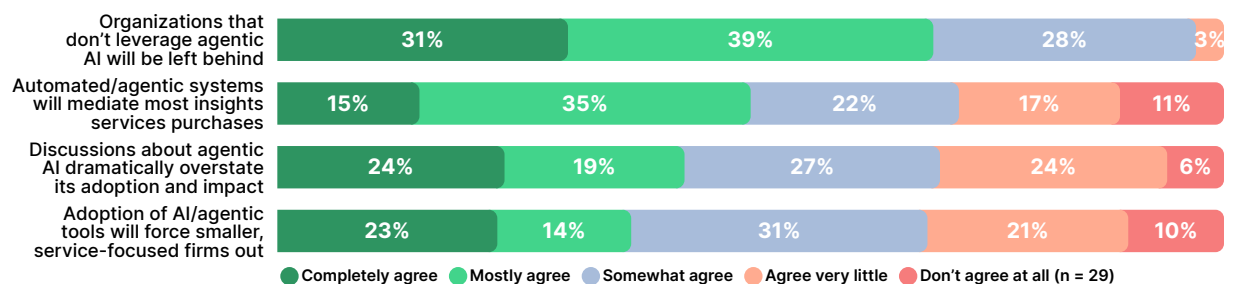


Takeaway: Service-led suppliers with 500+ FTE are most likely to report use of agentic AI for analyzing or modeling data (59%), creating or updating reports, dashboards, or summaries (56%), and preparing and integrating data (50%).

Among service-led suppliers with 500+ FTE, 31% agree very little or not at all that adoption of AI/agentic tools will force smaller, service-focused firms out of

the market, and 30% feel that way about discussions about agentic AI dramatically overstating its adoption and impact.

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (SERVICE-LED: 500+ FTE)



Takeaway: At least half of service-led suppliers with 500+ FTE completely or mostly agree organizations that don't leverage agentic AI will be left behind (70%) and automated/agentic systems will mediate most insights services purchases (50%).



At least half of service-led suppliers with 500+ FTE completely or mostly agree organizations that don't leverage agentic AI will be left behind.



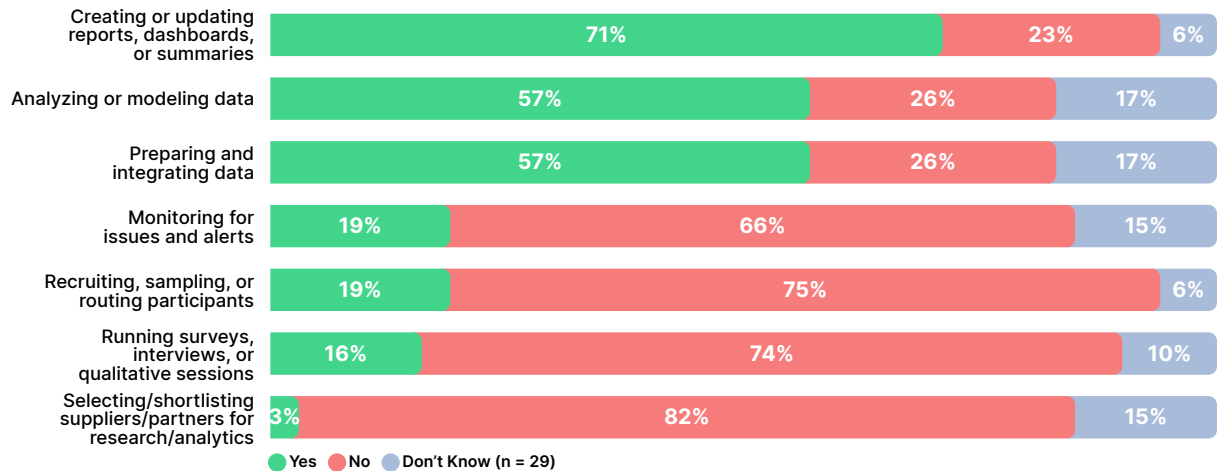
AGENTIC AI USE AND ATTITUDES |

SERVICE-LED: 101-500 FTE [DATA]

Regarding use of agentic AI, service-led suppliers with 101 to 500 FTE seem to have the most doubt about where it is used and not used with respect to analyzing or modeling data and preparing and

integrating data (17% each) plus monitoring for issues and alerts and selecting/shortlisting suppliers/partners for research/analytics (15% each).

CURRENT USE OF AGENTIC AI (SERVICE-LED: 101-500 FTE)



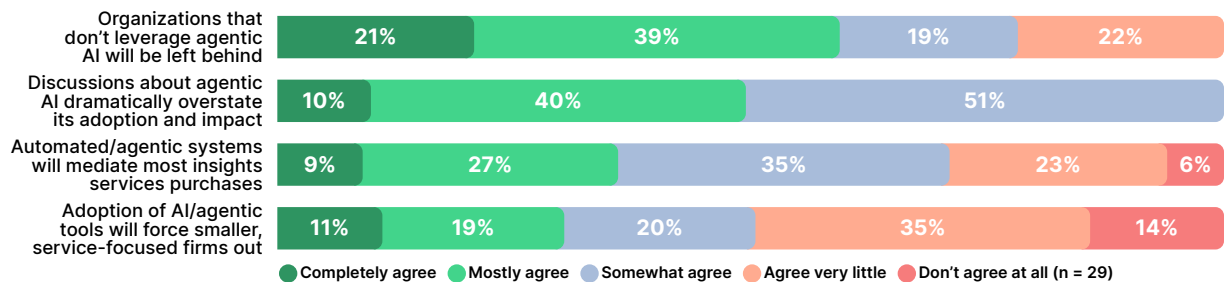
Source: GRIT Report

Takeaway: Service-led suppliers with 101-500 FTE are most likely to report use of agentic AI for creating or updating reports, dashboards, or summaries (71%), analyzing or modeling data (57%), and preparing and integrating data (57%).

Among service-led suppliers with 101 to 500 FTE, almost half (49%) agree very little or not at all that adoption of AI/agentic tools will force smaller, service-

focused firms out of the market, and 29% feel that way about automated/agentic systems mediating most insights services purchases.

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: At least half of service-led suppliers with 101-500 FTE completely or mostly agree organizations that don't leverage agentic AI will be left behind (60%) and discussions about agentic AI dramatically overstate its adoption and impact (50%).



At least half of service-led suppliers with 101 to 500 FTE completely or mostly agree organizations that don't leverage agentic AI will be left behind.



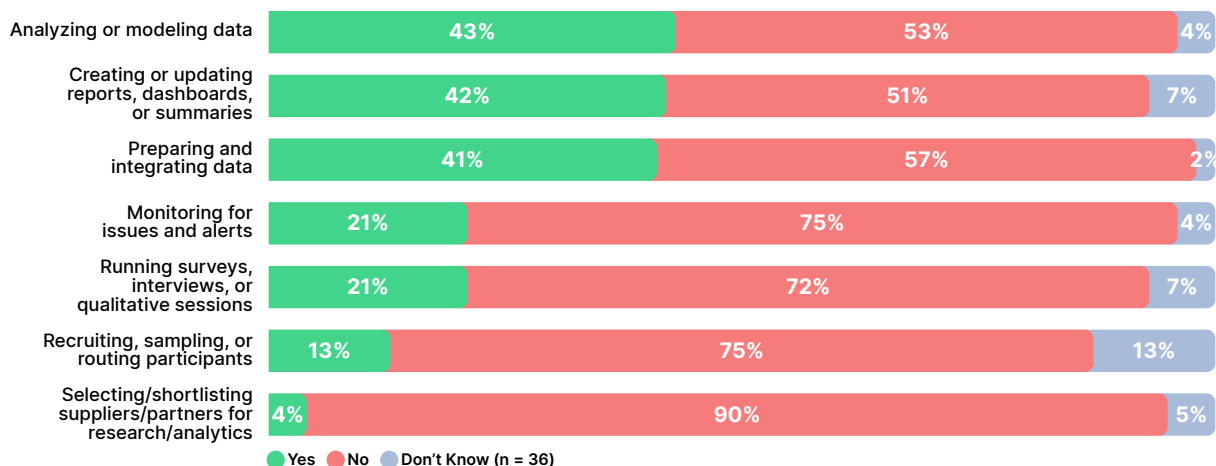
AGENTIC AI USE AND ATTITUDES |

SERVICE-LED: 21-100 FTE [DATA]

Regarding use of agentic AI, service-led suppliers with 21 to 100 FTE seem to have the most doubt about where it is used and not used with respect to

recruiting, sampling, or routing participants (13%), but they seem to be confident overall.

CURRENT USE OF AGENTIC AI (SERVICE-LED: 21-100 FTE)

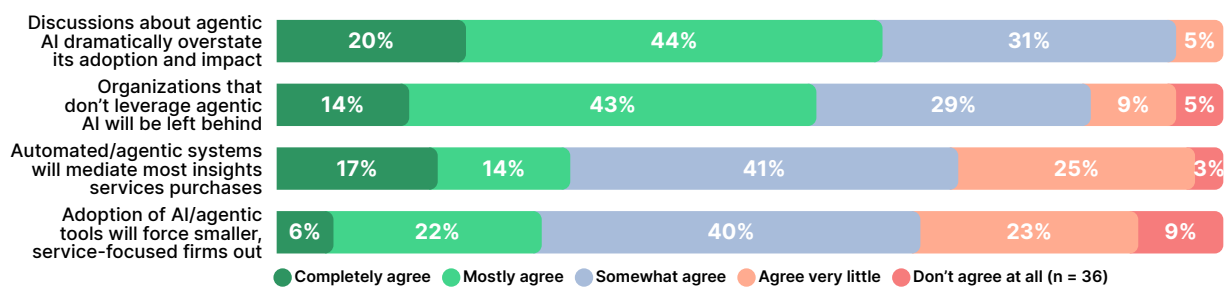


Takeaway: Service-led suppliers with 21-500 FTE are most likely to report use of agentic AI for analyzing or modeling data (43%), creating or updating reports, dashboards, or summaries (42%), and preparing and integrating data (41%).

Among service-led suppliers with 21 to 100 FTE, almost 32% agree very little or not at all that adoption of AI/agentic tools will force smaller, service-focused

firms out of the market, and 28% feel that way about automated/agentic systems mediating most insights services purchases.

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (SERVICE-LED: 21-100 FTE)



Takeaway: Most service-led suppliers with 21-100 FTE completely or mostly agree discussions about agentic AI dramatically overstate its adoption and impact (64%) and organizations that don't leverage agentic AI will be left behind (57%).



Among service-led suppliers with 101 to 500 FTE, almost 32% agree very little that adoption of AI/agentic tools will force smaller, service-focused firms out of the market.

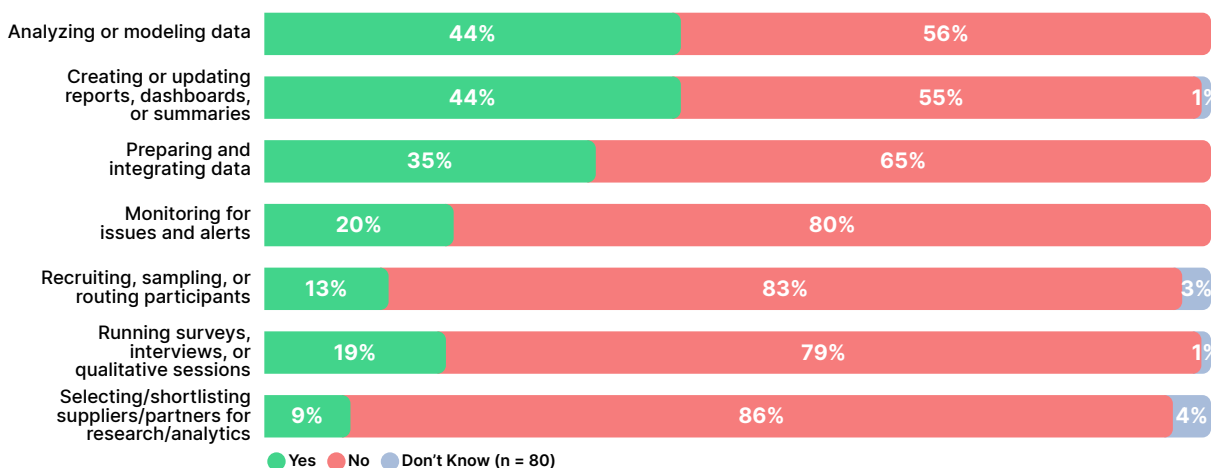


AGENTIC AI USE AND ATTITUDES |

SERVICE-LED: ≤20 FTE ^[DATA]

Regarding use of agentic AI, service-led suppliers with ≤20 FTE seem to have almost no doubt about where it is used and not used.

CURRENT USE OF AGENTIC AI (SERVICE-LED: ≤20 FTE)



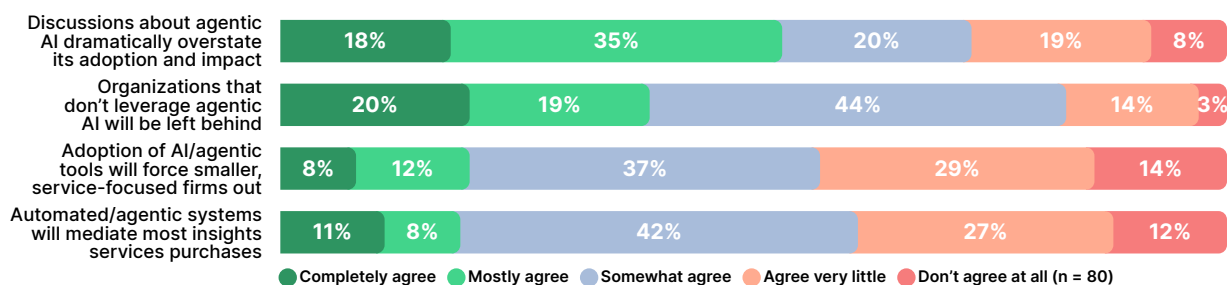
Source: GRIT Report

Takeaway: Service-led suppliers with ≤20 FTE are most likely to report use of agentic AI for analyzing or modeling data (44%), creating or updating reports, dashboards, or summaries (44%), and preparing and integrating data (35%).

Among service-led suppliers with ≤20 FTE, almost 39% agree very little or not at all that automated/agentic systems will mediate most insights services

purchases, and 43% feel that way about adoption of AI/agentic tools forcing smaller, service-focused firms out of the market.

ATTITUDES TOWARD AGENTIC AI - COMPLETELY/MOSTLY AGREE (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Most service-led suppliers with ≤20 FTE completely or mostly agree discussions about agentic AI dramatically overstate its adoption and impact (53%).



Most service-led suppliers with ≤20 FTE completely or mostly agree discussions about agentic AI dramatically overstate its adoption and impact.



THE BIG PICTURE [STRATEGIC INTERPRETATION]

Agentic AI is here, and it's big and it's real. Specifically, every GRIT segment has converged on the same three applications, regardless of their adoption rate: analyzing or modeling data, creating or updating reports, and preparing and integrating data. Regarding analyzing/modeling and creating/updating deliverables, at least half in each brand-side segment and most among tech-led suppliers and service-led suppliers with more than 100 FTE use agentic AI.

This suggests the industry has reached consensus on agentic AI's primary value proposition even while adoption is still uneven; well, consensus on its current value proposition. Agentic AI is most likely to be deployed where mistakes are recoverable and withheld where they aren't. The tasks where agentic AI is not being used as much are consistent across segments, such as supplier selection (3% to 29%) and recruiting and sampling (11% to 30%), and these can carry a higher cost if they fail.

GRIT has often characterized text analytics as a "gateway drug" for those wanting to become more involved with analytics because data is plentiful, tools become more accessible, and success can lead to deeper engagement. In a similar way, analyzing/modeling data, creating/updating deliverables, and preparing/integrating data may be a "gateway drugs" for agentic AI.

If those three tasks represent where agentic AI is currently in the collective mindset of the industry, where is it going?

Let's consider its low usage for supplier selection, which ranges from 3% among service-led suppliers with 101 to 500 FTE to 29% for brand-side analytics professionals. Let's also consider that most GRIT participants in each segment play a formal role in supplier selection, from 59% of service-led suppliers with 101 to 500 FTE to 83% of those with ≤ 20 FTE; among brand-side researchers, it's 79%, and among brand-side analytics, it's 72%. Why aren't they using agentic AI for supplier selection?

We may not have to wait too long for that question to become moot. Among brand-side analytics professionals, 66% completely or mostly agree automated/agentic systems will mediate most insights services purchases in the future. It's not happening yet, but it takes two to tango, so to speak. Perhaps they just need more partners.

After brand-side analytic professionals, the next-most agreement is among service-led suppliers with 500+ FTE (50%), and agreement declines with supplier size. It's likely that many of these suppliers are closer to the change that's coming, and they are preparing for it. Maybe it won't be long before brand-side analytics professionals are no longer the "one hand clapping."

The most consequential finding is the governance gap. Insights professionals often hold formal authority over supplier selection, technology acquisition, and outsourcing decisions, but they are much less likely to hold formal authority over AI policy, even though AI will increasingly shape or execute those same decisions.

– LM, ed.





In other sections of this report, we see how the largest service-led suppliers are adjusting their cost structures via changes to their service and methodology portfolios. Those changes might be in response to a “bigness” that is no longer sustainable, but it might also be in anticipation of which research and insights tasks will become more fully self-serve for clients. Agentic service transactions would be part of that service model.

OK, that’s a lot of speculation, and most segments agree that agentic AI adoption and impact is overstated. However, the agreement means different things depending on who’s saying it. Among brand-side analytics professionals, 59% agree it’s overstated while simultaneously using it for 3.6 of seven tasks and believing organizations will be left behind without it. Among service-led suppliers with ≤20 FTE, 54% agree it’s overstated while using it for fewer than two tasks on average.

The agreement is similar; the position is not. The analytics segment’s skepticism looks like informed critique from inside the adoption curve. The smaller suppliers’ skepticism may be serving a different function, perhaps one that includes proactive evaluation. Currently, no segment views agentic AI as a threat specifically to small suppliers, so maybe it could become an important leveler for them?

It’s clear that agentic AI has arrived and is playing a significant role in the insights workflow, but are insights professionals guiding it enough?

AI/automation policy is the only formal decision role that doesn’t reach the top three in any segment, including among the heaviest agentic AI users. The activities where agentic AI is most used are ones in which most participants have formal roles, including through adjacent decisions like technology acquisition and methods selection. They’re making decisions that enable agentic AI use without formally governing it.

The gap is sharpest among brand-side researchers, where AI policy ranks last at 41% despite 79% claiming formal authority over supplier selection, the activity most likely to be mediated by agentic systems in the future according to their own analytics colleagues. All GRIT can do at this point is flag the issue, and we’ll get another perspective on it when we discuss *Governance & Risk*.



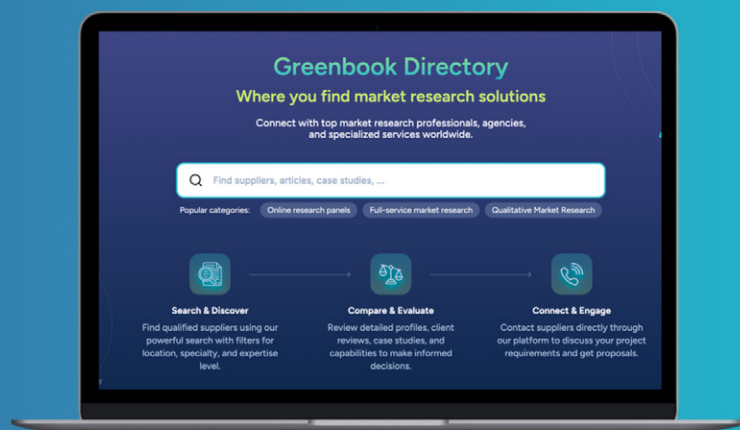
AI/automation policy is the only formal role that not in the top 3 in any segment, even though the activities where agentic AI is most used are where most participants have formal roles.



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RESEARCH SHOULD RUN LIKE BUSINESS: CONTINUOUSLY.

Daniel Graff-Radford

CEO, Discuss

Every research project has a beginning and an end. That design decision, which is so embedded in how the industry works that it rarely gets examined, may be the assumption most worth questioning right now.

The GRIT data shows agentic AI taking hold at familiar entry points: preparing and integrating data, analyzing it, generating reports. These tasks sit at the edges of the project cycle. That's a rational place to start, and the efficiency gains are visible.

What the data also shows, without quite naming it, is that AI adoption is following the same project-based rhythm the industry already runs on. Teams are improving how individual studies run. The interval between studies where questions accumulate, organizational memory sits dormant, and last year's findings slowly lose relevance remains largely unchanged.

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Daniel Graff-Radford is the CEO of Discuss and a veteran of private equity-backed SaaS companies. With a 20-year track record of scaling technology leaders, Daniel excels at bridging complex markets and operations. At Voxco he orchestrated the combination of Voxco, Ascribe, and Discuss to form an industry leader unifying AI with qualitative depth and quantitative scale. This vision was validated in 2026 when Discuss was named a Forrester Wave™ Leader.

Research built around a start/stop model has a structural problem. Knowledge doesn't compound when it's organized into discrete outputs filed away at project's end. It accumulates. The distinction matters: accumulation without access is an archive.

What I hear from insights leaders surfaces differently depending on the organization. Some describe fragmentation. Qual lives in one place, quant in another, and no one holds the complete picture. Some describe redundancy. The same questions are funded again and again because no one can locate the original answer. And some describe latency. Good work arriving after the decision has already moved on. Different symptoms, same root: research that stops between projects can't address any of them.

The project model persisted because it matched how budgets work, how teams get staffed, and how procurement runs. Those constraints are real.

But they were never a good description of how business questions actually arrive: continuously, often urgently, rarely on a quarterly schedule. The gap between when a question forms and when research can answer it has always been the real cost. Most organizations have simply learned to live with it.

The vision we've built at Discuss starts from a different assumption. Research should run continuously as a living system where what the organization has already learned stays available, queryable, and useful to the next question that comes in.

The goal is to make research a living asset. That's an operating model. And it's the shift that makes everything else compound.





INVESTING IN INSIGHTS

This section looks at trends in automation and outsourcing and whether GRIT participants think their organizations rely on them too much, too little, or the right amount.

WHO NEEDS MORE AUTOMATION? [ORIENTATION]

How much are insights organizations using automation? How much are they outsourcing? How could the average GRIT participant even quantify those practices?

We decided they couldn't, so we took the "three bears" approach: is it too much, too little, or "just right?" We presented six tasks that could be automated or outsourced, and asked their opinions of each.

Except for executing fieldwork and data collection (45%), at least half of brand-side researchers think automation is under-utilized for every task, from 50% for sourcing participants and data to 57% for analyzing and modeling insights. Most on the analytics side think they need more automation for sourcing participants and data (54%), and the other tasks range from 20% for analyzing and modeling insights to 44% for communicating and activating insights.

Suppliers also have an appetite for automation, especially tech-led suppliers and some service-led suppliers with more FTE. Most tech-led (64%) and service-led suppliers with 21 to 100 FTE (52%) and those with 101 to 500 FTE (64%) believe they do not use automation enough for executing fieldwork and data collection. Most service-led suppliers with 101 to 500 FTE also believe it is not used enough for designing research and analytics (53%), analyzing and modeling insights (55%), and sourcing participants and data (54%). Most of those with 500+ FTE believe automation is under-utilized for preparing and integrating data (54%) and analyzing and modeling insights (59%).

Each task is considered under-automated by a majority in at least one supplier segment except communicating and activating insights. Even that is considered under-automated by more suppliers as their FTE's increase, from 26% for service-led with ≤20 FTE to 43% for those with 500+ FTE.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data**.
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

[Report Top](#)[Contents](#)



HOW MUCH ORGANIZATION RELIES ON AUTOMATION - FAR/A BIT TOO LITTLE: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service- led: ≤20 FTE	Service- led: 21- 100 FTE	Service- led: 101- 500 FTE	Service- led: 500+ FTE
Analyzing and modeling insights	57%	20%	31%	41%	33%	55%	59%
Preparing and integrating data	53%	30%	45%	37%	47%	49%	54%
Designing research and analytics	53%	41%	26%	33%	40%	53%	46%
Communicating and activating insights	53%	44%	31%	26%	35%	41%	43%
Sourcing participants and data	50%	54%	30%	44%	48%	54%	46%
Executing fieldwork and data collection	45%	37%	64%	38%	52%	64%	40%
n (range) =	67-81	72-76	16-20	64-77	30-33	26-37	20-27

"No opinion" removed. Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

Takeaway: At least half of brand-side researchers believe automation is under-utilized for five tasks, from 50% for sourcing participants and data to 57% for analyzing and modeling insights; most tech-led suppliers and larger service-led suppliers also have unmet needs for automation.

Source: GRIT Report and NewtonX

If we take the same look at outsourcing, beliefs that it is under-utilized never exceed about one-third of any segment for any task. The need for more outsourcing is strongest among service-led suppliers with 500+ FTE: at least 30% say outsourcing is under-utilized for each task except executing fieldwork and data collection (15%). In that segment, unmet needs for outsourcing for other tasks range from 31% for

designing research and analytics to 34% for preparing and integrating data and analyzing and modeling insights. Among brand-side analytics professionals, the percentage needing more outsourcing reaches 30% for communicating and activating insights (30%) and preparing and integrating data (34%). In no other instance does an unmet need for outsourcing reach 30% for any task in any segment.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING - FAR/A BIT TOO LITTLE: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service- led: ≤20 FTE	Service- led: 21- 100 FTE	Service- led: 101- 500 FTE	Service- led: 500+ FTE
Preparing and integrating data	21%	34%	14%	7%	25%	18%	34%
Designing research and analytics	19%	23%	6%	9%	24%	22%	31%
Analyzing and modeling insights	18%	26%	5%	14%	25%	12%	34%
Communicating and activating insights	15%	30%	0%	16%	23%	19%	33%
Sourcing participants and data	14%	27%	6%	9%	23%	6%	32%
Executing fieldwork and data collection	11%	26%	11%	7%	12%	4%	15%
n (range) =	84-87	74-75	17-19	75-78	31-33	26-28	24-26

"No opinion" removed. Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

Takeaway: Beliefs that outsourcing is under-utilized never exceed about one-third of any segment for any task; the need for more outsourcing is strongest among service-led suppliers with 500+ FTE.

Source: GRIT Report and NewtonX



Beliefs that outsourcing is under-utilized never exceed about one-third of any segment for any task.



In *Managing Insights*, we saw the top three uses of agentic AI in each segment were analyzing or modeling data, creating or updating reports, dashboards, or summaries, and preparing and integrating data, but it doesn't seem to be enough yet.

Most brand-side researchers (57%) and service-led suppliers with more than 100 FTE (55% of those with 101 to 500 FTE and 59% of those with 500+ FTE) say analyzing and modeling insights is under-automated. Most researchers say communicating and activating

insights is under-automated (53%), and they say the same for preparing and integrating data (53%), along with nearly half of service-led suppliers with 101 to 500 FTE (49%) and most with 500+ FTE (54%).

Agentic AI has achieved broad adoption for analyzing/modeling, preparing/integrating data, and creating deliverables, yet majorities in several segments still consider these tasks under-automated. It's not a contradiction; it suggests agentic AI adoption may be raising expectations faster than it has satiated them.

AUTOMATION AND OUTSOURCING | BRAND POV ^[DATA]

Brand-side insights professionals are not very likely to believe their organizations rely on automation too much, but analytics professionals are more likely than researchers to think that way about any task. They are most likely to believe it is used too much for analyzing

and modeling insights (25%), and the gap is widest for communicating and activating insights (21% for analytics to 5% for researchers), executing fieldwork and data collection (19% to 3%), and preparing and integrating data (19% to 5%).

HOW MUCH ORGANIZATION RELIES ON AUTOMATION - FAR/A BIT TOO MUCH: BRAND SEGMENT

	Research	Analytics	Research - analytics
Analyzing and modeling insights	13%	25%	-12%
Preparing and integrating data	5%	19%	-14%
Communicating and activating insights	5%	21%	-16%
Designing research and analytics	5%	11%	-6%
Executing fieldwork and data collection	3%	19%	-16%
Sourcing participants and data	2%	13%	-11%
n (range) =	67-81	72-76	

"No opinion" has been removed.

Takeaway: Although not very likely to believe their organization relies too much on automation for any task, brand-side analytics professionals are consistently more likely than researchers to believe it across every task; the largest gaps are in communicating/activating insights (21% vs. 5%) and executing fieldwork (19% vs. 3%).

Source: GRIT Report and NewtonX



Brand-side professionals are not very likely to believe their organizations rely on automation too much, but analytics professionals are more likely than researchers to think that way.

Except for executing fieldwork and data collection (45%), at least half of brand-side researchers believe their organizations do not use automation enough across tasks. Most analytics professionals believe they do not use it enough for sourcing participants and data (54%), and this is the only task for which more of them believe this than researchers do (50%). Researchers are more likely to believe their organizations do not rely on automation enough for analyzing and modeling insights (57% to 20%), preparing and integrating data (53% to 30%), and designing research and analytics (53% to 41%).



HOW MUCH ORGANIZATION RELIES ON AUTOMATION - FAR/A BIT TOO LITTLE: BRAND SEGMENT

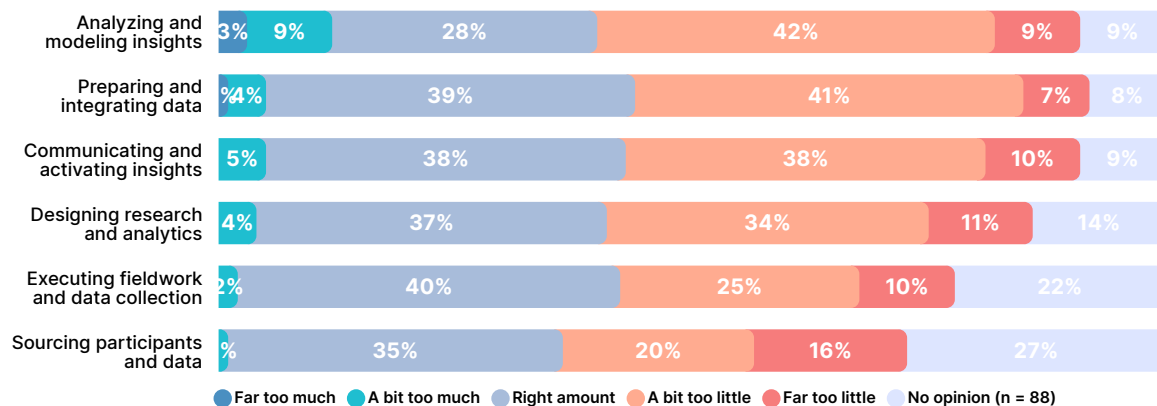
	Research	Analytics	Research - analytics
Analyzing and modeling insights	57%	20%	+37%
Communicating and activating insights	53%	44%	+9%
Designing research and analytics	53%	41%	+12%
Preparing and integrating data	53%	30%	+23%
Sourcing participants and data	50%	54%	-4%
Executing fieldwork and data collection	45%	37%	+8%
n (range) =	67-81	72-76	
No opinion removed.			
Takeaway: Brand-side researchers are more likely than analytics professionals to believe their organizations do not use automation enough for analyzing and modeling insights (57% to 20%) and preparing and integrating data (53% to 30%).			

Source: GRIT Report and NewtonX

Although most brand-side researchers have an opinion on whether automation is used too much or too little for each task, some have no opinion about sourcing participants and data (27%), executing fieldwork and data collection (22%), and designing research and analytics (14%).

When these are removed, the gap in the percentages who think automation is not used enough versus those who believe it is used too much ranges from +43% for executing fieldwork and data collection to +49% for communicating and activating insights and designing research and analytics. For comparison, when 'don't know' is removed, the percentages who think it is used the right amount range from 30% for analyzing and modeling insights to 52% for executing fieldwork and data collection. The research sentiment seems to be squarely on the side of thinking they do not rely enough on automation.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Most brand-side researchers believe their organization relies too little on automation for analyzing and modeling insights (51%), and nearly half say the same about preparing and integrating data (48%) and communicating and activating insights (48%).

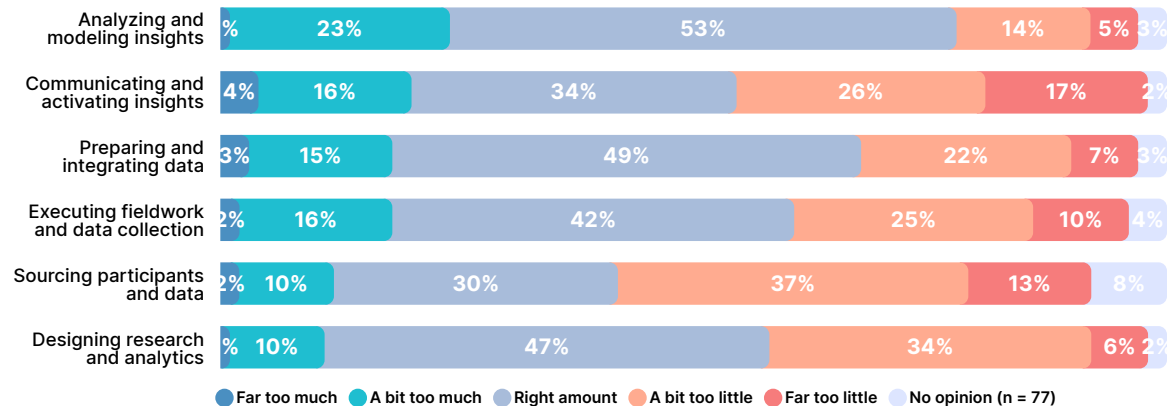




Among brand-side analytics professionals, very few lack an opinion on whether automation is used too much or little, ranging from 2% for communicating and activating insights and designing research and analytics to 8% for sourcing participants and data. After removing those, analytics professionals who think it is used the right amount ranges from 34% for sourcing participants and data to 56% for analyzing and modeling insights.

The gap between those who think automation is relied on too much versus too little is +5% for analyzing and modeling insights, but the relationship flips for all other tasks. The gaps between those who see under-reliance versus over-reliance range from +11% for preparing and integrating data to +42% for sourcing participants and data. Brand-side analytics professionals are likely to want more automation rather than less, but their needs seem to be more in line with their current practices than for researchers.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (BRAND: ANALYTICS)



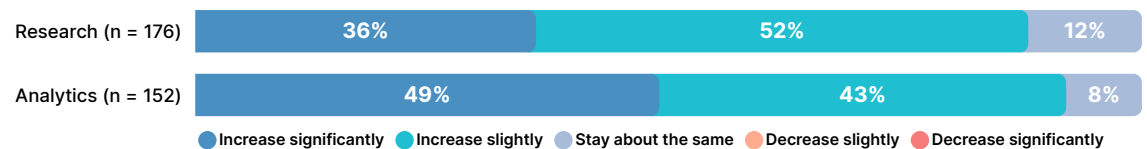
Source: GRIT Report and NewtonX

Takeaway: Across all activities, brand-side analytics professionals are more likely believe their organization relies too little on automation than too much, except for analyzing and modeling insights (19% to 24%); the biggest gaps are sourcing participants and data (50% too little to 12% too much), designing research and analytics (40% to 11%), and communicating and activating insights (43% to 20%).

Virtually all brand-side professionals expect automation use to increase: 88% of researchers and 92% of analytics anticipate some increase. Further,

analytics professionals are more likely to say it will increase significantly (49% to 36%).

HOW ORGANIZATION'S USE OF AUTOMATION WILL CHANGE: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Virtually all brand-side professionals expect automation use to increase: 88% of researchers and 92% of analytics anticipate some increase; analytics professionals are more likely say it will increase significantly (49% to 36%).





Brand-side researchers consistently believe they don't use automation enough across nearly every task. Analytics professionals want more automation too, but their gap is narrower and more task-specific. The researchers' appetite is broader and more uniform; the analytics professionals' is more calibrated. This connects directly to *Managing Insights*: researchers use agentic AI for fewer tasks (2.3 vs. 3.6) and are more likely to feel underserved by automation generally. The want is there; the adoption hasn't caught up.

Brand-side analytics professionals are the heaviest agentic AI users and the most likely to think automation is used too much in several areas. They're close enough to the work to see where automation is overreaching or underperforming, while researchers are further from full adoption and still in the "we need more" phase.

Turning to outsourcing, brand-side insights professionals are not very likely to believe their originations rely on outsourcing too much, but analytics professionals are more likely than researchers to think that way about any task. They are most likely to believe it is used too much for sourcing participants and data (36%), which also represents the widest gap across the segments (+24% analytics). The next widest gap is +21% for executing fieldwork and data collection.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING - FAR/A BIT TOO MUCH: BRAND SEGMENT

	Research	Analytics	Research - analytics
Sourcing participants and data	12%	36%	-24%
Executing fieldwork and data collection	10%	31%	-21%
Analyzing and modeling insights	10%	20%	-10%
Designing research and analytics	10%	23%	-13%
Preparing and integrating data	9%	21%	-12%
Communicating and activating insights	9%	19%	-10%
n (range) =	84-87	74-75	
"No opinion" removed.			

Takeaway: Although not very likely to believe their organization relies too much on outsourcing, brand-side analytics professionals are consistently more likely than researchers to believe that across all tasks; the largest gaps are in sourcing participants and data (36% vs. 12%) and executing fieldwork (31% vs. 10%).

Source: GRIT Report and NewtonX

Insights professionals in each brand-side segment are unlikely to believe that outsourcing is under-utilized for any task. The most extreme beliefs are among analytics professionals for preparing and integrating data (34%) and communicating and activating insights (30%). The largest gaps are in executing fieldwork and data collection (26% analytics versus 11% research) and communicating and activating insights (30% versus 15%).



The researchers' appetite for automation is broader and more uniform; the analytics professionals' is more calibrated.





HOW MUCH ORGANIZATION RELIES ON OUTSOURCING - FAR/A BIT TOO LITTLE: BRAND SEGMENT

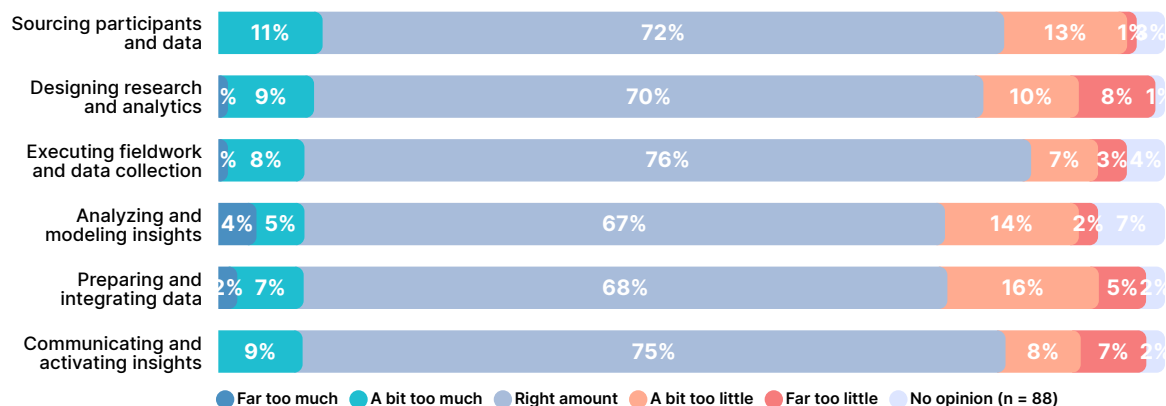
	Research	Analytics	Research - analytics
Preparing and integrating data	21%	34%	-13%
Designing research and analytics	19%	23%	-4%
Analyzing and modeling insights	18%	26%	-8%
Communicating and activating insights	15%	30%	-15%
Sourcing participants and data	14%	27%	-13%
Executing fieldwork and data collection	11%	26%	-15%
n (range) =	84-87	74-75	
No opinion removed.			
Takeaway: Although not very likely to believe their organization relies too little on outsourcing, brand-side analytics professionals are consistently more likely than researchers to believe that across all tasks; the largest gaps are in executing fieldwork and data collection (26% vs. 11%) and communicating and activating insights (30% vs. 15%).			

Source: GRIT Report and NewtonX

Almost all brand-side researchers have an opinion on whether outsourcing is used too much or too little for each task. The percentages with no opinion ranges from 1% for designing research and analytics to just 7% for analyzing and modeling insights.

When these are removed, the percentages who think outsourcing is used the right amount range from 70% for preparing and integrating data to 80% for executing fieldwork and data collection. The gaps between those who think it is used too little versus too much only range from +1% for executing fieldwork and data collection to +12% for preparing and integrating data. Researchers don't seem to have much need for their amount of outsourcing to change in either direction.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: At least two-thirds of brand-side researchers believe their organization relies the right amount on outsourcing for any tasks, from 67% for analyzing and modeling insights to 76% for executing fieldwork and data collection.

At least two-thirds of brand-side researchers believe their organization relies the right amount on outsourcing for every task.

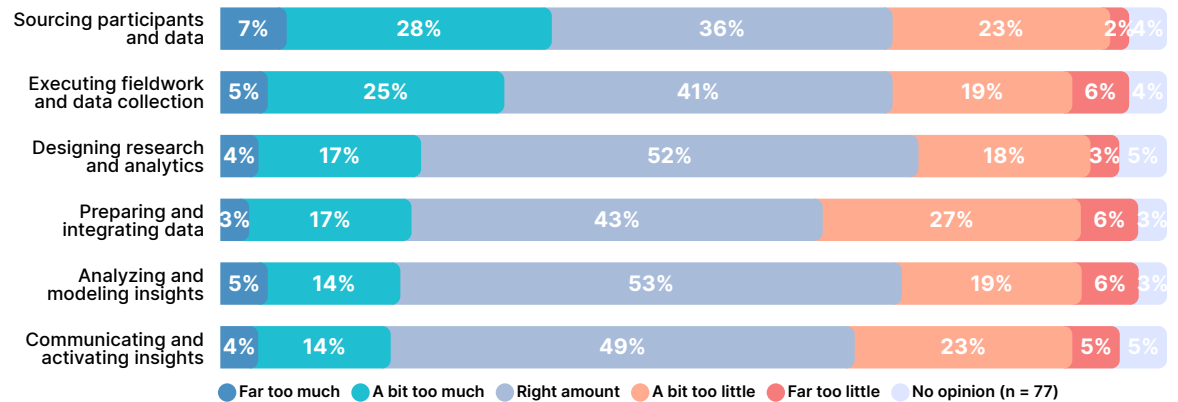
Almost all brand-side analytics professionals have an opinion on whether outsourcing is used too much or too little for each task. The percentages with no opinion ranges from 3% for preparing and integrating data and analyzing and modeling insights to just 5% for designing research and analytics and communicating and activating insights.



When these are removed, analytics professionals seem much less aligned with their current amount of outsourcing than researchers. The percentages who think outsourcing is used the right amount range from just 38% for sourcing participants and data to 55% for designing research and analytics.

The gaps between those who think it is used too much versus too little only range from +3% for executing fieldwork and data collection to +10% for sourcing participants and data. However, for two other tasks, the perception is on the side of too little use: preparing and integrating data (+13%) and communicating and activating insights (+10%). For the remaining two, the gaps point toward too little, but these are minor: +6% for analyzing and modeling insights and +1% for designing research and analytics.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (BRAND: ANALYTICS)



Takeaway: Brand-side analytics professionals' views on outsourcing are mixed; about half think they rely on the right amount for analyzing and modeling insights (53%), designing research and analytics (52%), and communicating and activating insights (49%), but other views split across too much versus too little.

Brand-side researchers are more likely to expect outsourcing to increase (26%) than to decrease (15%).

Analytics professionals agree, but with a wider gap (38% to 11%).

HOW ORGANIZATION'S USE OF OUTSOURCING WILL CHANGE: BRAND SEGMENT



Takeaway: Brand-side insights professionals are more likely to expect outsourcing to increase than to decrease; among researchers, expectations run 26% to 15% toward increasing, and among analytics professionals, it's 37% to 11%.

Researchers are largely satisfied with their outsourcing level, and analytics professionals are less satisfied but not clearly in one direction. They tend to want more outsourcing for some tasks (preparing/integrating data, communicating/activating insights) and less for others (sourcing participants, executing fieldwork). Researchers want more automation but are fine with outsourcing as-is; analytics professionals have nuanced views on both.

Brand-side insights professionals are more likely to expect outsourcing to increase than to decrease.





AUTOMATION AND OUTSOURCING | SUPPLIER POV ^[DATA]

On the supplier side, any concern about “too much automation” seems to be among service-led supplier with 500+ FTE. Although the belief never gets too elevated, five of the six areas are at least 10% in that segment compared to only three other instances, all

within service-led suppliers with 21 to 100 FTE and none greater than 12%. The two most extreme cases are communicating and activating insights (26% believe there is too much automation) and designing research and analytics (19%).

HOW MUCH ORGANIZATION RELIES ON AUTOMATION - FAR/A BIT TOO MUCH: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Communicating and activating insights	0%	3%	10%	3%	26%
Designing research and analytics	0%	3%	7%	3%	19%
Sourcing participants and data	5%	4%	7%	2%	14%
Executing fieldwork and data collection	5%	5%	9%	2%	14%
Preparing and integrating data	5%	6%	11%	3%	10%
Analyzing and modeling insights	0%	4%	12%	2%	2%
n =	16-20	64-77	30-33	26-37	20-27

“No opinion” removed. Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

Takeaway: Although not very likely to believe their organization relies too much on automation, concerns peak with service-led suppliers with 500+ FTE for communicating/activating insights (26%) and designing research and analytics (19%).

Source: GRIT Report

Even though belief that automation is over-used is elevated in some instances, the belief that it's under-used defines suppliers much better. Most tech-led suppliers (64%) and service-led suppliers with 21 to 100 FTE (52%) and those with 101 to 500 FTE (64%) believe automation is under-used for executing fieldwork and data collection. Most of those with 101 to 500 FTE (55%) and with 500+ FTE (59%) believe it is not used enough for analyzing and modeling insights.

Among service-led segments with more than 20 FTE, nearly half or more believe it is under-utilized for preparing and integrating data and sourcing participants and data. Nearly half or more among those with 101 to 500 FTE (53%) and those with 500+ FTE (46%) believe automation is not relied on enough for designing research and analytics. The largest suppliers and some others have significant needs for automation they have not yet filled.

On the supplier side, any concern about “too much automation” seems to be among service-led with 500+ FTE.



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HOW MUCH ORGANIZATION RELIES ON AUTOMATION - FAR/A BIT TOO LITTLE (SUPPLIER)

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Analyzing and modeling insights	31%	41%	33%	55%	59%
Preparing and integrating data	45%	37%	47%	49%	54%
Sourcing participants and data	30%	44%	48%	54%	46%
Designing research and analytics	26%	33%	40%	53%	46%
Communicating and activating insights	31%	26%	35%	41%	43%
Executing fieldwork and data collection	64%	38%	52%	64%	40%
n =	16-20	64-77	30-33	26-37	20-27

"No opinion" removed. Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.

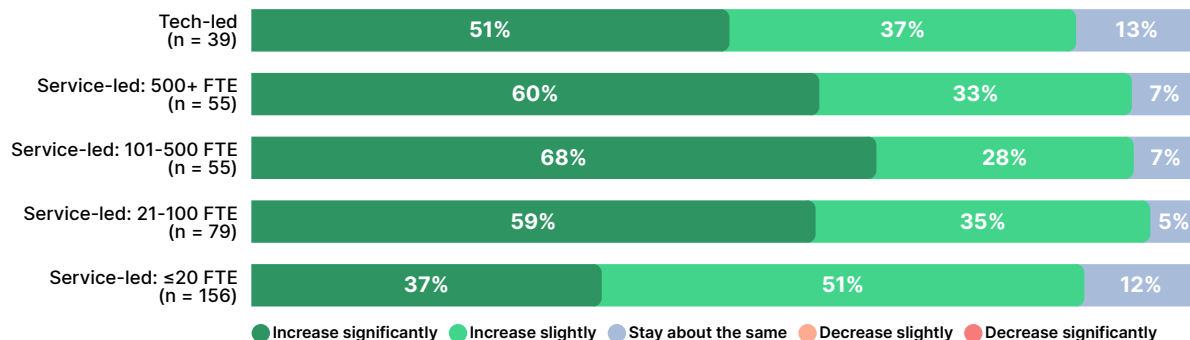
Takeaway: Most in three supplier segments believe too little automation is used in executing fieldwork and data collection; nearly half or more in the service-led supplier segments with more than 100 FTE believe it is not use enough for analyzing and modeling insights, preparing and integrating data, sourcing participants and data, and designing research and analytics.

Source: GRIT Report

No one in any supplier segment expects use of automation to decrease by any amount in the next year. Except for service-led suppliers with ≤20 FTE suppliers (37%), most suppliers in each segment expect their organization's use of automation to

increase significantly, from 51% for tech-led to 68% for service-led with 101-500 FTE. That's a rare instance of unanimous directional agreement across all supplier segments.

HOW ORGANIZATION'S USE OF AUTOMATION WILL CHANGE: SUPPLIER SEGMENT



Source: GRIT Report

Takeaway: Except for service-led suppliers with ≤20 FTE suppliers (37%), most suppliers in each segment expect their organization's use of automation to increase significantly, from 51% for tech-led to 68% for service-led with 101-500 FTE.



Except for service-led suppliers with ≤20 FTE, most in each segment expect their organization's use of automation to increase significantly.

Suppliers tend not to think their organizations rely too much on outsourcing. Belief they use too much peaks among service-led suppliers with 21 to 100 FTE for executing fieldwork and data collection (23%) and sourcing participants and data (26%). These two also crest among those with 500+ FTE (19% and 16% respectively), as well as sourcing participants and data among those with 101 to 500 FTE (18%). Not exactly an anti-outsourcing uprising.



HOW MUCH ORGANIZATION RELIES ON OUTSOURCING - FAR/A BIT TOO MUCH: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Executing fieldwork and data collection	6%	5%	23%	7%	19%
Sourcing participants and data	0%	11%	26%	18%	16%
Analyzing and modeling insights	0%	10%	7%	3%	11%
Communicating and activating insights	5%	5%	12%	3%	11%
Designing research and analytics	0%	6%	8%	3%	10%
Preparing and integrating data	5%	8%	10%	3%	8%
n (range) =	17-19	75-78	31-33	26-28	24-26
<i>"No opinion" removed. Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.</i>					
<i>Takeaway: Although not very likely to believe their organization relies too much on outsourcing, concerns peak with service-led suppliers with 21-100+ FTE for sourcing participants and data (26%) and executing fieldwork and data collection (23%).</i>					

Source: GRIT Report

Not exactly a pro-outsourcing outcry, either. Among service-led suppliers with 500+ FTE, about one-third believe they do not use outsourcing enough for preparing and integrating data (34%), analyzing and modeling insights (34%), communicating and activating insights (33%), sourcing participants and data (32%), and designing research and analytics (31%). Among service-led suppliers with 21 to 100 FTE, about one-quarter feel the same way about those tasks (23% to 25%). Among those with 101 to 500 FTE, 22% believe outsourcing is under-utilized for designing research and analytics; 19%, communicating and activating insights; and 18%, preparing and integrating data.

Overall, the pattern seems consistent with findings from earlier sections of this report. The combination of service-led suppliers with the 500+ FTE wanting more automation AND more outsourcing signals the segment is pursuing both as complementary levers for doing more with less fixed overhead (with the caveat that this segment's responses are based on fewer than 30 participants). That's a different posture than the 101 to 500 FTE segment, which reads more like capability-building investment. The largest suppliers are optimizing; the mid-size ones are expanding.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING - FAR/A BIT TOO LITTLE (SUPPLIER)

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Preparing and integrating data	14%	7%	25%	18%	34%
Analyzing and modeling insights	5%	14%	25%	12%	34%
Communicating and activating insights	0%	16%	23%	19%	33%
Sourcing participants and data	6%	9%	23%	6%	32%
Designing research and analytics	6%	9%	24%	22%	31%
Executing fieldwork and data collection	11%	7%	12%	4%	15%
n (range) =	17-19	75-78	31-33	26-28	24-26
<i>"No opinion" removed. Green indicates relatively higher agreement; red indicates relatively lower agreement. Color scale applies across both segments.</i>					
<i>Takeaway: Among service-led suppliers with 500+ FTE, about one-third believe they do not use outsourcing enough for preparing and integrating data (34%), analyzing and modeling insights (34%), communicating and activating insights (33%), sourcing participants and data (32%), and designing research and analytics (31%).</i>					

Source: GRIT Report



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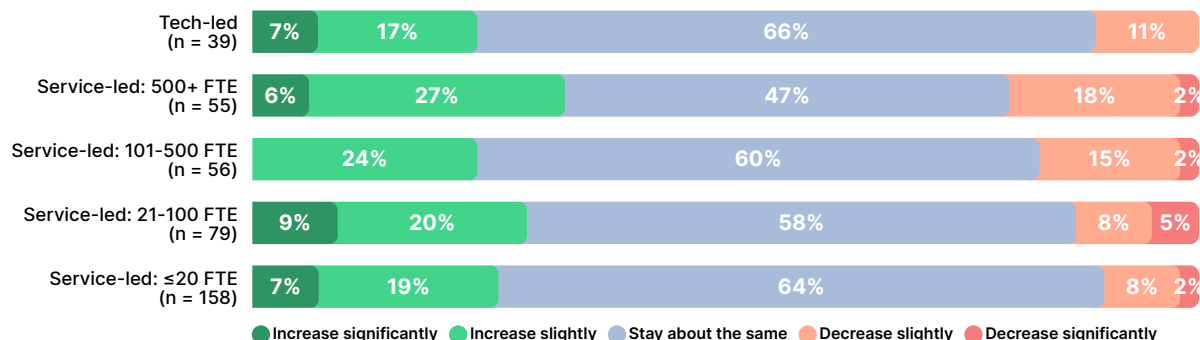
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Except for service-led suppliers with 500+ FTE (47%), most suppliers in each segment expect their organization's use of outsourcing to stay the same.

In every supplier each segment, the percentages expecting increases outnumber those expecting decreases.

HOW ORGANIZATION'S USE OF OUTSOURCING WILL CHANGE: SUPPLIER SEGMENT



Source: GRIT Report

Takeaway: Except for service-led suppliers with 500+ FTE suppliers (47%), most suppliers in each segment expect their organization's use of outsourcing to stay the same; in each segment, the percentages expecting increases outnumber those expecting decreases.

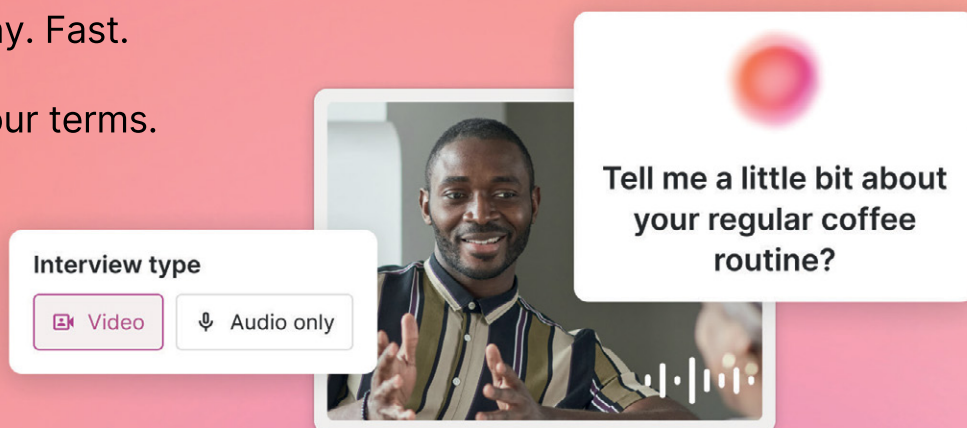
Most segments expect outsourcing to stay the same, while increases outnumber decreases, and this complements the automation expectations. Together, they suggest automation is expected to grow while

outsourcing holds steady, providing a partial answer to question of whether outsourcing and automation compete with each other or complete each other. Sometimes, they seem to harmonize with each other.

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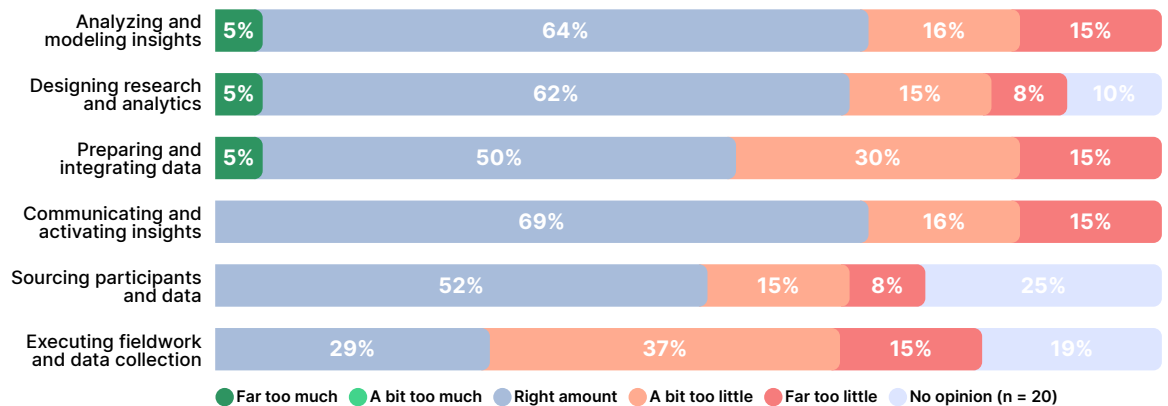
AUTOMATION AND OUTSOURCING |

TECH-LED POV ^[DATA]

Among tech-led suppliers, most have an opinion on whether automation is used too much or too little, with “no opinion” peaking for sourcing participants and data (25%) and executing fieldwork and data collection (19%). Among those who do have an opinion, at least half believe it is used the right amount for all tasks but executing fieldwork and data collection (36%). In fact, 64% believe automation is used too little for it, and no one believes it is used too much.

For each other task, those who believe automation is not used enough outnumber those who believe it is used too much, from +18% for designing research and analytics to +40% for preparing and integrating data. Their appetite for automation is strong.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (TECH-LED)

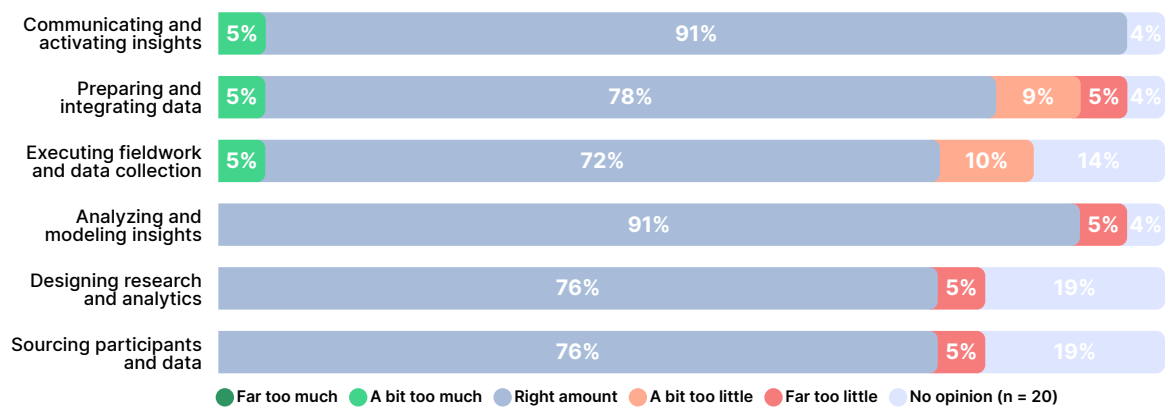


Takeaway: Except for executing fieldwork and data collection (29%), at least half of tech-led suppliers believe their company uses the right amount of automation; however, more than 20% believe they use too little across activities, led by preparing and integrating data (45%) and executing fieldwork and data collection (52%).

Among tech-led suppliers, most have an opinion on whether outsourcing is used too much or too little, with “no opinion” peaking for sourcing participants and data (19%) and designing research and analytics

(19%). Once “no opinion” is removed, more than 80% believe their organizations use the right amount of outsourcing for each task.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (TECH-LED)



Takeaway: Across activities, more than 70% of tech-led suppliers believe they use the right amount of outsourcing, led by communicating and activating insights (91%) and analyzing and modeling insights (91%).

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AUTOMATION AND OUTSOURCING |

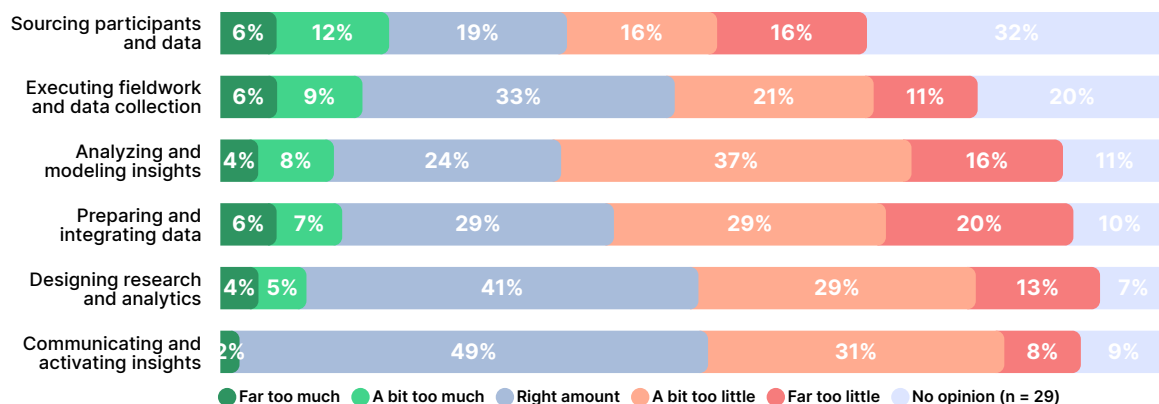
SERVICE-LED: 500+ FTE [DATA]

Among service-led suppliers with 500+ FTE, most have an opinion on whether automation is used too much or too little, with “no opinion” peaking for sourcing participants and data (32%) and executing fieldwork and data collection (20%).

Among those who do have an opinion, most believe it is used the right amount for communicating and activating insights (54%), but for three, less than

40% think it's used the right amount: analyzing and modeling insights (28%), preparing and integrating data (33%), and sourcing participants and data (36%). For each task, more believe automation is not used enough versus thinking it is not used enough. The gaps range from +17% for executing fieldwork and data collection to +41% for analyzing and modeling insights.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (SERVICE-LED: 500+ FTE)



Source: GRIT Report

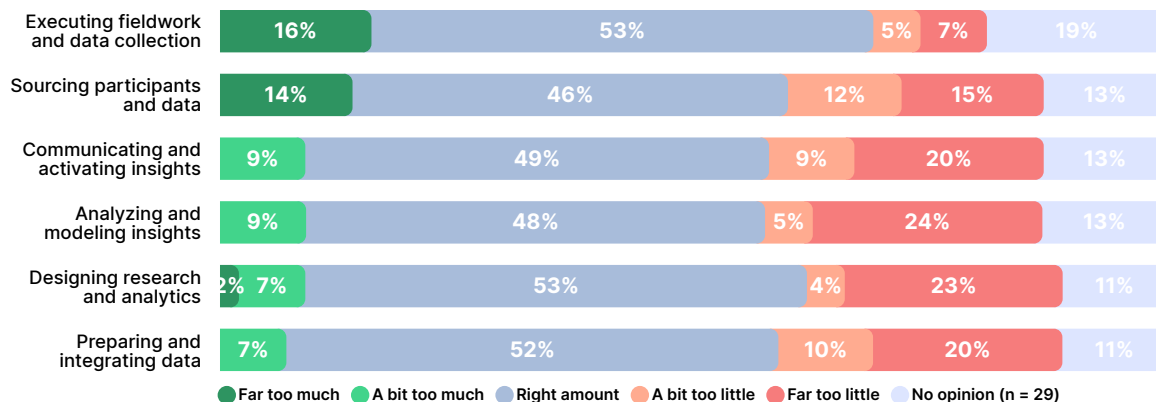
Takeaway: Service-led suppliers with 500+ FTE are more likely to believe their organizations use too little automation rather than too much, especially too little for analyzing and modeling insights (53%) and preparing and integrating data (49%).

Among service-led suppliers with 500+ FTE, most have an opinion on whether outsourcing is used too much or too little, with “no opinion” peaking for executing fieldwork and data collection (19%).

Once “no opinion” is removed, most believe their organizations use the right amount of outsourcing, from 55% for sourcing participants and data to 65% for

executing fieldwork and data collection. More believe outsourcing is used too much for executing fieldwork and data collection than believe it is under-utilized, but the gap is small (16% to 12%). For all other tasks, more think their organization doesn't rely enough on outsourcing than believe they rely on it too much. Gaps range from +13% for sourcing participants and data to +23% for preparing and integrating data.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (SERVICE-LED: 500+ FTE)



Source: GRIT Report

Takeaway: Across activities, about half of service-led suppliers with 500+ FTE believe they use the right amount of outsourcing, but those who think they use too little outnumber those who think they use too much for all but executing fieldwork and data collection (12% to 16%).



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AUTOMATION AND OUTSOURCING |

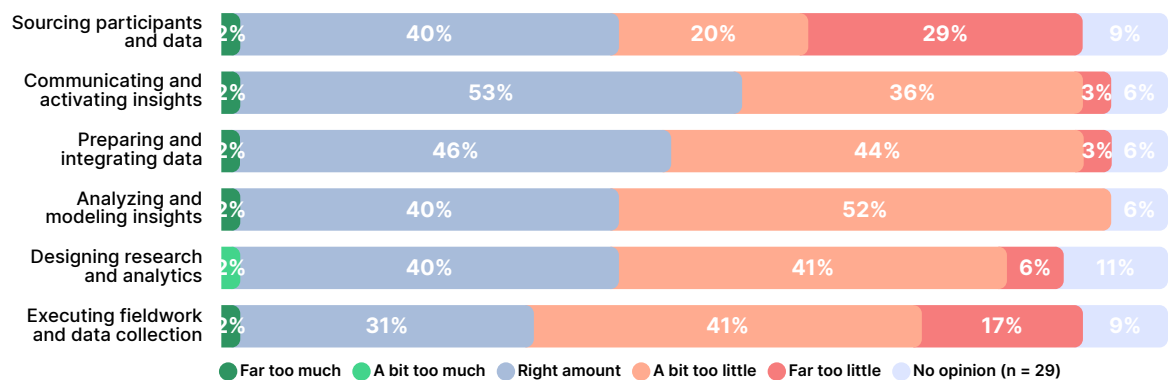
SERVICE-LED: 101-500 FTE [DATA]

Among service-led suppliers with 101 to 500 FTE, most have an opinion on whether automation is used too much or too little, with “no opinion” peaking for designing research and analytics (11%).

Among those who do have an opinion, most believe it is used the right amount for communicating and activating insights (56%), but it’s a minority for each

other task, and less than 40% think it’s used the right amount for executing fieldwork and data collection (34%). For every task, more believe automation is not used enough versus thinking it is not used enough. The gaps range from +37% for communicating and activating insights to +58% for executing fieldwork and data collection.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

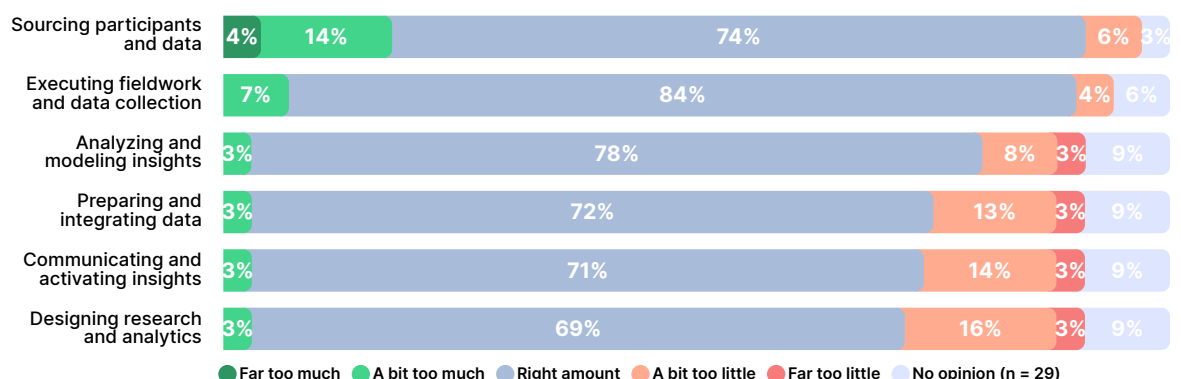
Takeaway: Service-led suppliers with 101-500 FTE are more likely to believe their organizations use too little automation rather than too much, especially for analyzing and modeling insights (52% to 2%), sourcing participants and data (49% to 2%), executing fieldwork and data collection (58% to 2%), designing research and analytics (47% to 2%), and preparing and integrating data (47% to 2%).

Among service-led suppliers with 101 to 500 FTE, most have an opinion on whether outsourcing is used too much or too little, with “no opinion” peaking at just 9% for four tasks.

Once “no opinion” is removed, more than 75% believe their organizations use the right amount of outsourcing, from 76% for sourcing participants and data and for designing research and analytics to 89%

for executing fieldwork and data collection. More believe outsourcing is used too much for executing fieldwork and data collection (+3%) and for sourcing participants and data (+12%) than believe it is under-utilized, but the gaps are small. For all other tasks, more think their organization doesn’t rely enough on outsourcing than believe they rely on it too much. Gaps range from +8% for analyzing and modeling insights to +16% for designing research and analytics.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Across activities, more than two-thirds of service-led suppliers with 101-500 FTE believe they use the right amount of outsourcing, but those who think they use too little outnumber those who think they use too much for analyzing and modeling insights (11% to 3%), preparing and integrating data (16% to 3%), communicating and activating insights (17% to 3%), and designing research and analytics (19% to 3%).



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AUTOMATION AND OUTSOURCING |

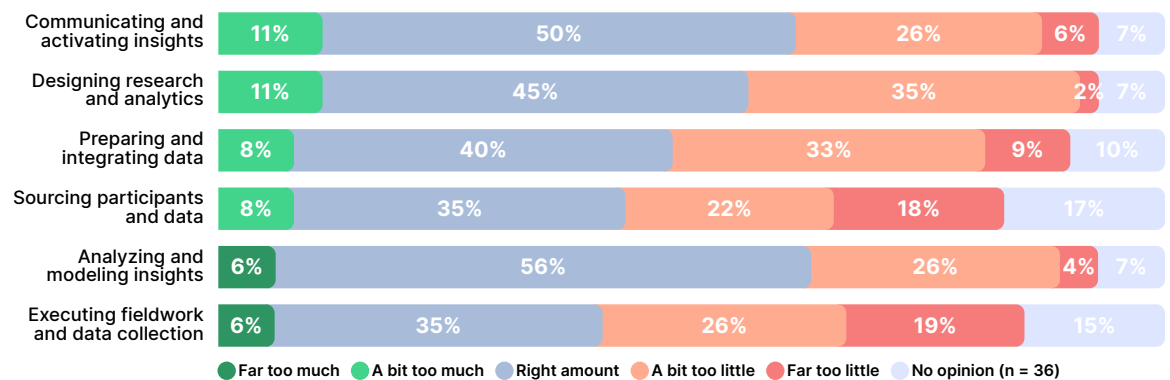
SERVICE-LED: 21-100 FTE [DATA]

Among service-led suppliers with 21 to 100 FTE, most have an opinion on whether automation is used too much or too little, with “no opinion” peaking for sourcing participants and data (17%).

Among those who do have an opinion, most believe it is used the right amount for communicating and activating insights (54%) and analyzing and modeling

insights (61%), but it's a minority for each other task. For the rest, it ranges from 42% for executing fieldwork and data collection to 49% for designing research and analytics. For every task, more believe automation is not used enough versus thinking it is not used enough. The gaps range from +11% for communicating and activating insights to +39% for executing fieldwork and data collection.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

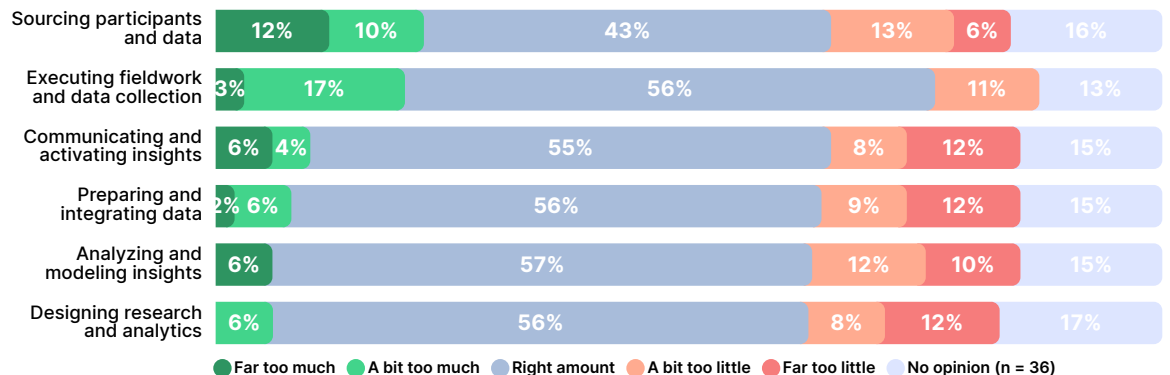
Takeaway: Across all activities, service-led suppliers with 21-100 FTE are more likely to believe their organizations use too little automation rather than too much, especially for executing fieldwork and data collection (45% to 6%), preparing and integrating data (42% to 8%), and sourcing participants and data (40% to 8%).

Among service-led suppliers with 21 to 100 FTE, most have an opinion on whether outsourcing is used too much or too little, with “no opinion” exceeding 10% for each task, peaking at 17% for designing research and analytics.

Once “no opinion” is removed, most believe their organizations use the right amount of outsourcing for each task, from 51% for sourcing participants to 69% for analyzing and modeling insights and for designing

research and analytics. More believe outsourcing is used too much for executing fieldwork and data collection (+9%) and for sourcing participants and data (+3%) than believe it is under-utilized, but the gaps are small. For all other tasks, more think their organization doesn't rely enough on outsourcing than believe they rely on it too much. Gaps range from +10% for communicating and activating insights to +16% for analyzing and modeling insights.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Across all activities except sourcing participants and data (43%), most service-led suppliers with 21-100 FTE believe they use the right amount of outsourcing, but those who think they use too much outnumber those who think they use too little for sourcing participants and data (22% to 19%) and executing fieldwork and data collection (22% to 11%); across the remaining activities, those who think they use too little outnumber those who think they use too much.



AUTOMATION AND OUTSOURCING |

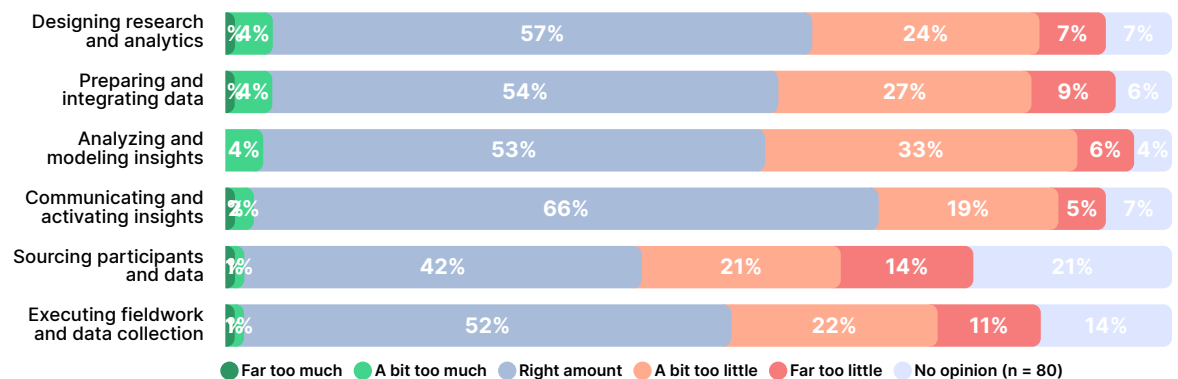
SERVICE-LED: ≤20 FTE [DATA]

Among service-led suppliers with ≤20 FTE, most have an opinion on whether automation is used too much or too little, with “no opinion” peaking for sourcing participants and data (21%).

Among those who do have an opinion, most believe it is used the right amount for each task, from

54% for sourcing participants and data to 71% for communicating and activating insights. For every task, more believe automation is not used enough versus thinking it is not used enough. The gaps range from +19% for communicating and activating insights to +31% for sourcing participants and data.

HOW MUCH ORGANIZATION RELIES ON AUTOMATION (SERVICE-LED: ≤20 FTE)



Takeaway: Across all activities except sourcing participants and data (42%), most service-led suppliers with ≤20 FTE believe their organizations use the right amount of automation; for every activity, more think they use too little rather than too much, led by analyzing and modeling insights (39% to 4%), preparing and integrating data (36% to 5%), and sourcing participants and data (35% to 2%).

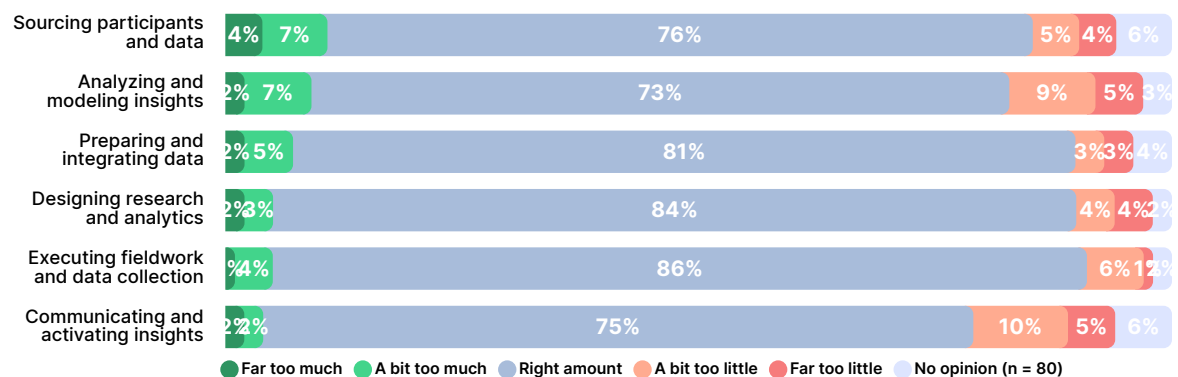
Among service-led suppliers with ≤20 FTE, most have an opinion on whether outsourcing is used too much or too little, with “no opinion” peaking at just 6% for two tasks.

Once “no opinion” is removed, more than 75% believe their organizations use the right amount of outsourcing, from 76% for analyzing and modeling insights to 88% for executing fieldwork and data collection. Slightly more believe outsourcing is used too much for sourcing participants and data (+2%) and

for preparing and integrating data (+1%) than believe it is under-utilized, but the gaps are small.

For all other tasks, somewhat more think their organization doesn't rely enough on outsourcing than believe they rely on it too much. Gaps range from +1% for executing fieldwork and data collection to +11% for communicating and activating insights. They have some appetite for more automation, but seem to be at equilibrium with outsourcing.

HOW MUCH ORGANIZATION RELIES ON OUTSOURCING (SERVICE-LED: ≤20 FTE)



Takeaway: Across all activities, more than 70% of service-led suppliers with ≤20 FTE believe they use the right amount of outsourcing, and those who think they use too little are about even with those who think they use too much, except for communicating and activating insights (15% to 4%).





THE BIG PICTURE [STRATEGIC INTERPRETATION]

In *Managing Insights*, we learned the tasks for which agentic AI has already achieved its highest adoption. In this section, we learned these tasks are still considered under-automated by majorities in several segments. Adoption seems to be raising the ceiling, not satisfying demand.

Every segment, without exception, expects automation to increase, and no one expects it to abate. The directional unanimity is striking even though the appetite for more automation is not evenly distributed across tasks. Brand-side researchers are the most broadly underserved, believing automation is insufficient across nearly every task, with gaps of +43% to +49% between “too little” and “too much.”

Among suppliers, executing fieldwork and data collection stands out as the task most demanding automation. Majorities in three supplier segments consider it under-automated, more than any other task in those segments. Yet, it’s the task brand-side researchers are the least likely to flag as under-automated, and only 37% of analytics professionals agree. Possibly, brand-side professionals care about whether outsourced data collection is faster, better, and cheaper, but how it’s accomplished is secondary.

Communicating and activating insights shows the opposite pattern. It’s most likely to be flagged as under-automated by brand-side segments, but smaller suppliers are much less interested in automating it further. Even though one-quarter of service-led suppliers with the 500+ FTE believe it’s over-automated, their interest (and those with 101 to 500 FTEs) in further automating it rivals that of brand-side analytics professionals. There seems to be a real tension between the strategic importance automation has to larger suppliers and concern about ceding control of client deliverables to automation.

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Brand-side researchers want more automation broadly and uniformly. Analytics professionals want more too, but more selectively. This may reflect their heavier agentic AI use: they're far enough into adoption to see where it overshoots, while researchers are still in the "we need more" phase. The two segments seem to be at different points on the same curve, not on different curves.

For most segments, outsourcing and automation do not appear to compete with each other. Most segments are at or near equilibrium on outsourcing, with large majorities saying they use the right amount across most tasks. Among brand-side researchers, 70% to 80% say outsourcing levels are right across all tasks, even while they're loudly underserved on automation. Outsourcing and automation are not substitutes for each other across most of the industry.

The largest service-led suppliers are the only segment pursuing more of both automation and outsourcing simultaneously and broadly. Their automation appetite spans five of six tasks at meaningful levels, and their outsourcing appetite reaches about one-third of the segment for most tasks, well above any other supplier segment.

This supports the cost structure optimization hypothesis from earlier sections: they're not choosing between automation and outsourcing; they're pulling all available levers to restructure overhead while maintaining capacity. This contrasts with those with 101 to 500 FTE, who show stronger automation appetite but more outsourcing satisfaction as they expand their own capabilities.

Service-led suppliers with ≤ 20 FTE are the quietest segment in a relative equilibrium. Most believe automation levels are right across most tasks, and outsourcing equilibrium is even higher. Their automation appetite is modest relative to other segments, but still significant. This fits the access-not-ownership pattern: they're not building infrastructure, they're using what's available, and they're not feeling acutely underserved by either lever.

One caveat: smaller suppliers are the segment most dependent on other suppliers for business. The largest suppliers are the segment most likely to feel like they are not outsourcing enough. Smaller suppliers should reflect on whether their automation practices align well with those of larger suppliers to ensure compatibility.

Finally, we had half-expected to hear GRIT participants complain about too much automation, but also to note they expect management to increase it anyway. We did not hear that.

However, we have to note the people who think automation went too far may no longer be in the survey pool. The relative scarcity of "too much" responses across the industry could reflect genuine satisfaction, or it could reflect a sample that has self-selected toward those who survived the automation wave so far.

Automation has become a universal expectation, but not a universal strategy. Every segment expects more automation, yet the task priorities differ sharply, especially between suppliers focused on fieldwork efficiency and buyers focused on whether outputs are faster, better, cheaper, and easier to use.

– LM, ed.



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GOVERNANCE & RISKS

This section looks at whether or not insights organizations have formal guidelines for use of AI, how clear they are, and how confident they are that their organization minimizes the risks of AI misuse.

DOES AI GOVERNANCE LEAD TO OVERALL SUCCESS? [ORIENTATION]

In *Managing Insights*, we found that insights professionals tend to have formal roles in deciding which suppliers or partners to work with, which technology, platforms, or tools to acquire, and how much work is outsourced versus done in-house, but they do not tend to have as much of a formal role in

whether or how agentic AI is used in these activities. If they do not have formal roles in governing use of AI for insights work, does anyone? How does that relate to confidence in their organization's effectiveness at minimizing the risks of AI misuse?

Most brand-side analytics professionals report their organization has formal guidelines or rules about how AI tools and synthetic data can be used in insights, analytics, or research (54%). Brand-side researchers are not far behind, but only a minority have formal rules (42%).

Tech-led suppliers are just as likely as analytics professionals to report formal rules (54%). Among service-led suppliers, the likelihood to have formal rules increases with size, up to a point, from 24% of those with ≤20 FTE to 58% of those with 21 to 100 FTE, to 83% of those with 101 to 500 FTE. At 500+FTE, the likelihood to have formal rules backtracks somewhat to 64%, but remains a majority.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "L.M., ed." are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.

Most brand-side analytics professionals say their organization has formal guidelines about how AI tools & synthetic data can be used in insights; researchers are not far behind.

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In every supplier segment, most say their organization's expectations about the use AI in insights work are completely or mostly clear. This ranges from 55% of suppliers with 500+ FTE to 73% of tech-led suppliers. Fewer on the brand-side believe these expectations are clear (50% of analytics, 41% of researchers).

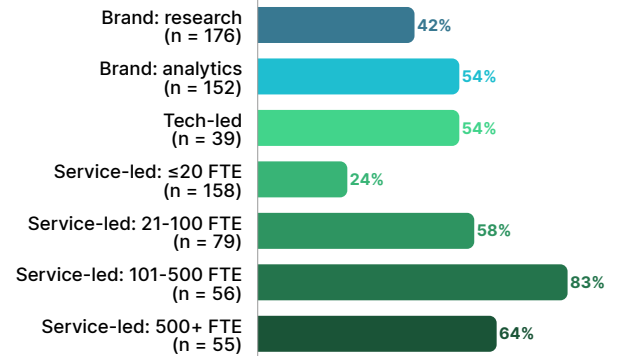
However, less than half on the brand-side are completely or mostly confident their organization minimizes unacceptable risks in insights work, such as misleading results or IP and privacy leaks, in its use of AI tools and synthetic data. Only 44% of researchers and 42% of analytics professionals are completely or mostly confident.

Confidence is higher in supplier segments. Among tech-led suppliers, 71% are completely or mostly confident, and the percentage grows with size for three service-led segments: those with ≤20 FTE, 55%; with 21 to 100 FTE, 60%; and those with 101 to 500 FTE, 77%. For those with 500+ FTE, confidence dips a little to 71%, putting them on par with tech-led suppliers.

Does confidence matter? Among brand-side insights professionals who are completely or mostly confident their organization minimizes risk, more than half said they exceeded their insights goals while 13% reported falling short. Among those who are not as confident, only around one-third report exceeding goals to 28% who fell short. For service-led suppliers with more than 20 FTE, the more confident group exceeded goals at a 42% rate compared to 20% of the less confident; the gap for falling short was 37% to 27%.

Correlation doesn't prove causality, so they say. However, it seems like there is more to success than simply adopting and deploying AI tools; clear expectations and communication around it seem to play roles, too.

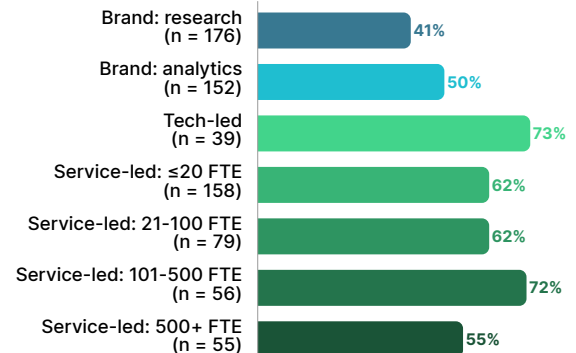
ORGANIZATION HAS FORMAL RULES ABOUT USE OF AI IN INSIGHTS: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Most brand-side analytics professionals (54%), tech-led suppliers (54%), and service-led suppliers with 500+ FTE (64%), 101-500 FTE (83%), and 21-100 FTE (58%) have formal rules about AI use; most brand-side researchers (58%) and service-led suppliers with ≤20 FTE (76%) do not.

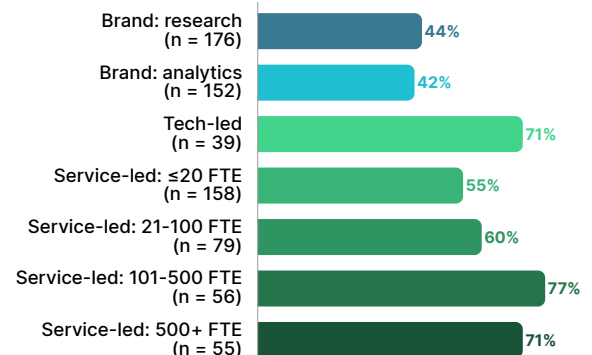
CLARITY OF ORGANIZATION'S EXPECTATIONS OF USE OF AI IN INSIGHTS - COMPLETELY/MOSTLY: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: In each supplier segment, most say their organization's expectations of AI use in insights are mostly or completely clear, from 55% in service-led suppliers with 500+ FTE to 73% in tech-led, but half or fewer believe that on the brand-side (41% researchers, 50% analytics).

CONFIDENCE ORGANIZATION MINIMIZES RISKS OF AI MISUSE - COMPLETELY/MOSTLY: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: In each supplier segment, most are confident their organization minimizes the risks of AI misuse, from 55% in service-led suppliers with ≤20 FTE to 77% of those with 101-500 FTE, but less than half believe that on the brand-side (44% researchers, 42% analytics).





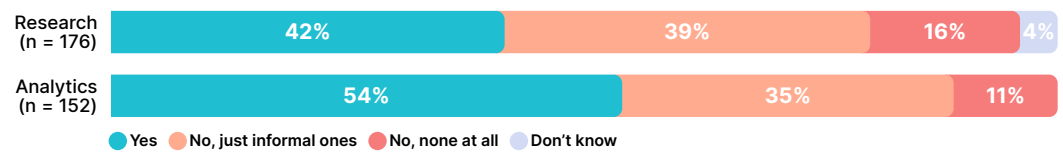
AI GOVERNANCE, CLARITY, AND RISK

CONFIDENCE | BRAND POV ^[DATA]

Across brand-side insights professionals, more in analytics feel there are formal guidelines for AI use in insights and that expectations are clear than among researchers. However, the numbers who cite guidelines and perceive clarity may not be too impressive in either segment.

Brand-side analytics professionals are more likely than researchers to say their organization has formal AI governance rules (54% vs. 42%). The gap is spread evenly across those who say they have informal rules (39% researchers, 35% analytics), those who say they have none at all (15% to 11%), and a small number who don't know (4% to 0%).

ORGANIZATION HAS FORMAL RULES ABOUT USE OF AI IN INSIGHTS: BRAND SEGMENT

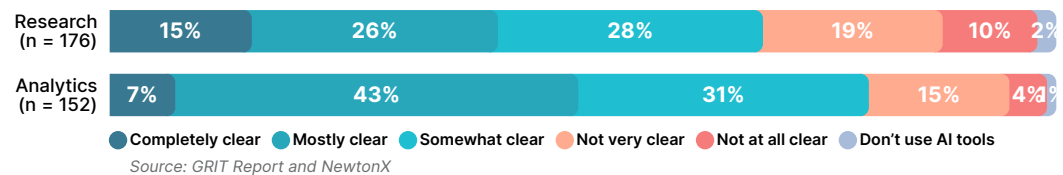


Takeaway: Brand-side analytics professionals are more likely than researchers to say their organization has formal AI governance rules (54% vs. 42%).

Brand-side analytics professionals are more likely than researchers to say their organization's expectations of AI use in insights are completely or mostly clear, 50% to 41%. Researchers are more likely to say expectations are not very or not at all clear, 29% to

19%. So, just over half of analytics professionals say they have formal guidelines in place, and half say expectations are completely or mostly clear, but is that enough?

CLARITY OF ORGANIZATION'S EXPECTATIONS OF USE OF AI IN INSIGHTS: BRAND SEGMENT

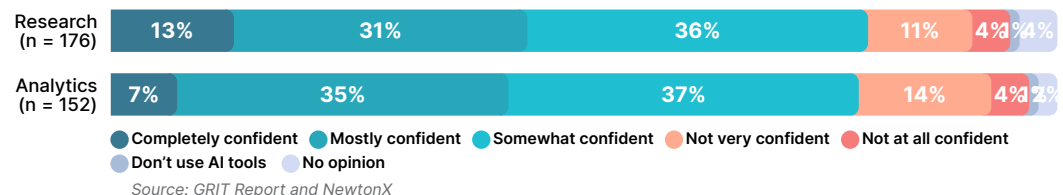


Takeaway: Brand-side analytics professionals are more likely than researchers to say their organization's expectations of AI use in insights are completely or mostly clear, 50% to 41%.

If we look at how confident each segment is regarding how well their organizations minimize (not necessarily *manage*) the risks of AI misuse, such as misleading results or IP and privacy leaks, less than half are

completely or mostly confident. It's only 44% of researchers and 42% of analytics professionals, and, for the latter group, the number is lower than it is for those with formal guidelines and clear expectations.

CONFIDENCE ORGANIZATION MINIMIZES RISKS OF AI MISUSE: BRAND SEGMENT



Takeaway: Similar proportions of brand-side analytics professionals (42%) and researchers (44%) are mostly or completely confident their organization minimizes the risks of AI misuse.

Let's drill a little deeper to see if confidence in how well organizations minimize risk of AI misuse correlates to performance against goals, a proxy for "does

confidence in AI management matter?" Then, we'll look at whether confidence is inspired by formal guidelines, clarity of expectations, or both.

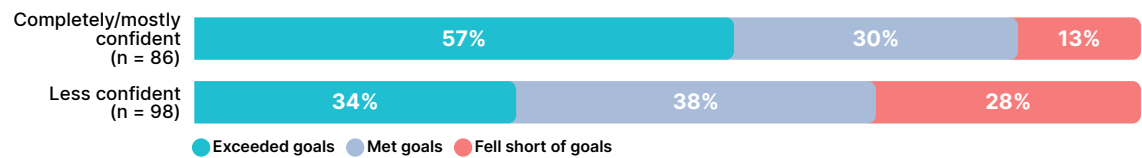




Keep in mind that correlation doesn't equal causation, a favorite maxim even for people who don't understand what it means. The latter group probably also believes "the enemy of my enemy is my friend" and have obviously never seen *The Good, the Bad, and the Ugly*. They probably also believe "perfect is the enemy of good" because, of course, abstract concepts have enemies, just like people do. Back to work!

Among brand-side researchers, 57% of those who are completely or mostly confident their organization minimizes the risk of AI use exceeded their research insights, and analytics goals. Only 34% of those with less confidence exceeded their goals, and fell short of them more than twice as often (28% to 13%).

PERFORMANCE AGAINST RESEARCH & INSIGHTS/ANALYTICS GOALS: COMPLETELY/MOSTLY CONFIDENT IN AI RISK MANAGEMENT (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

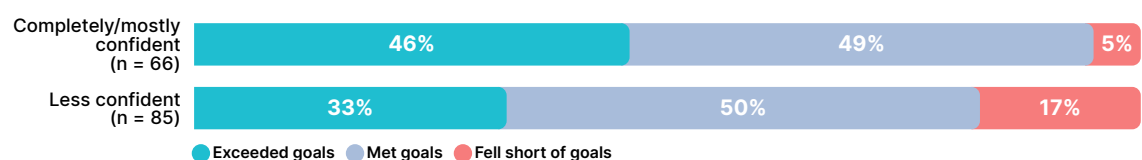
Takeaway: Among brand-side researchers, 57% of those who are completely or mostly confident their organization minimizes the risk of AI use exceeded their research insights, and analytics goals; only 34% of those with less confidence exceeded their goals.

On the analytics side, the story is almost amazingly (or predictably?) similar. Of those with the most confidence, 46% exceeded goals compared to just 33% of the less confident. Those least confident in their organization's ability to minimize the risk of AI misuse were three times as likely to fall short of goals (17% to 5%).

No, greater confidence that AI misuse is minimized doesn't automatically translate into better performance, but they appear to be related. Perhaps the people who are good at managing AI usage are also good at other aspects of their jobs, but it's close to the same takeaway: all things can work together for good if you make the effort, to paraphrase the passengers of flight 828.

AI governance confidence is now a performance issue, not just a compliance issue. Formal rules and clear expectations are associated with higher confidence, and confidence in minimizing AI misuse is associated with stronger outcomes. That makes governance part of the operating model for high-quality insights, not an administrative overlay.
– LM, ed.

PERFORMANCE AGAINST RESEARCH & INSIGHTS/ANALYTICS GOALS: COMPLETELY/MOSTLY CONFIDENT IN AI RISK MANAGEMENT (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, 46% of those with the most confidence exceeded goals compared to just 33% of the less confident; the least confident in their organization's ability to minimize the risk of AI misuse were three times as likely to fall short of goals (17% to 5%).

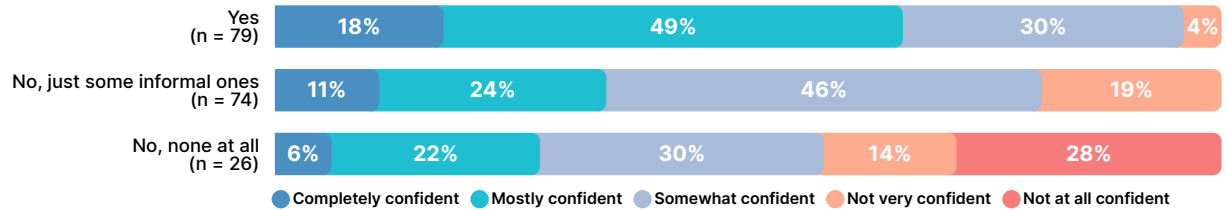




What is related to increased confidence in risk management? Twice as many brand-side researchers who say formal guidelines for AI use in insights are in place are completely or mostly confident their

organization minimizes risk of misuse (67%) versus those who have only informal guidelines (35%). When no guidelines exist, this drops to 28%.

CONFIDENCE IN AI RISK MANAGEMENT: HAVE GUIDELINES (BRAND: RESEARCH)



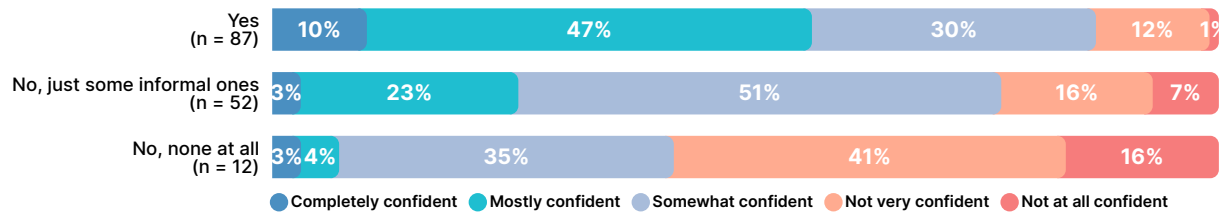
Source: GRIT Report and NewtonX

Takeaway: Of brand-side researchers who have formal guidelines for AI use in insights, 67% are completely/mostly confident their organization minimizes risk of AI misuse compared to just 35% of those with informal guidelines and 28% of those without any guidelines.

Of brand-side analytics professionals who say formal guidelines for AI use in insights are in place, 57% are completely or mostly confident their organization minimizes risk of misuse. When only informal guidelines are in place, confidence drops to 26%. When no guidelines exist, confidence drops to further, to 7%. Both brand-side segments suggest that when attempts are made to formally guide AI use, confidence increases.

We don't know if the presence of guidelines actually makes the use of AI any more effective versus simply making people feel better about it or less responsible for the consequences, but higher confidence is also associated with better performance. It doesn't seem like too much of a leap to recognize that formal attempts to guide AI usage are helpful to the greater good.

CONFIDENCE IN AI RISK MANAGEMENT: HAVE GUIDELINES (BRAND: ANALYTICS)



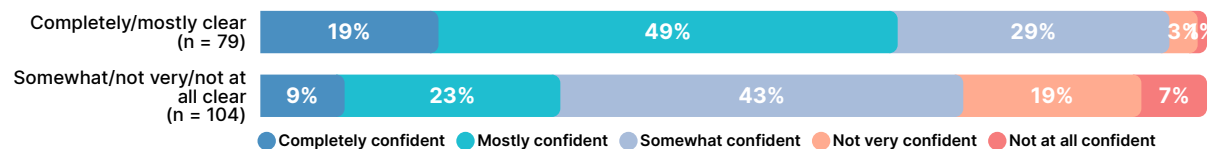
Source: GRIT Report and NewtonX

Takeaway: Of brand-side analytics professionals who have formal guidelines for AI use in insights, 57% are completely/mostly confident their organization minimizes risk of AI misuse compared to just 26% of those with informal guidelines and 7% of those without any guidelines.

If you make expectations clear, do you need formal guidelines? More than twice as many brand-side researchers are completely or mostly confident

their organization minimizes risk of AI misuse when expectations are completely or mostly clear (68%) as when they are not (32%).

CONFIDENCE IN AI RISK MANAGEMENT: CLARITY OF EXPECTATIONS (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Of brand-side researchers who say their organization's expectations of AI use are completely or mostly clear, 68% are completely/mostly confident their organization minimizes risk of AI misuse compared to just 32% of those who think they are less clear.

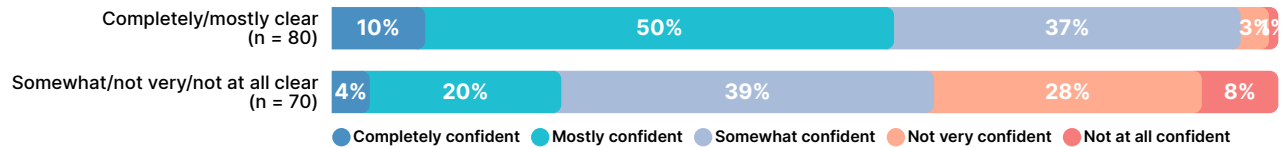




We see similar results among brand-side analytics professionals. More than twice as many are confident their organization minimizes risk of misuse when

expectations are at least mostly clear (60%) than when they are not (24%).

CONFIDENCE IN AI RISK MANAGEMENT: CLARITY OF EXPECTATIONS (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Of brand-side analytics professionals who say their organization's expectations of AI use are completely or mostly clear, 60% are completely/mostly confident their organization minimizes risk of AI misuse compared to just 24% of those who think they are less clear.

Results are similar across brand-side segments. They suggest overall performance improves when insights professionals are confident in their organization's use of AI, and confidence increases when formal guidelines are in place and expectations are clearly understood. We can't disentangle formality and clarity, but because they are similarly dominant and because clarity is slightly stronger than formality in the results, it suggests both are needed. Clarity may depend on formality, but may also enhance its impact.

There is room to improve confidence, and there is always room to improve overall performance. Perhaps more insights professionals should lobby for a formal role in AI governance.

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AI GOVERNANCE, CLARITY, AND RISK

CONFIDENCE | SUPPLIER POV ^[DATA]

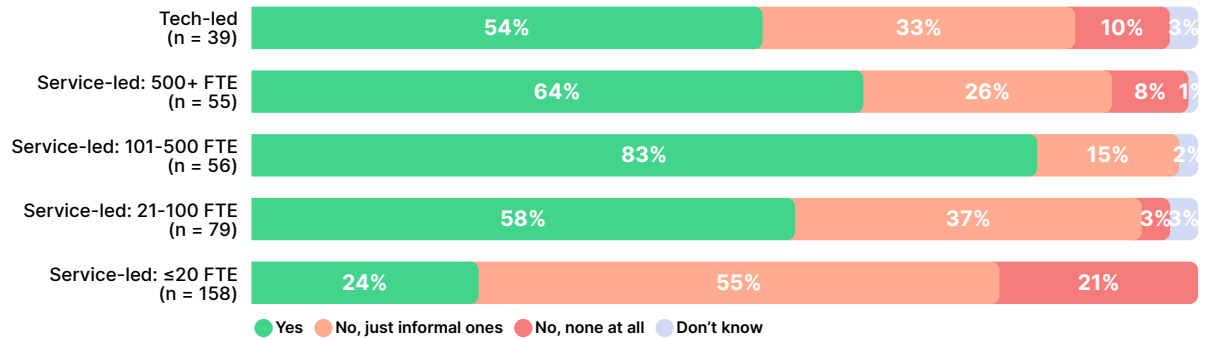
Except for service-led suppliers with ≤ 20 FTE (24%), most in each supplier segment say their organization has formal rules about use of AI in insights, from 54% of tech-led to 83% of service-led suppliers with 101 to 500 FTE.

Among service-led suppliers with ≤ 20 FTE, 21% say they have no guidelines at all, but these also tend to be companies in which the GRIT participant is the decision-maker in multiple areas (see *Managing Insights*). Someone with that much control (and only

a few people, if any, to control) may not perceive the need for as much structure as those in more complex management environments.

It's a little counter-intuitive that service-led suppliers with 500+ FTE (64%) are less likely than those with 101 to 500 FTE to have formal rules. However, this trend may not represent reduced need among them as much as it may reflect the difficulty of getting everyone from a large organization on the same page.

ORGANIZATION HAS FORMAL RULES ABOUT USE OF AI IN INSIGHTS: SUPPLIER SEGMENT

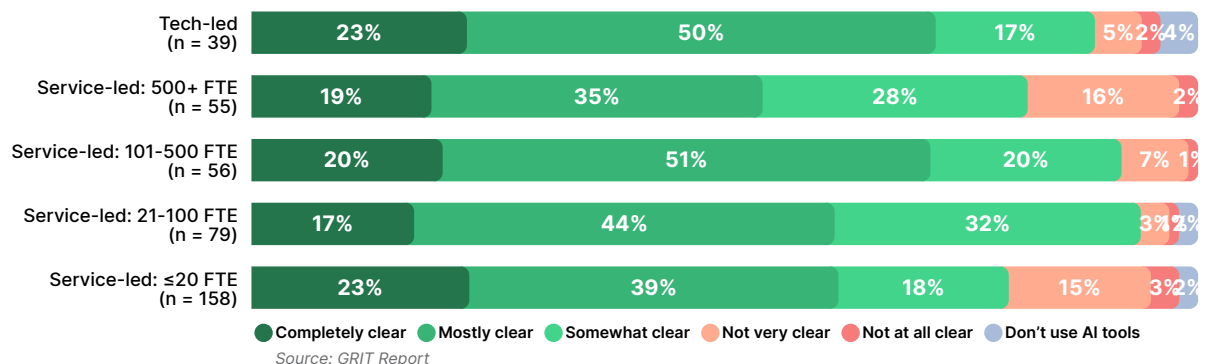


Takeaway: Except for service-led suppliers with ≤ 20 FTE (24%), most suppliers say their organization has formal rules about use of AI in insights, from 54% of tech-led to 83% of service-led with 101-500 FTE.

In each supplier segment, most say their organization's expectations of AI use in insights are mostly or completely clear. It's 73% for tech-led suppliers, who may have greater need for intimate technology-related sharing than other segments; 62% among service-led suppliers with ≤ 20 FTE, even though they have

the most centralized decision-making and the least complex staff environment. It's 61% for those with 21 to 100 FTE, and grows to 71% for those with 101 to 500 FTE. It falls off among those with 500+ FTE, to 54%.

CLARITY OF ORGANIZATION'S EXPECTATIONS OF USE OF AI IN INSIGHTS: SUPPLIER SEGMENT



Takeaway: In each supplier segment, most say their organization's expectations of AI use in insights are mostly or completely clear, from 54% in service-led suppliers with 500+ FTE to 73% in tech-led

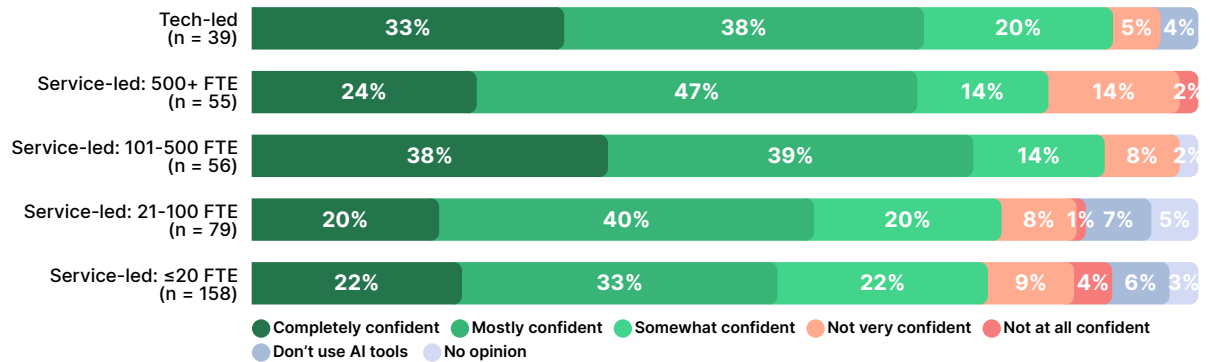
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In each supplier segment, most are confident their organization minimizes the risks of AI misuse. Confidence is 71% among tech-led suppliers, higher than for service-led suppliers with ≤ 20 FTE (55%) and

those with 21 to 100 FTE (60%). It peaks for those with 101 to 500 FTE (77%), but falls off slightly for those with 500+ FTE (71%).

CONFIDENCE ORGANIZATION MINIMIZES RISKS OF AI MISUSE: SUPPLIER SEGMENT



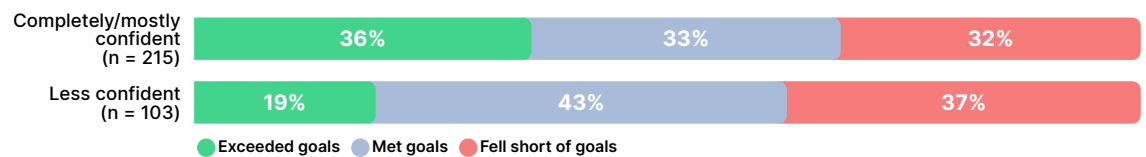
Takeaway: In each supplier segment, most are confident their organization minimizes the risks of AI misuse, from 55% in service-led suppliers with ≤ 20 FTE to 77% of those with 101-500 FTE.

Next, let's put this together by looking at how these concepts relate to performance. Due to sample size restrictions, we will look at service-led suppliers as a composite, then we'll remove those with ≤ 20 FTE because they tend to be very different from the other service-led segments.

When service-led suppliers are completely or mostly confident their organizations minimize risk of AI misuse, 36% exceed goals, but 32% fall short. However, when they lack such confidence, only 19% exceed goals while 37% fall short.

We hypothesize the line from confidence in AI use to performance is straighter for brand-side insights professionals than for suppliers. For suppliers, performance against goals is usually strongly tied to revenue performance, and confidence in AI use may not be as directly impactful as some other factors. For example, *how* they use it in their offerings may have a greater impact on revenue than *how well* or *how consistently* they use it.

PERFORMANCE AGAINST RESEARCH & INSIGHTS/ANALYTICS GOALS: COMPLETELY/MOSTLY CONFIDENT IN AI RISK MANAGEMENT (SERVICE-LED SUPPLIERS)



Takeaway: When service-led suppliers are completely or mostly confident their organizations minimize risk of AI misuse, 36% exceed goals, but 32% fall short; when they lack such confidence, only 19% exceed goals while 37% fall short.



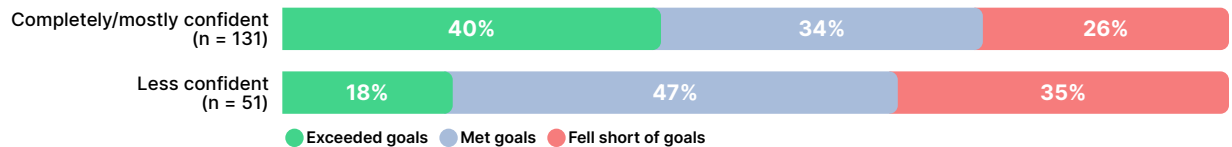
For suppliers, performance is usually measured in terms of revenue; confidence in AI use may not be as directly impactful as other factors.



If we take out those with ≤ 20 FTE, the picture gets a little clearer. When the remaining suppliers are completely or mostly confident their organizations minimize risk of AI misuse, 40% exceed goals, while 26% fall short. Among the less confident, fewer exceed their goals (18%) and more fall short (35%).

When we focus on suppliers with more than 20 FTE, the gap between those who exceed and those who fall short expands among the more confident. However, performance is basically the same for the least confident whether smaller suppliers are included or not.

PERFORMANCE AGAINST RESEARCH & INSIGHTS/ANALYTICS GOALS: COMPLETELY/MOSTLY CONFIDENT IN AI RISK MANAGEMENT (SERVICE-LED: >20 FTE)



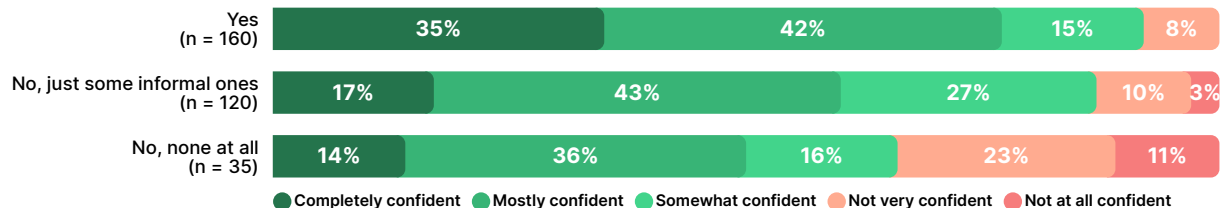
Source: GRIT Report

Takeaway: When service-led suppliers with more than 20 FTE are completely or mostly confident their organizations minimize risk of AI misuse, 40% exceed goals, while 26% fall short; among the less confident, fewer exceed their goals (18%) and more fall short (35%).

Among service-led suppliers, those who say they have formal guidelines for AI use in insights are more confident in their organization's minimization of AI misuse. When there are formal guidelines, 77% are

completely or mostly confident. When there are only informal guidelines, this drops to 60%. When there are no guidelines, it declines to 50%.

CONFIDENCE IN AI RISK MANAGEMENT: HAVE GUIDELINES (SERVICE-LED SUPPLIERS)



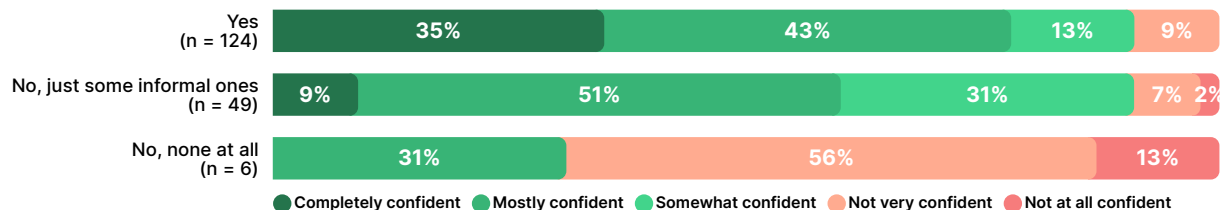
Source: GRIT Report

Takeaway: Among service-led suppliers who say they have formal guidelines for AI usage in insights, 77% are completely or mostly confident risks are minimized; with only informal guidelines, this drops to 60%, and with no guidelines, it declines to 50%.

If we take out those with ≤ 20 FTE, confidence among those with formal guidelines stays about the same (78%). It's also similar when there are only

informal guidelines (60%), but lower when there are none (31%).

CONFIDENCE IN AI RISK MANAGEMENT: HAVE GUIDELINES (SERVICE-LED: >20 FTE)



Source: GRIT Report

Takeaway: Among service-led suppliers with more than 20 FTE who say they have formal guidelines for AI usage in insights, 78% are completely or mostly confident risks are minimized; with only informal guidelines, this drops to 60%, and with no guidelines, it falls to 31%.

Among service-led suppliers who say expectations for AI usage in insights are completely or mostly clear, 78% are completely or mostly confident risks

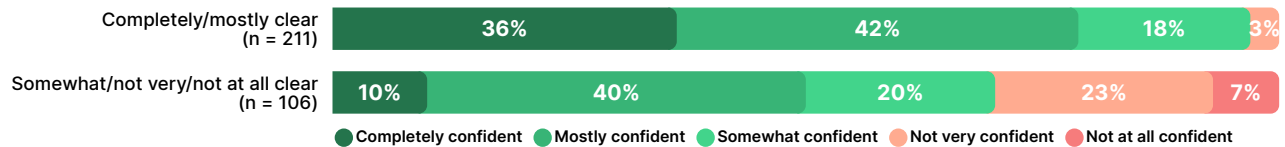
are minimized; when expectations are less clear, this drops to 50%. These are similar to the gaps between those with formal guidelines and those without.



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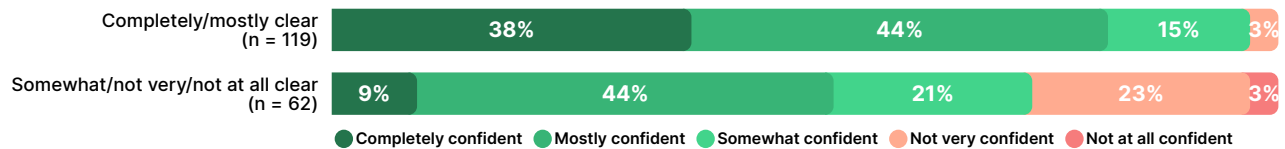
**CONFIDENCE IN AI RISK MANAGEMENT: CLARITY OF EXPECTATIONS (SERVICE-LED SUPPLIERS)**

Source: GRIT Report

Takeaway: Among service-led suppliers who say expectations for AI usage in insights are completely or mostly clear, 78% are completely or mostly confident risks are minimized; when expectations are less clear, this drops to 50%.

Among service-led suppliers with more than 20 FTE who say expectations for AI usage in insights are completely or mostly clear, 82% are completely or mostly confident risks are minimized; when

expectations are less clear, this drops to 53%. Interestingly, when service-led suppliers with ≤20 FTE are removed, baseline confidence seems to increase regardless of clarity of rules.

CONFIDENCE IN AI RISK MANAGEMENT: CLARITY OF EXPECTATIONS (SERVICE-LED: >20 FTE)

Source: GRIT Report

Takeaway: Among service-led suppliers with more than 20 FTE who say expectations for AI usage in insights are completely or mostly clear, 82% are completely or mostly confident risks are minimized; when expectations are less clear, this drops to 53%.

As among brand-side insights professionals, among suppliers, we see positive correlation between greater confidence in minimizing AI risk and performance against goals, and between confidence, formal

guidelines, and clarity. However, these relationships seem more confounded by other factors on the supplier side.

THE BIG PICTURE [STRATEGIC INTERPRETATION]

While not quite *The Lord of the Rings* or *The Matrix*, *Managing Insights*, *Investing in Insights*, and *Governance & Risks* comprise a trilogy. Unlike those two movie franchises, we have no plans to stretch the definition of “trilogy” to extend this discussion to a fourth section and beyond.

Managing Insights establishes that insights professionals have formal authority over the decisions agentic AI will increasingly execute, such as supplier selection, technology acquisition, and outsourcing, but not over AI governance itself. *Investing in Insights* shows they have strong appetite for more automation and expect it to grow, with no segment expecting decreases. *Governance & Risks* shows that the people driving and expecting AI expansion are the least confident it’s being managed well, and that confidence in management is meaningfully associated with performance outcomes.

In other words, insights professionals are actively enabling AI expansion through their formal roles, are hungry for more of it, but are largely not in the room where governance decisions happen, and it shows in their confidence levels. The suggestion that “perhaps more insights professionals should lobby for a formal role in AI governance” is the logical conclusion of all three sections taken together, presumptuous though it may sound.

Confidence in the organization to minimize AI misuse correlates with performance, and the brand-side numbers are striking: researchers who are confident exceed goals at 57% versus 34% for the less confident; analytics professionals at 46% versus 33%. The falling-short gap is equally notable: the least confident analytics professionals fall short at three times the rate of the most confident (17% to 5%). While being appropriately cautious about causality, we think the relationship is consistent enough across both brand-side segments and supplier segments to be taken seriously.





The brand-side confidence deficit matters because brand-side professionals are simultaneously the ones with the least formal governance authority (from *Managing Insights*) and the least confidence in outcomes. Less than half of brand-side professionals in either segment are confident their organization minimizes risk from misuse of AI, while suppliers are substantially more confident across every segment.

Clarity may outperform formality, but both matter. Formal guidelines and clear expectations produce nearly identical confidence levels, but although clarity may benefit from formality, it may also enhance its impact. The practical implication is that writing rules down without communicating them is insufficient, and communicating expectations without formalizing them may not be as effective in the short term.

The service-led supplier with 101 to 500 FTE segment is the governance leader: 83% have formal rules, the highest of any segment, and 77% are confident in risk minimization, also the highest. This is the same segment leading in capability investment, automation appetite, and revenue trends across earlier sections. Governance maturity appears to be part of the same organizational posture, not separate from it.

Although some of these metrics consistently increase with service-led supplier FTE size, they slide when we reach the 500+ FTE segment. Formal rules drop from 83% for those with 101 to 500 FTE to 64%; clarity drops from 71% to 54%; and confidence slides from 77% to 71%, plus the “completely confident” rate is lower. At 500+ FTE, organizational complexity may be making alignment harder, but no less important.

It’s important to keep in mind that we are nowhere near the ceiling for confidence in management of AI-related risks, and such confidence appears to influence overall performance, if not drive it directly. Communication, both formal and informal, can help build confidence, and larger organizations need to rise to the challenges presented by their size and complexity. It might help if more insights professionals had seats at the AI policy-setting table.

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AI GOVERNANCE ISN'T REALLY ABOUT GOVERNANCE

Matilda Sarah

Co-Founder Displayr + VP Sales & Marketing, Displayr

One of the more striking findings in this year's GRIT data is that the people driving AI adoption in insights are also the least confident it is being managed well.

Less than half of brand-side researchers (44%) and analytics professionals (42%) say they're confident their organization minimizes the risks of AI misuse. Part of the reason may be that most of them aren't in the room where governance decisions get made.

AI governance tends to get treated as a legal or procurement exercise, something that happens upstream of research teams. The data suggests that's exactly the problem.

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Matilda Sarah is Co-Founder of Q and Displayr, analysis and reporting software used by market researchers globally. With over 20 years in the industry, she focuses on what AI changes, and doesn't change, about the practice of market research. Based in Sydney, she works closely with research and insights teams navigating AI-driven transformation.

Confidence rises sharply when expectations are clear. Among brand-side researchers who said their organization's expectations around AI use were completely or mostly clear, 68% were confident risks were being minimized. Among those who found expectations unclear, that dropped to 32%. The same pattern held across analytics teams and supplier segments. Formal policies help, but writing rules down without communicating them isn't enough. People need to understand what AI is allowed to do, what it shouldn't do, and how outputs get validated.

That matters because AI in research is no longer just summarizing documents or drafting emails. It's in the analysis workflows that shape business decisions.

Trust in market research has always come from traceability. Researchers can inspect a crosstab, review weighting logic, check significance testing, and challenge an interpretation. AI changes the speed of work dramatically, but it doesn't remove the need for that chain of evidence. When insights teams lose visibility into how AI is being used, or governed, that chain becomes harder to defend.

The performance data makes the stakes concrete. Among brand-side researchers confident in how AI risks were being managed, 57% exceeded their goals, compared with 34% among those who were less confident. The least confident analytics professionals were more than three times as likely to fall short.

The future of AI in insights won't be determined by who adopts it fastest. It'll be determined by who can scale it while keeping the answers defensible. And that requires insights professionals to have a say in how AI is governed, not just how it's used.





SELECTION CRITERIA

This section reviews how insights professionals across two brand-side segments, researchers and analytics professionals, and five supplier segments, tech-led and four size categories of service-led, prioritize criteria for choosing approaches and methodologies and for selecting suppliers and partners.

WHAT'S 'BETTER' THAN 'FASTER' AND 'CHEAPER'? [ORIENTATION]

Do insights professionals apply the same criteria when choosing methods as they do when choosing suppliers or partners? The commonalities and differences are partly reflected in criteria GRIT tests for each, but also in the results. For method selection, the question

is “can we execute this efficiently?” and the criteria address practical execution. For supplier selection, the question is “can we trust them, and do they bring something we don’t have?” and the criteria address trust and differentiation.

When choosing methods, each GRIT segment has total cost among its top two selection criteria, and it's first for all but the two service-led supplier segments with the most employees. When choosing suppliers, general pricing is a top-three key decision factor in each segment and has been in each GRIT year with few exceptions: 22A among service-led suppliers with 500+ FTE and a few years among tech-led suppliers, for whom it goes in and out. Whether methodologies and approaches or suppliers and partners, “cheaper” is a common decision element.

Although GRIT doesn't explicitly measure “faster” as a supplier decision criterion, “speed of results” is often a top factor in methodology selection. However, it's not top-of-mind in every segment, and it's not as popular as it once was.

You know what is? Ease of interpreting and communicating results, and its introduction to GRIT in 24A stole some of “faster's” thunder. Expertise required to produce results is also top-of-mind for some, and also seems to have taken some of “faster's” territory away from it. When interpreting and communicating results is difficult and a lot of expertise is needed to apply methods, it takes more time to get to results and activation. Fulfilling these two criteria impacts insights effectiveness on multiple dimensions, and one of those is speed.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed “**L.M., ed.**” are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.



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TOP THREE PRIORITIES FOR METHOD SELECTION: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Total cost	43.9	36.9	33.2	41.9	31.9	23.6	24.9
Ease of interpreting/communicating results	25.8	21.6	22.4	19.8	25.3	32.5	23.5
Expertise required to produce results	16.3	9.8	15.5	25.4	16.1	18.0	6.9
Speed of results	16.0	19.2	24.9	10.7	9.0	16.6	18.9
Innovative approach	10.5	7.8	3.9	15.9	26.8	20.9	28.5
n =	88	75	19	78	43	27	26

Maxdiff scores. Green shading represents top three in segment.

Takeaway: When considering methods, total cost is the top concern in each segment except service-led suppliers with 101-500 FTE; ease of interpreting/communicating results is also in the top three in each segment.

Source: GRIT Report and NewtonX

Our supplier selection criteria results are not as nuanced, at least at the top level. Data quality, service quality, and general pricing are the top key decision factors in each segment, as they generally are in every

segment in every GRIT year. These are table stakes that signal trust and, if they signal differentiation, they can rapidly reduce the consideration set.

TOP THREE KEY FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT SEGMENT

	Brand: research	Brand: analytics	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Data quality	88%	76%	91%	87%	90%	87%	84%
Service quality	78%	73%	62%	80%	75%	64%	81%
General pricing	68%	59%	79%	60%	58%	58%	63%
n =	88	75	19	78	43	27	26

Green shading indicates top three within segment.

Takeaway: In each segment, the top three criteria for choosing between suppliers are data quality, service quality, and general pricing.

Source: GRIT Report and NewtonX

However, there's more activity below the surface, particularly involving reputation, relationship, and innovative tools and approaches. For supplier selection, we'll distinguish between key decision factors and other significant considerations, and the "significant considerations" are the criteria that can determine choice if everyone in the consideration set agrees on the key decision factors.



In each segment, the top three criteria for choosing between suppliers are data quality, service quality, and general pricing.





METHOD AND SUPPLIER SELECTION PRIORITIES |

BRAND POV ^[DATA]

When selecting methodologies, both brand-side segments agree on the top tier concerns, but differentiate in the middle. Total cost (maxdiff score 43.9 for researchers, 36.9 for analytics) and ease of interpreting and communicating results (25.8, 21.6) are the two most important criteria. Amount of expertise required to produce results is third for researchers (16.3), just barely edging out speed of results (16.0). For analytics, speed of results is third, and not far out of second place (19.2).

Along with speed of results, amount of labor required to produce results (12.8) and innovative approach (10.5) form a middle tier for researchers. These are followed by ease of synthesis with other sources (4.5) and scalability (3.5).

For the analytics segment, the middle tier includes scalability (15.8), ease of synthesis with other sources (12.2), amount of labor required to produce results (10.0), and amount of expertise required to produce results (9.8). Innovative approach (7.8) is last, but still more important than the bottom two criteria for researchers.

KEY PRIORITIES FOR METHOD SELECTION: BRAND SEGMENT

	Research	Analytics	Research - analytics
Total cost (including services, data, or tools)	43.9	36.9	+7.0
Ease of interpreting and communicating results	25.8	21.6	+4.2
Amount of expertise required to produce results	16.3	9.8	+6.5
Speed of results	16.0	19.2	-3.2
Amount of labor required to produce results	12.8	10.0	+2.8
Innovative approach	10.5	7.8	+2.7
Ease of synthesis with other sources	4.5	12.2	-7.7
Scalability	3.5	15.8	-12.3
n =	88	75	

Maxdiff scores. Green shading indicates top three within segment.

Takeaway: When selecting methods, both brand-side segments rank total cost and ease of interpreting/communicating results 1-2; speed of results is third for analytics professionals, while amount of expertise required is third for researchers, although in a virtual tie with speed.

Source: GRIT Report and NewtonX



When selecting methodologies, both brand-side segments agree on the top tier concerns, but differentiate in the middle.

In 24A, we changed this set of questions to a maxdiff trade-off to avoid GRIT participants saying everything is important. Everything may, in fact, be important, but they're not all equally important. Due to this change, we track the rank orders of criteria because the raw metrics aren't comparable from year to year.





Total cost and ease of interpreting/communicating results continue to be the top two criteria for brand-side researchers. Total cost has placed first or second in each GRIT wave, as has ease of interpreting/communication since it was introduced in 24A. Expertise required to produce results, also introduced in 24A, has gradually moved up from sixth to third.

Maybe we can take for granted that total cost will always be important, but the other two seem to reflect the every-increasing need to mainstream more ways of doing insights work. For newer or more esoteric methods to realize their potential value, more people need to be able to execute them and the deliverables need to connect with a broad swath of non-expert stakeholders who need to absorb them quickly.

Below the top three, speed of results has slid from the top two to third and now fourth since we introduced ease of interpreting/communicating and expertise required. It's unlikely that speed has become less important; it's more likely that speed is less important if you don't have something worth delivering.

Scalability has also slid for brand-side researchers from fourth in 20A to eighth last year and this year. Partly, this has been due to the introduction of other criteria to the GRIT survey, but those new criteria also happen to be higher priority.

KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)
Total cost	1	1	2	1	1	2	1
Ease of interpreting/ communicating results	--	--	--	--	2	1	2
Expertise required to produce results	--	--	--	--	6	4	3
Speed of results	2	2	1	2	3	3	4
Labor required to produce results	--	--	--	--	4	6	5
Innovative approach	3	3	3	3	5	5	6
Ease of synthesis with other sources	4	4	4	4	8	7	7
Scalability	4	5	5	5	7	8	8
n =	295	213	203	117	105	129	88

Question changed from rating to maxdiff in 24A.

Takeaway: Among brand-side researchers, total cost and ease of interpreting/communicating results have been top two concerns when selecting methods in each year they were presented, while expertise required has climbed into third place.

Source: GRIT Report and NewtonX

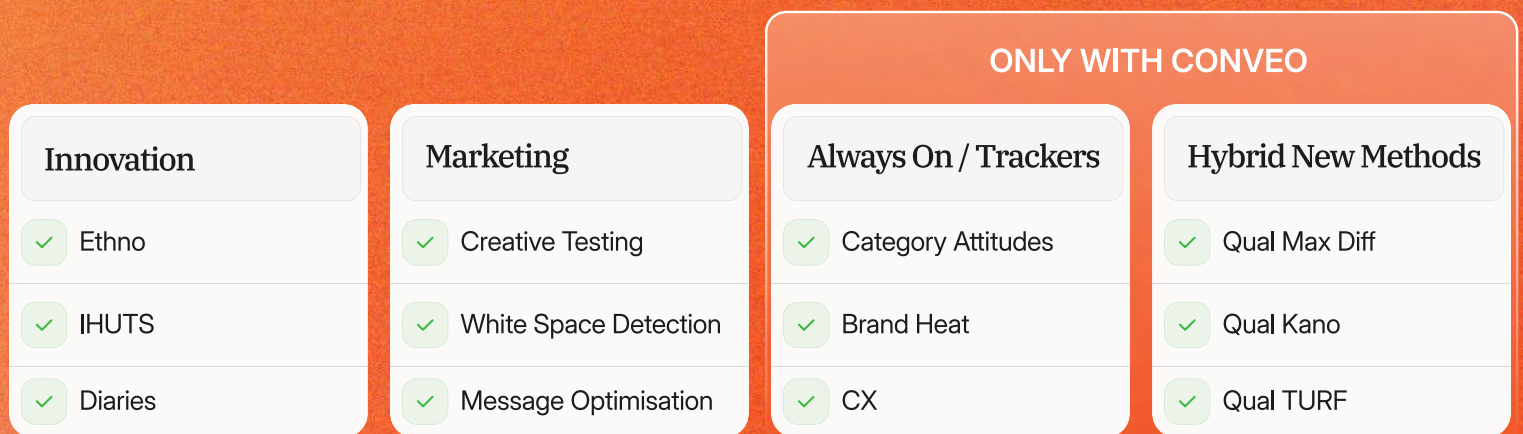
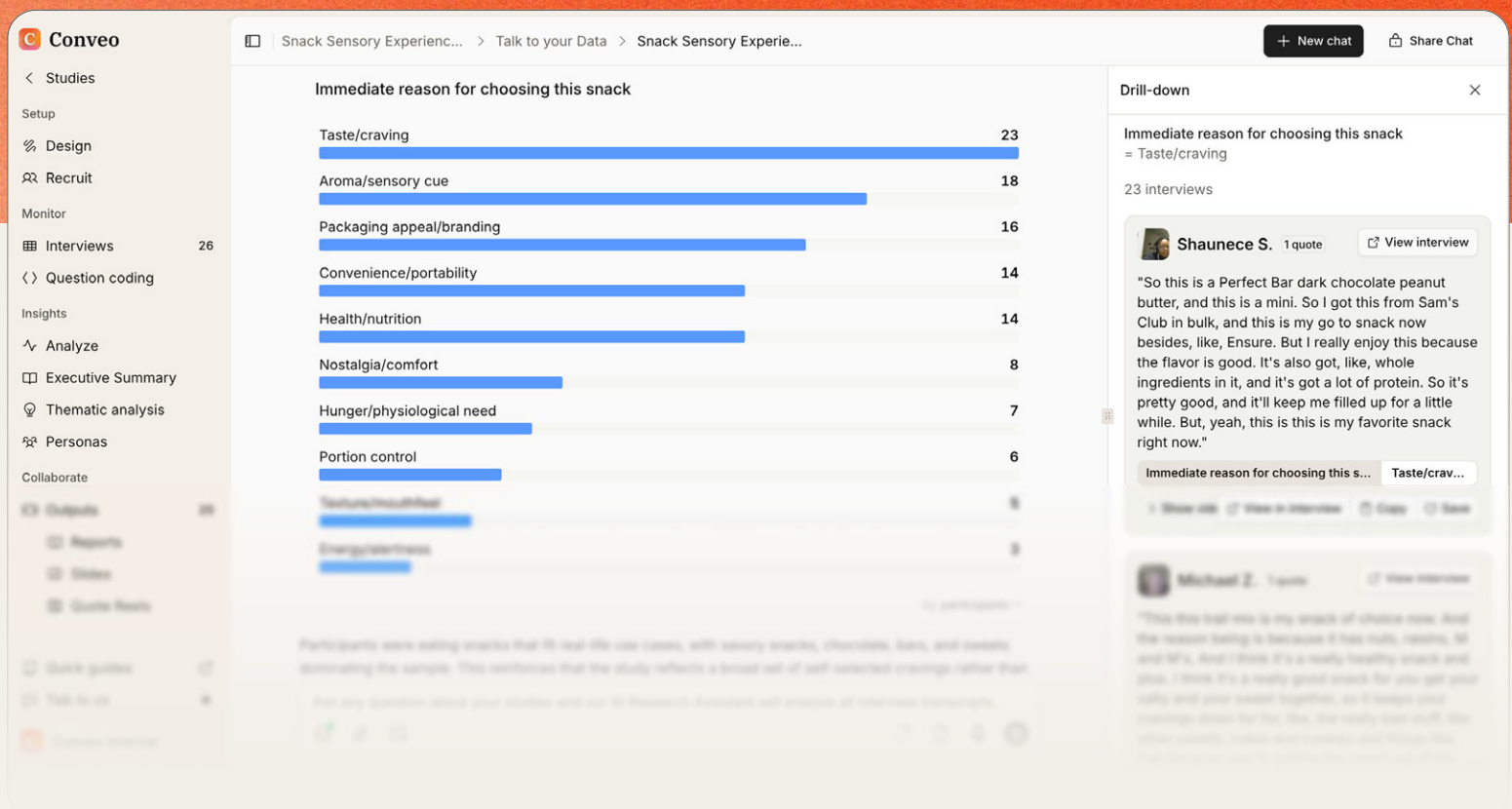
Similar to researchers, brand-side analytics professionals prioritize total cost and ease of interpreting/communicating results, as they always do. Speed of results has been among the top three each year, except last year when it was surpassed by expertise required to produce results, scalability, and labor required to produce results. Priorities in the analytics segment tend to be less stratified than in the research segment, so it's not too much of a surprise to see these kinds of changes during technologically turbulent years.



For newer methods to realize their potential, more people need to be able to execute them and the deliverables need to connect broadly with non-experts.

AI research: conversational and observational.

Run AI-moderated interviews that fuel business growth with proactive, deep customer understanding.

Conveo | Snack Sensory Experienc... > Talk to your Data > Snack Sensory Experienc...

Immediate reason for choosing this snack

Reason	Count
Taste/craving	23
Aroma/sensory cue	18
Packaging appeal/branding	16
Convenience/portability	14
Health/nutrition	14
Nostalgia/comfort	8
Hunger/physiological need	7
Portion control	6
Texture/mouthfeel	5
Energy/alertness	3

Participants were eating snacks that fit real-life use cases, with savory snacks, chocolate, bars, and sweets dominating the sample. This reinforces that the study reflects a broad set of self-selected cravings rather than...

Ask any question about your studies and our AI Research Assistant will analyze all interview transcripts.

Drill-down

Immediate reason for choosing this snack
= Taste/craving

23 interviews

Shaunece S. 1 quote View interview

"So this is a Perfect Bar dark chocolate peanut butter, and this is a mini. So I got this from Sam's Club in bulk, and this is my go to snack now besides, like, Ensure. But I really enjoy this because the flavor is good. It's also got, like, whole ingredients in it, and it's got a lot of protein. So it's pretty good, and it'll keep me filled up for a little while. But, yeah, this is this is my favorite snack right now."

Immediate reason for choosing this s... Taste/crav...

Show all View interview Copy Save

Michael Z. 1 quote View interview

"This bar had me in my snack of choice now. And the reason being is because it has nuts, marsh, M&M's, and I think it's a really healthy snack and plus, I think it's a really good snack for you get your fatty and your sweet together, so it keeps your cravings down for the day, the really best stuff. Not other snacks, candy and cookies and things like that because they're not really the best stuff of all."



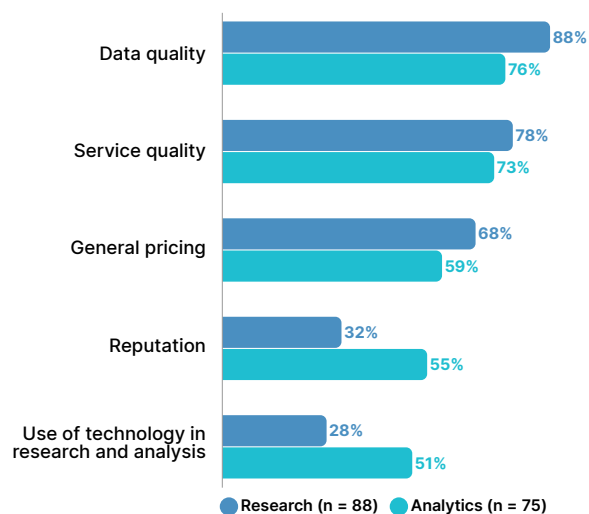
KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A
Total cost	1	2	1	1
Ease of interpreting/communicating results	--	1	2	2
Speed of results	2	3	6	3
Scalability	5	6	4	4
Ease of synthesis with other sources	4	7	8	5
Labor required to produce results	--	8	5	6
Expertise required to produce results	--	4	3	7
Innovative approach	3	5	7	8
n =	133	97	121	75
Question changed from rating to maxdiff in 24A.				
Takeaway: Brand-side analytics professionals look for methods that perform well on cost, ease of interpreting/communicating results, and speed.				

Source: GRIT Report and NewtonX

Turning to supplier and partner selection criteria, three are considered key decision factors when choosing between suppliers in both brand-side segments: data quality (88% research, 76% analytics), service quality (78% and 73%), and general pricing (68% and 59%). Two more are key decision factors for a majority of the analytics segment: reputation (55%) and use of technology in research and analysis (51%).

KEY DECISION FACTORS - MAJORITY IN EITHER SEGMENT: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: In both brand-side segments, most identify data quality, service quality, and general pricing as key factors when choosing between suppliers, and majorities of analytics professionals also name reputation (55%) and use of technology in research and analytics (51%) as key.

The market is redefining quality around usefulness. Cost remains a dominant consideration, but ease of interpreting and communicating results has become a central criterion, signaling that speed alone is no longer enough. Work that cannot be understood, defended, shared, and acted upon is not truly high quality.

– LM, ed.





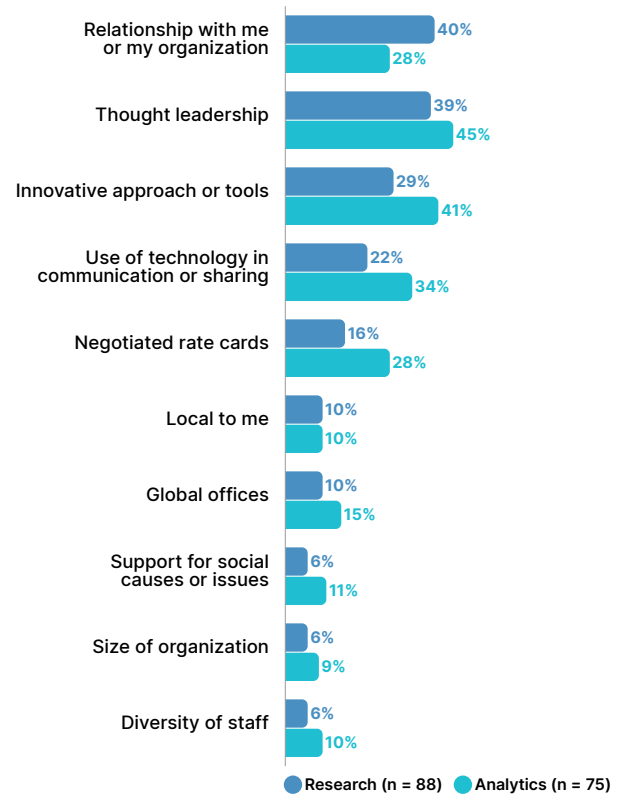
Of the remaining factors, relationship reaches 40% in the research segment, followed closely by thought leadership (39%). In the analytics segment, thought leadership (45%) also hits 40%, as does innovative approach or tools (41%). Generally, when innovation is either an implied or manifest decision criterion, reputation also rises in importance. For new innovative offerings, there isn't always an existing relationship to generate confidence, so you need be able to put more stock in reputation.

When we consider mentions of all significant factors in addition to key factors, data quality (100%), service quality (98%), and general pricing (98%) remain in the top three for brand-side researchers, but reputation (94%) and innovative approach (90%) become more prominent.



Generally, when innovation is either an implied or manifest decision criterion, reputation also rises in importance.

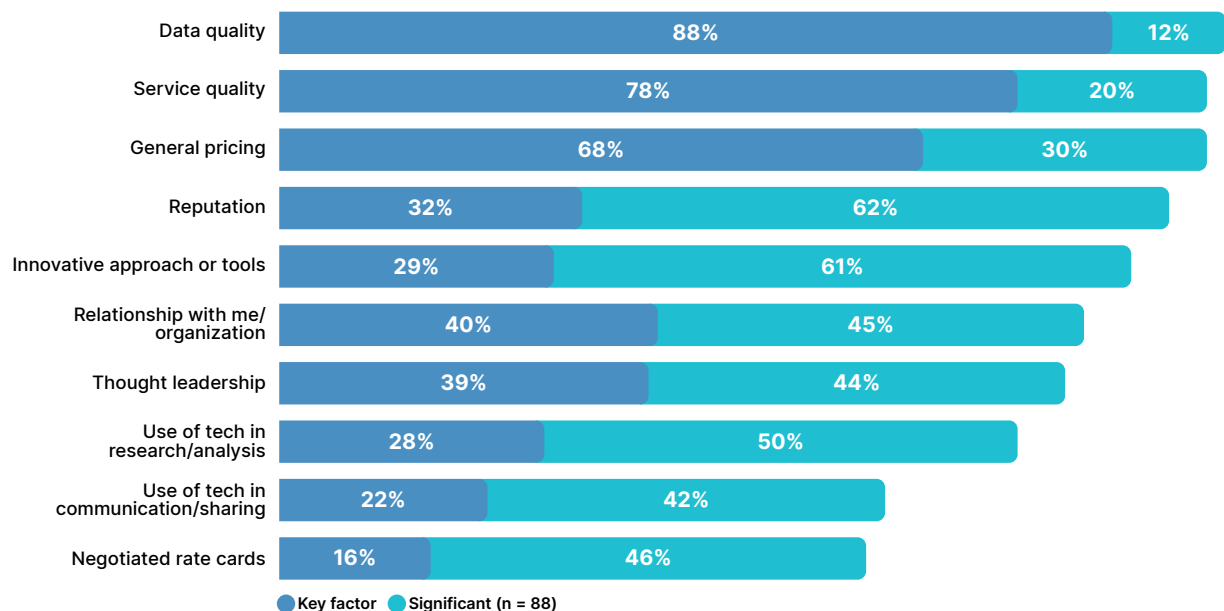
KEY DECISION FACTORS - MINORITY IN BOTH SEGMENTS: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Among factors that are not considered key when choosing between suppliers by a majority in either segment, relationship (40%) and thought leadership (39%) lead among brand-side researchers and thought leadership (45%) and innovative approach (41%) lead among analytics.

TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: When considering which factors are considered key or significant when choosing between suppliers, reputation (94%) and innovation (90%) emerge as top-of-mind among brand-side researchers.

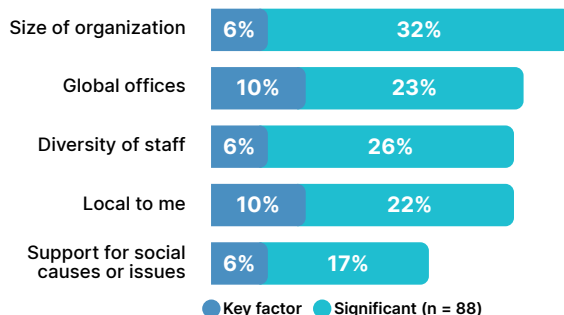




Outside of the top ten, about one-third of brand-side researchers factor in size of organization (38%), global

offices (33%), diversity of staff (32%), and local (32%).

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, size of organization (38%) stands out among brand-side researchers.

Among brand-side researchers, data quality (88%), service quality (78%), general pricing (68%), and thought leadership (39%) are perennially among the top five key decision factors. Relationship (40%)

moves in and out of the top five in alternate years, and this year it pushed out reputation (32%). Reputation and innovative approach or tools (29%) fell by -14% and -11%, respectively, this year.

KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (BRAND: RESEARCH)

	20A (Aggregate)	21A (Aggregate)	22A (Aggregate)	23A (Research)	24A (Research)	25A (Research)	26A (Research)	26A – 25A
Data quality	85%	80%	80%	91%	80%	86%	88%	+2%
Service quality	58%	56%	53%	83%	73%	87%	78%	-9%
General pricing	46%	41%	43%	44%	51%	59%	68%	+9%
Relationship with me or my organization	50%	37%	33%	35%	40%	45%	40%	-5%
Thought leadership	44%	38%	35%	45%	48%	47%	39%	-8%
Reputation	42%	37%	32%	43%	39%	46%	32%	-14%
Innovative approach or tools	40%	39%	33%	34%	31%	40%	29%	-11%
Use of technology in research and analysis**	25%	30%	25%	26%	26%	31%	28%	-3%
Use of technology in communication or sharing	*	17%	15%	18%	19%	18%	22%	+4%
Negotiated rate cards	15%	14%	12%	11%	22%	17%	16%	-1%
Local to me	13%	8%	3%	7%	10%	12%	10%	-2%
Global offices	11%	8%	4%	10%	8%	9%	10%	+1%
Support for social causes or issues	*	8%	5%	2%	6%	5%	6%	+1%
Size of organization	4%	6%	4%	4%	9%	5%	6%	+1%
Diversity of staff	*	10%	6%	5%	7%	8%	6%	-2%
Average number of factors:	4.3	4.3	3.8	4.6	4.7	5.2	4.8	+0.4
n =	298	215	203	117	105	129	88	

* Not asked in 20A **Asked as "Use of technology" in 20A Green shading indicates top five within wave.

Takeaway: Among brand-side researchers, data quality (88%), service quality (78%), general pricing (68%), and thought leadership (39%) are perennially top key factors, and relationship (40%) moved back into the top five in 26A.

Source: GRIT Report and NewtonX

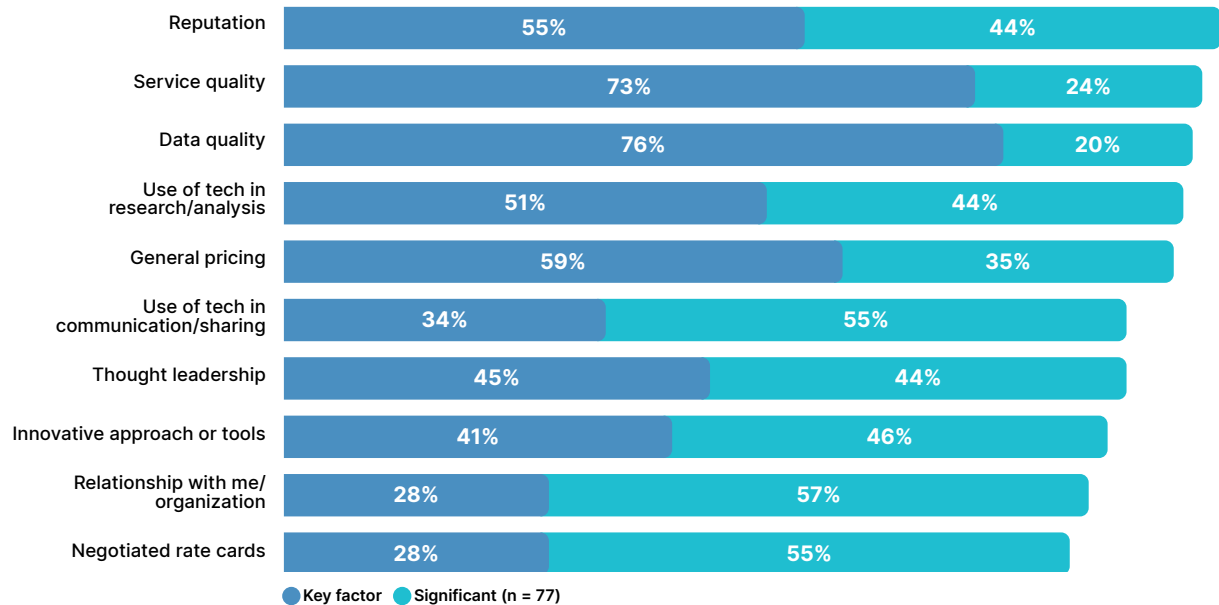




When all significant factors are included, reputation (99%) shoots to the top for the brand-side analytics segment, and we often suspect that reputation becomes more important when you are pursuing solutions with a limited track record. Use of technology in research and analysis (95%) also moves

up, just ahead of general pricing (94%). Similar to what we see for methodology selection, the analytics segment's criteria list is much less stratified than the list for researchers; they seem to juggle many factors when making decisions.

TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (BRAND: ANALYTICS)



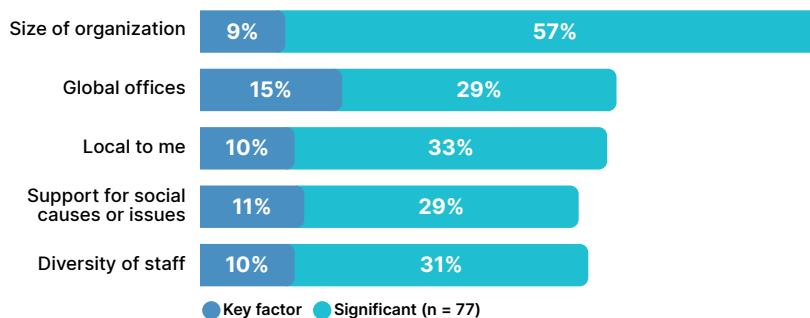
Source: GRIT Report and NewtonX

Takeaway: When considering factors which are considered key or significant when choosing between suppliers, several emerge as top-of-mind among brand-side analytics professionals, led by reputation (99%) and use of technology in research and analysis (95%).

Outside of the top ten, most brand-side analytics professionals factor in size of organization (66%), and at least 40% consider global offices (44%), local

(43%), support for social causes or issues (40%), and diversity of staff (41%).

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, size of organization (66%) stands out among brand-side analytics.





Among brand-side analytics professionals, data quality (76%), service quality (73%), general pricing (59%), and reputation (55%) are perennially among the top five key decision factors. Use of technology in research and analysis (51%) has been in the top five for three of four waves.

Two key factors increased by double digits: thought leadership (+12% to 45%) and service quality (+10%). On the downside, data quality fell -10%. For context,

it had peaked last year at 86% after a +17% spike. If it seems odd that data quality would become less of a priority, it doesn't mean that it's less important, just that it doesn't differentiate suppliers in the analytics segment decision set as much. For example, with the data quality crisis intensifying, data quality may have spiked as a factor because it became a stronger differentiator between suppliers. If analytics professionals have recalibrated their consideration set, it may not differentiate as often this year.

KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (BRAND: ANALYTICS)

	23A	24A	25A	26A	26A - 25A
Data quality	79%	69%	86%	76%	-10%
Service quality	73%	63%	63%	73%	+10%
General pricing	47%	61%	52%	59%	+7%
Reputation	52%	62%	54%	55%	+1%
Use of tech in research/analysis	52%	44%	48%	51%	+3%
Thought leadership	43%	47%	33%	45%	+12%
Innovative approach or tools	45%	38%	37%	41%	+4%
Use of tech in communication/sharing	39%	32%	34%	34%	--
Negotiated rate cards	17%	25%	19%	28%	+9%
Relationship with me/organization	36%	29%	25%	28%	+3%
Global offices	10%	15%	12%	15%	+3%
Support for social causes or issues	17%	10%	10%	11%	+1%
Diversity of staff	19%	14%	7%	10%	+3%
Local to me	15%	11%	5%	10%	+5%
Size of organization	15%	18%	5%	9%	+4%
Average number of factors:	5.6	5.4	4.9	5.4	+0.5
n =	133	97	121	77	

Green shading indicates top five within wave.

Takeaway: Among brand-side analytics professionals, data quality (76%), service quality (73%), general pricing (59%), and reputation (55%) are perennial top-five key factors when choosing between suppliers.

Source: GRIT Report and NewtonX



Among brand-side analytics professionals, data quality, service quality, general pricing, and reputation are perennially among the top five key factors



METHOD AND SUPPLIER SELECTION PRIORITIES |

SUPPLIER POV ^[DATA]

The three segments of service-led suppliers with more than 20 FTE share the same top three criteria for methodology selection: innovative approach, total cost (including services, data, or tools), and ease of interpreting and communicating results. However, they prioritize them somewhat differently.

For those with 500+ FTE, the three are somewhat tightly clustered together: innovative approach (28.5), total cost (24.9), and ease of interpreting and communicating results (23.5). For those with 101 to 500 FTE, ease of interpreting and communicating results (32.5) is clearly their top priority while total cost (23.6) and innovative approach (20.9) are a distant second and third. For those with 21 to 100 FTE, they are more tightly clustered, and total cost (31.9) is their top priority, followed by innovative approach (26.8) and ease of interpreting and communicating results (25.3).

To riff off our analyses from earlier sections of this report, service-led suppliers with 500+ FTE are aggressively redefining their businesses, so it is not surprising their priorities are more balanced across multiple priorities. Innovative approach is slightly ahead of the others as a method selection criterion, which may speak to the how creative they need to be with their business transformation.

Those with 101 to 500 FTE are in growth and expansion mode, and ease of interpreting and communicating results might be the leverage they need to lead with in order to both grow diverse capabilities internally and to build their relationships with clients. Many service-led suppliers with 21 to 100 FTE are in an earlier stage of growth, and their prioritization of total cost may reflect a need to conserve resources so they can invest in the most productive ways. All of which is, of course, speculation on our part.

Service-led suppliers with ≤ 20 FTE also prioritize total cost (41.9) and ease of interpreting and communicating results (19.8), and they seem to have an almost single-minded focus on cost. In between, they prioritize amount of expertise required to produce results (25.4), probably because they have limited time to invest in learning new methodologies. Each of these priorities seems to point to a need to do more with less investment.

Tech-led suppliers also share total cost (33.2) and ease of interpreting and communicating results (22.4) with the other segments, plus they prioritize speed of results (24.9). They don't have innovative approach as a top criterion for methods they select because innovation is what they produce, not necessarily what they need to consume.



Many service-led with 21 to 100 FTE are in an earlier stage of growth, and their prioritization of total cost may reflect a need to conserve resources to invest.

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KEY PRIORITIES FOR METHOD SELECTION: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Innovative approach	3.9	15.9	26.8	20.9	28.5
Total cost (including services, data, or tools)	33.2	41.9	31.9	23.6	24.9
Ease of interpreting and communicating results	22.4	19.8	25.3	32.5	23.5
Speed of results	24.9	10.7	9.0	16.6	18.9
Scalability	18.8	3.7	12.8	11.8	18.3
Amount of expertise required to produce results	15.5	25.4	16.1	18.0	6.9
Ease of synthesis with other sources	1.9	5.9	4.8	2.6	6.7
Amount of labor required to produce results	12.7	10.1	6.6	7.4	5.6
n =	19	78	43	27	26

Maxdiff scores. Green shading represents top three in segment.

Takeaway: Across supplier segments, total cost and ease of interpreting/communicating results are among the three most important factors when selecting methodologies; innovative approach is a top-three concern for service-led suppliers with 20+ FTE, amount of expertise required for those with ≤20 FTE, and speed of results for tech-led.

Source: GRIT Report

As with brand-side segments, when choosing between partners and suppliers, data quality, service quality, and general pricing are universal top five key decision factors. Among suppliers, reputation is also among the top five in each segment.

Service-led suppliers with 500 or fewer FTE put relationship in their top five. Tech-led suppliers have use of technology in research and analysis (52%), and service-led suppliers with 500+ FTE have innovative approach or tools (51%) in their top five criteria.

KEY DECISION FACTORS - MAJORITY IN ANY SEGMENT: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Data quality	91%	87%	90%	87%	84%
Service quality	62%	80%	75%	64%	81%
General pricing	79%	60%	58%	58%	63%
Innovative approach or tools	17%	18%	45%	36%	51%
Reputation	49%	48%	46%	57%	47%
Use of technology in research and analysis	52%	19%	29%	36%	36%
Relationship with me or my organization	47%	57%	51%	51%	35%
Average number of factors:	5.4	4.4	4.9	4.9	5.4
n =	19	78	43	27	26

Green shading indicates top five within segment.

Takeaway: Data quality, service quality, and general pricing are considered key factors when choosing suppliers by majorities in each segment, and reputation is also in the top five for each. Rounding out the top five, tech-led suppliers mention use of technology in research/analysis, service-led with 500+ FTE mention innovative approach, and the others mention relationship.

Source: GRIT Report

Eight criteria are not claimed by a majority in any segment as key decision factors when choosing between suppliers and partners. Among tech-led suppliers, use of technology in communication or sharing (46%) and negotiated rate cards (43%)

break 40%. The next highest instances are thought leadership among service-led suppliers with 500+ FTE (30%) and those with 21 to 100 FTE (27%) and use of technology in communication or sharing among those with 500+ FTE (29%).





KEY DECISION FACTORS – MINORITY IN EACH SEGMENT: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Thought leadership	23%	18%	27%	19%	30%
Use of technology in communication or sharing	46%	13%	20%	21%	29%
Global offices	3%	5%	12%	7%	22%
Negotiated rate cards	43%	16%	15%	16%	17%
Support for social causes or issues	4%	4%	2%	7%	17%
Diversity of staff	3%	3%	3%	16%	13%
Size of organization	--	2%	4%	3%	13%
Local to me	21%	9%	12%	7%	6%
Average number of factors:	5.4	4.4	4.9	4.9	5.4
n =	19	78	43	27	26

Green shading indicates top five within segment.

Takeaway: Among key supplier choice priorities that are not in the top five in any segment, use of technology in communication and sharing (46%) and negotiated rate cards (43%) among tech-led suppliers stand out.

Source: GRIT Report

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METHOD AND SUPPLIER SELECTION PRIORITIES |

TECH-LED POV ^[DATA]

For tech-led suppliers, total cost has usually been a lower-tier priority for methodology selection, but it's number one again as it was in 24A. Speed of results is second, the highest ranked it's been since 23A. Ease of interpreting and communicating results is in the top three for the second year in a row, and it seems to be a universal priority across segments. Scalability is fourth, but it was in the top two from 20A to 23A. Innovative approach was in the top three every year until now, when it plummeted to seventh.

Admittedly, the sample size is smaller than in the past, but the pattern suggests they are focusing more on producing competitive technology than trying to compete based on a wider service portfolio. Total cost could reflect the need to be competitive, ease of interpreting and communicating results seems to be table stakes at every table, and speed of results could reflect their need to get to market quickly. Again, innovation is not something they need to acquire, it's something they need to produce.

KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A
Total cost	4	4	4	4	1	5	1
Speed of results	2	1	1	1	3	4	2
Ease of interpreting/communicating results	--	--	--	--	5	2	3
Scalability	1	1	2	2	4	3	4
Expertise required to produce results	--	--	--	--	8	6	5
Labor required to produce results	--	--	--	--	6	7	6
Innovative approach	3	3	2	3	2	1	7
Ease of synthesis with other sources	5	5	5	5	7	8	8
n =	92	52	117	47	29	27	19

Takeaway: Among method selection priorities for tech-led suppliers, total cost has returned to the top, speed is back up to second, and ease of interpreting/communicating results is third; innovative approach has fallen from first to seventh.

Source: GRIT Report

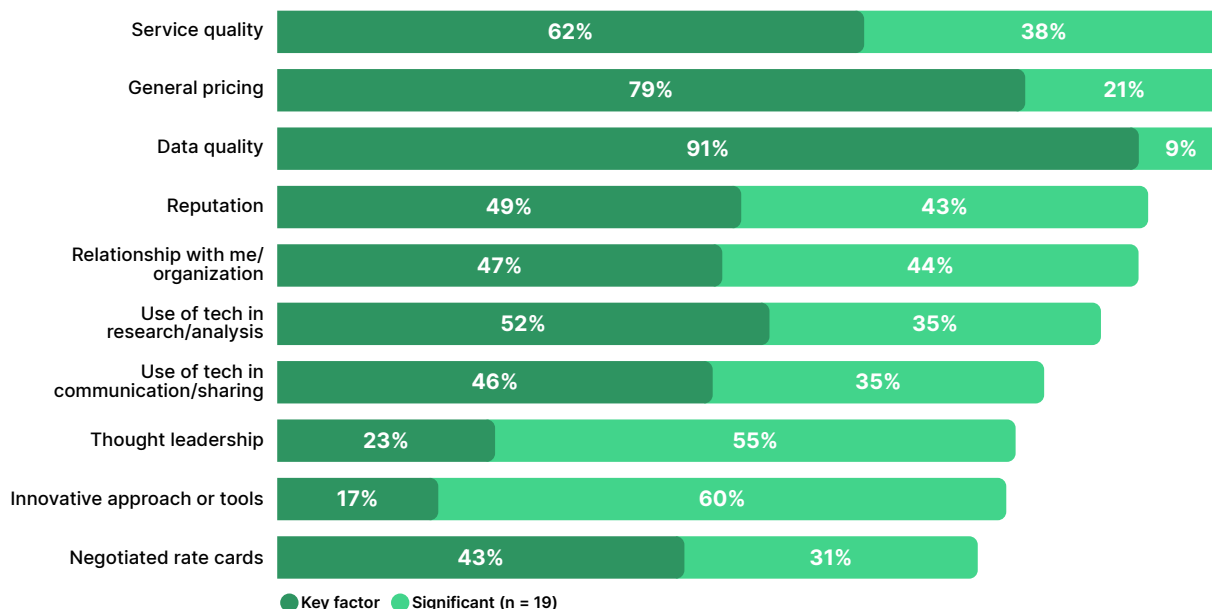
Although they don't necessarily stand out when we look at key decision factors when choosing between suppliers, some factors become more prominent when we consider other significant priorities, too. Among tech-led suppliers, reputation (92%) and relationship (91%) rise toward the top, and thought leadership (78%) and innovative approach or tools (77%) look much more important.



For tech-led, total cost could reflect the need to be competitive, and speed of results could reflect their need to get to market quickly.



TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (TECH-LED)

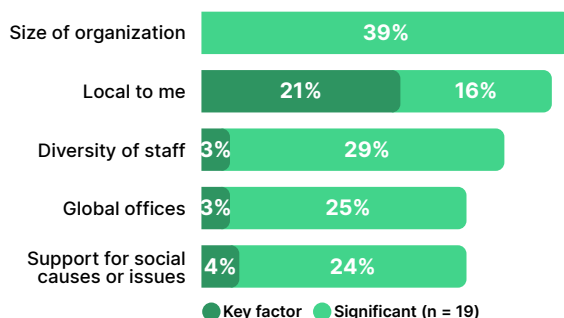


Source: GRIT Report

Takeaway: When considering factors which are considered key or significant when choosing between suppliers, several emerge as top-of-mind among tech-led, led by reputation (92%) and relationship (91%).

Of the factors outside the top ten, size of organization (39%) and local (37%) stand out among tech-led suppliers.

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (TECH-LED)



Source: GRIT Report

Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, size of organization (39%) and local (37%) stand out among tech-led suppliers.

For tech-led suppliers, data quality (91%) and service quality (62%) are perennial top five key priorities when choosing between suppliers and partners. General pricing (79%) has been in and out of the top five, and use of technology in research and analysis (52%) has been in the top five for all waves but 24A. Reputation (49%) returns to the top five, as relationship (47%) and innovative approach or tools (17%) dropped out.

There have been some big movements since last year. General pricing jumped +35%; negotiated rate cards, +24% to 43%; and reputation, +11%. On the downside, innovative approach or tools plunged -49%; service quality, -20%; thought leadership, -16 to 23%; global offices, -14 to 3%; size of organization, -14 to 0%, and relationship, -12%.



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KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (TECH-LED)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Data quality	78%	81%	74%	89%	77%	94%	91%	-3%
General pricing	46%	38%	35%	42%	55%	44%	79%	+35%
Service quality	60%	37%	48%	78%	59%	82%	62%	-20%
Use of tech in research/analysis**	61%	60%	50%	65%	22%	47%	52%	+5%
Reputation	45%	37%	32%	46%	40%	38%	49%	+11%
Relationship with me/organization	49%	37%	32%	38%	48%	59%	47%	-12%
Use of tech in communication/sharing*	--	27%	23%	38%	27%	46%	46%	--
Negotiated rate cards	16%	10%	13%	14%	22%	19%	43%	+24%
Thought leadership	35%	19%	20%	28%	14%	39%	23%	-16%
Local to me	6%	6%	4%	6%	5%	18%	21%	+3%
Innovative approach or tools	47%	44%	48%	43%	28%	66%	17%	-49%
Support for social causes or issues*	--	10%	7%	11%	7%	14%	4%	-10%
Diversity of staff*	--	12%	7%	4%	5%	9%	3%	-6%
Global offices	8%	10%	8%	14%	--	17%	3%	-14%
Size of organization	3%	6%	7%	10%	13%	14%	--	-14%
Average number of factors:	4.6	4.3	4.1	5.3	4.2	6.1	5.4	-0.7
n =	97	52	117	47	29	27	19	

Green shading indicates top five within wave. * Not asked in 20A **Asked as "Use of technology" in 20A

Takeaway: Among tech-led suppliers, general pricing increased as a key factor when choosing between suppliers, from 44% in 25A to 79% in 26A, as did negotiated rate cards (19% to 43%); innovative approach fell (66% to 17%).

Source: GRIT Report



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METHOD AND SUPPLIER SELECTION PRIORITIES |

SERVICE-LED: 500+ FTE POV ^[DATA]

For service-led suppliers with 500+ FTE, innovative approach has been their top or second priority when selecting methods every year except 20A when it was third and 24A when it dropped to fourth. The current second priority, total cost, has been in the top three since 23A after a couple of years in fourth

place. Ease of interpreting and communicating results has been in the top three since it was introduced in 24A. From 20A to 23A, speed of results was their top priority for method selection, but it's dropped and is currently fourth.

KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A
Innovative approach	3	2	2	2	4	1	1
Total cost	1	4	4	3	1	3	2
Ease of interpreting/communicating results	--	--	--	--	2	2	3
Speed of results	1	1	1	1	3	5	4
Scalability	4	3	3	4	5	4	5
Expertise required to produce results	--	--	--	--	7	6	6
Ease of synthesis with other sources	5	5	5	5	8	7	7
Labor required to produce results	--	--	--	--	6	8	8
n =	104	94	124	63	42	44	26

Takeaway: Among method selection priorities for service-led suppliers with 500+ FTE, innovative approach is the top concern, followed by total cost and ease of interpreting/communicating results.

Source: GRIT Report

Among service-led suppliers with 500+ FTE, some factors become more prominent when we consider other significant priorities, too. Use of technology in research and analysis (86%), relationship (85%), thought leadership (79%), negotiated rate cards (78%), and use of technology in communication and sharing (72%) look much more important when we consider other significant factors.



For service-led with 500+ FTE, innovation has been their top or second priority when selecting methods every year except 20A and 24A.



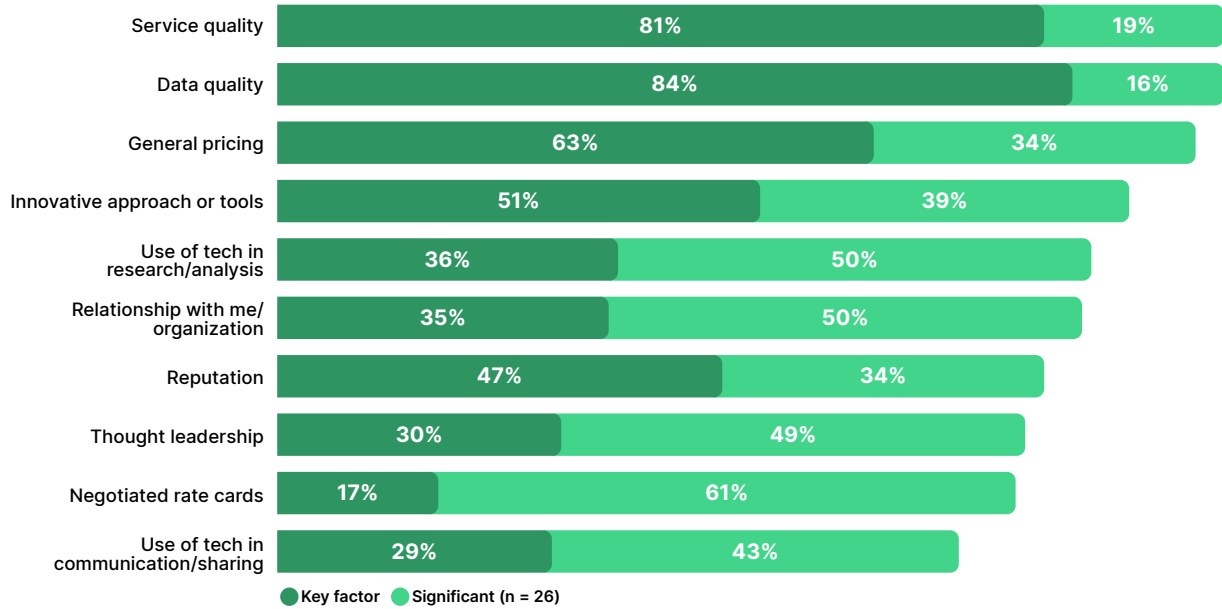
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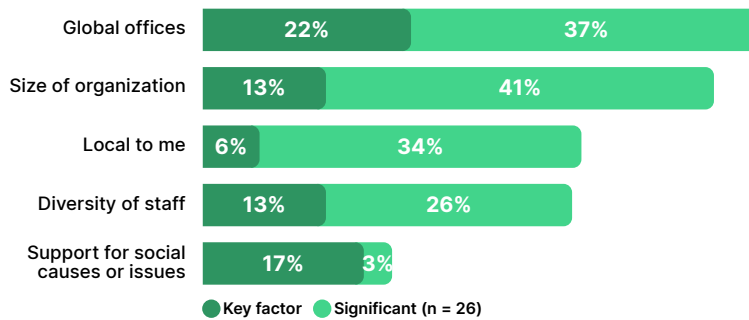
TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: 500+ FTE)



Takeaway: When considering factors which are considered key or significant when choosing between suppliers, several emerge as top-of-mind among service-led suppliers with 500+ FTE, led by innovative approach (90%), use of technology in research/analysis (86%), and relationship (85%).

Of the factors outside the top ten, global offices (59%) and size of organization (54%) stand out among service-led suppliers with 500+ FTE.

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: 500+ FTE)



Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, global offices (59%) and size of organization (54%) stand out among service-led suppliers with 500+ FTE.

For service-led suppliers with 500+ FTE, data quality (84%), service quality (81%), and reputation (47%) are perennial top five key priorities when choosing between suppliers and partners. General pricing (63%) has been in the top five every wave except 22A. Innovative approach or tools (51%) took a big leap back into the top five after a three-year absence, ending relationship's (35%) three-year run.

There have been some big swings up and down since last year. Innovative approach or tools jumped +22%; general pricing, +16%; global offices, +16% to 22%; and support for social causes or issues, +12% to 17%. Two factors became less important to choices between suppliers and partners: relationship fell -17% and local fell -12% to 6%.





KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (SERVICE-LED: 500+ FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Data quality	88%	90%	80%	87%	76%	83%	84%	+1%
Service quality	67%	59%	61%	85%	31%	79%	81%	+2%
General pricing	53%	49%	36%	53%	64%	47%	63%	+16%
Innovative approach or tools	42%	46%	52%	28%	23%	29%	51%	+22%
Reputation	55%	47%	52%	47%	57%	53%	47%	-6%
Use of tech in research/analysis**	48%	34%	48%	35%	30%	31%	36%	+5%
Relationship with me/organization	46%	47%	40%	43%	38%	52%	35%	-17%
Thought leadership	39%	31%	33%	17%	29%	31%	30%	-1%
Use of tech in communication/sharing*	--	20%	31%	18%	27%	26%	29%	+3%
Global offices	16%	17%	19%	18%	9%	6%	22%	+16%
Negotiated rate cards	15%	23%	23%	28%	30%	21%	17%	-4%
Support for social causes or issues*	--	14%	15%	1%	15%	5%	17%	+12%
Diversity of staff*	--	17%	16%	3%	11%	11%	13%	+2%
Size of organization	8%	11%	15%	5%	13%	9%	13%	+4%
Local to me	8%	7%	12%	4%	10%	18%	6%	-12%
Average number of factors:	4.9	5.1	5.3	4.7	4.6	5.0	5.4	+0.4
n =	106	94	124	63	42	44	26	

Green shading indicates top five within wave. * Not asked in 20A **Asked as "Use of technology" in 20A

Takeaway: Among service-led suppliers with 500+ FTE, innovative approach increased as a key factor when choosing between suppliers, from 29% in 25A to 51% in 26A; general pricing (47% to 63%) and global offices (6% to 22%) also rose.

Source: GRIT Report

METHOD AND SUPPLIER SELECTION PRIORITIES | SERVICE-LED: 101-500 FTE POV [DATA]

For service-led suppliers with 101 to 500 FTE, ease of interpreting and communicating results, currently the top priority when choosing methods, has been first or second since it was introduced in 24A. The second most important criterion, total cost, has been in the top three every year except 24A, when it was sixth. Innovative approach, currently third, moved up from fourth last year after four years in second place.

Similar to service-led suppliers with 500+ FTE, those with 101 to 500 FTE had ranked speed of results number one from 20A through 23A, then it dropped to third, and it is now fifth. It's been pushed down by innovative approach and expertise required to produce results (currently fourth). Possibly, these suppliers are more focused on the how lack of expertise can lead to delays and are looking at how to streamline processes that currently require special expertise.



For service-led with 101 to 500 FTE, ease of interpreting and communicating results has been first or second since it was introduced in 24A.



KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A
Ease of interpreting/communicating results	--	--	--	--	1	2	1
Total cost	1	3	3	3	6	1	2
Innovative approach	3	2	2	2	2	4	3
Expertise required to produce results	--	--	--	--	5	6	4
Speed of results	1	1	1	1	3	3	5
Scalability	4	4	3	4	4	7	6
Labor required to produce results	--	--	--	--	7	5	7
Ease of synthesis with other sources	5	5	5	5	8	8	8
n =	106	86	132	55	48	44	27

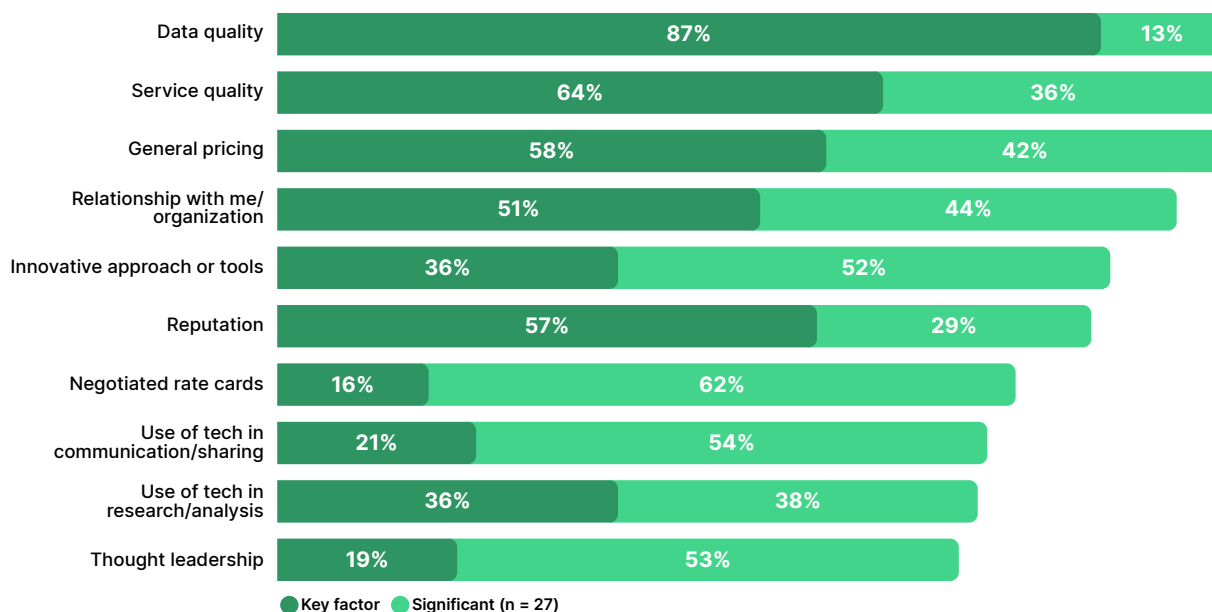
Takeaway: Among method selection priorities for service-led suppliers with 101-500 FTE, ease of interpreting/communicating results is the top concern, followed by total cost and innovative approach.

Source: GRIT Report

Among service-led suppliers with 101 to 500 FTE, some factors become more prominent when we consider other significant factors in addition to key decision factors. General pricing (100%), relationship (95%), innovative approach or tools (88%),

reputation (86%), negotiated rate cards (78%), use of technology in communication and sharing (75%), use of technology in research and analysis (74%), and thought leadership (72%) look much more important when other significant factors are considered.

TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: When considering factors which are considered key or significant when choosing between suppliers, several emerge as top-of-mind among service-led suppliers with 101-500 FTE, led by relationship (95%), use of innovative approach (88%), and reputation (86%).





Of the factors outside the top ten, diversity of staff (33%) stands out among service-led suppliers with 101 to 500 FTE.

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, diversity of staff (33%) stands out among service-led suppliers with 101-500 FTE.

For service-led suppliers with 101 to 500 FTE, data quality (87%), service quality (64%), general pricing (58%), and reputation (57%) are perennial top five key priorities when choosing between suppliers and partners. Relationship (51%) has been there, too, every year except 24A.

There have been three double-digit changes since last year. Diversity of staff increased +14% to 16%. Service quality declined -20%, and negotiated rate cards fell -14%.

KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (SERVICE-LED: 101-500 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Data quality	87%	86%	89%	96%	88%	90%	87%	-3%
Service quality	62%	57%	61%	79%	83%	84%	64%	-20%
General pricing	49%	49%	47%	51%	61%	59%	58%	-1%
Reputation	52%	41%	52%	54%	59%	58%	57%	-1%
Relationship with me/organization	57%	40%	45%	49%	44%	50%	51%	+1%
Use of tech in research/analysis**	30%	31%	37%	36%	46%	39%	36%	-3%
Innovative approach or tools	31%	38%	41%	46%	50%	36%	36%	--
Use of tech in communication/sharing*	--	19%	26%	14%	34%	23%	21%	-2%
Thought leadership	34%	28%	35%	25%	35%	21%	19%	-2%
Negotiated rate cards	15%	15%	13%	23%	21%	30%	16%	-14%
Diversity of staff*	--	9%	15%	6%	13%	2%	16%	+14%
Local to me	6%	13%	13%	4%	14%	10%	7%	-3%
Support for social causes or issues*	--	3%	8%	2%	13%	5%	7%	+2%
Global offices	7%	3%	8%	4%	19%	9%	7%	-2%
Size of organization	6%	2%	6%	6%	19%	5%	3%	-2%
Average number of factors:	4.4	4.3	5.0	5.0	6.0	5.2	4.9	-0.3
n =	108	86	132	55	48	44	27	

Green shading indicates top five within wave. * Not asked in 20A **Asked as "Use of technology" in 20A

Takeaway: Among service-led suppliers with 101-500 FTE, service quality declined as a key factor when choosing between suppliers, from 84% in 25A to 64% in 26A, although it is still second.

Source: GRIT Report



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METHOD AND SUPPLIER SELECTION PRIORITIES |

SERVICE-LED: 21-100 FTE POV ^[DATA]

For service-led suppliers with 21 to 100 FTE, total cost is a perennial top-three criterion for selecting methodologies. The second most important, innovative approach, has been in the top three each year except 24A when it was fourth. Ease of interpreting/communicating results has been in the top three since it was introduced in 24A.

Similar to the larger service-led supplier segments, those with 21 to 100 FTE used to rank speed of results much higher from 20A through 23A, always second or third most important. It fell to fifth in 24A, and it's now sixth.

KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A
Total cost	1	2	3	1	2	3	1
Innovative approach	3	1	1	2	4	1	2
Ease of interpreting/communicating results	--	--	--	--	1	2	3
Expertise required to produce results	--	--	--	--	3	5	4
Scalability	4	4	4	4	6	8	5
Speed of results	2	3	2	3	5	4	6
Labor required to produce results	--	--	--	--	7	7	7
Ease of synthesis with other sources	5	5	5	5	8	6	8
n =	167	143	140	131	63	54	43

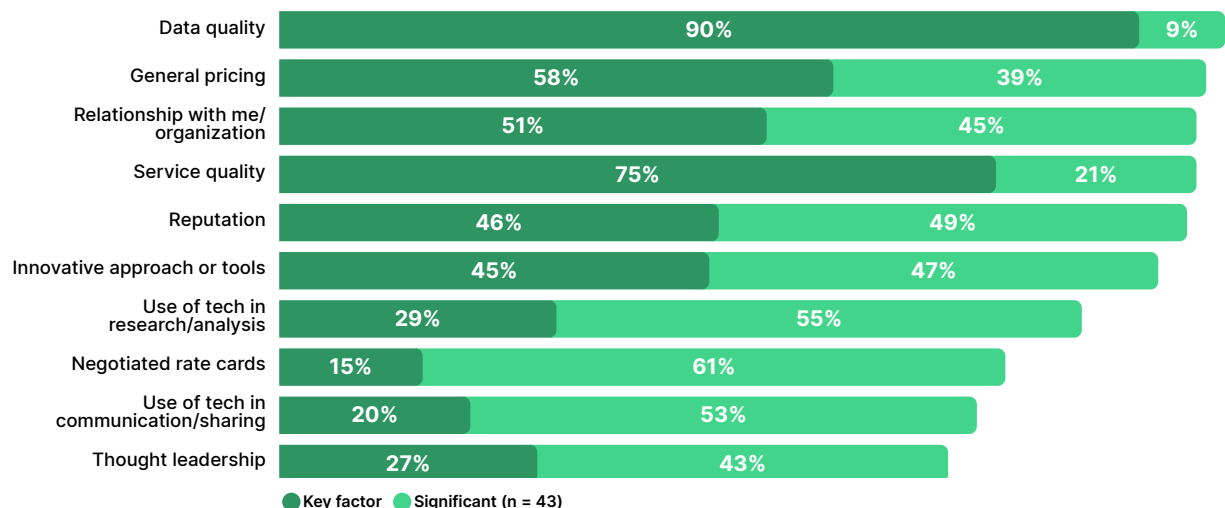
Takeaway: Among method selection priorities for service-led suppliers with 21-100 FTE, total cost is most important, followed by innovative approach and ease of interpreting/communicating results.

Source: GRIT Report

Among service-led suppliers with 101 to 500 FTE, some factors become more prominent when we consider other significant factors, too. Notably, relationship (96%), reputation (95%), innovative approach or tools (92%), use of technology in research

and analysis (84%), negotiated rate cards (76%), and use of technology in communication and sharing (73%) look much more important when other significant factors are considered.

TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: When considering factors which are considered key or significant when choosing between suppliers, several emerge as top-of-mind among service-led suppliers with 21-100 FTE, led by relationship (96%), reputation (95%), and innovative approach (92%).



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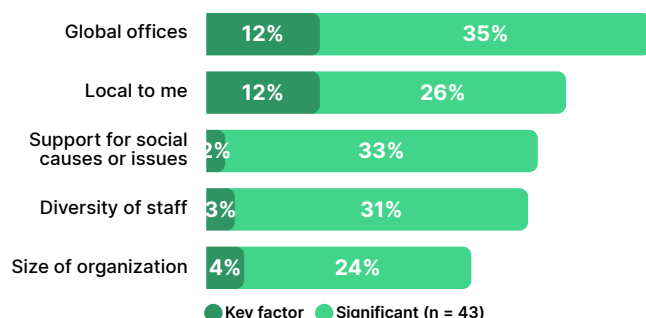


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Of the factors outside the top ten, global offices (47%) stands out among service-led suppliers with 21 to 100 FTE.

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, global offices (47%) and local (38%) stand out among service-led suppliers with 21-100 FTE.

For service-led suppliers with 21 to 100 FTE, data quality (90%), service quality (75%), general pricing (58%), and reputation (46%) are perennial top five key decision factors when choosing between suppliers and partners. Relationship (51%) has been there, too, every year except 21A.

Since last year, two factors increased by double digits: innovative approach or tools by +14% to 45% and thought leadership by +11% to 27%. Another two declined by double digits: negotiated rate cards by -13% to 15% and support for social causes or issues by -12% to 2%.

KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (SERVICE-LED: 21-100 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A - 25A
Data quality	87%	86%	83%	88%	95%	93%	90%	-3%
Service quality	63%	55%	62%	81%	86%	77%	75%	-2%
General pricing	47%	45%	44%	55%	56%	61%	58%	-3%
Relationship with me/organization	56%	35%	44%	47%	47%	52%	51%	-1%
Reputation	50%	41%	44%	49%	53%	52%	46%	-6%
Innovative approach or tools	40%	43%	44%	39%	44%	31%	45%	+14%
Use of tech in research/analysis**	33%	36%	36%	37%	43%	34%	29%	-5%
Thought leadership	33%	26%	36%	23%	40%	16%	27%	+11%
Use of tech in communication/sharing*	--	24%	26%	28%	29%	27%	20%	-7%
Negotiated rate cards	12%	14%	12%	19%	16%	28%	15%	-13%
Local to me	9%	6%	6%	9%	14%	12%	12%	--
Global offices	7%	8%	8%	9%	14%	3%	12%	+9%
Size of organization	4%	7%	4%	9%	12%	5%	4%	-1%
Diversity of staff*	--	8%	6%	9%	13%	8%	3%	-5%
Support for social causes or issues*	--	8%	9%	10%	12%	14%	2%	-12%
Average number of factors:	4.4	4.4	4.6	5.1	5.7	5.1	4.9	-0.3
n =	169	143	140	131	63	54	43	

Green shading indicates top five within wave. * Not asked in 20A **Asked as "Use of technology" in 20A

Takeaway: Among service-led suppliers with 21-100 FTE, data quality (90%), service quality (75%), general pricing (58%), and reputation (46%) are perennial top-five key factors when choosing between suppliers.

Source: GRIT Report



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METHOD AND SUPPLIER SELECTION PRIORITIES |

SERVICE-LED: ≤20 FTE POV [DATA]

For service-led suppliers with ≤20 FTE, total cost is a perennial top-three criterion for selecting methodologies. The second most important, expertise required to produce results, was in the top three for the first time last year. Ease of interpreting and communicating results is third and has been in the top three since it was introduced in 24A.

Innovative approach had been in the top three from 20A through 24A, but is now fourth. Speed of results had been from 20A through 23A, then fell to sixth and is now fifth.

KEY PRIORITY RANK FOR METHOD SELECTION: GRIT WAVE (SERVICE-LED: ≤20 FTE)

	20A	21A	22A	23A	24A	25A	26A
Total cost	1	1	3	1	1	2	1
Expertise required to produce results	--	--	--	--	4	3	2
Ease of interpreting/communicating results	--	--	--	--	2	1	3
Innovative approach	3	2	1	3	3	4	4
Speed of results	2	3	1	2	6	5	5
Labor required to produce results	--	--	--	--	5	6	6
Ease of synthesis with other sources	4	4	4	5	7	8	7
Scalability	5	5	5	4	8	7	8
n =	307	213	222	164	77	96	78

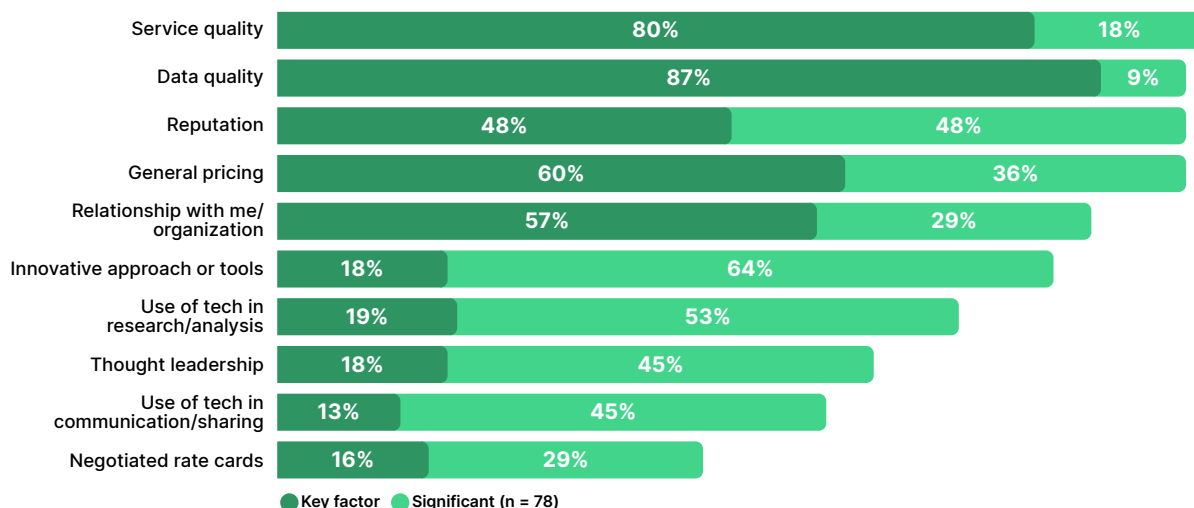
Takeaway: Among method selection priorities for service-led suppliers with ≤20 FTE, total cost is most important, expertise required to produce results has emerged as second, and ease of interpreting/communicating results is third.

Source: GRIT Report

Among service-led suppliers with ≤20 FTE, some factors become more prominent when we consider other significant decision factors, too. Reputation (96%), innovative approach or tools (82%), and use

of technology in research and analysis (72%) look much more important when other significant factors are considered.

TOP 10 FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: When considering factors which are considered key or significant when choosing between suppliers, some emerge as top-of-mind among service-led suppliers with ≤20 FTE, led by reputation (96%).



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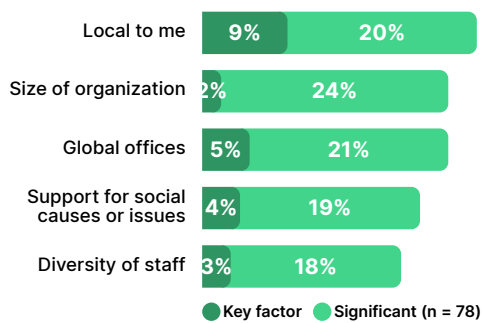


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Of the factors outside the top ten, none stand out among service-led suppliers with ≤ 20 FTE.

OTHER FACTORS IN PARTNER/SUPPLIER SELECTION (SERVICE-LED: ≤ 20 FTE)



Takeaway: Of the lower-ranked factors according to key or significant consideration when choosing between suppliers, local (29%) stands out the most among service-led suppliers with ≤ 20 FTE.

For service-led suppliers with ≤ 20 FTE, data quality (87%), service quality (80%), general pricing (60%), and relationship (57%) are perennial top five key priorities when choosing between suppliers and partners. Reputation (48%) has been there, too, every year except 21A.

Since last year, the only double-digit change was a -13% drop to 18% for innovative approach or tools.

KEY DECISION FACTORS IN PARTNER/SUPPLIER SELECTION: GRIT WAVE (SERVICE-LED: ≤ 20 FTE)

	20A	21A	22A	23A	24A	25A	26A	26A – 25A
Data quality	83%	85%	83%	91%	84%	86%	87%	+1%
Service quality	66%	64%	62%	80%	72%	87%	80%	-7%
General pricing	48%	46%	45%	51%	54%	57%	60%	+3%
Relationship with me/organization	59%	51%	52%	56%	53%	66%	57%	-9%
Reputation	47%	39%	42%	50%	46%	51%	48%	-3%
Use of tech in research/analysis**	25%	31%	33%	29%	37%	28%	19%	-9%
Innovative approach or tools	34%	40%	34%	34%	45%	31%	18%	-13%
Thought leadership	27%	30%	24%	26%	26%	25%	18%	-7%
Negotiated rate cards	11%	9%	14%	7%	18%	17%	16%	-1%
Use of tech in communication/sharing*	--	20%	19%	16%	34%	15%	13%	-2%
Local to me	8%	14%	9%	4%	8%	8%	9%	+1%
Global offices	4%	4%	7%	3%	6%	5%	5%	--
Support for social causes or issues*	--	8%	8%	2%	9%	6%	4%	-2%
Diversity of staff*	--	10%	7%	4%	8%	2%	3%	+1%
Size of organization	3%	4%	5%	1%	10%	1%	2%	+1%
Average number of factors:	4.2	4.6	4.5	4.5	5.1	4.9	4.4	-0.5
n =	310	213	222	164	77	96	78	

Green shading indicates top five within wave. *Not asked in 20A **Asked as "Use of technology" in 20A

Takeaway: Among service-led suppliers with ≤ 20 FTE, data quality (87%), service quality (80%), general pricing (60%), and relationship (57%) are perennial top-five key factors when choosing between suppliers.

Source: GRIT Report



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THE BIG PICTURE [STRATEGIC INTERPRETATION]

When choosing a method, you're evaluating something you're going to *do*, and the constraints are largely internal: can your team execute it, can you afford it, and can you get results you can actually use.

The relevant risks are operational, and cost, ease of communication, and expertise required are commanding more attention while speed as an independent factor mostly fades to the periphery.

When choosing a supplier, you're evaluating a *relationship* with an external party, and the constraints include things you can't verify in advance: will they deliver, will they be honest about problems, and will they still be around next year. The relevant risks are relational and reputational. Data quality, service quality, and pricing are table stakes, but reputation, relationship, and innovation make winning hands depending on the game and what the dealer declares as the high value cards.

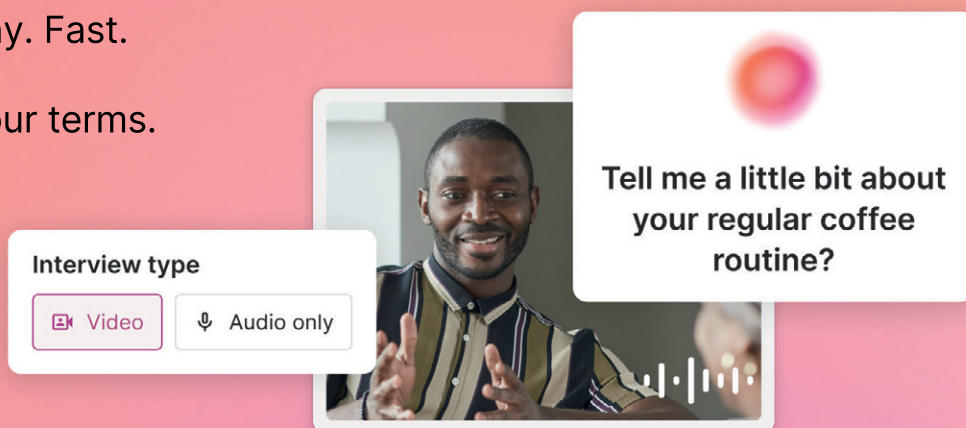
Regarding method selection, total cost is a near-universal top concern, but ease of interpreting and communicating results is also becoming a universal must-have. While total cost addresses "cheaper," ease of interpreting and communicating results delivers "better" and "faster."

Results can't be "better" if they go unheard and unused, and the process can't be "faster" if it's not easy to meet your standard for "better." It's no coincidence that its rise coincides with reduced focus on speed of results because it represents a progression from feeling the pressure to be faster to a realization of how you can actually accomplish it. These dynamics apply in practically every GRIT segment.

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The exception is tech-led, where total cost dominates, speed is back up to second, and innovative approach collapsed from first to seventh. Their workflow is very different from service-led and brand-side segments, and they seem to be optimizing for competitive delivery, not capability breadth. They need to produce innovation, but don't necessarily need to buy it.

Overall, innovation seems to be more of a selling point than a buying criterion. Across brand-side and most supplier segments, innovative approach ranks low as a method selection criterion, but when choosing suppliers, it surfaces more prominently, especially when "significant" considerations are included. As a general rule, if something does what you need it to do, how you need it to do it, and at a price you can afford, it doesn't matter if it is innovative or not.

Service-led suppliers seem to be an exception as their consideration of innovation is more manifest than latent, especially regarding supplier selection. In addition, global offices rose in importance while relationship fell sharply. These trends fit the transformation hypothesis discussed in earlier sections of this report: these suppliers are evaluating partners less on familiarity and more on capability and reach, and the scope of their transformation probably demands they pursue innovative solutions as a top-level filter.

Data quality, service quality, and general pricing are sort of the Holy Trinity of supplier selection criteria; they are top-ranked and stable across all segments and waves. However, there are some segment-specific nuances for other decision factors. One interesting trend is the ascendance or resilience of thought leadership. As a key decision factor, it's been consistently in the top five for brand-side researchers, grew +12% to 45% (sixth) among brand-side analytics, but ranks no higher than eighth in any supplier segment.

Granted, we are looking at criteria used when *selecting* suppliers, not priorities for marketing and selling your own services. Still, if we are entering a world where reputation needs to precede you because relationships may not be the best source for the latest and greatest, perhaps thought leadership deserves more consideration from suppliers.



Across brand-side and most supplier segments, innovative approach ranks low in method selection, but surfaces more prominently when choosing suppliers.



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BUSINESS OUTLOOK

This section discusses trends in research project budgets, supplier revenue, tech spending, staff sizes, and outsourcing, all from the perspectives of brand-side research and analytics professionals as well as service-led suppliers across size bands and tech-led suppliers.

TECHNOLOGY IS THE VEHICLE — WHAT'S THE DESTINATION? [ORIENTATION]

This is GRIT's first look at the *Business Outlook* in the *Insights Practice Report* through the eyes of service-led supplier segments broken out by employee size. These findings reinforce the understanding of these segments we've developed throughout this report, and as well as of brand-side segments.

Amid all the industry turbulence, the *Business Outlook* reminds us of one constant: no matter the segment or the moment in GRIT history, technology spending increases. Across both brand segments and the largest and smallest suppliers, across COVID and the genAI explosion, technology spending may slow down, but it never stops.

Business Outlook will complement the discussion from *Investing in Insights*, which dealt with automation, staffing, and outsourcing. Each segment has a different set of challenges and opportunities to pursue, and no matter how they choose to leverage internal and external human resources, technology is always a key vehicle for getting to where they are going.

In every GRIT segment except service-led suppliers with ≤ 20 FTE, most report increases in technology spending in the past year, from 55% of brand-side researchers to 82% of service-led suppliers with 500+ FTE. Among those with ≤ 20 FTE, only 41% increased technology spending, but only 9% decreased it, either.

Dominant though it is, their 4.6 to 1 ratio of increases to decreases is the lowest of any segment; it's 26.6 to 1 for tech-led suppliers and 18.8 to 1 for brand-side analytics. However, it's incalculable for service-led suppliers with more than 100 FTE because none of them reported a decrease in technology spending.

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "L.M., ed." are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.



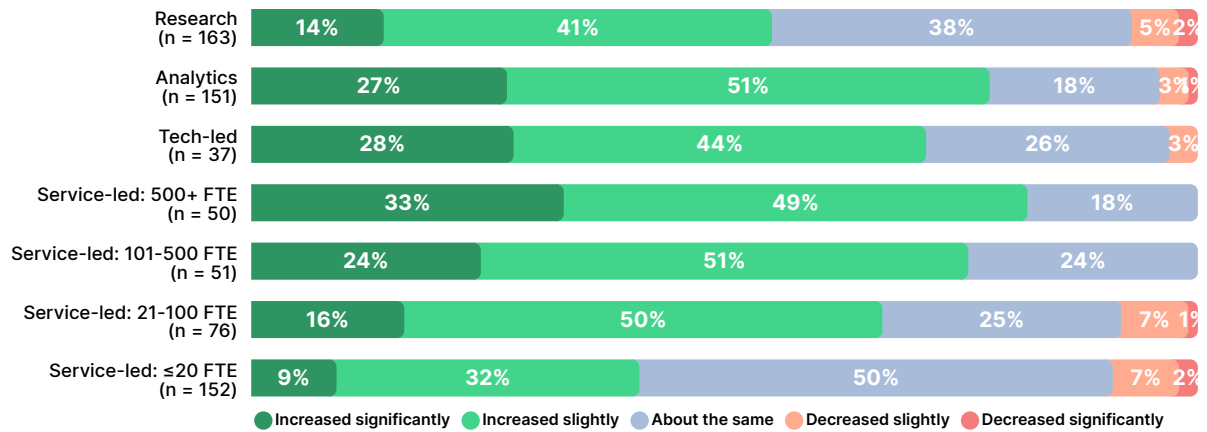
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TECH SPENDING TREND: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: In every GRIT segment except service-led suppliers with ≤20 FTE, most report increases in technology spending in the past year, from 55% of brand-side researchers to 82% of service-led suppliers with 500+ FTE.

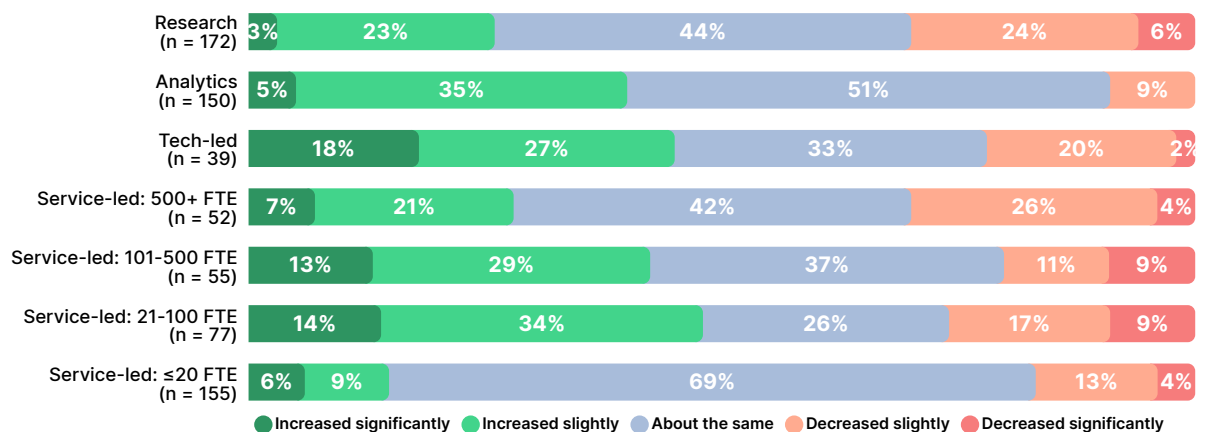
Let's compare the trends in technology spending to the trends in human staffing. Increases in staff size were not reported by majorities in any segment. In four segments, at least 40% reported staff size increases: brand-side analytics (40%), tech-led suppliers (45%), service-led suppliers with 101 to 500 FTE (42%), and those with 21 to 100 FTE (48%).

Among those with ≤20 FTE, only 15% reported staff size increases; among those with 500+ FTE, only 28% reported them; and among brand-side researchers, only 26% reported increases in staff size. Among brand-side researchers, more report staff decreases

(30%) than increases. The same is true for service-led suppliers with 500+ FTE (30% to 28%) and those with ≤20 FTE (17% to 15%).

Further, the gap between those reporting technology spending increases versus those reporting staff size increases always favors technology spending and ranges from +18% for service-led suppliers with 21 to 100 FTE to +54% for those with 500+ FTE. Clearly, there is more momentum behind technology spending than staff size increases, and, as we'll see throughout the *Business Outlook*, this is perennially the case.

STAFF SIZE TREND: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Increases in staff size were not reported by majorities in any segment, but in four segments, at least 40% reported staff size increases: brand-side analytics (40%), tech-led suppliers (45%), service-led suppliers with 101 to 500 FTE (42%), and those with 21 to 100 FTE (48%).

Is this an apples-to-oranges comparison? Probably, but even though they're different kinds of fruit, one appears to be fresher than the other right now. Anyhow, the immediate point isn't about technology spending versus staffing, it's simply to demonstrate the ubiquity of technology investment acceleration.

Although the technology vehicle is part of every segment's journey forward, each segment is on a different journey, and they will leverage technology with human resources in different ways.



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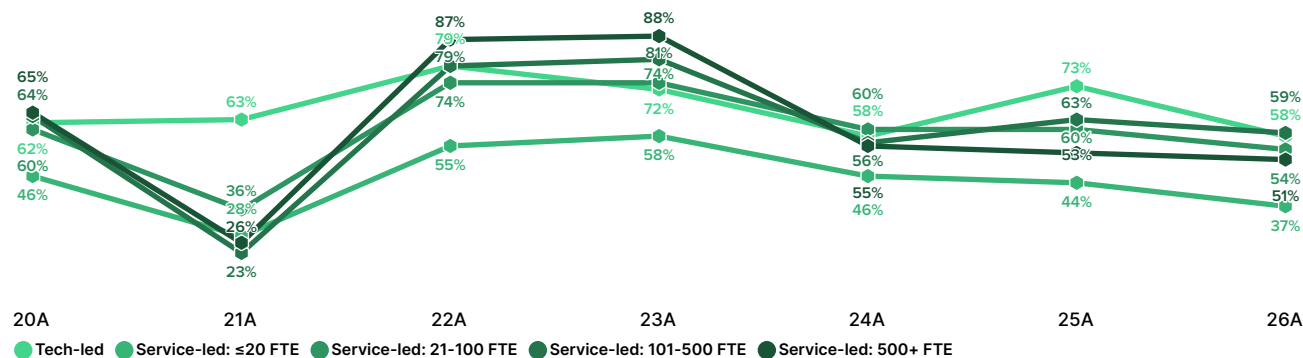
RESEARCH SPENDING AND REVENUE TRENDS [DATA]

Before we discuss technology, staff size, and outsourcing trends, let's look at a supplier revenue and brand-side research project spending trends. If technology is a vehicle, budget and revenue have to fuel it along with other vehicles in the fleet.

Even though tech-led suppliers were relatively resilient during the pandemic, in 24A they had their fewest revenue increases since 20A (58%), and they have matched that low again this year. Service-led suppliers with 101 to 500 FTE bottomed out in 21A (23%), hit their post-pandemic low in 24A (56%), and nearly matched it this year (59%).

In the other three supplier segments, this year represents their worst outside of the first full year of the pandemic. Among service-led suppliers with 21 to 100 FTE, only 54% had revenue increases, down -20% from 23A. Only 37% of those with ≤ 20 FTE had revenue increases, continuing a three-year slide from 23A's 58%. The largest suppliers with 500+ FTE also declined for a third straight year, from 88% in 23A to 51% currently.

REVENUE INCREASES: GRIT WAVE BY SUPPLIER SEGMENT

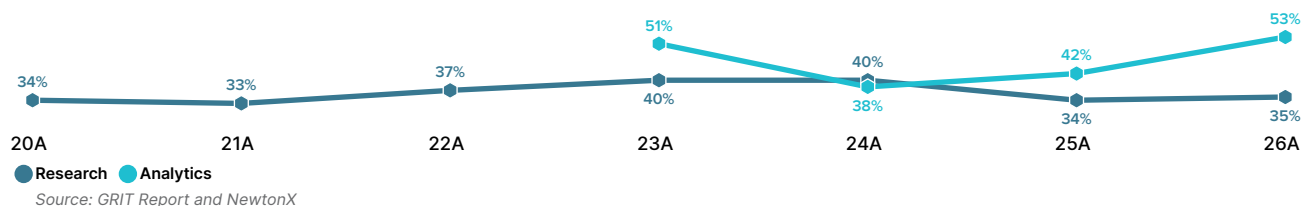


Takeaway: Revenue increases among supplier segments peaked during recovery from the pandemic 22A–23A, however, in 26A all segments show fewer increases since 25A.

The declining revenue performance does not parallel trends in research project spending. Brand-side researchers' project spending increases peaked from 22A to 24A, reaching 40%, but have fallen back to 35% this year. However, the overall range since 20A has

been 33% to 40%, so this is not abnormal. Analytics professionals report a stronger but more volatile pattern, rebounding from 38% two years ago to 53% in 26A.

RESEARCH PROJECT SPEND INCREASES: GRIT WAVE BY BRAND SEGMENT



Takeaway: Brand-side researchers' project spending increases peaked from 22A to 24A, reaching 40%, but have fallen back to 35% this year; analytics professionals report a stronger but more volatile pattern, rebounding from 38% in 24A to 53% in 26A.





The *number* of project budget increases may be holding steady or rising, but the overall *amount* of spending may not be increasing, and that may translate into fewer increases for suppliers. It

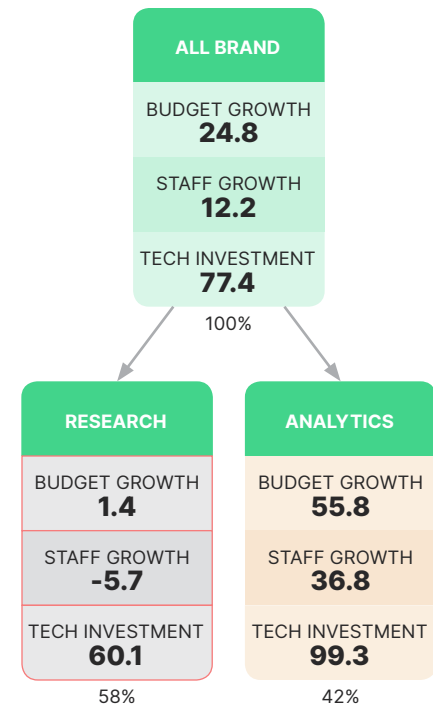
might also be that increased project spending is concentrated on fewer suppliers, so only a handful are seeing increased revenue. We'll keep these hypotheses in mind as we go forward.

TRENDS OVERVIEW | BRAND POV [DATA]

This Business Outlook section includes two tree diagrams, one for brands and one for suppliers, which illustrate how three key trends differ by segment. The three trends, budget (for brands) or revenue (for suppliers), staff size, and technology spending, represent areas that, if increasing, suggest the segment is healthy or, if decreasing, suggest it is not. These do not constitute a perfect or complete set of indicators, but they paint a general picture.

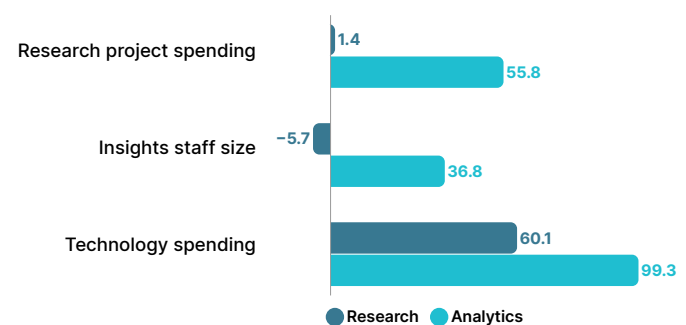
The metrics in each tree represent scores calculated from the five-point scales which measure the direction of each trend and how strongly the GRIT participant feels about it. For example, if a brand-side professional said staff size increased significantly, that would count as 200; if they said it increased slightly, it would count for 100; if they said it stayed the same, it would count as 0. Decreases are treated as the negative of increases, e.g., counting as -100 or -200. An average score of 200 means that everyone thought the metric increased significantly, and a score of -200 means every brand-side professional thought it decreased significantly. A score of 100 means it increased slightly, on average; -100 means it decreased slightly on average; 0 means it was unchanged on average.

The trends for budget growth, staff size, and technology spending are each much stronger in the brand-side analytics segment than in the research segment. In analytics, budget growth (55.8) is stronger than staff size trends (36.8), and technology spending is much stronger than both (99.3). Among researchers, budget (1.4) and staff size (-5.7) are basically stagnant, but technology spending is positive (60.1).



Source: GRIT Report and NewtonX

KEY TRENDS INDICES: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Research spending, staff size, and technology spending are stronger among brand-side analytics professionals than among researchers; for each segment, technology spending is the strongest trend (99.3 index for analytics; 60.1 for researchers).

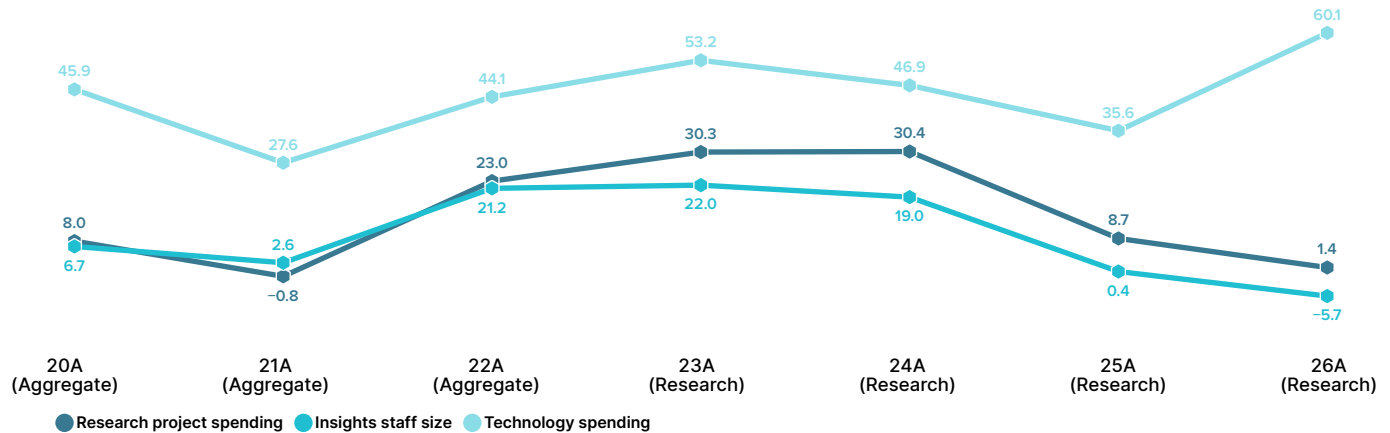




Among brand-side researchers, since 20A, the research project spending index peaked at 30.3 in 23A and 30.4 in 24A, but has retreated back close to 0.0 currently. Staff size growth also peaked coming

out of the pandemic from 22A (21.2) to 24A (19.0) but has fallen just negative in 26A. Technology spending, despite some ups and downs, has always been positive and is currently peaking.

KEY TRENDS INDICES: GRIT WAVE (BRAND: RESEARCH)



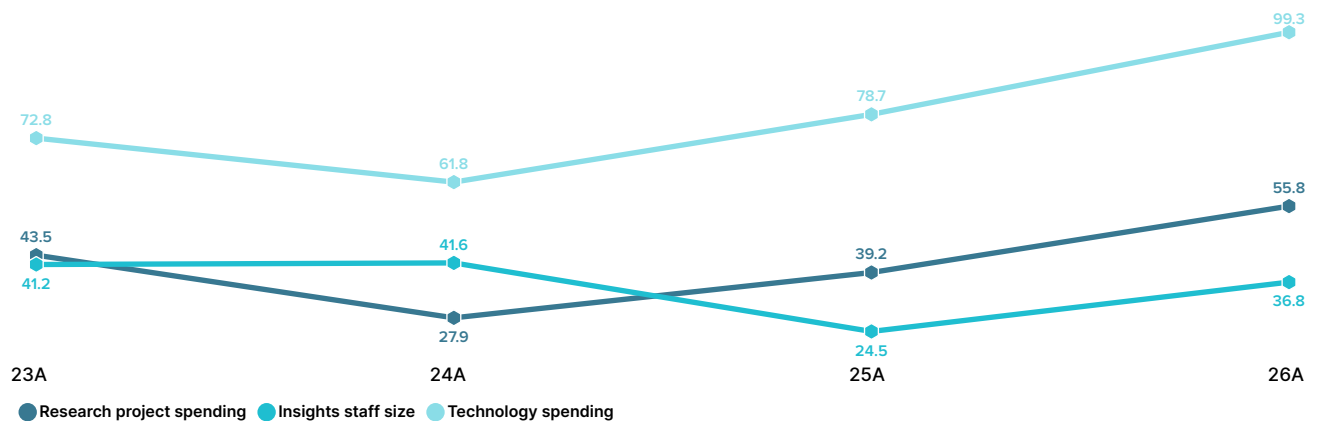
Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, the technology spending index just peaked in 26A (60.1), while research project spending continued to drop to near zero (1.4); the staff size index turned negative (-5.7) for the first time.

Since last year, every trend index picked up for the brand-side analytics segment: research spending improved from 39.2 to 55.8; staff size, from 24.5 to 36.8; and technology spending, from 78.7 to 99.3. In fact, research project and technology spending are higher than they've been since we began tracking the segment in 23A.

These two segments are moving in opposite directions on nearly every indicator. Researcher project spending is at its worst outside the pandemic. Analytics professionals are at or near their best on every tracked metric.

KEY TRENDS INDICES: GRIT WAVE (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: For brand-side analytics professionals, all three indices improved in 26A: research spending (from 39.2 to 55.8), staff size (from 24.5 to 36.8), and technology spending (from 78.7 to 99.3).



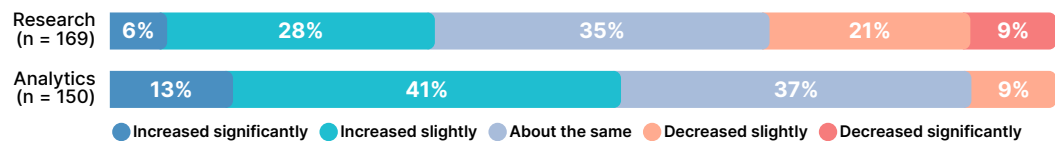


PROJECT BUDGET TRENDS | BRAND POV [DATA]

The research project spending trend is positive for the brand-side analytics segment, but stagnant for researchers. Among analytics, 54% said the budget increased versus 34% of researchers, and they were twice as likely as researchers to say it increased

significantly (13% to 6%). In the other direction, researchers were three times more likely to say research project spending decreased (30% to 9%, including 9% to 0% claiming significant decreases).

ANNUAL RESEARCH PROJECT SPENDING TREND: BRAND SEGMENT



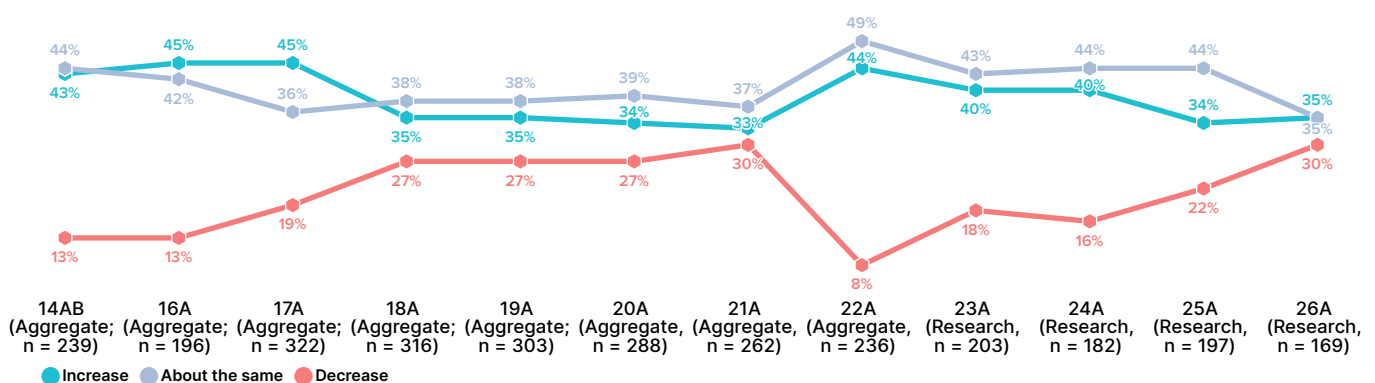
Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals experienced substantially more budget increases than researchers (54% to 34% for research).

For brand-side researchers, the golden age of budget increases came from 14AB through 17A when they ranged from 43% to 45%. From 18A into the pandemic (21A), they ranged from 33% to 35%. In the years emerging from the pandemic from 22A to 24A, increases ranged from 40% to 44%, but this was recovery-fueled rather than a new golden age. Last year and this year, research project spending has regressed to 34% to 35%, identical to the probable pre-pandemic “new normal.”

There’s nothing normal about research project spending decreases, which have once again hit 30%, matching the record set in 21A at the depth of the pandemic. This is the third straight year with more decreases than the previous year, a first. Overall, 26A shows 35% with research project spending increases to 30% with decreases; the most recent comparable year is the abysmal 21A when increases numbered 33% and decreases were nearly equal at 30%.

ANNUAL RESEARCH PROJECT SPENDING TREND: GRIT WAVE (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers reporting decreases in project spending reached 30% in 26A, matching the high from 21A and reversing a period of relative stability.



For brand-side researchers, research project spending has regressed to its probable pre-pandemic “new normal.”

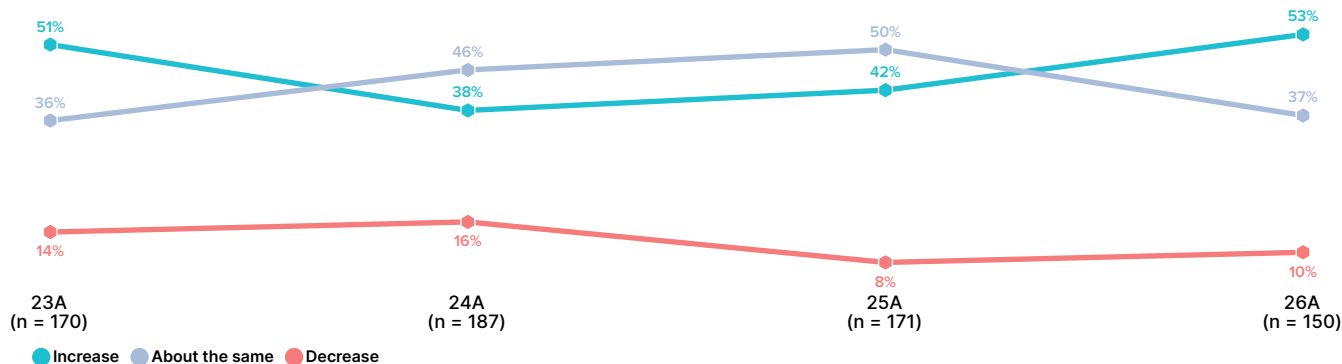
Meanwhile, there were slightly more research project spending increases reported by brand-side analytics professionals than ever, 53% versus 51% in 23A. Budget decreases hit a low of 8% last year, and are currently relatively similar at 10%.



Across the two brand-side segments, the research project budget sizes favor analytics professionals: 51% report budgets of more than \$10MM and 26% report budgets of more than \$30MM compared to just 17%

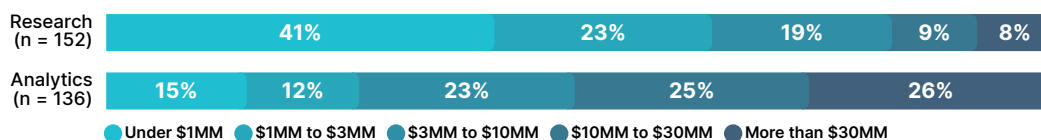
and 8% for researchers. For budgets under \$1MM, researchers clobber analytics professionals, 41% to 15%.

ANNUAL RESEARCH PROJECT SPENDING TREND: GRIT WAVE (BRAND: ANALYTICS)



Takeaway: Brand-side analytics professionals' spending growth is at its strongest since tracking began, with 53% reporting increases in 26A, up from 42% in 25A.

ANNUAL RESEARCH PROJECT BUDGET SIZE: BRAND SEGMENT



Takeaway: Brand-side analytics professionals operate with substantially larger budgets than researchers: 51% have budgets of \$10MM or more vs. only 17% of researchers.



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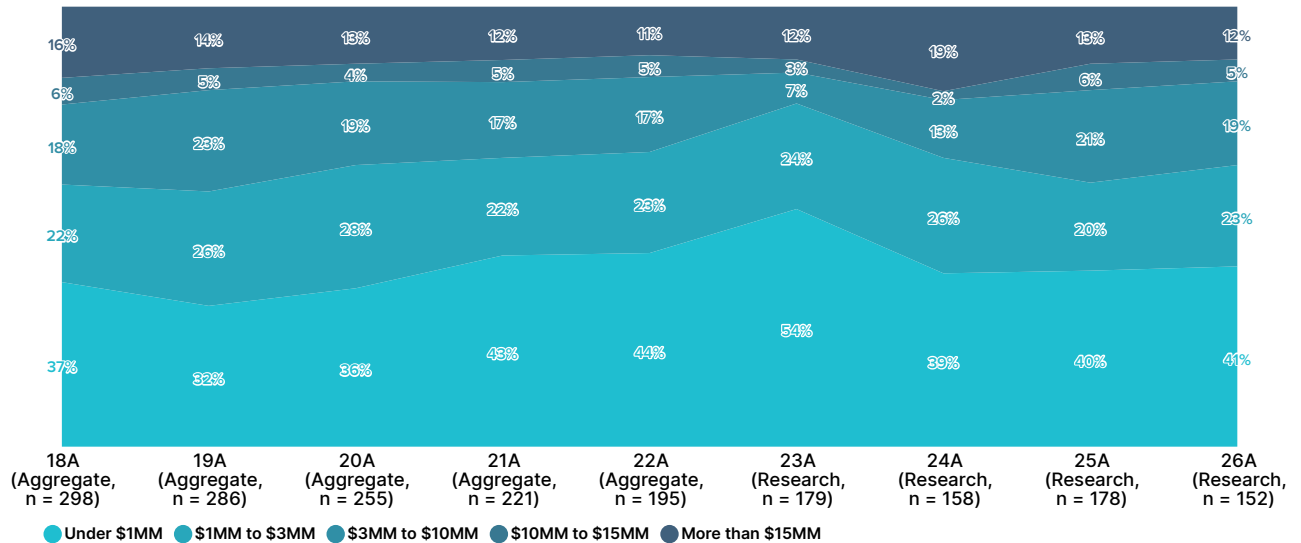
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From 18A to the onset of the pandemic in 20A, 32% to 37% of researchers had research project budgets of less than \$1MM. From 21A to 23A, this swelled to 54%, but has ranged from 39% to 41% since 24A. This seems similar to its normal pre-pandemic level.

At the top end, researchers' budgets of more than \$15MM have ranged from 11% to 19% since 18A. Aside from the spike to 19% in 24A, this percentage hasn't been as high as 14% since 19A. Overall, based on these budget size categories, the two extremes look as much like equilibrium as we've seen over nine years.

ANNUAL RESEARCH PROJECT BUDGET SIZE: GRIT WAVE (BRAND: RESEARCH)

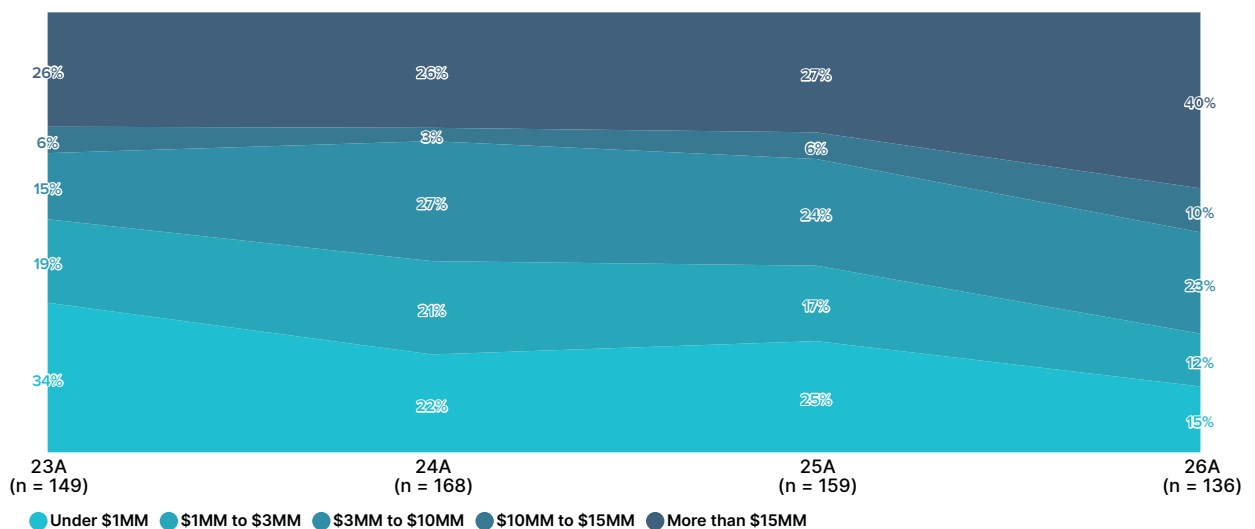


Takeaway: The budget distribution for brand-side researchers has been mostly stable for two years since 24A with 39% to 41% under \$1MM, although budgets of \$15MM+ have fallen from 19% to 12%.

When we introduced the brand-side analytics segment in 23A, 34% had budgets of under \$1MM. Now, it's more than halved to 15%. In 23A, 26% had research project budgets of more than \$15MM; now, it's 40%.

As we've seen so far in the section, the research segment, at best, appears to tread water despite periods of turbulence, but the analytics segment keeps gaining strength.

ANNUAL RESEARCH PROJECT BUDGET SIZE: GRIT WAVE (BRAND: ANALYTICS)



Takeaway: Brand-side analytics professionals' budget sizes shifted upward in 26A: those with budgets over \$15MM grew from 27% in 25A to 40%, the highest level in the tracked period.

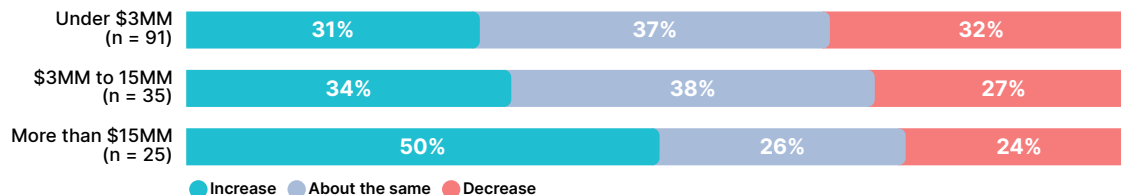




Among brand-side researchers, half of those with research project budgets of more than \$15MM reported increases (50%) compared to 31% of those with budgets under \$3MM and 34% of those with

budgets of \$3MM to \$15MM. Only 24% of those with the largest budgets reported decreases compared to 32% of those with the smallest and 27% with mid-sized budgets.

ANNUAL RESEARCH PROJECT SPENDING TREND: BUDGET SIZE (BRAND: RESEARCH)



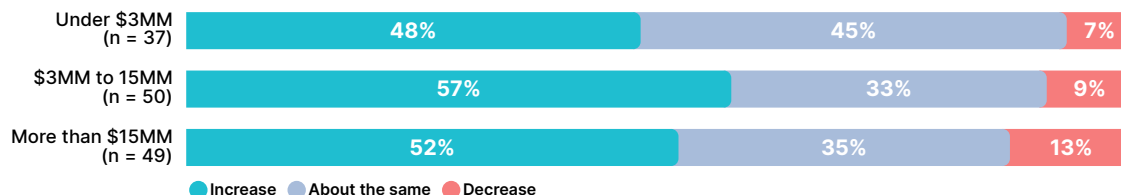
Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, those with budgets of more than \$15MM reported the most budget increases (50%).

Among brand-side analytics professionals, most of those with research project budgets of more than \$15MM (52%) and those with \$3MM to \$15MM (57%) reported budget increases, as did nearly half of those

with budgets under \$3MM (48%). However, those with the largest budgets also reported the most decreases (13%).

ANNUAL RESEARCH PROJECT SPENDING TREND: BUDGET SIZE (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, those with budgets of \$3MM to \$15MM reported the most budget increases (57%).

Budget scale appears to provide some insulation from the pressure. Among researchers, those with budgets over \$15MM reported increases at 50% versus 31% for

those under \$3MM. Analytics professionals with mid-size budgets (\$3MM to \$15MM) led increases at 57%.

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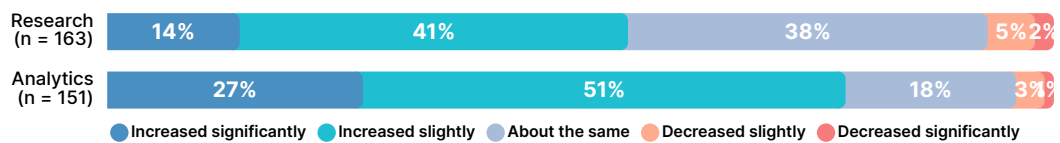


TECH SPENDING AND STAFFING TRENDS | BRAND POV [DATA]

In addition to what brand-side insights professionals spend on research project budgets, GRIT tracks trends in technology spending, staff size, and outsourcing. For this year's report, we modified the wording of technology spending to "spending on technology, software, or automation (including AI)" instead of simply "spending on technology, software, or automation."

Majorities in each segment increased technology spending, but the percentage of analytics professionals reporting increases was a much more dominant majority, 78% to 55% of researchers. Nearly twice as many reported significant increases, 27% to 14%. Only 7% of researchers and 4% of analytics reported technology spending decreases.

TECH SPENDING TREND: BRAND SEGMENT



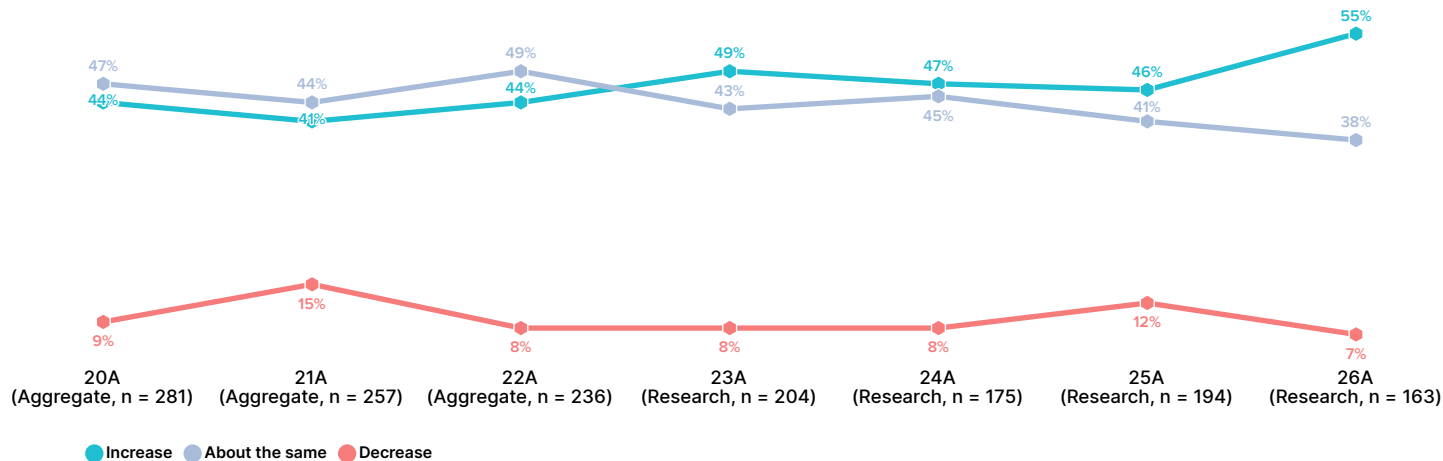
Source: GRIT Report and NewtonX

Takeaway: Majorities in each brand segment increased technology spending: 55% of researchers and 78% of analytics report increases; analytics are nearly twice as likely to report significant increases (27% vs. 14%).

Among brand-side researchers, the 55% of technology spending increasers is the highest since 20A, just ahead of 23A's 49% and the first time they've been the majority. Maybe it has something to do with adding

"(including AI)" to the question text, but the 7% of decrease is also a new low (barely), and -5% lower than last year's 12%.

TECH SPENDING TREND: GRIT WAVE (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Technology spending increases among brand-side researchers peaked at 55% in 26A; decreases were also at their low of 7%.



Among brand-side researchers, the 55% who increased technology spending is the highest since 20A.

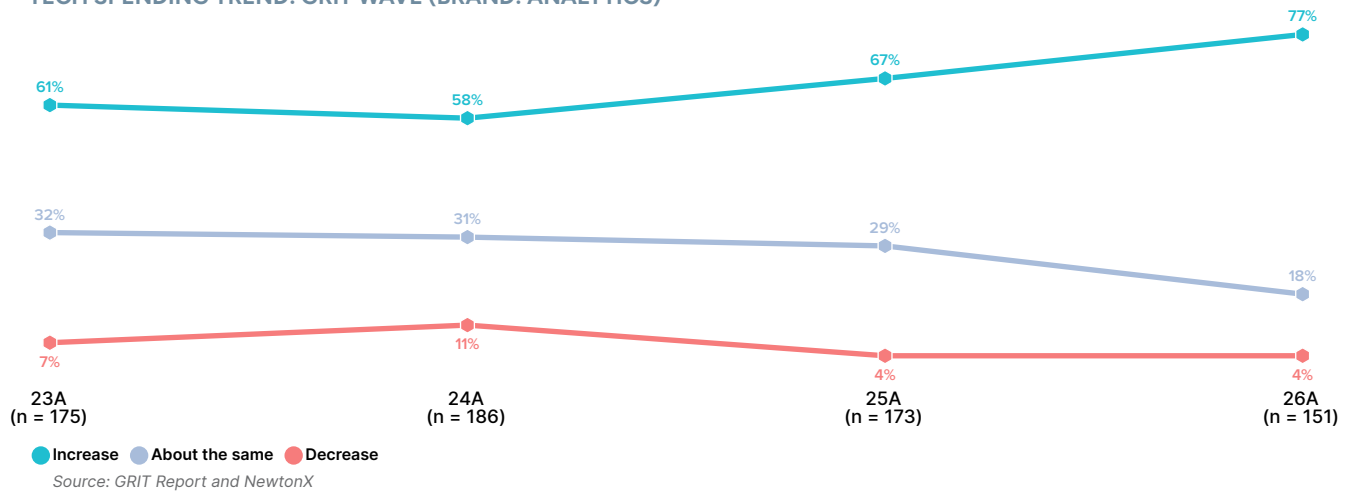




The brand-side analytics segment's technology spending increases also hit a new high: 77% eclipsed last year's high of 67% while the 4% of decrease

matched last year's low. Again, it theoretically could have been influenced by adding "(including AI)" to the question text.

TECH SPENDING TREND: GRIT WAVE (BRAND: ANALYTICS)

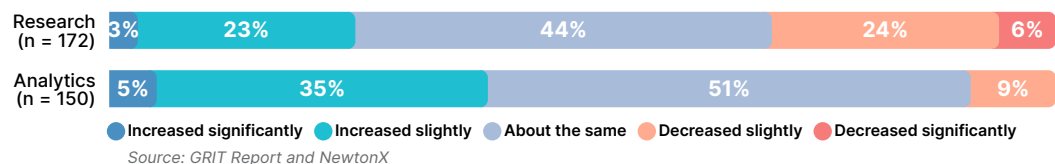


Takeaway: Technology spending increases among brand-side analytics professionals peaked at 77% in 26A, up from 67% in 25A, while decreases remained low.

In *Investing in Insights*, we cover a similar topic: "In the next year, how do you expect your organization's use of tools and automation (including AI) for insights work to change?" Looking ahead at automation, no one in either segment expects it to decrease, and dominant majorities in research (88%) and analytics (92%) expect it to increase.

Looking to the human resources available for insights work, more brand-side researchers report staff size decreases (30%) than increases (26%). On the other hand, four times as many analytics professionals report increases (40%) as decreases (9%). In each segment, 5% or fewer report significant increases, and significant decreases are limited to 6% of researchers.

STAFF SIZE TREND: BRAND SEGMENT

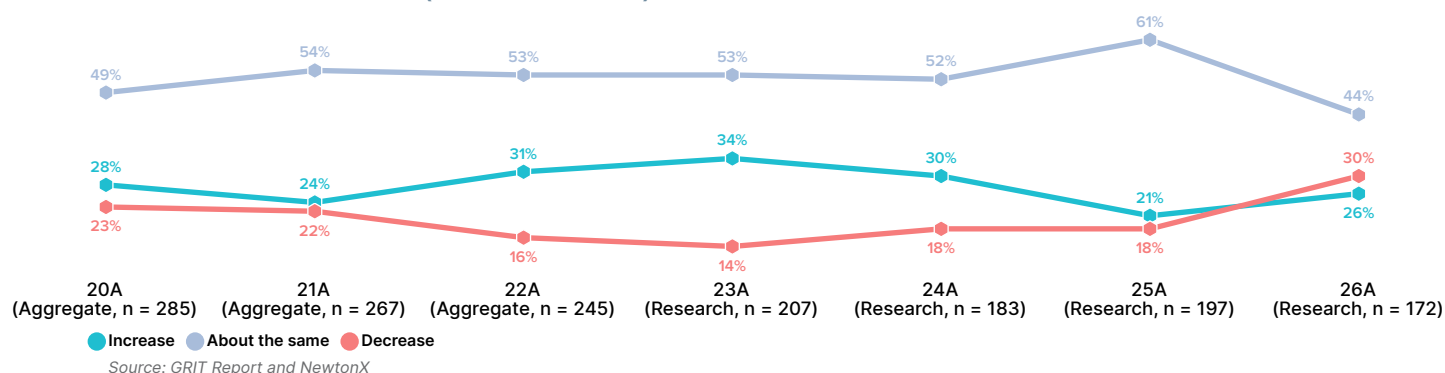


Takeaway: Brand-side analytics professionals report more staff size increases than researchers, 40% to 26%; none in analytics report significant decreases vs. 6% for researchers.

Even including the pandemic years, this is the first time brand-side researchers have reported more staff size decreases than increases. This year's new high of 30% is well above the previous high of 23% set just as

the pandemic was breaking in 20A. The 26% reporting increases is +5% higher than last year, and just below the 28% reported coming into the pandemic in 20A.

STAFF SIZE TREND: GRIT WAVE (BRAND: RESEARCH)



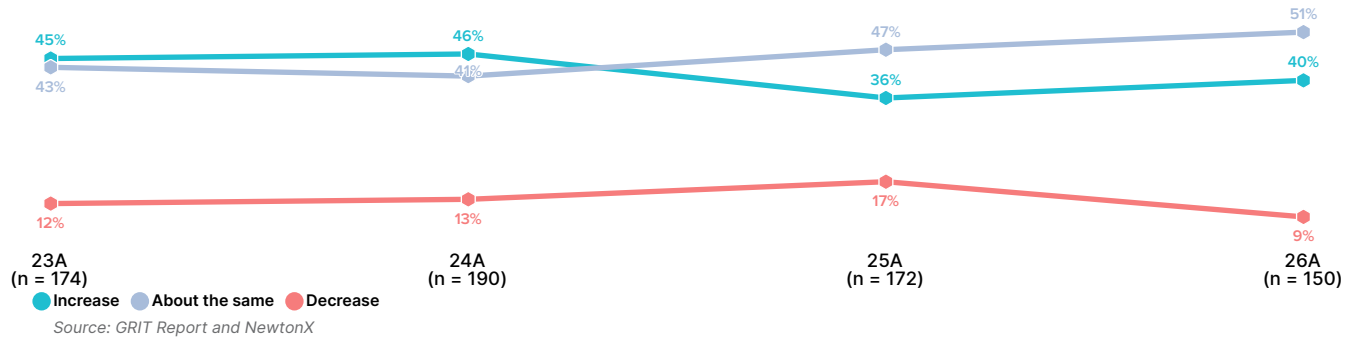
Takeaway: Staff size decreases among brand-side researchers peaked at 30% in 26A, up from 18% in 25A and just 14% in 23A.



Among brand-side analytics, the ratio of 40% reporting staff size increases to 9% (4.4) reporting decreases is a record, eclipsing 20A's 45% to 12% (3.8)

ratio. The increases represent a slight bump from last year (+4%), and the decreases are just over half of last year's 17%, establishing a new low.

STAFF SIZE TREND: GRIT WAVE (BRAND: ANALYTICS)



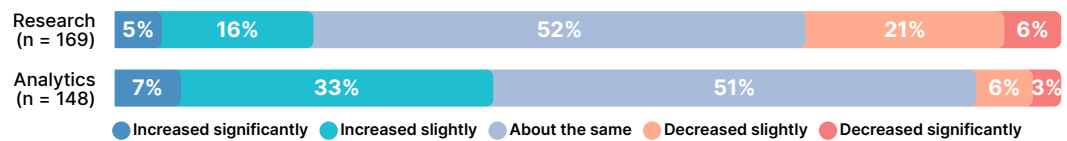
Takeaway: Staff size increases among brand-side analytics professionals recovered from a -10% drop 36% in 25A to 40% in 26A; decreases fell from 17% to a low of 9%.

Brand-side researchers are bullish on technology spending while staff size trends lean toward decreases, and outsourcing also leans toward decreases. While 21% say outsourcing increased over the last year, more said it decreased (27%).

In *Investing in Insights*, we ask "In the next year, how do you expect your organization's use of external suppliers or partners versus internal staff for insights work to change?" Projectively, 26% of researchers expect it to increase while only 15% expect it to decrease. When asked for which tasks they think outsourcing is over-used versus under-used, two-thirds or more say it is used the right amount.

Brand-side analytics professionals, on the other hand, are also bullish on technology spending, more positive about staff size increases, and much more likely to say outsourcing increased in the last year (40%) than decreased (9%, coincidentally, the same numbers as for staff size). Looking ahead, 38% expect outsourcing to increase in the next year while only 11% expect it to decrease, similar to how they view the past year. When asked for which tasks they think outsourcing is over-used versus under-used, they tend to say outsourcing is used too much for tasks like sourcing participants and data (35% to 25%) and too little for tasks like communicating and activating insights (28% to 18%).

OUTSOURCING TREND: BRAND SEGMENT



Takeaway: Brand-side analytics professionals are more likely than researchers to be increasing outsourcing (40% vs. 21%) and less likely to be decreasing it (9% vs. 27%).



The researcher outsourcing trend further suggests an overall contraction of human resources in their insights work.

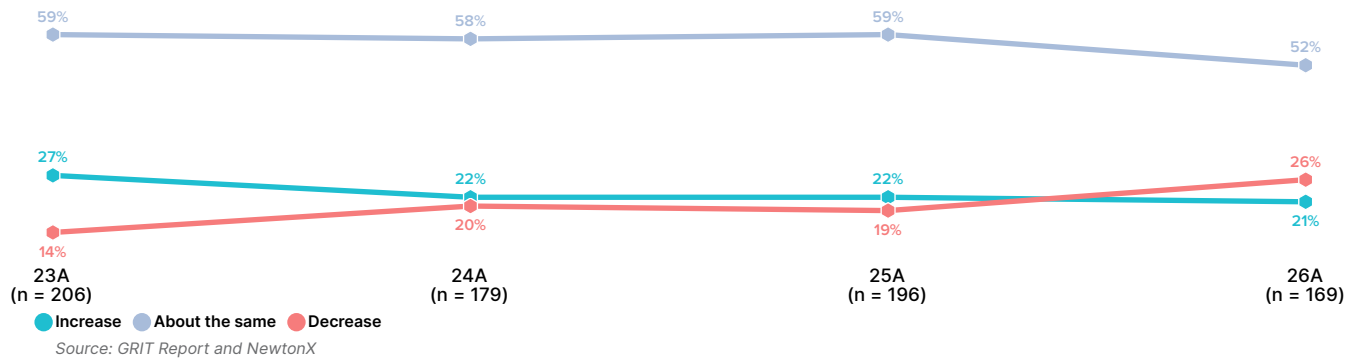




Since we started asking about outsourcing in 23A, the percentage of brand-side researchers who report increase in outsourcing has declined moderately, from

27% to 21%. Meanwhile, those reporting decreases in outsourcing have grown from a low of 14% in 23A to a new high of 26% currently.

OUTSOURCING TREND: GRIT WAVE (BRAND: RESEARCH)

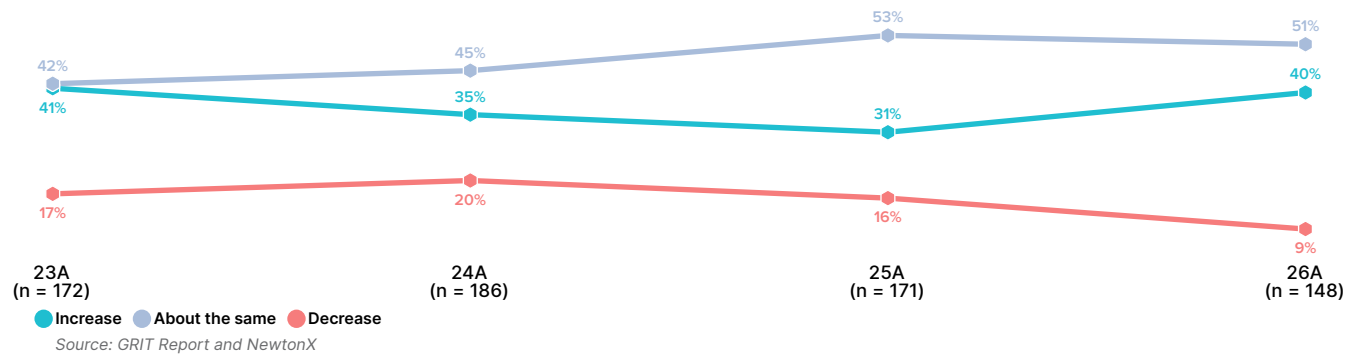


Takeaway: Outsourcing decreases among brand-side researchers peaked at 26% in 26A; increases remained in the low 20% (21%) for the third straight year.

Among brand-side analytics professionals, increases in outsourcing (40%) have returned to near 23A's 41% after dipping as low as 31% last year. After

ranging from 16% to 20% from 23A to 25A, reports of decreased outsourcing are at a new low of 9%.

OUTSOURCING TREND: GRIT WAVE (BRAND: ANALYTICS)



Takeaway: Outsourcing increases among brand-side analytics professionals rebounded from a low of 31% in 25A to 40% in 26A; decreases fell from 16% to a low of 9%.

The researcher outsourcing trend further suggests an overall contraction of human resources in their insights work. Researchers are now more likely to report outsourcing decreases (27%) than increases (21%), while the staff size index is now negative. Researchers are trending toward reducing reliance on human resources, both internally and externally.

The technology spending peak is the outlier, reinforcing the hypothesis that researchers are becoming more self-sufficient in a DIY sense. The trend is toward reducing internal staff and outsourcing to external parties while automating more of the tasks and workflow. However, as we learned in *Investing in Insights*, brand-side researchers lean somewhat toward expecting outsourcing to increase going forward.

On the other hand, brand-side analytics professionals are increasing outsourcing at the same rate as staff size: 40% report increases and 9% report decreases in both cases. Expansion through both channels simultaneously is consistent with the budget size shift toward larger budgets plus the methodology adoption breadth we saw in earlier sections of this report. They're not substituting technology for humans or internal staff for external staff; they are building out their capabilities how they see the best fit.



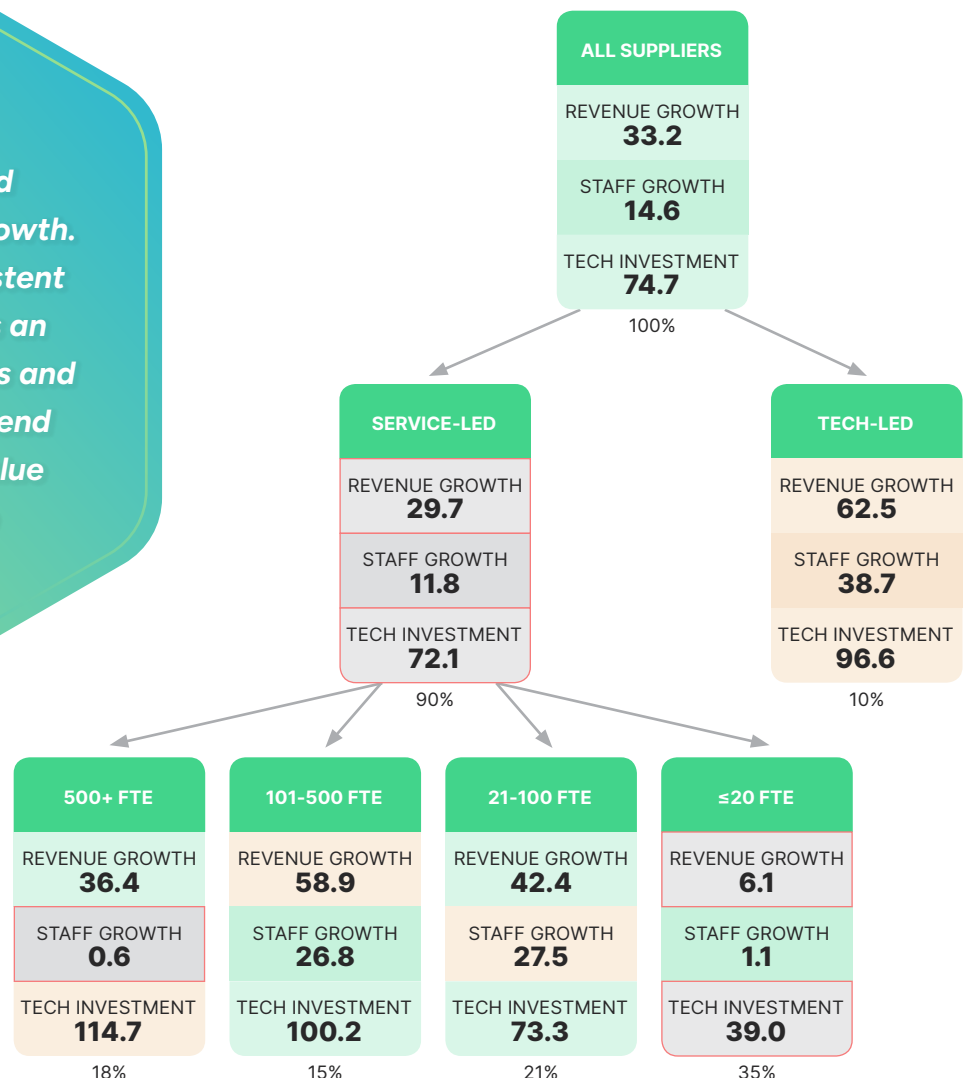


REVENUE, SPENDING, AND STAFFING TRENDS | SUPPLIER POV ^[DATA]

Across revenue (62.5), staff size (38.7), and technology spending (96.6), tech-led suppliers lead service-led suppliers on every trend index. When we break out service-led by size category, tech-led suppliers are still ahead of each segment on each metric except technology spending, where service-led suppliers with 500+ FTE score 114.7.

Among service-led supplier segments, those with 101 to 500 FTE lead on revenue growth, 58.9 to 42.4 for the next-highest segment (those with 21 to 100 FTE). Service-led suppliers with 21 to 100 FTE have a slight lead in staff size trend over those with 101 to 500, 27.5 to 26.8. Those with 500+ FTE lead on technology spending over those with 101 to 500 FTE, 114.7 to 100.2. Service-led suppliers with ≤20 FTE are last in revenue growth (6.1) and technology spending (39.0) and just ahead of those with 500+ FTE on staff size (1.1 to 0.6).

The central puzzle is the disconnect between rising analytics-side spend and broadly softer supplier revenue growth. Technology spending is the consistent bright spot, but the report raises an important question for both buyers and suppliers: where is expanding spend going, and is it concentrating value in ways that will reshape the supplier ecosystem?
— LM, ed.



Source: GRIT Report and NewtonX

Overall, revenue trends are healthiest among tech-led suppliers and service-led with 101-500 FTE, and staff size trends are anemic but healthiest among tech-

led. In each supplier segment, technology spending is the healthiest trend, from 39.0 for service-led with ≤20 FTE to 114.7 for those with 500+ FTE.



KEY TRENDS INDICES: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Revenue	62.5	6.1	42.4	58.9	36.4
Insights staff size	38.7	1.1	27.5	26.8	0.6
Technology spending	96.6	39.0	73.3	100.2	114.7

Darker green indicates higher percentage; yellowish, middle percentage; and darker red, lower percentage.

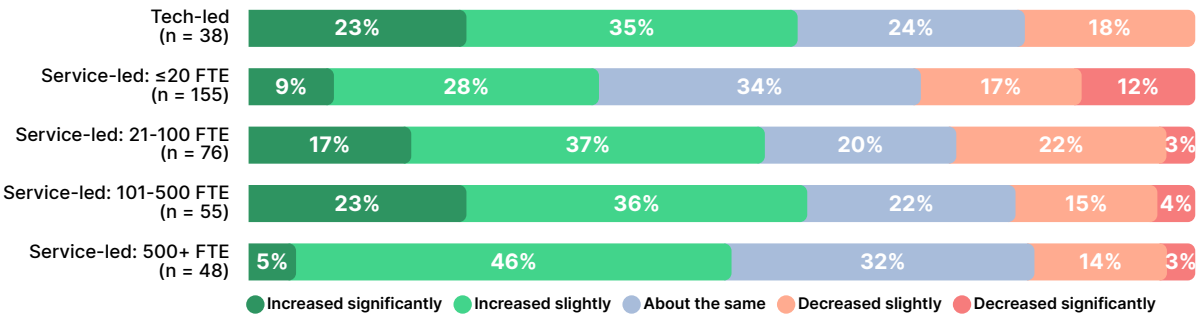
Takeaway: Revenue trends are healthiest among tech-led suppliers (62.5 index) and service-led with 101-500 FTE (58.9), and staff size trends are anemic but healthiest among tech-led (38.7). In each supplier segment, tech spending is the healthiest trend, from 39.0 for service-led with ≤20 FTE to 114.7 for those with 500+ FTE.

Source: GRIT Report

Most tech-led suppliers (58%), service-led suppliers with 21 to 100 FTE (54%), those with 101 to 500 FTE (59%), and those with 500+ FTE (51%) report revenue increases. Only 37% of those with ≤20 FTE say the same. The ratio of increases to decreases is about

3:1 for tech-led suppliers (3.2 to 1), service-led suppliers with 101 to 500 FTE (3.1 to 1), and those with 500+ FTE (3.0 to 1). For those with 21 to 100 FTE, it's 2.2 to 1, and, for those with ≤20 FTE, it's only 1.3 to 1.

REVENUE TREND: SUPPLIER SEGMENT



Source: GRIT Report

Takeaway: Revenue increases are most common among tech-led (58%) and service-led suppliers with 101-500 FTE (59%); service-led suppliers with ≤20 FTE have the weakest revenue trend, as 37% report increases while 29% report decreases.



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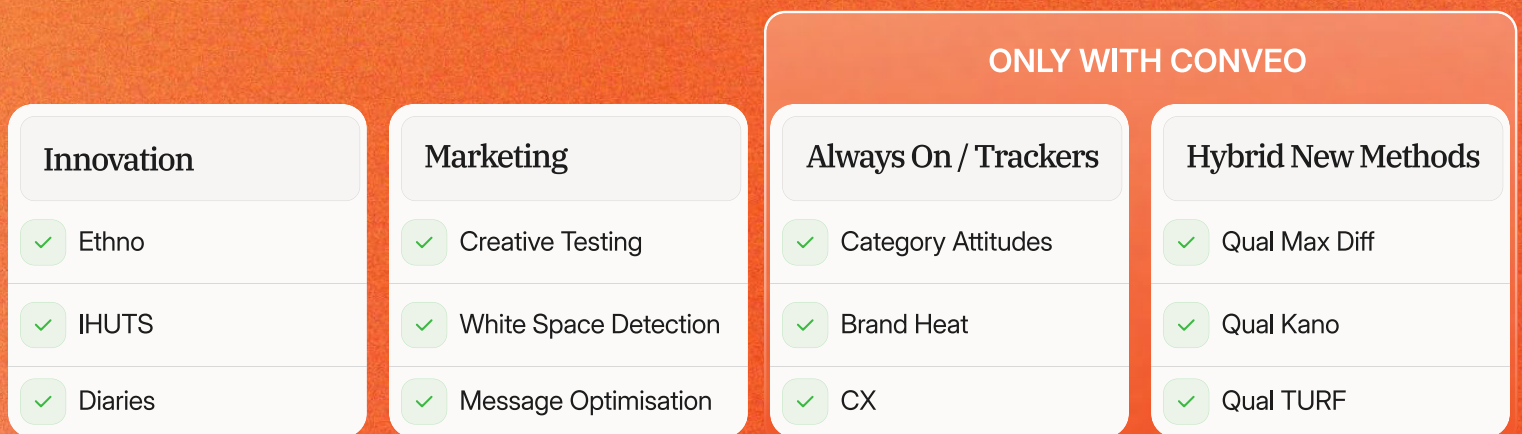
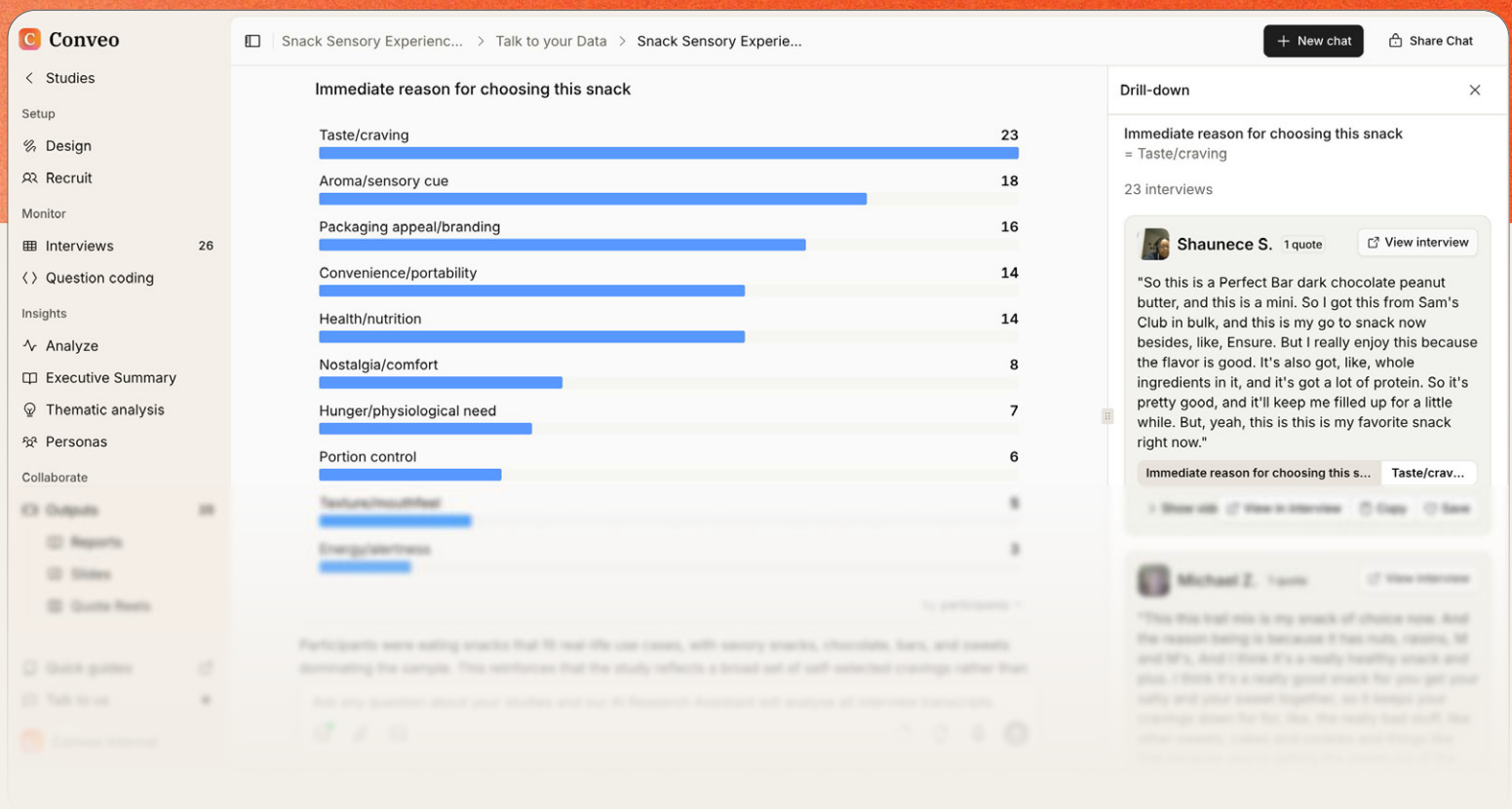
Karen Lynch



Lenny Murphy

AI research: conversational and observational.

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Conveo

Snack Sensory Experience > Talk to your Data > Snack Sensory Experie...

Immediate reason for choosing this snack

Reason	Count
Taste/craving	23
Aroma/sensory cue	18
Packaging appeal/branding	16
Convenience/portability	14
Health/nutrition	14
Nostalgia/comfort	8
Hunger/physiological need	7
Portion control	6
Texture/mouthfeel	5
Energy/alertness	3

Participants were eating snacks that fit real-life use cases, with savory snacks, chocolate, bars, and sweets dominating the sample. This reinforces that the study reflects a broad set of self-selected cravings rather than...

Ask any question about your studies and our AI Research Assistant will analyze all interview transcripts.

Drill-down

Immediate reason for choosing this snack
= Taste/craving

23 interviews

Shaunece S. 1 quote View interview

"So this is a Perfect Bar dark chocolate peanut butter, and this is a mini. So I got this from Sam's Club in bulk, and this is my go to snack now besides, like, Ensure. But I really enjoy this because the flavor is good. It's also got, like, whole ingredients in it, and it's got a lot of protein. So it's pretty good, and it'll keep me filled up for a little while. But, yeah, this is this is my favorite snack right now."

Immediate reason for choosing this s... Taste/crav...

Show all View interview Copy Save

Michael Z. 1 quote View interview

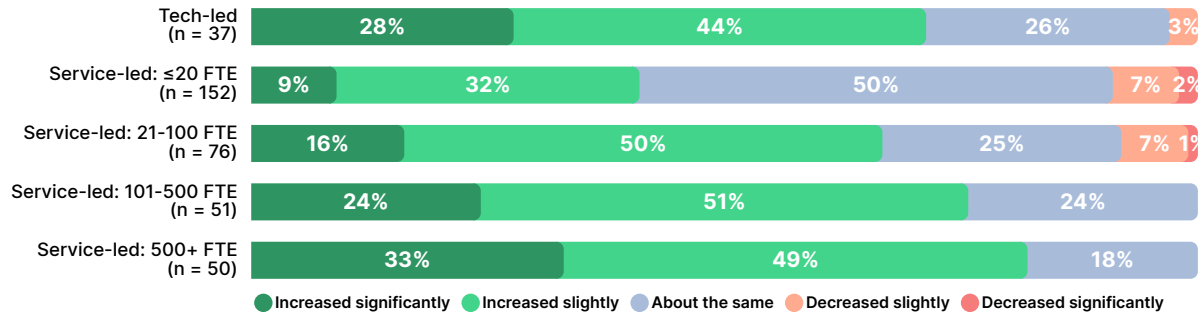
"This bar had me in my snack of choice now. And the reason being is because it has nuts, marsh, M&M's, and I think it's a really healthy snack and plus, I think it's a really good snack for you get your fatty and your sweet together, so it keeps your cravings down for the day, the really best stuff. Not other snacks, candy and cookies and things like that because they're not really the best stuff of the day."



At least two-thirds increased technology spending in each supplier segment except service-led suppliers with ≤ 20 FTE (41%). Among tech-led suppliers, 72% increased spending; among service-led suppliers with 21 to 100 FTE, 66%; among those with 101 to 500 FTE, 75%; and among those with 500+ FTE, 82%. Further,

33% of service-led suppliers with 500+ FTE said they increased spending significantly, as did 28% of tech-led suppliers and 24% of service-led suppliers with 101 to 500 FTE. Only 9% of those with ≤ 20 FTE and 8% of those with 21 to 100 FTE decreased spending, and it was fewer in each of the other segments.

TECH SPENDING TREND: SUPPLIER SEGMENT

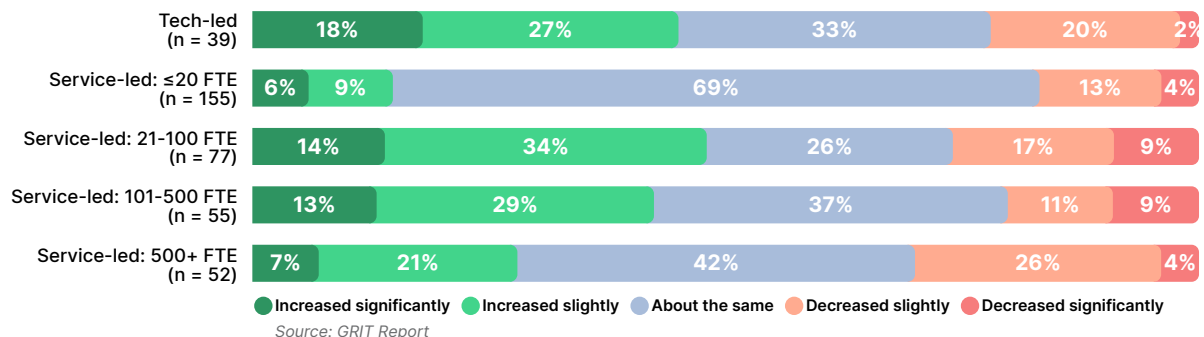


Takeaway: Technology spending increases range from 41% for service-led with ≤ 20 FTE to 82% with 500+ FTE; decreases range from 0% for service-led suppliers with more than 100 FTE to 9% for those with ≤ 20 FTE.

Staff size increases were strongest among tech-led suppliers (45%), service-led suppliers with 21 to 100 FTE (48%), and those with 101 to 500 FTE (42%). They were weakest among those with 500+ FTE (28%).

and those with ≤ 20 FTE (15%), and decreases actually outnumbered increases in these two segments by +2% each. In the other segments, increases were approximately double the decreases.

STAFF SIZE TREND: SUPPLIER SEGMENT



Takeaway: Staffing growth is most common among tech-led suppliers (45%), service-led with 21-100 FTE (48%), and with 101-500 FTE (42%); decreases are most common among those with 500+ FTE (30%) and with 21 to 100 FTE (26%).

Regarding outsourcing, about half or more in each supplier segment said it was about the same as the year before, from 48% of service-led suppliers with 500+ FTE to 69% of those with 101 to 500 FTE. In each segment, increases were approximately equal to decreases.

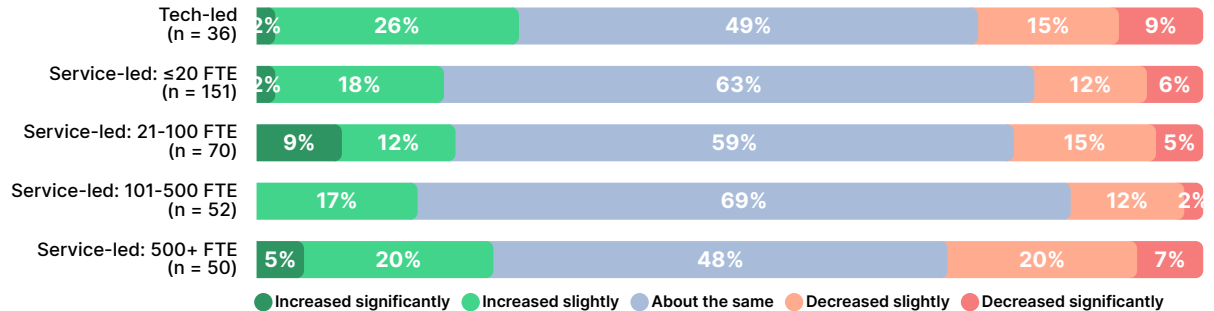
Staff size increases were strongest among tech-led suppliers, service-led with 21 to 100 FTE, and those with 101 to 500 FTE.



However, in *Investing in Insights*, we learned that more than twice as many expect it to increase than to decrease among tech-led suppliers (24% to 11%), service-led suppliers with 21 to 100 FTE (29% to 13%),

and those with ≤20 FTE (26% to 10%). Among those the 101 to 500 FTE, the gap is narrower: 24% expect to increase outsourcing versus 17% decrease. For those with 500+ FTE, it's 33% versus 20%.

OUTSOURCING TREND: SUPPLIER SEGMENT

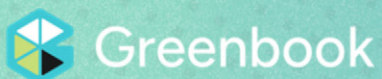


Source: GRIT Report

Takeaway: Outsourcing increases are most common among tech-led suppliers (28%) and service-led with 500+ FTE (25%); decreases are also most common among these two segments, 27% of service-led with 500+ FTE and 24% of tech-led.

Technology spending is the universal bright spot. Every supplier segment hit a new high or near-high in technology spending increases, and the two service-led supplier segments with the most FTE reported zero decreases. This is happening across widely varying revenue and staffing conditions, which means its not simply a prosperity effect. Suppliers are investing in technology regardless of whether business is good.

The forward-looking outsourcing expectations consistently exceed backward-looking actuals in nearly every segment. Suppliers expect to outsource more than they have been. Whether that reflects genuine strategic intent or habitual optimism will have major implications for the supplier segments that depend on outsourcing to other suppliers.



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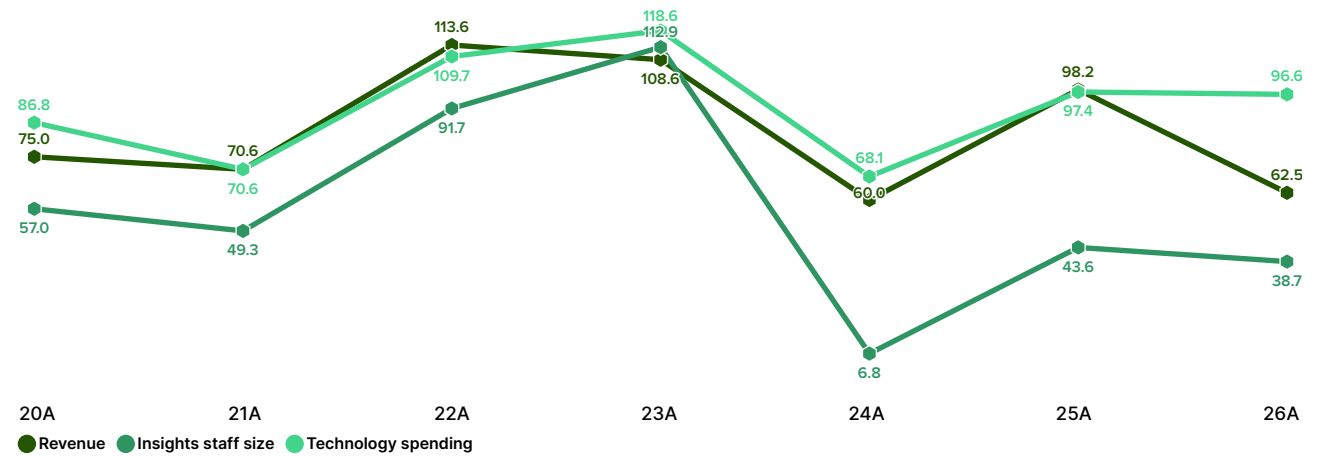
REVENUE, SPENDING, AND STAFFING TRENDS |

TECH-LED POV [DATA]

Although the tech-led supplier segment leads suppliers with a 62.5 revenue index, it's a far cry from its 22A (113.6) to 23A (108.6) heyday; in fact, it's -35.7 points lower than last year. We always suspect this segment is somewhat volatile because successful technology suppliers might be acquired by service-led suppliers or otherwise might leverage their technology to move into a service-led segment. The only segment to thrive during COVID, that success likely led to segment membership changes before the genAI explosion upset their status quo.

Outside of the uncertain year of 24A when it bottomed out at 6.8, the staff size index (38.7) is at its lowest point after a -4.9-point drop from last year. Technology spending (96.6) is about even with last year (97.4), and well higher than 24A (68.1). It's lower than the peak years of 22A (109.7) to 23A (118.6), but still higher than the onset and early days of the pandemic (86.8 in 20A, 70.6 in 21A).

KEY TRENDS INDICES: GRIT WAVE (TECH-LED)

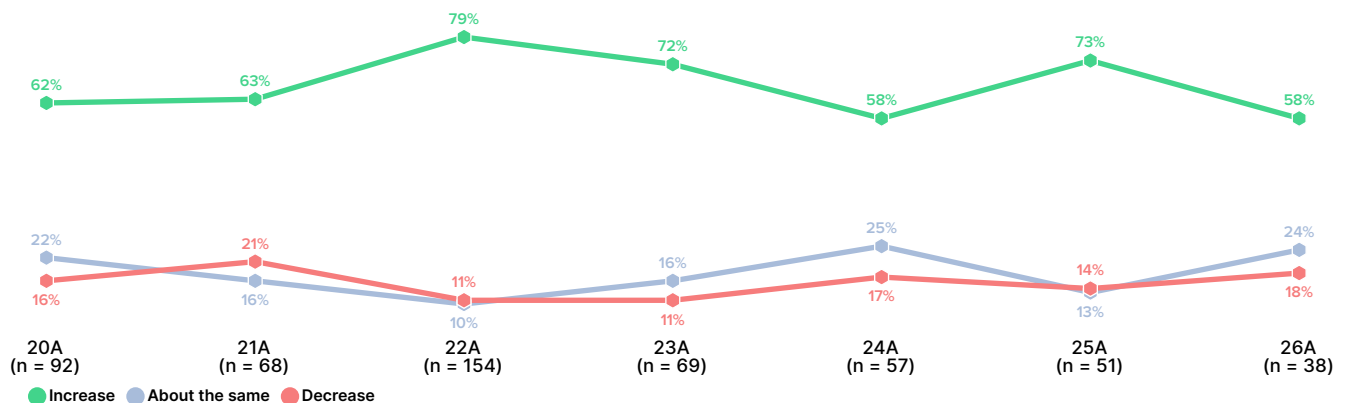


Takeaway: Revenue weakened among tech-led suppliers (index dropped from 98.2 to 62.5) as did staff size trends (43.6 to 38.7); technology spending remained about the same (97.4 to 96.6).

Revenue increases among tech-led suppliers match their 24A low point since 20A (58%) and are -15% lower than last year. Revenue decreases (18%) are

almost as frequent as the pandemic's 21A record high (21%) and +4% more than last year.

REVENUE TREND: GRIT WAVE (TECH-LED)

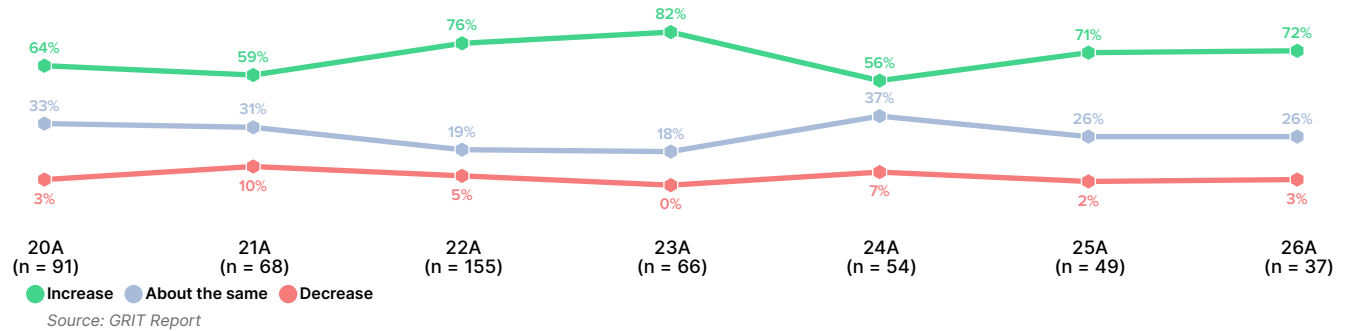


Takeaway: Tech-led revenue increases declined from 73% in 25A to match its low of 58%, set in the 24A; decreases edged up from 14% to 18%.



Among tech-led suppliers, technology spending increases (72%) kept pace with last year (71%). Only 3% reported decreases, among the fewest since 20A.

TECH SPENDING TREND: GRIT WAVE (TECH-LED)

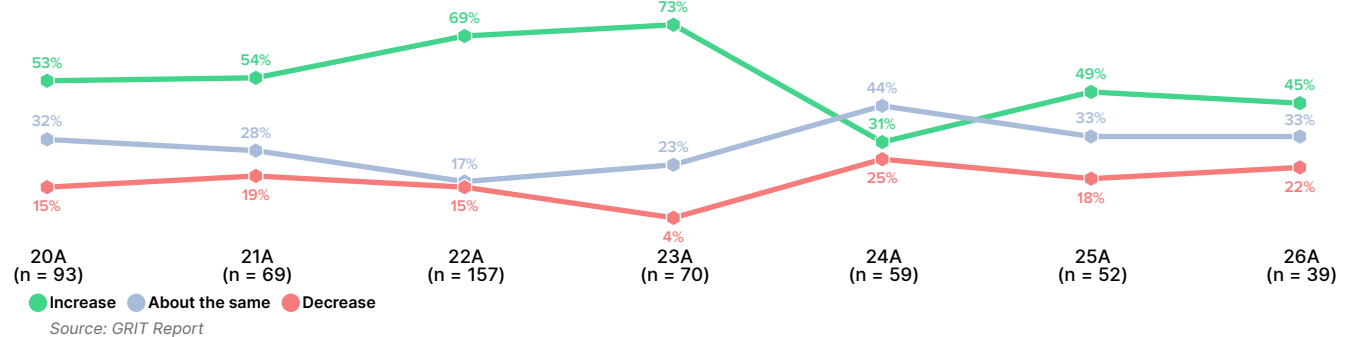


Takeaway: Technology spending increases among tech-led suppliers held at 72% in 26A, essentially unchanged from 71% in 25A; decreases remain very low at 3%.

After last year's rebound from 31% to 49%, staff size increases among tech-led suppliers fell off slightly to 45%, well below what would have been considered

normal before 24A when most reported increases in each year. Decreases (22%) rival 24A's high of 25%.

STAFF SIZE TREND: GRIT WAVE (TECH-LED)

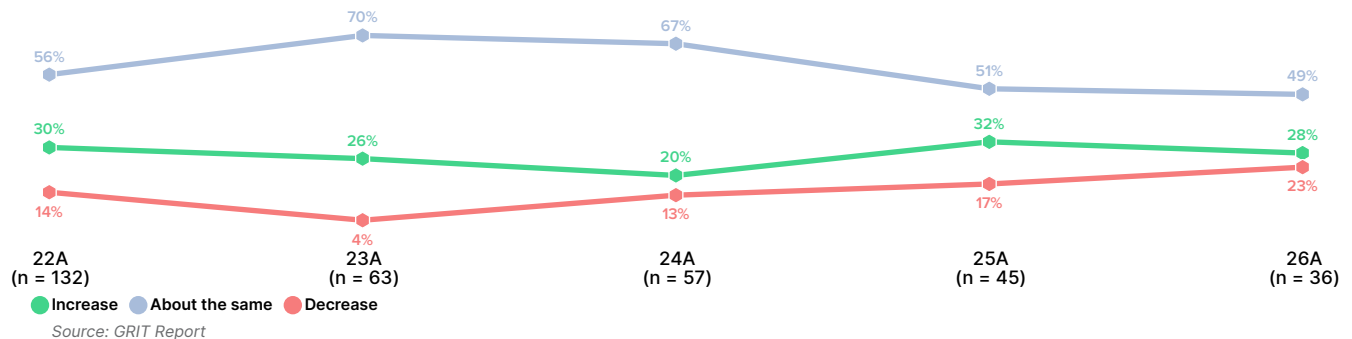


Takeaway: Staff size increases among tech-led suppliers declined somewhat from 49% in 25A to 45% in 26A, while decreases edged up from 18% to 22%.

Although about half of tech-led suppliers report no change in outsourcing, the gap between increasing and decreasing shrank from last year's 32% to 17% gap to just 28% to 23% this year. While this year's

increases are close to historic norms, the decreases surpass the previous high established last year and have grown for a third straight year.

OUTSOURCING TREND: GRIT WAVE (TECH-LED)



Takeaway: Outsourcing increases among tech-led suppliers slid from 32% in 25A to 28%, while decreases peaked at 23%, up from 17% in 25A and +10% higher than 24A.

Revenue fell back to its 24A low after a partial recovery in 25A. Technology spending held steady and staff size is softening again after last year's

rebound. Tech-led suppliers appear to have plateaued again after a 24A to 25A disruption cycle rather than embarking on a recovery trajectory.

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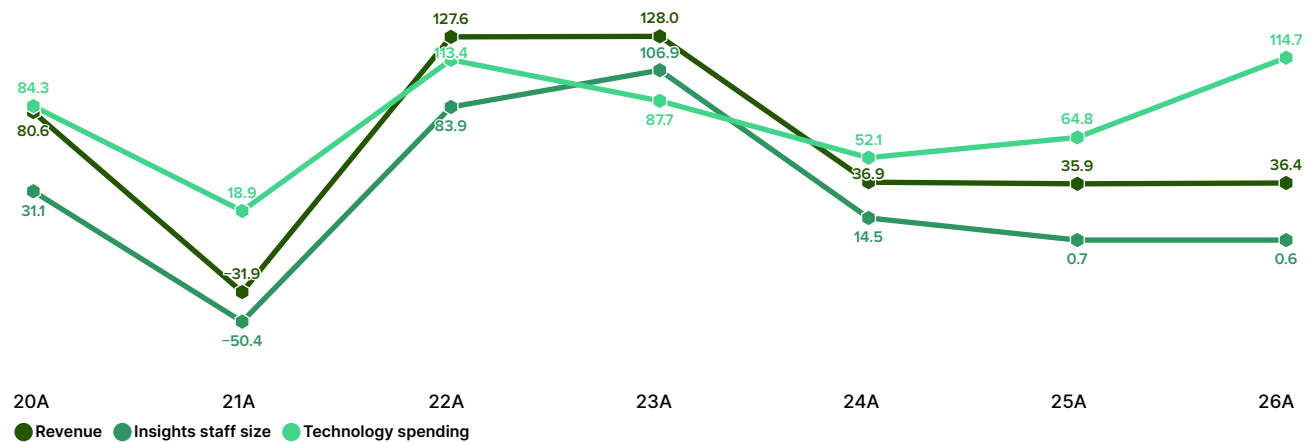


REVENUE, SPENDING, AND STAFFING TRENDS | SERVICE-LED: 500+ FTE POV [DATA]

Service-led suppliers with 500+ FTE are sitting in the doldrums with their revenue index (36.4) basically unchanged for the last three years and the staff size index (0.6) remaining near zero after plummeting from 106.9 coming out of the pandemic in 23A to 14.5 as genAI spread in 24A. Clearly, as a segment they are struggling with revenue and do not see adding staff as the solution.

They do see technology as a big part of the answer. The technology spending index just set a new record, nudging 22A's high, 113.4 to 113.4. After that technology spending splurge, service-led suppliers with 500+ FTE started hiring again, but it didn't last long. We'll see what happens with staff size next year after this year's tech splurge.

KEY TRENDS INDICES: GRIT WAVE (SERVICE-LED: 500+ FTE)

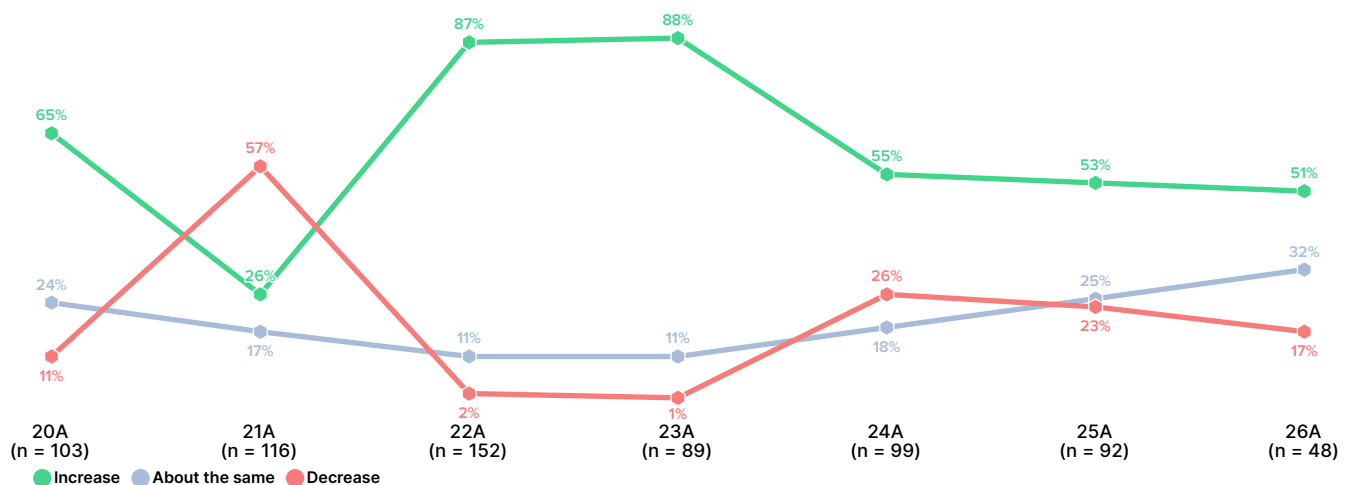


Takeaway: The technology spending index for service-led suppliers with 500+ FTE surged to 114.7 in 26A, its highest level since 22A; revenue (36.4) and staff size (0.6) indices have been weak and flat since 24A.

After peaking at 88% coming out of the pandemic in 23A, revenue increases among service-led suppliers with 500+ FTE fell to 55% and is now 51%, its third year in the lower 50s. If not for the abysmal

pandemic-driven 26% in 21A, it would represent a new low. However, decreases (17%) are down -6% from last year, its second consecutive decline.

REVENUE TREND: GRIT WAVE (SERVICE-LED: 500+ FTE)



Takeaway: Revenue increases among service-led suppliers with 500+ FTE remained sluggish, 53% in 25A to 51% in 26A, while decreases fell from 23% to 17%.

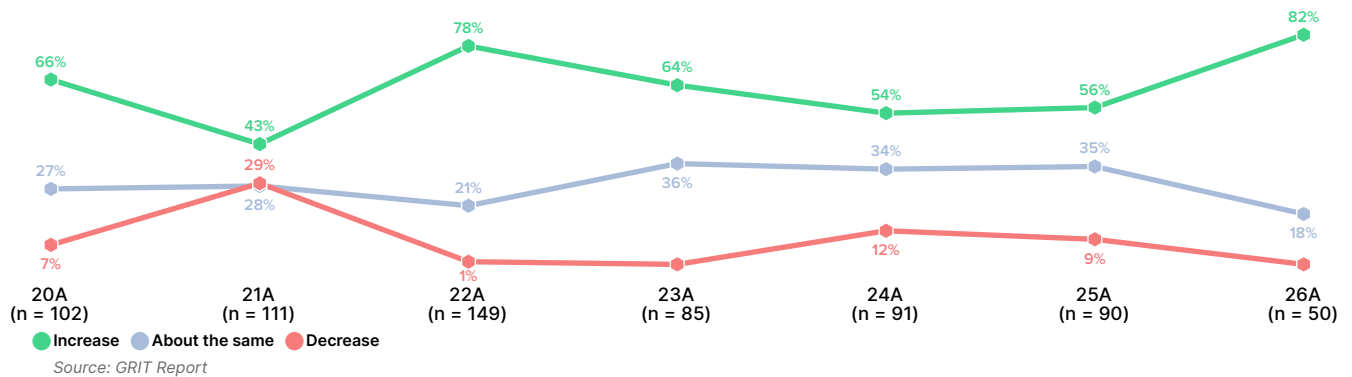
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Technology spending increases (82%) are at their highest point among service-led suppliers with

500+ FTE after a +26% jump. No one reported a decrease.

TECH SPENDING TREND: GRIT WAVE (SERVICE-LED: 500+ FTE)

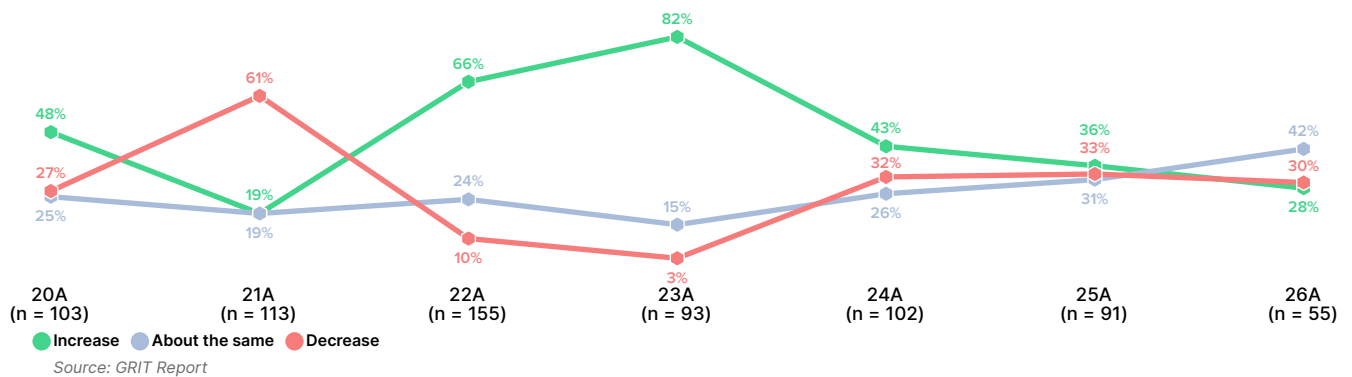


Takeaway: Technology spending increases among service-led suppliers with 500+ FTE jumped from 56% in 25A to 82% in 26A, highest in the tracked period; decreases fell to zero.

In contrast to the technology break-out, staff size increases among service-led suppliers with 500+ FTE (28%) are lower than any point since 20A, save 21A's

pandemic-infected nadir (19%). Decreases (30%) are the lowest since 23A's 3%, but they've been in the low 30s for each of the last three years.

STAFF SIZE TREND: GRIT WAVE (SERVICE-LED: 500+ FTE)

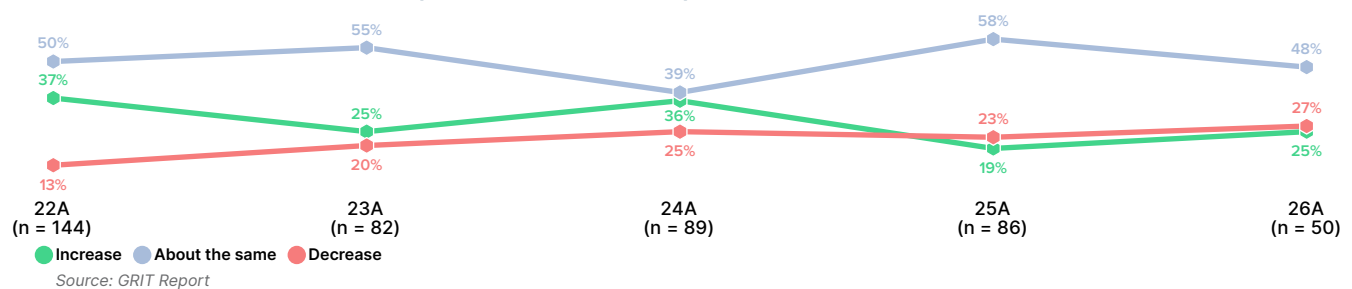


Takeaway: Staff size increases among service-led suppliers with 500+ FTE declined from 36% in 25A to 28% in 26A, their lowest level since 21A; decreases (30%) outnumbered increases.

Outsourcing increases among service-led suppliers with 500+ FTE (25%) rebounded from last year's low of 19%. Decreases (27%) have reached a new high. As we

learned in *Investing in Insights*, 33% of this segment expects outsourcing to increase compared to 20% who expect it to decrease.

OUTSOURCING TREND: GRIT WAVE (SERVICE-LED: 500+ FTE)



Takeaway: Outsourcing levels among service-led suppliers with 500+ FTE edged up from 19% in 25A to 25% in 26A, but still lagged decreases (27%).

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Throughout this report, we've discussed the restructuring of service-led suppliers with 500+ FTE, and that theme is reinforced in their *Business Outlook*. Staff size has been stagnant for three consecutive years while technology spending just hit its highest point ever. Revenue has been essentially flat, with increases ranging from 51% to 55% for three years.

The segment is not growing its way out of its revenue plateau, it's reengineering its cost structure. The 22A to 23A pattern is suggestive: a technology spending surge in 22A preceded a staffing surge in 23A. Next year's staffing data will reveal if the pattern repeats or not.

REVENUE, SPENDING, AND STAFFING TRENDS | SERVICE-LED: 101-500 FTE POV [DATA]

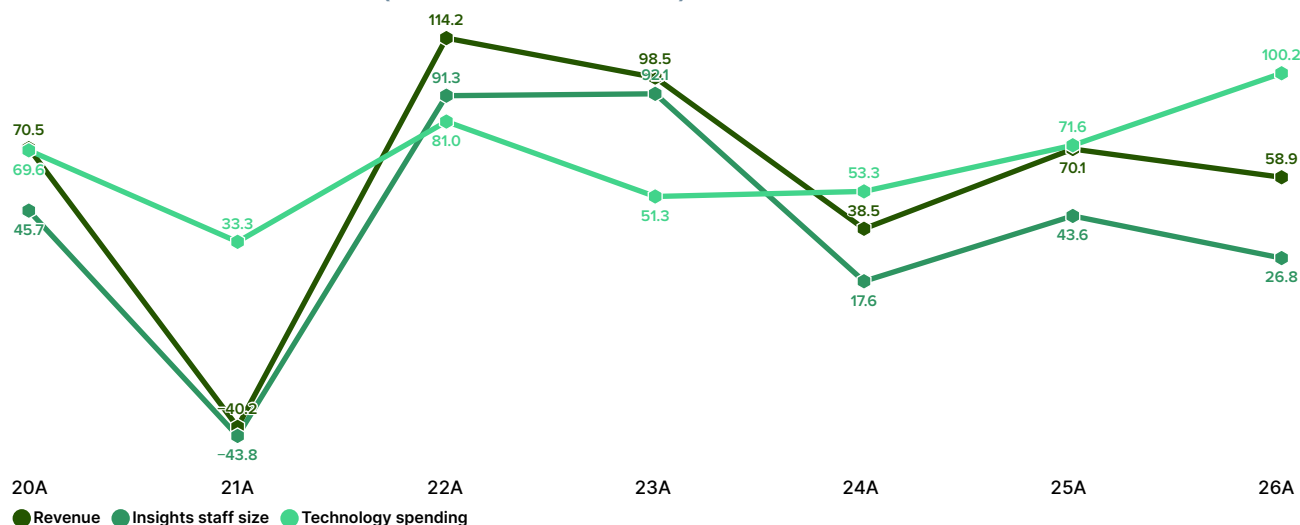
During the pandemic, service-led suppliers with 101 to 500 FTE had a negative revenue index (-40.2), suggesting they did whatever they could to keep their businesses running. Part of that involved a staff index that also went negative (-43.8). The technology spending index declined to 33.3, but didn't go negative.

While it's not likely this current crop of service-led suppliers with 101 to 500 FTE overlaps much with the 21A group, it's interesting to see the segment now has the leading revenue index among service-led

suppliers at 58.9 despite a -11.2 point drop since last year. Last year's 70.1 index nearly matched our original 70.5 reading from 20A, but it's impossible to say what's normal and what will come next.

The staff size index (26.8) for service-led suppliers with 101 to 500 FTE declined -16.8 points from last year, but they're virtually tied for the lead with service-led suppliers with 21 to 100 FTE (27.5). Their technology spending index (100.2) is strong, establishing a new high since 20A after a +28.6-point increase.

KEY TRENDS INDICES: GRIT WAVE (SERVICE-LED: 101-500 FTE)



Source: GRIT Report

Takeaway: The technology spending index among service-led suppliers with 101-500 FTE peaked at 100.2 in 26A; revenue (70.1 to 58.9) and staff size (43.6 to 26.8) indices fell.



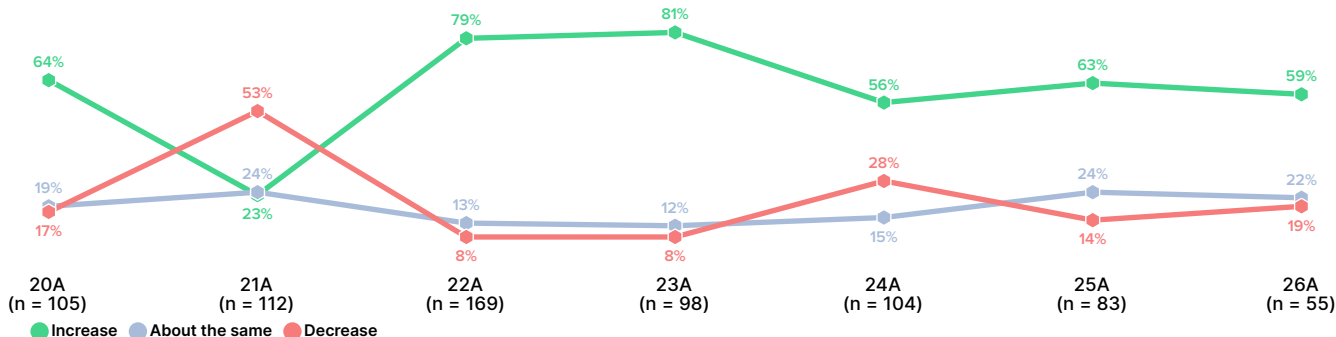
The staff size index for service-led with 101 to 500 FTE declined from last year, but they're virtually tied for the lead with those with 21 to 100 FTE.



Among service-led suppliers with 101 to 500 FTE, revenue increases (59%) are in the middle of their three-year range of 56% to 63%, but lower than the peak years coming out of the pandemic in 23A to

24A (79% to 81%) and its pre-pandemic 64% in 20A. Decreases grew from 14% last year to 19% this year, its highest post-pandemic point outside of 24A's 28%.

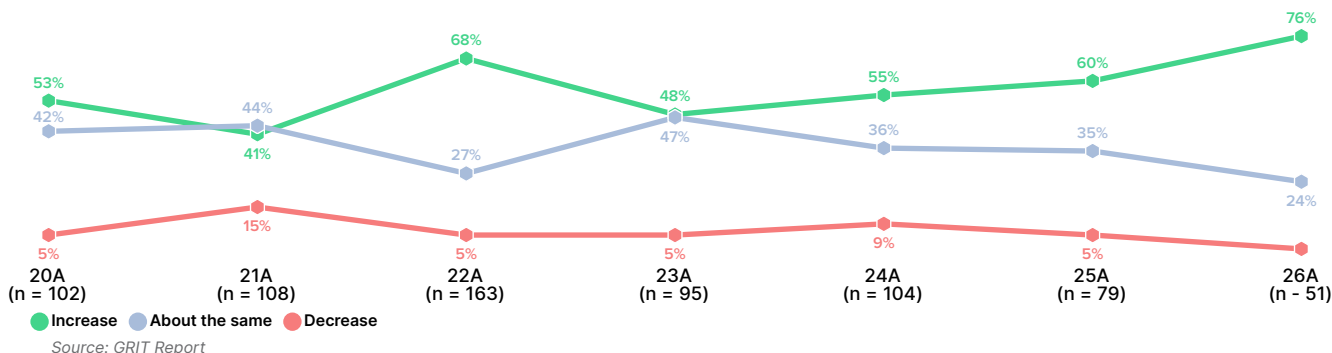
REVENUE TREND: GRIT WAVE (SERVICE-LED: 101-500 FTE)



Takeaway: Revenue increases among service-led suppliers with 101-500 FTE declined slightly from 63% in 25A to 59% in 26A, while decreases grew from 14% to 19%.

Technology spending increases have hit a new high for service-led suppliers with 101 to 500 FTE (76%). No one reported a decrease.

TECH SPENDING TREND: GRIT WAVE (SERVICE-LED: 101-500 FTE)

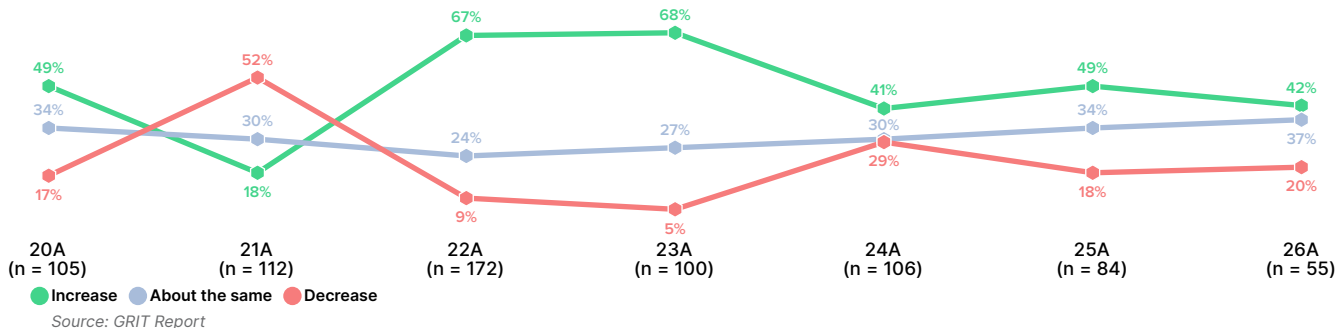


Takeaway: Technology spending increases among service-led suppliers with 101-500 FTE grew from 60% in 25A, peaking at 76% in 26A; decreases fell to zero for the first time.

Among service-led suppliers with 101 to 500 FTE, staff size increases (42%) stayed in the 40% for the third straight year after falling -7% since last year. Disregarding the peak years coming out of the

pandemic, this could be considered normal. Staff size decreases inched up from 18% last year to 20%, but they are still fewer than 24A's 29%.

STAFF SIZE TREND: GRIT WAVE (SERVICE-LED: 101-500 FTE)



Takeaway: Staff size increases among service-led suppliers with 101-500 FTE declined from 49% in 25A to 42% in 26A, while decreases inched up from 18% to 20%.

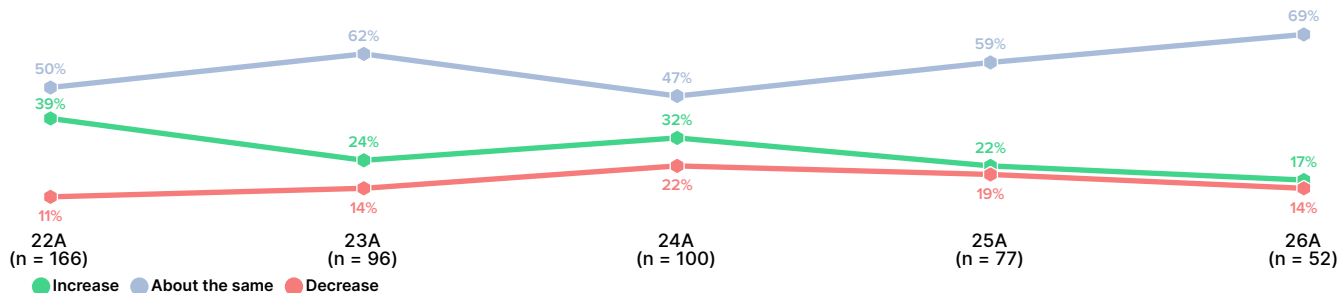
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Among service-led suppliers with 101 to 500 FTE, those who report increases in outsourcing fell -5% from last year after falling -10% the year before, now hitting a new low of 17%. Those who decreased

outsourcing fell -5% to 14%. More than two-thirds report no change (69%). As we learned in *Investing in Insights*, 24% of this segment expects outsourcing to increase compared to 17% who expect it to decrease.

OUTSOURCING TREND: GRIT WAVE (SERVICE-LED: 101-500 FTE)



Takeaway: Outsourcing increases among service-led suppliers with 101-500 FTE fell from 22% in 25A to 17% in 26A, but decreases also fell from 19% to 14%

Revenue increases for service-led suppliers with 101 to 500 FTE leads all service-led segments but is softening and well below the post-pandemic peaks. Technology spending hit a new high with no reported decreases while staff size increases held in the 40% for a third straight year. Outsourcing is contracting on both ends with fewer increases, fewer decreases,

and two-thirds reporting no change. This segment is not building its business by leveraging outsourcing; it's building through technology and organic staffing. That's a different construction model than analytics professionals on the brand side, who are expanding selectively through both channels simultaneously.

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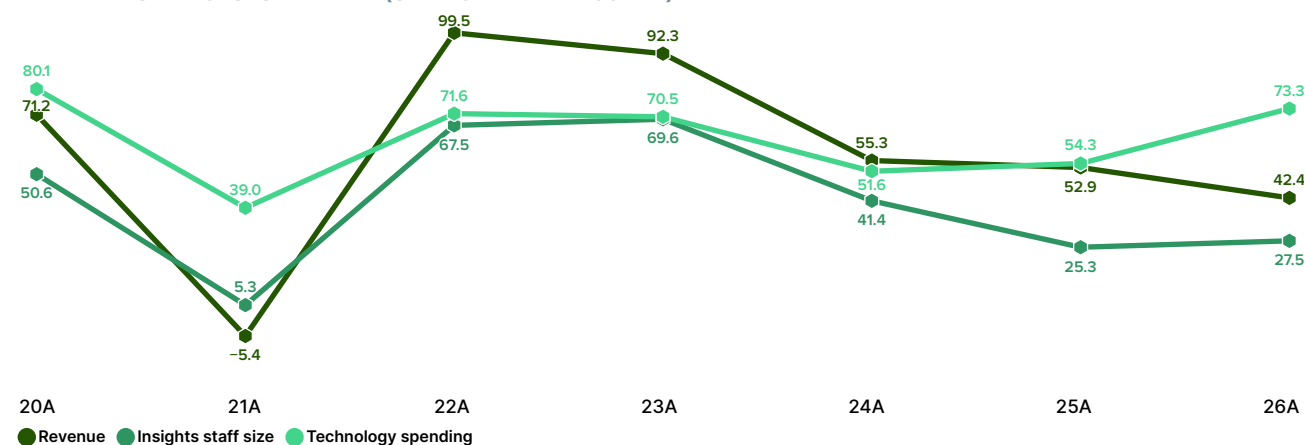
REVENUE, SPENDING, AND STAFFING TRENDS | SERVICE-LED: 21-100 FTE POV [DATA]

Like other supplier segments, service-led suppliers with 21 to 100 FTE also experienced peak revenue indexes coming out of the pandemic in 22A (99.5) and 23A (92.3), but it fell into the 50s for next two years, and it's fallen -10.5 points this year to 42.4. This staff size index followed a similar arc, peaking in the upper 60s before falling to 41.4 in 24A and again to 25.3 last

year. It's still only 27.5, but that's the highest of any service-led supplier segment.

The technology spending index (73.3), on the other hand, is at its highest point since our original measure in 20A (80.1). It increased 19.0 points from last year, to near its 22A to 23A surge.

KEY TRENDS INDICES: GRIT WAVE (SERVICE-LED: 21-100 FTE)

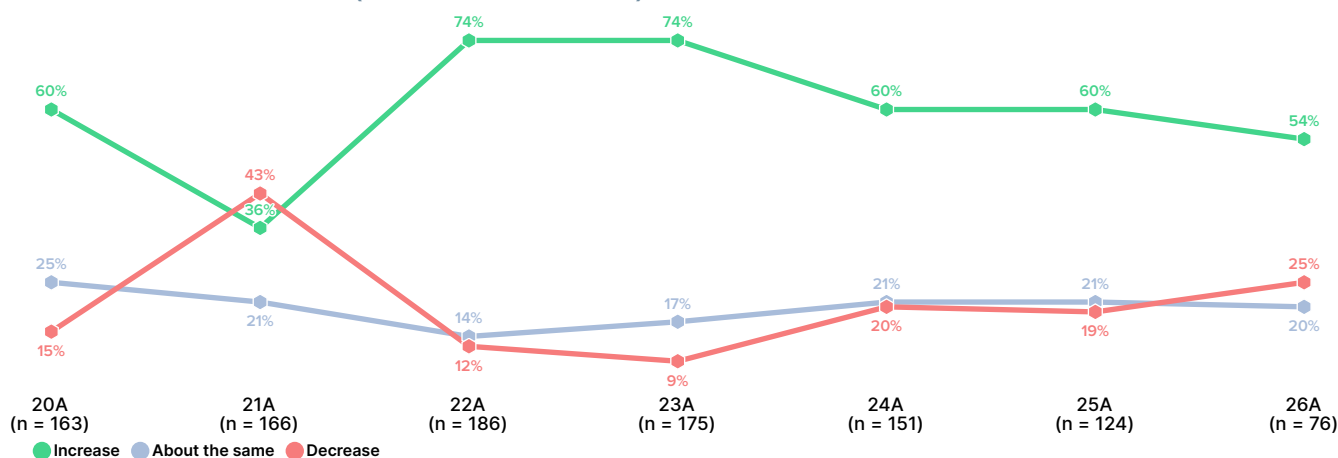


Takeaway: Among service-led suppliers with 21 to 100 FTE, technology spending (73.3) recovered to its highest level since 23A in 26A, while revenue (42.4) fell from 52.9 in 25A and staff size (27.5) remained about the same (25.3).

Revenue increases (54%) among service-led suppliers with 21 to 100 FTE are at their lowest point outside of the pandemic's 36% in 21A after a -6% slide since last

year. Similarly, decreases grew from last year's 19% to 25%, highest outside of 21A's 43%.

REVENUE TREND: GRIT WAVE (SERVICE-LED: 21-100 FTE)



Takeaway: Revenue increases among service-led suppliers with 21-100 FTE declined from 60% in 25A to 54% in 26A, while decreases grew from 19% to 25%.

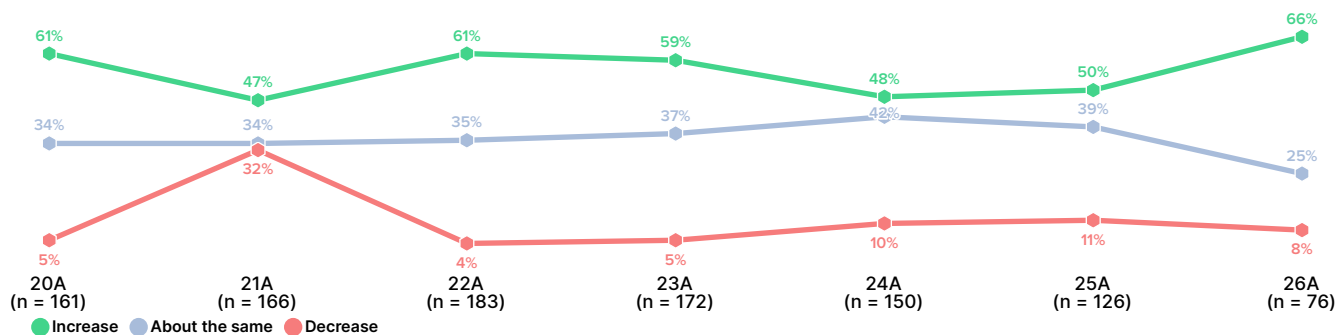
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At 66%, tech spending increases have reached their highest point among service-led suppliers with 21 to

100 FTE after a +16% jump from 25A. Those reporting decreases fell -3% to just 8%.

TECH SPENDING TREND: GRIT WAVE (SERVICE-LED: 21-100 FTE)



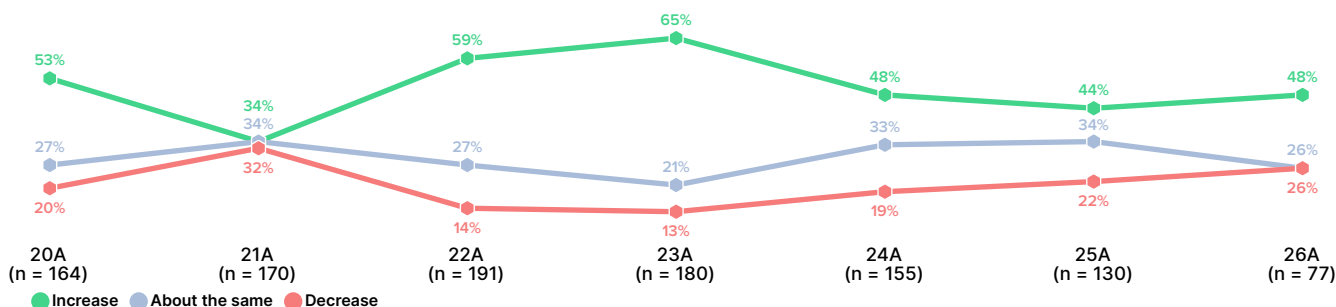
Source: GRIT Report

Takeaway: Technology spending increases among service-led suppliers with 21-100 FTE grew from 50% in 25A to 66% in 26A, the highest level since 22A; decreases slipped from 11% to 8%.

Among service-led suppliers with 21 to 100 FTE, staff size increases (48%) have been in the 40% for three straight years after cresting in 22A (59%) and

23A (65%). If we disregard 21A's 32%, decreases have peaked at 26%.

STAFF SIZE TREND: GRIT WAVE (SERVICE-LED: 21-100 FTE)



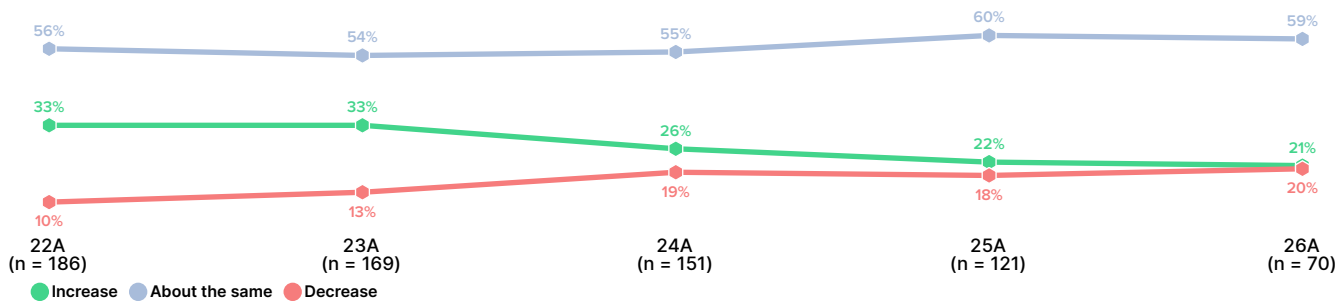
Source: GRIT Report

Takeaway: Staff size increases among service-led with 21-100 FTE rose to 48% in 26A, up from 44% in 25A, while decreases grew from 22% to 26%.

Among service-led suppliers with 21 to 100 FTE, outsourcing increases (21%) have been in the 20% for three years in a row after two years at 33%. Decreases have nudged up to a new high of 20%. As we learned

in *Investing in Insights*, 29% of this segment expects outsourcing to increase compared to 13% who expect it to decrease, one of the widest gaps favoring more outsourcing in any segment.

OUTSOURCING TREND: GRIT WAVE (SERVICE-LED: 21-100 FTE)



Source: GRIT Report

Takeaway: Outsourcing increases among service-led suppliers with 21-100 FTE suppliers were about the same in 26A (21%) as in 25A (22%) as were decreases (20% and 18%).

Revenue is weakening while technology spending has surged to a post-pandemic high. Staff size is in a holding pattern in the 40% for increases, but decreases are also rising. The forward-looking outsourcing expectation gap is one of the widest

in any segment, suggesting this segment sees outsourcing as a near-term solution to capacity constraints it's not solving through hiring or to complementing capabilities without taking on more fixed costs.



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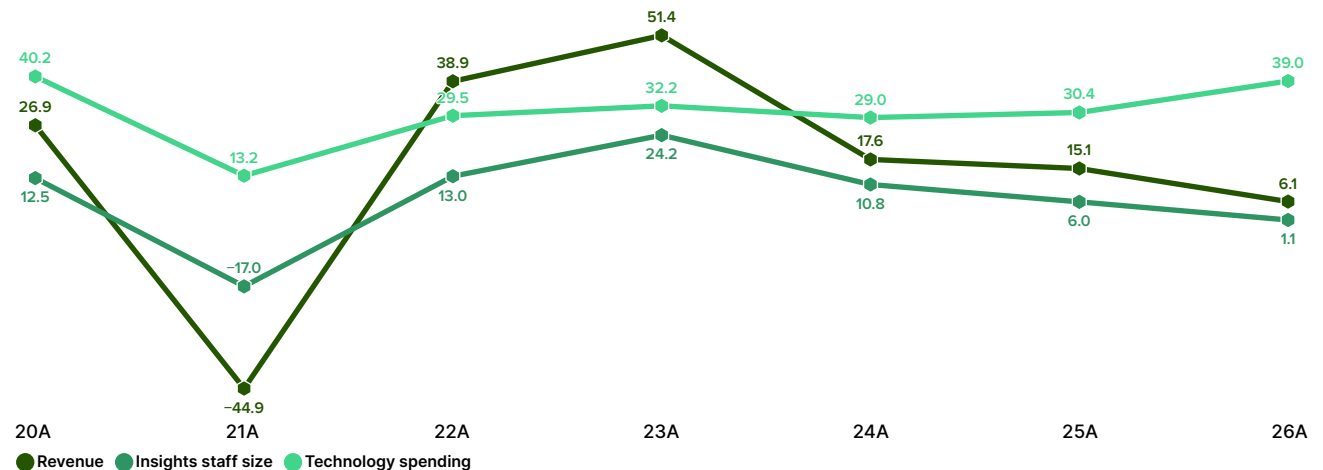


REVENUE, SPENDING, AND STAFFING TRENDS | SERVICE-LED: ≤20 FTE POV [DATA]

Among service-led suppliers with ≤20 FTE, the revenue index went negative during the pandemic (-44.9 in 21A), rebounded to 51.4 coming out of it in 23A, then decreased three years in a row to 6.1 currently. The staff size index followed: -17.0 in 21A, 24.2 in 23A, and down to 1.1 currently.

The tech spending index (39.0) is close to its original measurement and high point in 20A (40.2). It's always been positive, but never impressively so.

KEY TRENDS INDICES: GRIT WAVE (SERVICE-LED: ≤20 FTE)



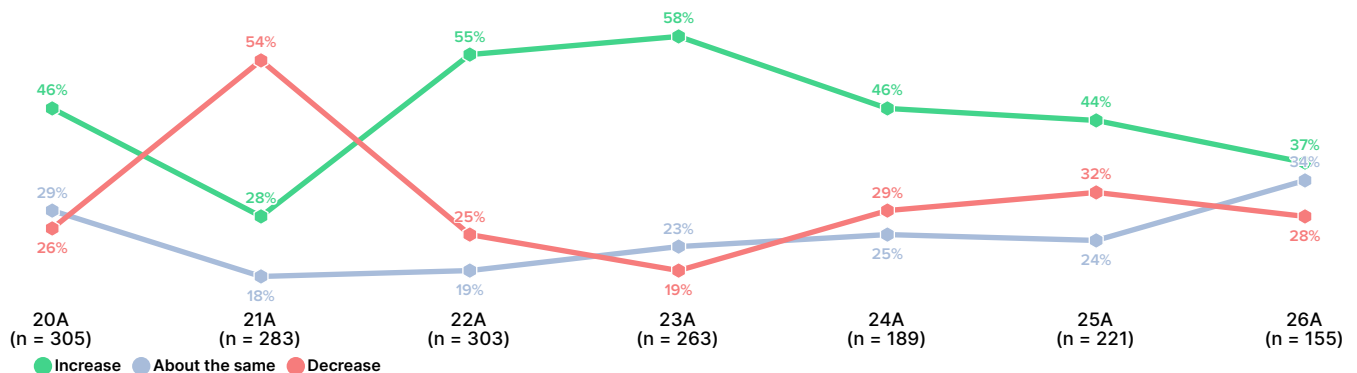
Source: GRIT Report

Takeaway: Among service-led suppliers with ≤20 FTE, the revenue trend index declined from 15.1 in 25A to 6.1 in 26A, and the staff size index slid from 6.0 to 1.1. The tech spending trend strengthened slightly from 30.4 in 25A to 39.0 in 26A.

Revenue increases among service-led suppliers with ≤20 FTE (37%) is at a non-pandemic low after three years of decline. Revenue decreases climbed from 19%

to 29% in 24A, and have stayed in that range every since, now at 28%.

REVENUE TREND: GRIT WAVE (SERVICE-LED: ≤20 FTE)



Source: GRIT Report

Takeaway: Revenue increases among service-led suppliers with ≤20 FTE fell from 44% in 25A to 37% in 26A, while decreases declined from 32% to 28%.



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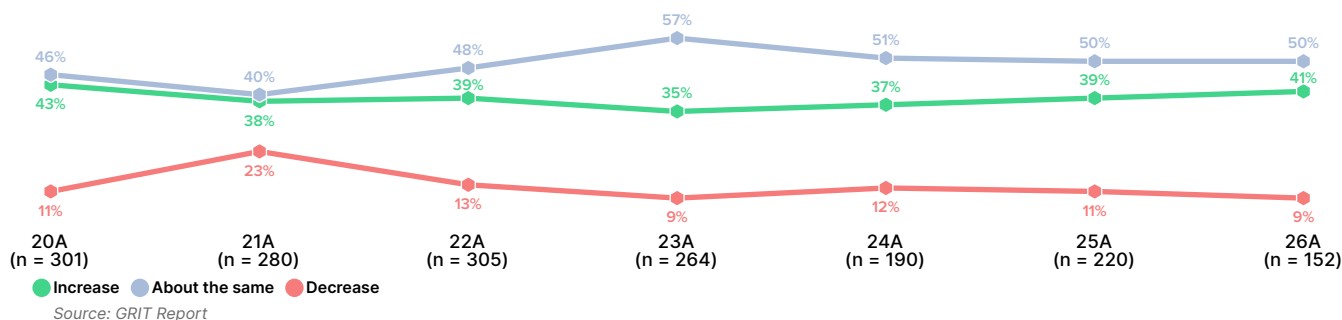
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Technology spending increases (41%) among service-led suppliers with ≤20 FTE have never ranged outside of 35% (23A) to 43% (20A). Technology spending

decreases (9%), however, surged to 23% in 21A, but have otherwise ranged from 9% to 13%.

TECH SPENDING TREND: GRIT WAVE (SERVICE-LED: ≤20 FTE)

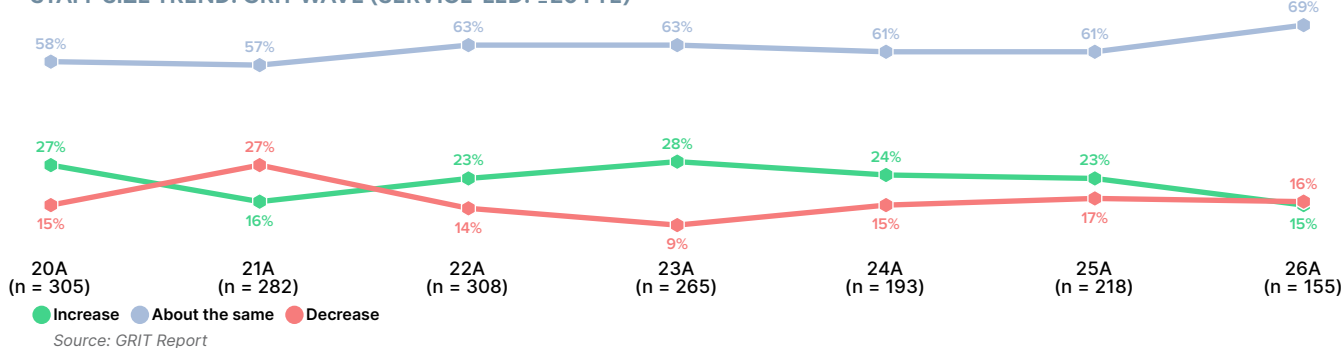


Takeaway: Technology spending increases among service-led suppliers with ≤20 FTE have slowly rebounded from a low of 35% in 23A to 41% in 26A, and decreases have matched 23A's all-time low of 9%.

In every previous year, between 57% and 63% of service-led suppliers with ≤20 FTE report no change in staff size. This year, it jumped to 69% as staff size increases dropped from 23% to 15%, lowest ever,

including the pandemic. Staff size decreases are 16%, which can be considered a normal amount for this segment.

STAFF SIZE TREND: GRIT WAVE (SERVICE-LED: ≤20 FTE)

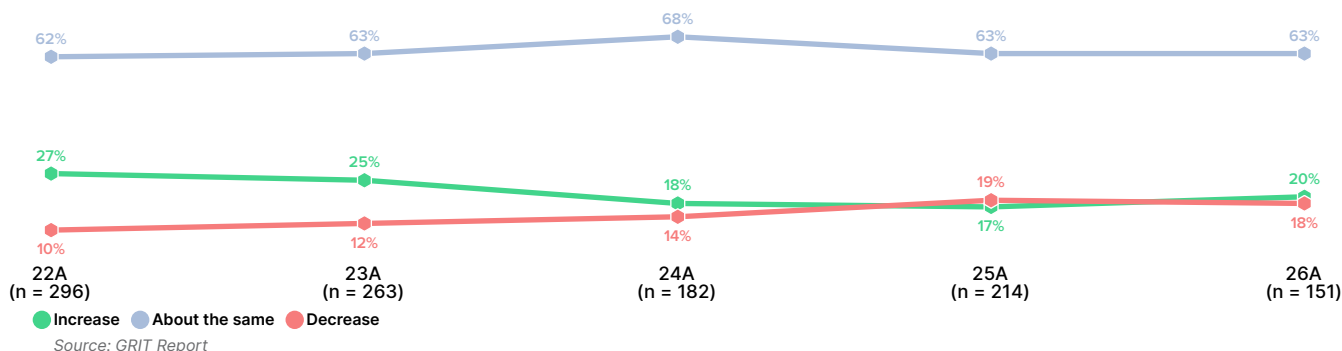


Takeaway: Staff size increases among service-led suppliers with ≤20 FTE fell to 15% in 26A, their lowest level in the tracked period; decreases held at 16% compared to 17% in 25A.

Recovering from the pandemic, increases in outsourcing in 22A (27%) and 23A (25%) peaked among service-led suppliers with ≤20 FTE, then fell to 18% in 24A. Currently, it's 20%. Decreases in outsourcing mirror that pattern, peaking at 19% last

year and staying at 18% this year. As we learned in *Investing in Insights*, 26% of this segment expects outsourcing to increase compared to 10% who expect it to decrease, one of the widest gaps favoring more outsourcing in any segment.

OUTSOURCING TREND: GRIT WAVE (SERVICE-LED: ≤20 FTE)



Takeaway: Outsourcing increases among service-led suppliers with ≤20 FTE inched up from 17% in 25A to 20% in 26A while decreases stayed about the same (from 19% to 18%).



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Revenue increases continue a three-year slide to 37%, a non-pandemic low, while staff size increases hit their lowest level ever, including the pandemic years. Technology spending increases have been consistent over seven years. Combined with what we know from

other sections, such as selling frequently to other industry participants, access-not-ownership patterns, narrowing selection criteria, this looks less like a segment in transition and more like one coping with a narrowing band of opportunities.

THE BIG PICTURE [STRATEGIC INTERPRETATION]

Throughout this report, we've developed hypotheses about each of our seven GRIT segments, and the *Business Outlook* findings help to underscore differences across them while fleshing out each segment persona a bit more. This is the first time *Business Outlook* data has been broken out by the service-led size bands in an *Insights Practice Report*, and the result is a clearer economic picture of the industry than we've had before.

Let's start with the most distinct and one of the most volatile segments: tech-led suppliers. Although the pandemic was devastating for other types of suppliers, tech-led suppliers thrived, and revenue and staffing growth indexes hit their highest points during the peak years coming out of it. Just when they appeared poised to own the industry's analytical future, mass-market generative AI arrived and met needs that tech-led suppliers had probably expected to fill themselves.

Although revenue increases are currently at a low point and staff size trends have weakened, technology spending has been strong the past two years, suggesting a reload. In *Evolving Supplier Landscape*, we see fewer offerings based on analytics services and unstructured data, and more infrastructure that can't be replicated by a general-purpose language model: fraud detection, CAPI platforms, online survey infrastructure, etc. This looks like a deliberate retrenchment toward industry-specific, workflow-integrated, and compliance-sensitive technology that mass-market AI can't supplant.

In contrast to the smaller and more specialized tech-led suppliers, the broad service-led supplier category comprises four distinct segments. We've been developing our understanding of them throughout this report, and *Business Outlook* reveals four distinct economic situations which influence how service-led research and consulting businesses operate right now. Service-led suppliers with 500+ FTE have been working out one problem for three years: how do you sustain a large organization when the research work that built it is becoming more automatable and less labor-intensive? Their answer, visible across *Evolving Supplier Landscape*, *Insights' Hottest Methods!*, and now *Business Outlook*, is a deliberate repositioning toward data and analytics and high-value insight methods, while reducing dependence on field services, structured survey modes, and the headcount that supported them.

Revenue growth has been essentially flat for three years; staffing has been stagnant for three years; technology spending just hit its highest point since 22A. The pattern mirrors 22A, when a technology surge preceded a hiring wave. Whether history repeats is one of the more interesting questions this report leaves open.

Service-led with 500+ FTE have been working out one problem for 3 years: how do you sustain size when your core research work is becoming more automatable and less labor-intensive?





Service-led suppliers with 101 to 500 FTE tell a different story. Throughout this report, in sections like *Evolving Supplier Landscape*, *Governance & Risks*, *Investing in Insights*, *Selection Criteria*, and *Insights' Hottest Methods!*, this segment consistently displays the broadest and most simultaneous expansion of any supplier segment. *Business Outlook* confirms it in financial terms: they lead service-led suppliers in revenue growth index, technology spending has hit a new high with zero reported decreases, and staffing increases have held in the 40% for a third consecutive year.

They are building through technology and organic human capacity rather than outsourcing, and their methodology portfolio is expanding across every family simultaneously. Whether this segment represents suppliers who have grown methodically into this position, suppliers who have right-sized down from 500+ FTE, or some combination, the result looks like a segment that has found a viable formula and is thriving with it.

Service-led suppliers with 21 to 100 FTE are less settled. Revenue is weakening toward its lowest point outside the pandemic, technology spending has surged to a post-pandemic high, and expectations of outsourcing growth are among the widest of any segment. This is a segment working out its growth formula while leveraging technology and external human resources to avoid over-committing to fixed costs. Some are reaching toward the next size band, some have found a comfortable cruising altitude, and some are simply navigating revenue pressure with the tools available to them. While their heterogeneity makes it harder to characterize than other service-led segments, the technology investment is real and the outsourcing ambition is notable.

Service-led suppliers with ≤ 20 FTE have a unique make-up and are not as clearly on a continuum with the larger FTE size categories. It is sustained by entrepreneurial energy, specialist positioning, and the persistent human impulse to build something of one's own. Revenue at a non-pandemic low and staffing increases at an all-time low look alarming until you consider that this segment is structurally bounded by its own definition: a supplier that consistently grows revenue and adds staff eventually becomes a different supplier, in a different segment. The character of the segment partly depresses the metrics we track naturally.

What's more telling is that this segment has accounted for roughly a third of GRIT's supplier-side participants across every wave, through a pandemic, a generative AI disruption, and everything in between. Most participants in this segment work for companies in business ten years or fewer, by far the highest proportion of any segment. Perhaps individual companies may be volatile, but the segment itself is resilient.

Turning to the brand side, the apparent divergence between research and analytics professionals is the starkest finding in this section, and possibly in the report. Analytics professionals are expanding on every tracked dimension simultaneously: research project budgets are their strongest since tracking began, budget composition is shifting upward, staff size increases outpace decreases four to one, and outsourcing and technology spending have hit new highs. The segment that entered GRIT tracking in 23A

Service-led suppliers with 21 to 100 FTE are working out their growth formula while leveraging technology and external human resources to avoid over-committing to fixed costs.



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with 34% of participants holding budgets under \$1MM now has only 15% in that range, while those with budgets over \$15MM grew from 26% to 40%. It seems like every card we flip over for them turns out to be an ace.

Brand-side researchers have been dealt a more difficult hand. Research project spending decreases have reached 30%, matching the pandemic nadir, and for the first time decreases have swelled larger in three consecutive years. Staffing growth has turned net-negative for the first time. Outsourcing is contracting. These trends, taken together, are consistent with a segment in transition rather than merely in a down cycle.

As we've discussed in *Brand-side Roles & Teams* and *Insights' Hottest Methods!*, the methods gaining among researchers are desk-executable, owned, and asynchronous; the methods declining require external infrastructure or physical presence. The one unambiguously strong trend in this segment, the technology spending peak, fits a self-sufficiency hypothesis: tools enabling them to do more with fewer internal and external human resources. Whether the research segment is consolidating around a narrower but stable identity, or whether it is in the early stages of a more fundamental redefinition, is a question this report raises but cannot answer.

This brings us to the apparent disconnect between brand-side budget trends and supplier revenue trends. Brand-side researchers are holding roughly steady on project spending increases, and analytics professionals are at their strongest. Yet revenue increases across all five supplier segments are at or near their worst outside the pandemic.

The data tracks direction, not magnitude, so it's possible that budget increases are modest while decreases are larger creating a situation where more participants report increases but total market dollars are contracting. It's also possible that spending is concentrating among fewer suppliers, leaving most of the supplier population feeling the pressure even as aggregate demand holds. These possibilities are not mutually exclusive, and the data cannot resolve the question. What it can say is that the disconnect is real, and worth pondering as we observe the real world.

Against all of this divergence — segments moving in different directions, “rich man, poor man” brand-side segments, supplier revenue softening broadly — one finding holds across every segment without exception: technology spending is strong. Every segment reported new highs or near-highs in technology investment. Two of the largest supplier segments reported zero decreases. Brand-side analytics professionals hit 77% increases; brand-side researchers hit their highest rate since tracking began even as budgets and staffing contracted. Tech-led suppliers sustained their investment through a revenue plateau. The smallest service-led suppliers, whose technology spending acceleration rate has barely moved in seven years, ticked upward.

If *Business Outlook* has a single takeaway, it may be this: industry participants disagree as to their ideal destinations, but they generally agree on how they intend to get to them.

Every segment reported new highs or near-highs in technology investment, and two of the largest supplier segments reported zero decreases.

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MOOD & CONFIDENCE

This section looks at optimism about the future of roles, companies, and the industry plus performance against insights goals from the perspectives of brand-side research and analytics professionals as well as service-led suppliers across size bands and tech-led suppliers.

WHAT ARE THE REASONS TO BE CHEERFUL? [ORIENTATION]

If you've just finished *Business Outlook*, you might get the impression that these are the last days of Pompeii, and the walls keep tumbling down in the industry that we love. But, if you close your eyes, it might almost feel like nothing changed at all. However, when you then open them again, you might be inclined to ask yourself, "how am I gonna be an optimist about this?"

In each GRIT survey, we begin by asking "How optimistic are you about the future of the insights and analytics industry?" Also, about "your department or area at your company or organization?" and "your company or organization?" We start with that so we can get a top-of-mind read on how the industry is feeling about itself before we make it think about the topics that will become the *Business Outlook* section. Of the three questions, optimism about the future of "your department or area" best represents how confident or secure brand-side insights professionals feel about their roles, and optimism about the future of "your company" best represents confidence and security on the supplier side.

If we look at the gap between those who say they are "optimistic" or "very optimistic" versus those who say they are "pessimistic" or "very pessimistic," we find a stratification of segments according to how confident they are in their positions in the industry. Tech-led suppliers (+81% gap toward optimism), brand-side analytics professionals (+78%), and service-led suppliers with 101 to 500 FTE (+79%) are the most confident. Brand-side researchers (+57%) and service-led suppliers with 21 to 100 FTE (+56%) are the next most confident. Least confident are those with ≤ 20 FTE (+44%) followed by those with 500+ FTE (+31%).

HOW TO READ THIS SECTION

- **Tags;** For a purely data focused summary, prioritize the [DATA] subsections.
 - [ORIENTATION] = how to pay attention to this topic
 - [DATA] = GRIT survey results
 - [PERSPECTIVE] = interpretation or opinion
 - [STRATEGIC INTERPRETATION] = findings and potential implications
 - **Points of view (POV) used in headings**
 - **Brand POV** (buyer/client side)
 - **Tech-led POV**
 - **Service-led: <band> FTE POV** (e.g., 21–100 FTE)
 - **Wave codes in longitudinal tables and charts**
 - **A = Insights Practice Report** (or first GRIT report each year)
 - **B = Business & Innovation Report** (or second GRIT report each year)
 - **Examples:** **26A** = 2026 Insights Practice; **25B** = 2025 Business & Innovation
 - **Editor call-outs**
 - Boxes labeled **Editor's note:** or **Editor's POV:** and signed "**L.M., ed.**" are editorial opinions, **not data.**
 - **Takeaway:** a one-line summary appears under tables and charts.
- See Design, Methodology & Sample for full context.



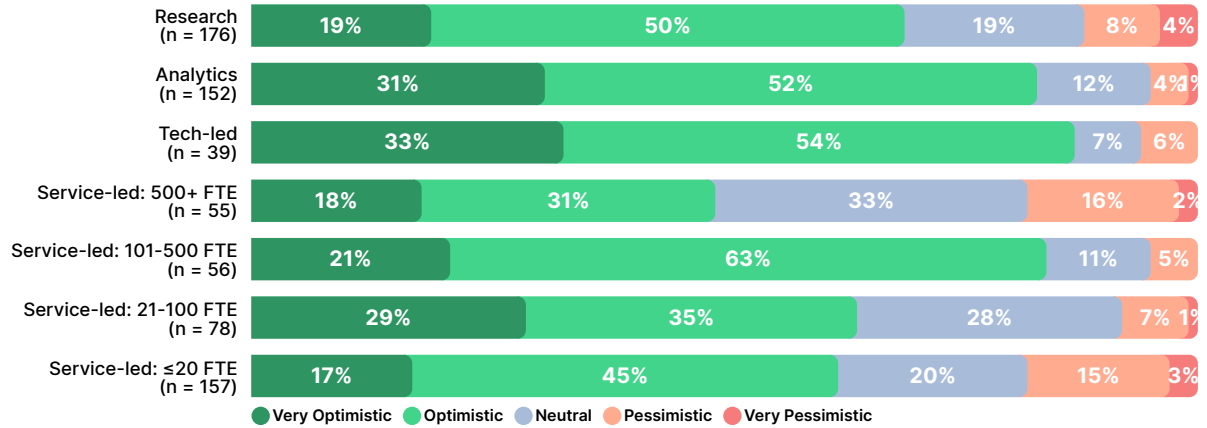
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OPTIMISM ABOUT DEPARTMENT OR ROLE [BRAND]/COMPANY [SUPPLIER]: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals (83% to 5%), tech-led suppliers (87% to 6%), and service-led suppliers with 101 to 500 FTE (84% to 5%) are the most optimistic about their situations, overall.

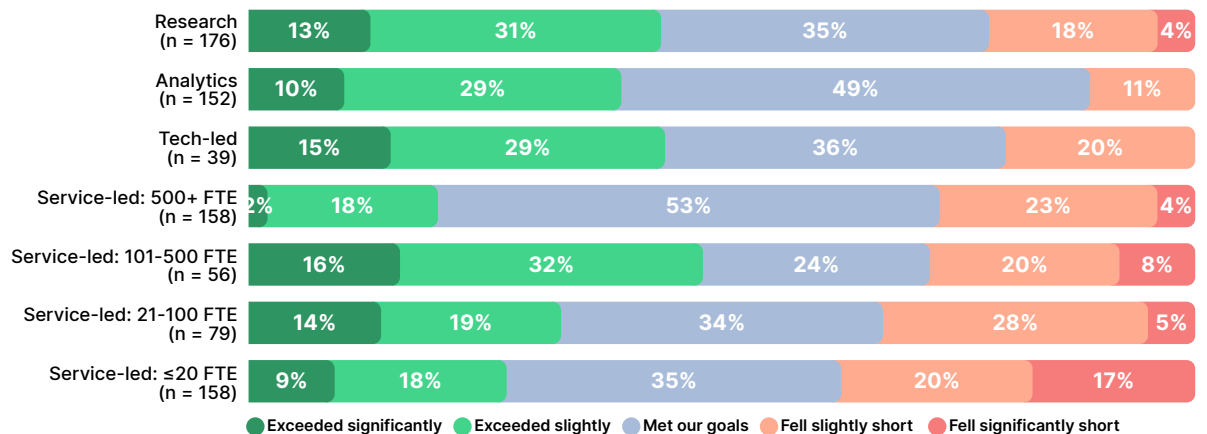
Segment-specific themes we've been developing from the beginning of this report through *Business Outlook* include how brand-side analytics professionals are expanding capabilities (and budgets), while service-led suppliers with 101 to 500 FTE are having a similar sort of epiphany. Those with ≤20 FTE are vulnerable due to their smallness, and those with 500+ FTE are struggling with their bigness. From this perspective, the stratification of confidence levels across segments should not be a surprise to anyone who is familiar with the rest of the report.

If optimism indicates how confident insights professionals feel about their roles, performance against goals might indicate how justified they are to feel as they do. If we look at the gaps between those who exceeded their insights goals "significantly" or "slightly" versus those who fell "significantly" or "slightly" short of them, we see a similar yet different segment stratification.

Of our three most optimistic segments, two are also among the highest-performing: tech-led suppliers (+24% gap toward "exceed") and brand-side analytics professionals (+28%). Brand-side researchers, one of the mid-tier optimists, have a similar gap (+22%), and the third top-tier optimists, service-led suppliers with 101 to 500 FTE, are not far behind (+20%).

The other mid-tier optimists, service-led suppliers with 21 to 100 FTE, have virtually no gap between those who exceeded goals and those who fell short. Earlier, we characterized them as suppliers trying to make the right investments to grow their businesses, and the high-optimism/break-even performance demonstrates cautious faith in their ability to get where they want to go. The two least optimistic segments are also the ones struggling most with their goals: service-led suppliers with ≤20 FTE (27% exceeded goals while 37% fell short) and those with 500+ FTE (20% versus 27%).

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals (39% to 11%), tech-led suppliers (44% to 20%), and brand-side researchers (44% to 22%) have the best ratios of exceeding goals to falling short of them.



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We'll provide more detail on the history of performance and optimism within each segment throughout this section, and also consider the question of which topics in this report track with higher and lower levels

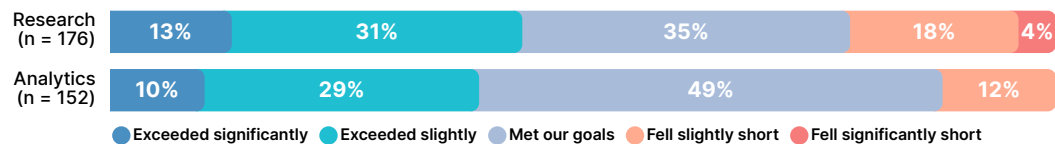
of optimism about the futures of brand-side roles and supplier companies so we can conclude with some reasons to be cheerful.

GOAL PERFORMANCE AND OPTIMISM | BRAND POV [DATA]

Currently, brand-side analytics professionals report stronger performance relative to their organization's research, insights, and analytics work over the past year than do researchers. In the analytics segment,

39% report exceeding goals while 12% report falling short. Among researchers, more report that goals were exceeded (44%), but, compared to analytics, twice as many report falling short (22%).

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: BRAND SEGMENT



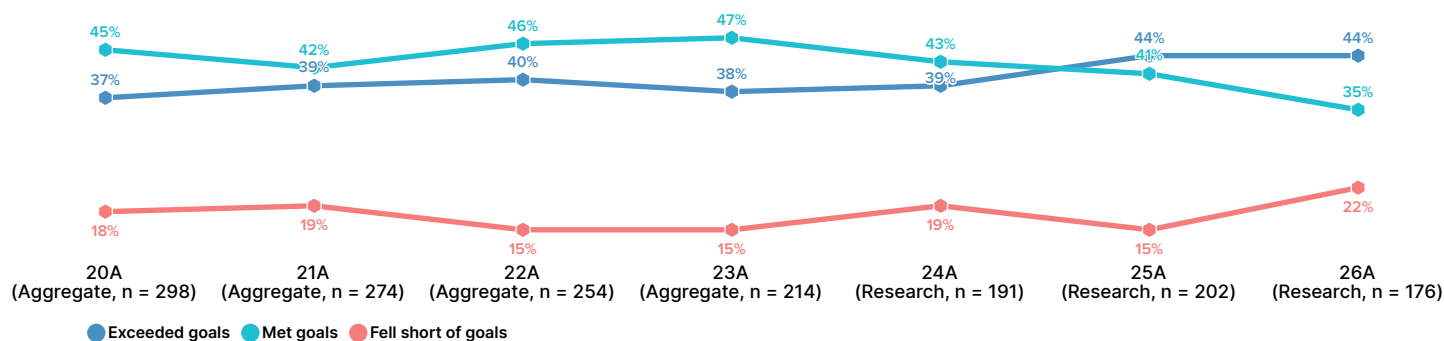
Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, 39% exceeded goals versus 44% for researchers, but analytics have a much lower "fell short" rate (12% vs. 22%) and no significant shortfalls.

This was the second consecutive year in which 44% of researchers reported exceeding goals, equaling their highest ever. However, the 22% who fell short is also the highest ever, eclipsing the 19% from 24A and 21A.

In *Business Outlook*, we hypothesize that the research segment is in transition, and peaks at both extremes seem to support that interpretation.

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



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers exceeding goals held at 44% in 26A, matching 25A as the highest in the series, but "fell short" rose to 22%.



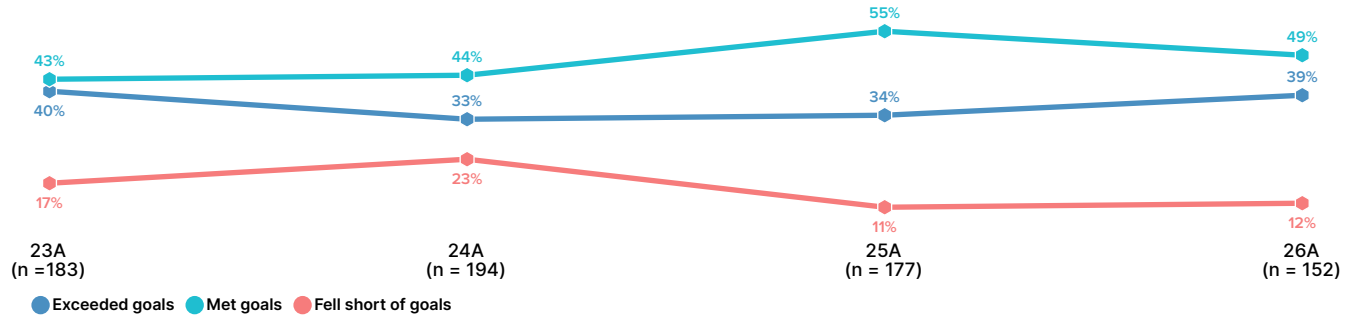
In *Business Outlook*, we hypothesize that the research segment is in transition; peaks at both extremes supports that interpretation.



The brand-side analytics segment's performance looks more like a segment gaining momentum. Those who exceeded goals increased from 34% to 39%, close to the high of 40% from 23A. Those who fell short (12%)

remained close to last year's low of 11%. In the last two years, the percent falling short was about half the amount from 24A.

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



Source: GRIT Report and NewtonX

Takeaway: Among brand-side analytics professionals, those exceeding goals grew from 34% to 39% while those falling short remained near last year's low (12% versus 11%).

Brand-side analytics professionals are more optimistic about their department or role than researchers (83% vs. 69%), and many more describe themselves as

“very” optimistic (31% vs. 19%). Pessimism is more than twice as high among researchers (12% vs. 5%).

OPTIMISM ABOUT DEPARTMENT OR ROLE: BRAND SEGMENT



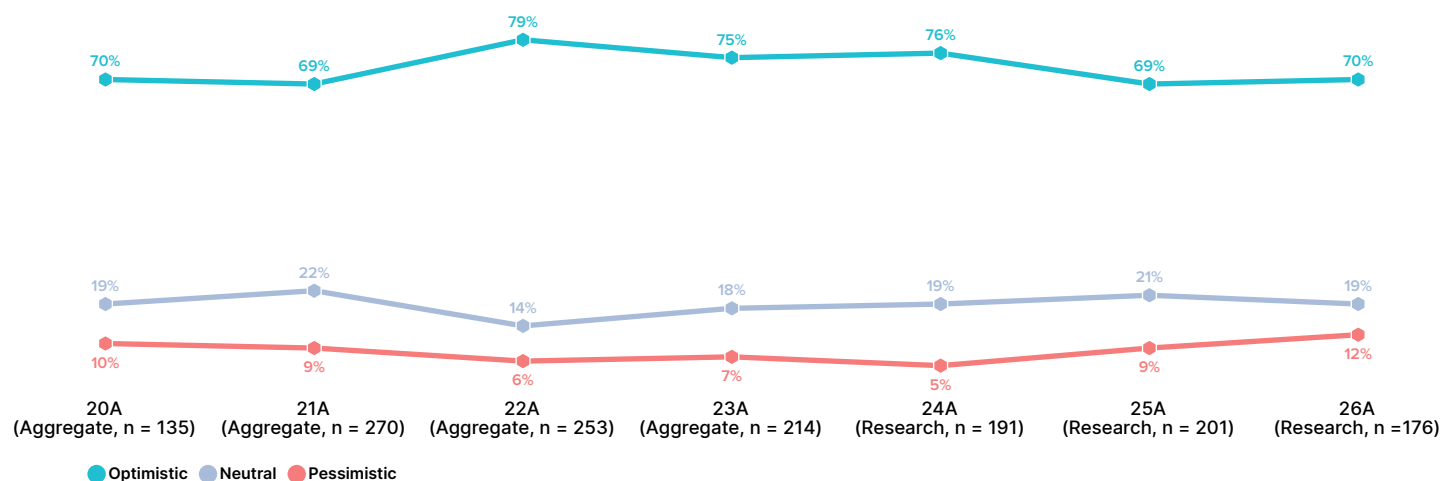
Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals are more optimistic about their department or role than researchers (83% vs. 69%), with many more describing themselves as very optimistic (31% vs. 19%); pessimism is more than twice as high among researchers (12% vs. 5%).

Optimism about their roles among brand-side researchers hasn't varied too much since 20A, ranging from 69% (21A, 25A) to 79% (22A); currently, it's 70%.

Although pessimism is low, it's at its highest level (12%) since the first measurement in 20A (10%) having increased twice since its 24A low of 5%.

OPTIMISM ABOUT DEPARTMENT OR ROLE: GRIT WAVE (BRAND: RESEARCH)



Source: GRIT Report and NewtonX

Takeaway: Brand-side researcher optimism about their role the past two years has been 69-70%, same as it was prior to peaking at 79% in 22A; at 12%, pessimism is the highest in the tracked period.



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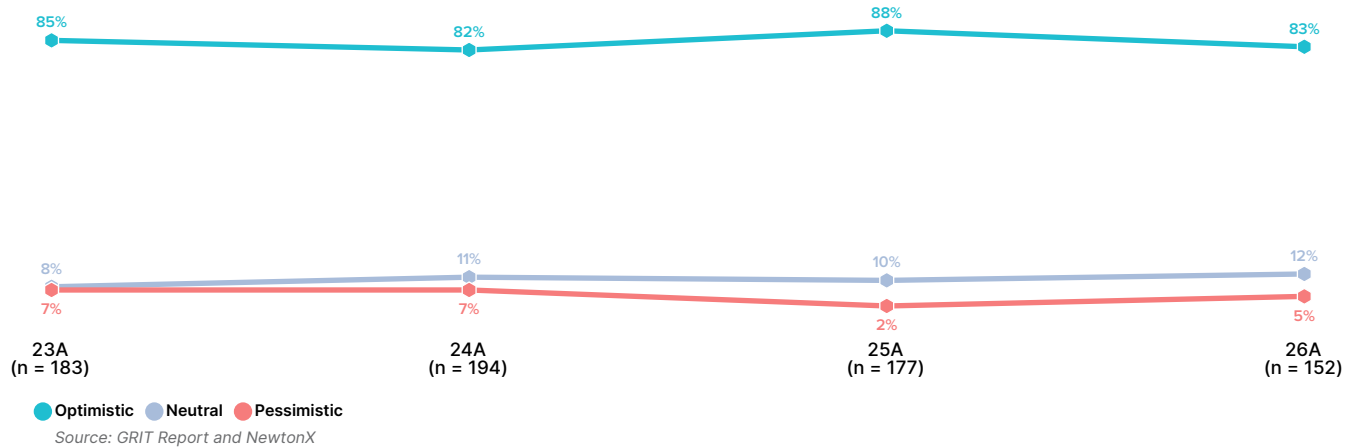
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Brand-side analytics professionals have had very consistent levels of high optimism (82% to 88%) and low pessimism (2% to 7%) since the segment was

introduced in 23A. Currently, 83% are optimistic and 5% are pessimistic.

OPTIMISM ABOUT DEPARTMENT OR ROLE: GRIT WAVE (BRAND: ANALYTICS)

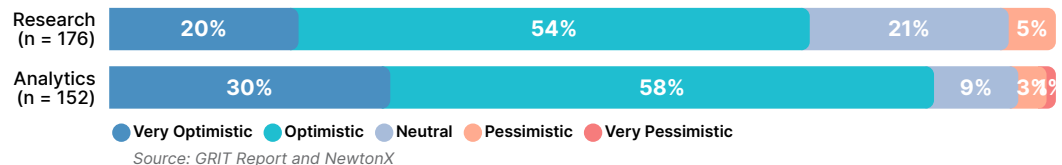


Takeaway: Brand-side analytics professionals' optimism about their role has been consistently above 80% across all waves (82–88%); pessimism remains in the single digits (2–7%) throughout.

Considering optimism about the industry, brand-side analytics professionals are more optimistic (88%) than researchers (74%), although both are optimistic.

The analytics segment is also more likely to be “very” optimistic about it (30% to 20%). Pessimism is 5% or lower in each segment.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: BRAND SEGMENT

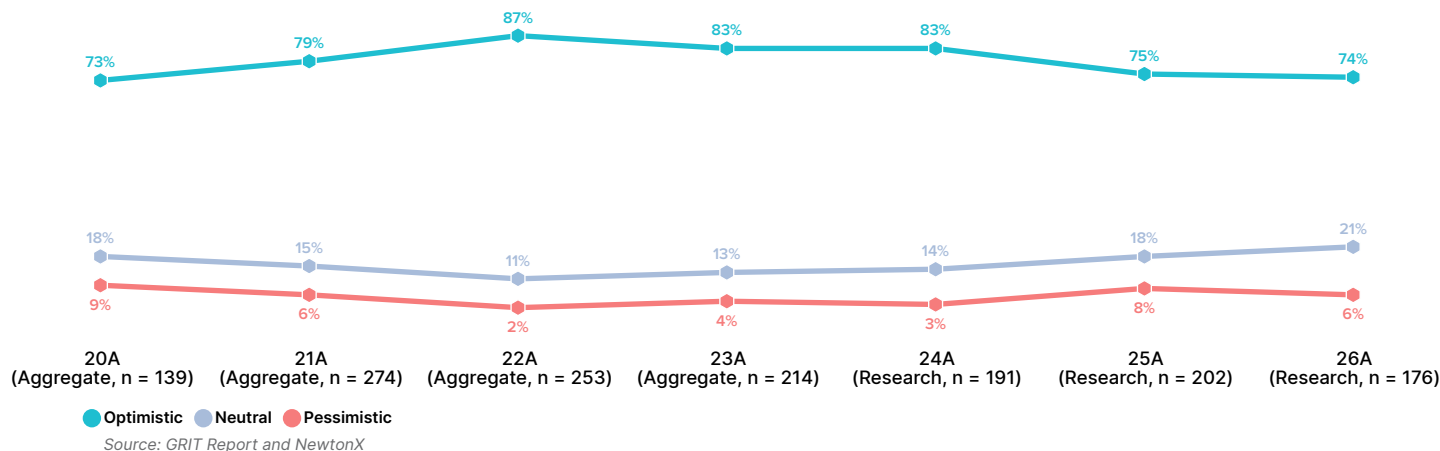


Takeaway: Both brand segments are optimistic about the industry (74% research, 88% analytics), but analytics professionals are notably more likely to be very optimistic (30% vs. 20%); pessimism is low in both segments (5% research, 4% analytics).

Coming out of the pandemic, brand-side researchers' industry optimism peaked at 87% in 22A but has declined to 74% in 26A, its lowest since 20A (73%).

At 6%, pessimism remains low but has doubled from 3% over two years.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (BRAND: RESEARCH)



Takeaway: Coming out of the pandemic, brand-side researchers' industry optimism peaked at 87% in 22A but has declined to 74% in 26A, its lowest since 20A; at 6%, pessimism remains low but has doubled from 3% over two years.

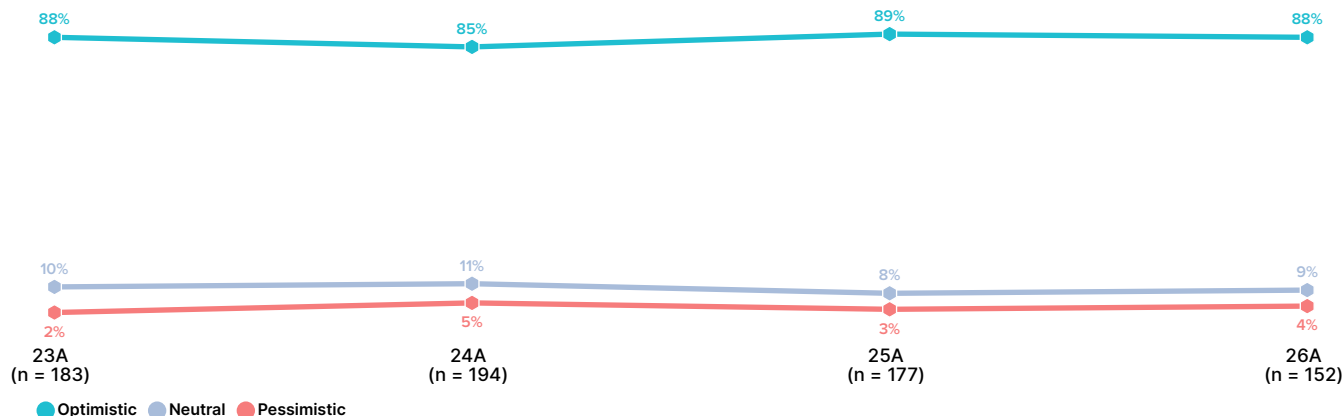
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Brand-side analytics professionals' industry optimism has been consistently in the upper-80%s (85% to 89%) across all tracked waves. Currently 88%, it is

virtually unchanged from last year (89%). Pessimism remains minimal (4%), and ranged from 2% to 5% previously.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (BRAND: ANALYTICS)



Source: GRIT Report and NewtonX

Takeaway: Brand-side analytics professionals' industry optimism has been consistently in the upper-80%s (85–89%) across all tracked waves; at 88%, 26A is virtually unchanged from 25A while pessimism remains minimal (4%).

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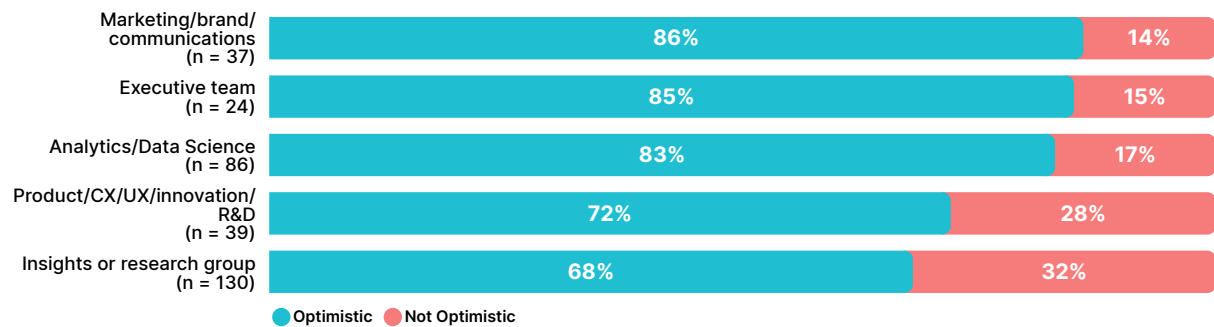


OPTIMISM & IDENTITY | BRAND POV [DATA]

Across our *Insights Practice* topics, what differentiates between higher and lower optimism about the future of brand-side roles? Let's take a quick look at some examples, with some speculation. In the interest of space, we are going to look at both segments aggregated, even though there are differences across them.

On the brand-side, optimism is highest for those working in marketing/brand/communications (86%), on the executive team (85%), and in analytics/Data Science (83%). It's lowest for those working in an insights or research group (68%).

OPTIMISM ABOUT DEPARTMENT OR ROLE: DEPARTMENT/FUNCTIONAL AREA (BRAND)



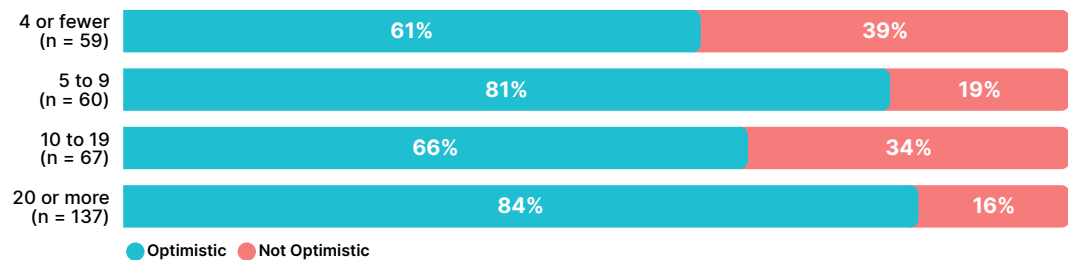
Source: GRIT Report and NewtonX

Takeaway: On the brand-side, optimism is highest for those working in marketing/brand/communications (86%), on the executive team (85%), and in analytics/Data Science (83%).

Optimism is lowest when there are only four or fewer insights professionals on staff (61%) and when there are 10 to 19 (66%). It's highest when there are five to nine (81%) and 20 or more (84%). Possibly, smaller

staffs are more resource-constrained, and there may be growing pains when they reach 10 to 19 professionals, such as new decisions to make about how to manage the size.

OPTIMISM ABOUT DEPARTMENT OR ROLE: INSIGHTS STAFF SIZE (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Optimism is lowest when there are only four or fewer insights professionals on staff (61%) and when there are 10 to 19 (66%); it's highest when there are five to nine (81%) and 20 or more (84%).

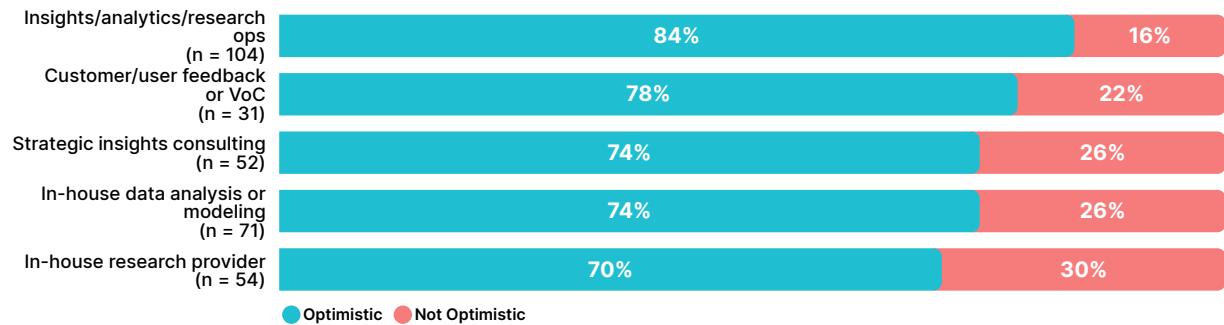
Brand-side insights professionals are most optimistic about their roles when the primary role of insights staff is insights, analytics, or research operations (84%). It's lowest when the most important role is in-house research provider (70%). GRIT often hears about the desire of insights professionals to have their work have a business impact, including in this

report's *Industry Buzz Topics*. It could be that having a broader strategic role like operations fills that need better than if the expectation was simply to provide research. It could be an even more satisfying role if "insights operations" extends to coordinating work done by non-insights staff embedded throughout the organization.





OPTIMISM ABOUT DEPARTMENT OR ROLE: MOST IMPORTANT INSIGHTS STAFF ROLE (BRAND)



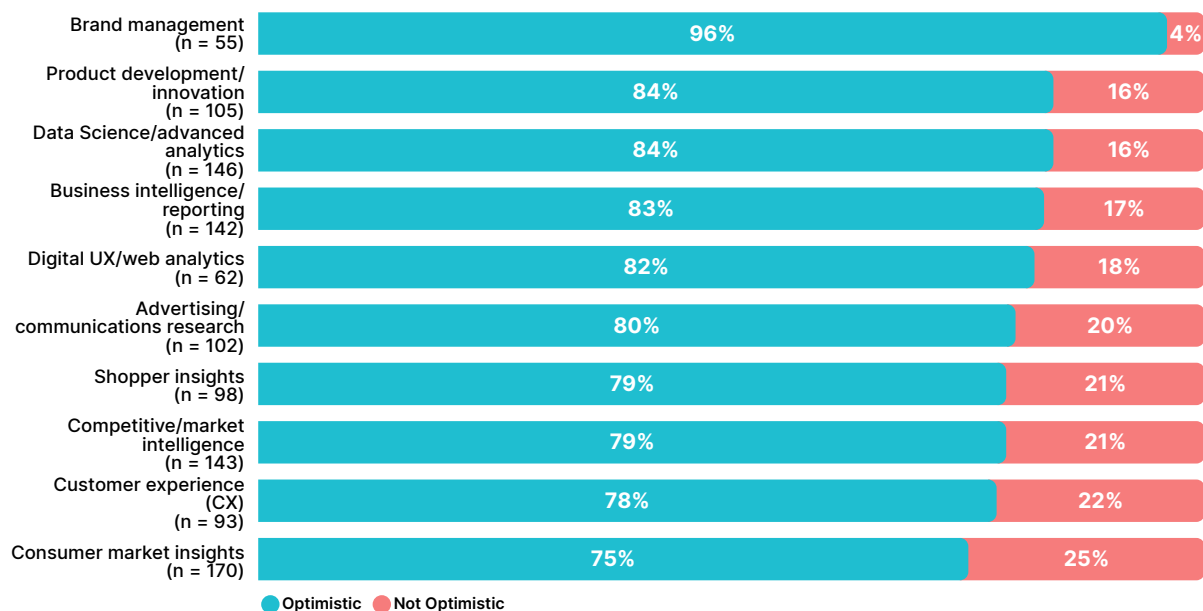
Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are most optimistic about their roles when the primary role of insights staff is insights, analytics, or research operations (84%); optimism is lowest when it's in-house research provider (70%).

Although the areas led by insights professionals overlap, some are associated with higher levels of optimism about the future of their roles and some with lower. Leadership of brand management (96%) is associated with the highest optimism, while consumer market insights is on the low end (75%). This suggests

that brand-side insights professionals are most comfortable with roles they can clearly own, like brand management, and less sure of their roles when they are working on general topics or areas that non-specialists dabble in, like consumer market insights.

OPTIMISM ABOUT DEPARTMENT OR ROLE: AREAS LED BY INSIGHTS (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are most optimistic about their roles when insights lead brand management (96%), least when they lead consumer market insights (75%).



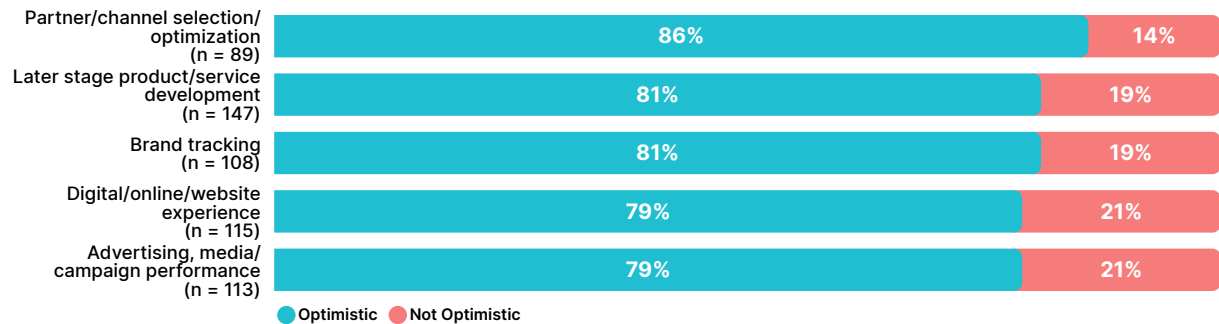
Leadership of brand management is associated with the highest optimism, while consumer market insights is on the low end.



Even though areas in which they spend significant time also overlap, these are associated with different levels of optimism about future of their role. The three

most associated with optimism are partner/channel selection/optimization (86%), later stage product/service development (81%), and brand tracking (81%).

HIGHEST OPTIMISM ABOUT DEPARTMENT OR ROLE: SPEND SIGNIFICANT TIME (BRAND)



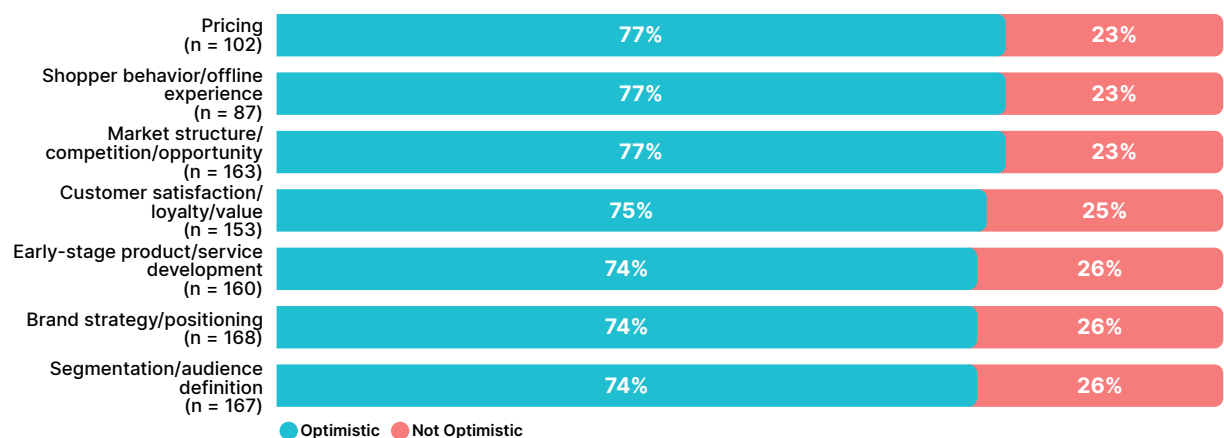
Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are most optimistic about their roles when they spend significant time on partner/channel selection/optimization (86%).

Although there isn't a clear break across these areas indicating two tiers of optimism, the range from 86% for partner/channel selection/optimization to 74% for early-stage product/service development, brand strategy/positioning, and segmentation/audience definition seems notable, especially because these areas can overlap.

It's interesting that brand strategy/positioning is at the low end when brand tracking is among the areas where significant time is spent that is most associated with optimism, but brand management is at the top when it's an area led by insights. Perhaps brand management engenders more optimism when it is firmly in the domain of insights experts, but not necessarily something to spend personal time on. Regarding optimism about the future of one's role, brand tracking seems like a regular activity that isn't likely to be phased out.

LOWEST OPTIMISM ABOUT DEPARTMENT OR ROLE: SPEND SIGNIFICANT TIME (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are least optimistic about their roles when they spend significant time on early-stage product/service development, brand strategy/positioning, and segmentation/audience definition (74% each).





OPTIMISM & MANAGING INSIGHTS |

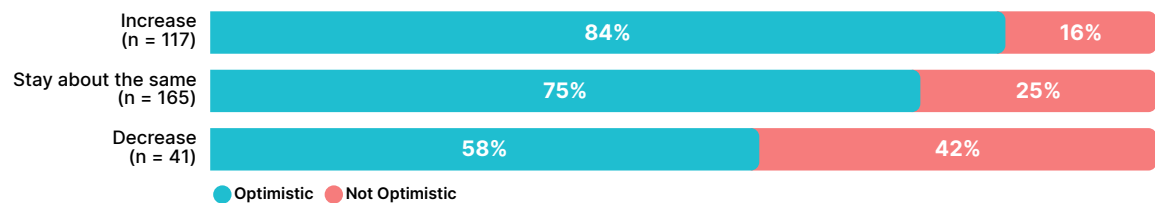
BRAND POV ^[DATA]

Brand-side insights professionals are more optimistic about the future of their roles when they expect outsourcing to external suppliers to increase (84%). When they expect it to stay about the same, only 75% are optimistic, and, when they expect it to decrease, it drops to 58%.

There are several potential explanations for this relationship. The simplest might be the signal that outsourcing sends about their department or area: there's budget to spend to get help and/or management has a clear, deliberate plan for how to optimize the workflow. It could mean they'll be able to focus on the areas that are core to their jobs and not have to pick up miscellaneous, unfulfilling tasks. If outsourcing is reduced, they may have to act more like an internal research supplier, and we've seen that this role is associated with lower optimism.

This might also be related to our characterizations of the two brand-side segments. Researchers seem to be trending toward doing more work they can control from their desks, so perhaps the reduction in outsourcing means they'll have an additional burden of figuring out how to automate more tasks they are used to hiring out. Analytics professionals seem to be aggressively increasing their capabilities, and outsourcing is a tool they plan to use to achieve that. If it's taken away, it will compromise their ideal workflow.

OPTIMISM ABOUT DEPARTMENT OR ROLE: OUTSOURCING EXPECTATION (BRAND)



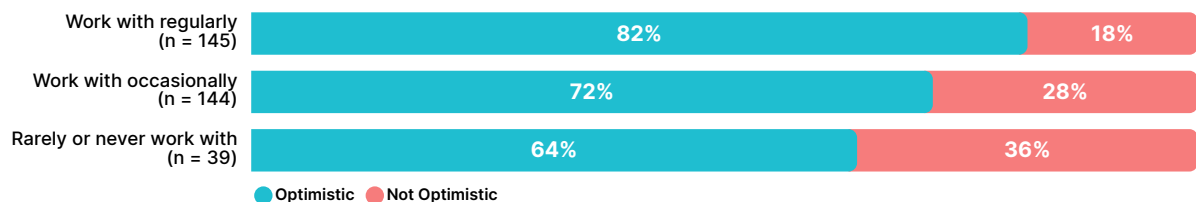
Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are more optimistic about the future of their roles when they expect outsourcing to external suppliers to increase (84%).

Perhaps brand-side insights professionals gain confidence by working with different kinds of external suppliers. Those who work regularly with qualitative research suppliers (82%) are much more optimistic about the future of their roles than those who rarely or

never do (64%). Perhaps it instills confidence because it demonstrates investment in research, or perhaps it's a richer experience than they get from other kinds of suppliers and helps improve their own skills.

OPTIMISM ABOUT DEPARTMENT OR ROLE: QUALITATIVE RESEARCH SUPPLIERS (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are more optimistic about the future of their roles when they work regularly with qualitative research suppliers (82%) than those who rarely or never do (64%).



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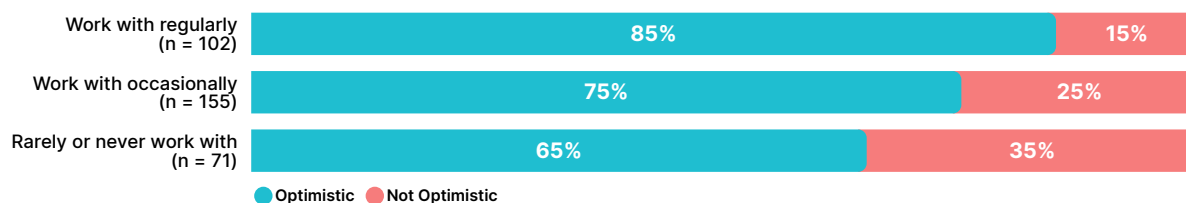
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In fact, their optimism pattern is similar to when they work with strategic consultants. When they work with them regularly, optimism hits (85%). If they only work with them occasionally, optimism hits (75%). If they only work with them rarely or never do, it falls to 65%. Brand-side insights professionals seem to feel more secure

in their jobs the more they can work with consultative kinds of external suppliers. Use of full-service research suppliers and other types do not generate these kinds of patterns.

OPTIMISM ABOUT DEPARTMENT OR ROLE: STRATEGIC CONSULTANTS (BRAND)



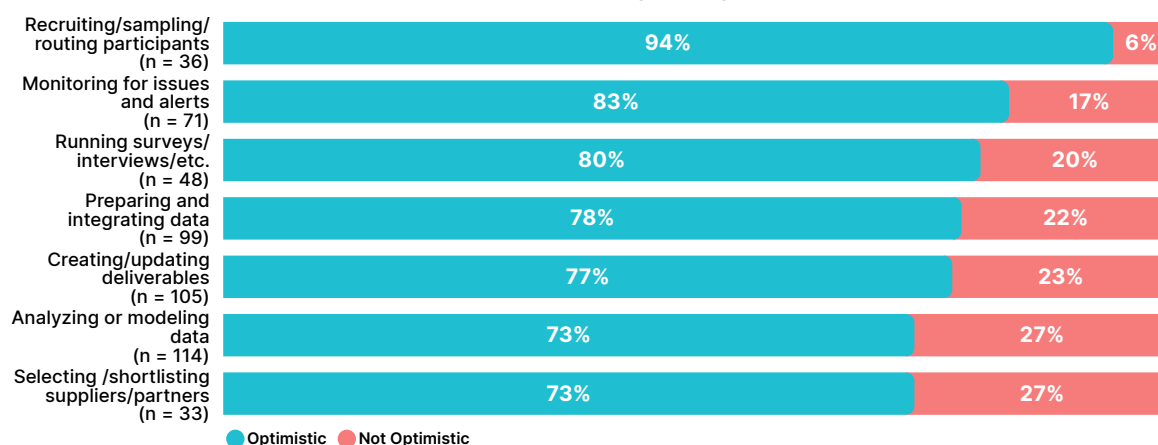
Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are more optimistic about the future of their roles when they work with them regularly (85%).

Use of agentic AI is associated with optimism about brand-side insights roles. Although not the leading application of agentic AI, those who have it in use for recruiting/sampling/routing participants are the most optimistic (94%); possibly, this is seen as addressing a vulnerability. On the low end, use of agentic AI for

analyzing or modeling data (73%) and selecting / shortlisting suppliers/partners (73%) doesn't inspire as much optimism. Possibly, use of it for analysis is job-threatening, and use of it for selecting suppliers may seem to introduce unacceptable risk.

OPTIMISM ABOUT DEPARTMENT OR ROLE: USE OF AGENTIC AI (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are least optimistic about their roles when their organizations use agentic AI for recruiting/sampling/routing participants (94%), monitoring for issues and alerts (83%), and running surveys/interviews/etc. (80%).



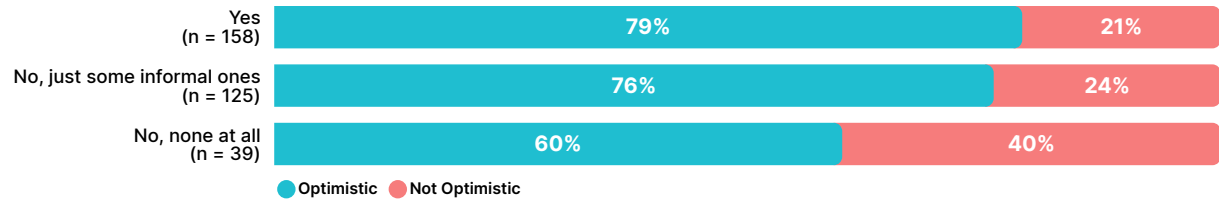
Those who use agentic AI for recruiting/sampling/routing participants are the most optimistic, possibly, because it addresses a key vulnerability.



On the brand side, optimism about their roles is not differentiated according to whether they have formal (79%) or informal guidelines for use of AI in insights

work (76%). However, it plummets if there are no guidelines (60%).

OPTIMISM ABOUT DEPARTMENT OR ROLE: GUIDELINES FOR AI USE (BRAND)



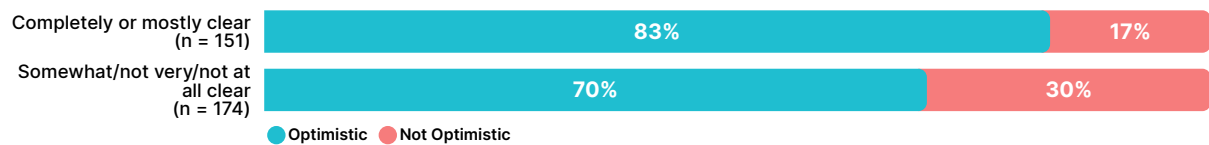
Source: GRIT Report and NewtonX

Takeaway: On the brand side, optimism about their roles does not differ according to whether they have formal (79%) or informal guidelines for use of AI in insights work (76%); however, it plummets if there are no guidelines (60%).

Establishing clear expectations of how AI should be used in insights work can improve optimism about the future of brand-side insights roles. Optimism is higher

when expectations are completely or mostly clear (83%) and lower when they are not (70%).

OPTIMISM ABOUT DEPARTMENT OR ROLE: CLARITY OF EXPECTATIONS FOR AI USE (BRAND)



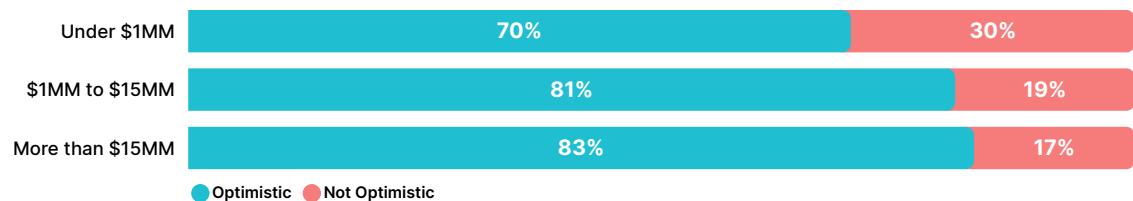
Source: GRIT Report and NewtonX

Takeaway: Establishing clear expectations of how AI should be used insights work can improve optimism (83%) about the future of brand-side insights roles.

Brand-side insights professionals are most optimistic about their roles when their research budgets

exceed \$1MM (more than 80%). When their research budgets are under \$1MM, optimism declines to 70%.

OPTIMISM ABOUT DEPARTMENT OR ROLE: ANNUAL BUDGET (BRAND)



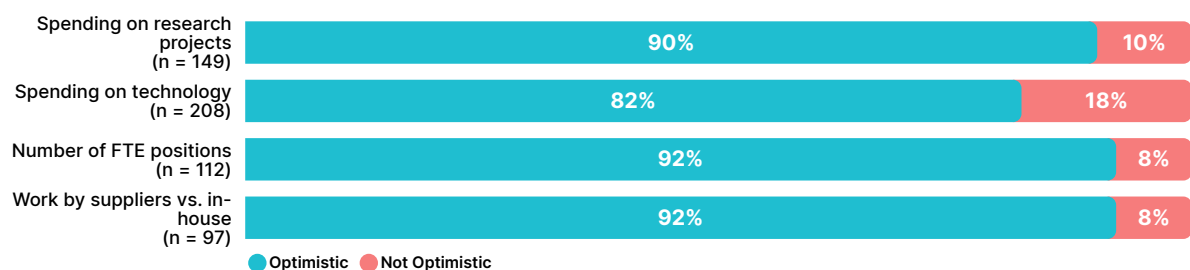
Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are most optimistic about their roles when their research budgets exceed \$1MM (more than 80%).

Brand-side researchers are extremely optimistic about their roles when research spending (90%), technology spending (82%), FTE staff (92%), and

outsourcing (92%) increase. Possibly, any kind of spending increase communicates stability in their job situation.

OPTIMISM ABOUT DEPARTMENT OR ROLE: INCREASES (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers are extremely optimistic about their roles when research spending (90%), technology spending (82%), FTE staff (92%), and outsourcing (92%) increase.



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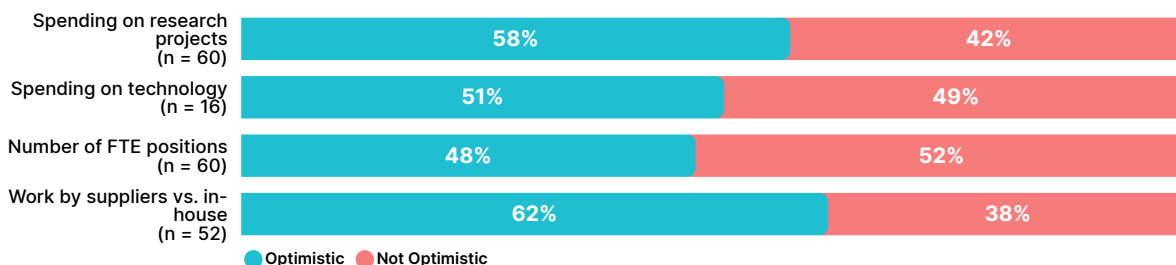
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Brand-side researchers are much less optimistic about their roles when research spending (58%), technology spending (51% - note sample size), FTE staff (48%), and/or outsourcing (62%) decrease. Unlike increases, which seem to lift optimism in harmony, decreases

have more severe effects depending on which area decreases. For example, when FTE staff decreases, optimism drops lower than when research project budgets decrease. I

OPTIMISM ABOUT DEPARTMENT OR ROLE: DECREASES (BRAND)



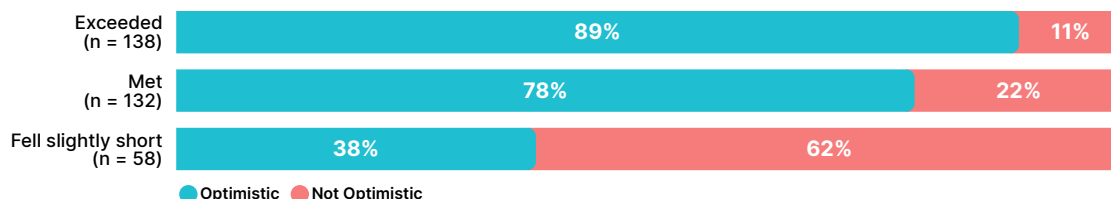
Source: GRIT Report and NewtonX

Takeaway: Brand-side researchers are much less optimistic about their roles when research spending (58%), technology spending (51%), FTE staff (48%), and outsourcing (62%) decrease.

As we would intuitively expect, optimism about the future of their jobs drops as their organization's performance against goals declines. Brand-side insights professionals are most optimistic about their

roles when goals are exceeded (89%) than when goals are met (78%) and especially than when they fall short (38%).

OPTIMISM ABOUT DEPARTMENT OR ROLE: PERFORMANCE AGAINST GOALS (BRAND)



Source: GRIT Report and NewtonX

Takeaway: Brand-side insights professionals are more optimistic about their roles when their organizations exceed their goals (89%) than when goals are met (78%) and especially than when they fall short (38%).



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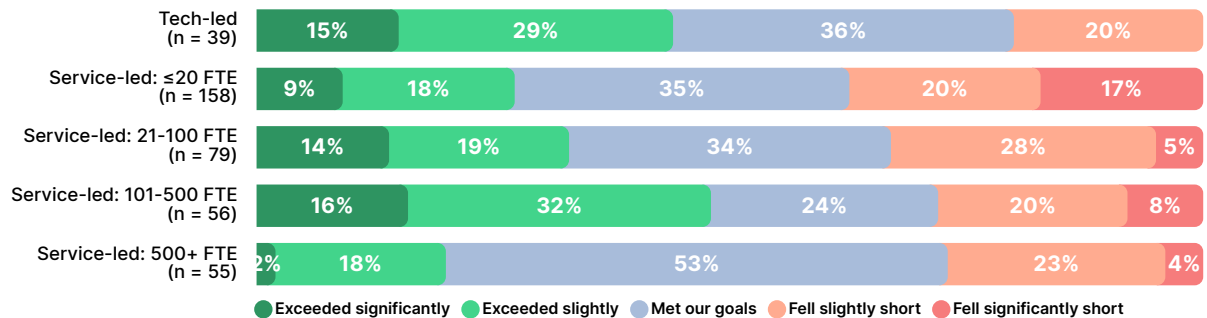
GOAL PERFORMANCE AND OPTIMISM |

SUPPLIER POV [DATA]

Currently, goal performance varies widely across supplier segments. More than 40% of service-led suppliers with 101 to 500 FTE (48%) and tech-led suppliers (44%) exceeded goals, compared to only 33% of those with 21 to 100 FTE, 27% of those with ≤20 FTE, and 20% of those with 500+ FTE. Among

tech-led suppliers, the gap between those who exceeded goals versus those who fell short is +24%, and it's +20% for service-led suppliers with 101 to 500 FTE. It's even for those with 21 to 100 FTE, and more fell short than exceeded goals among those with ≤20 FTE (-10%) and those with 500+ FTE (-7%).

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: SUPPLIER SEGMENT

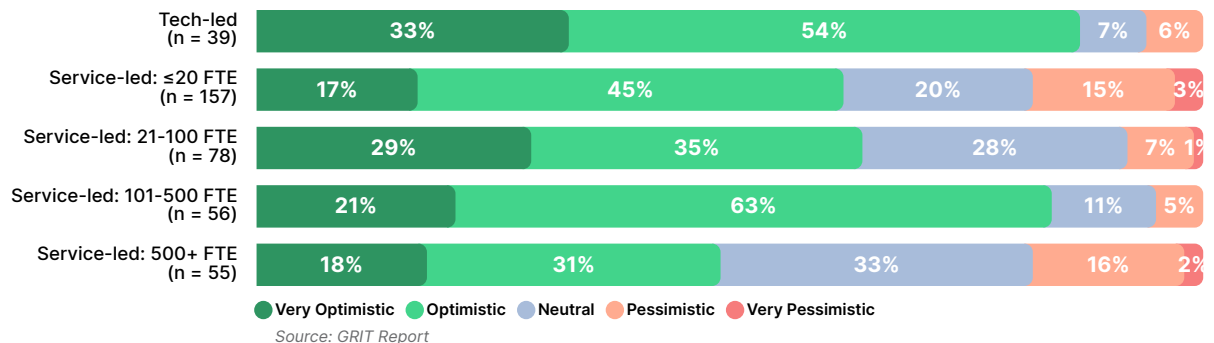


Takeaway: More than 40% of service-led suppliers with 101 to 500 FTE (47%) and tech-led suppliers (44%) exceeded goals, compared to only 33% of those with 21 to 100 FTE, 27% of those with ≤20 FTE, and 21% of those with 500+ FTE.

The gap between optimism and pessimism about the future of their companies also varies. It's +81% for tech-led suppliers and +79% for service-led suppliers

with 101 to 500 FTE. It falls to +56% for those with 21 to 100 FTE, then +43% for those with ≤20 FTE, and only +31% for those with 500+ FTE.

OPTIMISM ABOUT COMPANY: SUPPLIER SEGMENT



Takeaway: Tech-led suppliers (87%) and service-led suppliers with 101-500 FTE (84%) show the highest company optimism while fewer than half of service-led with 500+ FTE are optimistic (49%); for service-led with ≤20 FTE and those with 500+ FTE (18% each), company pessimism is more than double any other supplier segment.

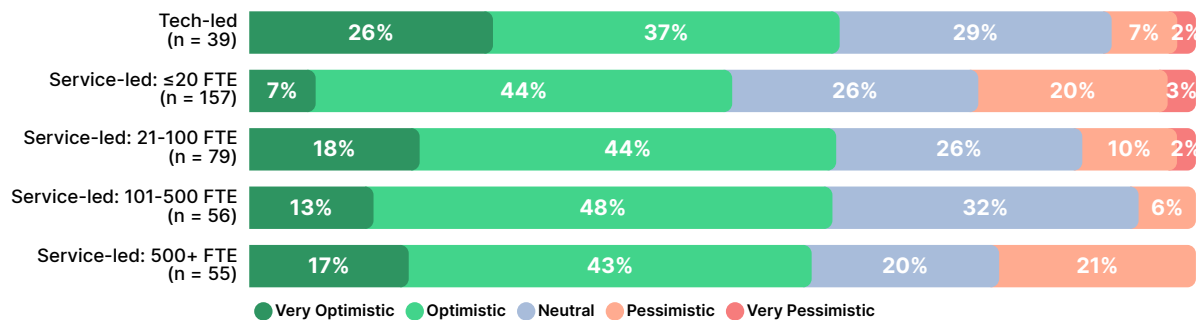




Tech-led suppliers (63%) and service-led suppliers with 101 to 500 FTE (61%) have much less optimism about the industry than about their companies (-24% and -23%). In the other supplier segments, industry

optimism is 62% for those with 21 to 100 FTE, 60% for those with 500+ FTE, and only 51% for those with ≤20FTE.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: SUPPLIER SEGMENT



Source: GRIT Report

Takeaway: Tech-led suppliers (+24%) and service-led suppliers with 101-500 FTE (+23%) have much more optimism about their companies than about the industry; industry pessimism exceeds 20% for service-led with ≤20 FTE (23%) and those with 500+ FTE (21%).



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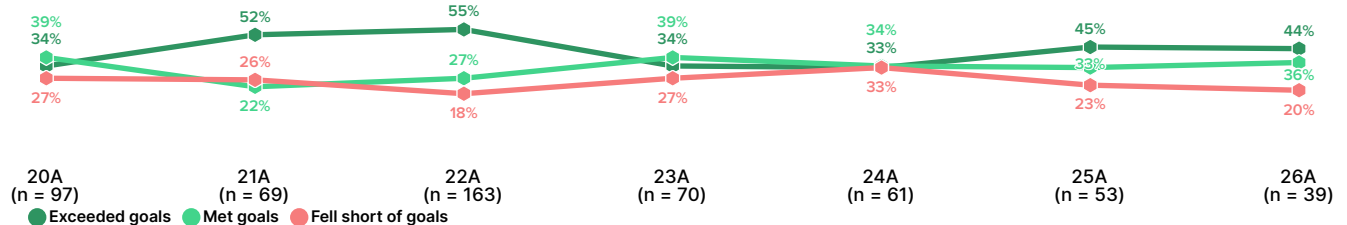
GOAL PERFORMANCE AND OPTIMISM |

TECH-LED POV [DATA]

While recovering from the pandemic in 22A, tech-led suppliers who exceeded goals peaked at 55% before plunging to 34% in 23A and 33% in 24A, similar to the level coming into the pandemic (34%). Last year, it jumped to 45% and remains at 44% currently. Possibly, the percentage exceeding expectations soared during

the pandemic because goals were recalibrated, then dropped once business returned to closer to usual. The current upswing could be spurred by the emergence of genAI and a pivot from reeling from the challenges it presents to how to adjust to make the most of it.

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (TECH-LED)



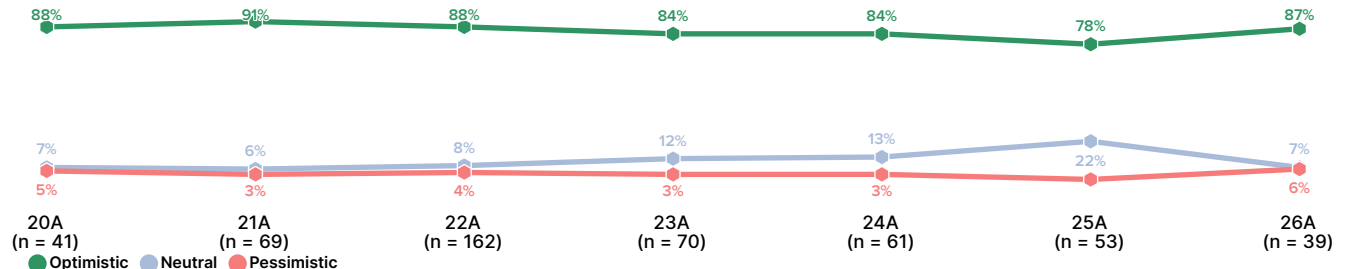
Source: GRIT Report

Takeaway: While recovering from the pandemic in 22A, tech-led suppliers who exceeded goals peaked at 55% before plunging to 34% in 23A; now, more are exceeding goals (44%) than had been going into the pandemic (34%).

Tech-led suppliers were the only segment to thrive during the pandemic, and optimism about their companies actually ticked up slightly from 88% to 91% in 21A. Since then, it had gradually but continuously declined to 78% last year before rebounding to 87% this year.

in 21A. Since then, it had gradually but continuously declined to 78% last year before rebounding to 87% this year.

OPTIMISM ABOUT COMPANY: GRIT WAVE (TECH-LED)



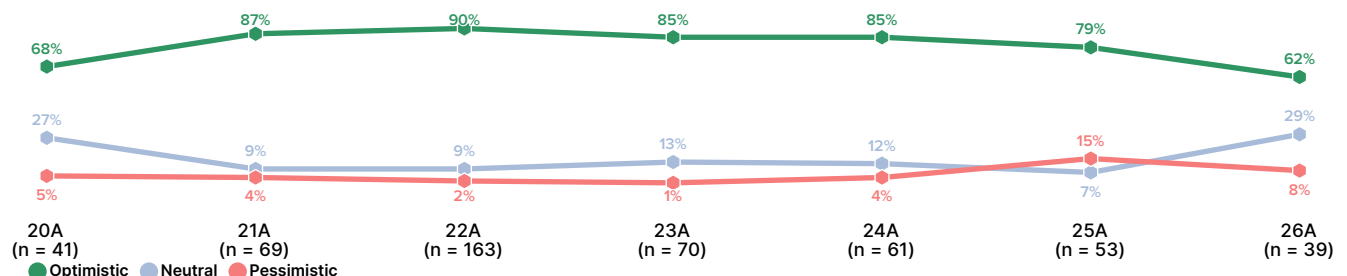
Source: GRIT Report

Takeaway: Tech-led suppliers were the only segment to thrive during the pandemic, with optimism about their companies peaking at 91% in 21A; since then, it had gradually declined to 78% last year before rebounding to 87% this year.

Industry optimism also peaked in 21A (87%) and 22A (90%) even though it was only 68% going into it. By 25A, it fell to 79%, then to below its pre-pandemic level this year (62%). The percentage who are pessimistic about the industry didn't spike, however, until last year (+11% to 15%), and is now about half that (8%), its second-highest level. Company optimism

is more resilient than optimism about the industry, which may indicate that tech-led suppliers consider their market to be broader than traditional insights professionals. This would be consistent with focusing on DIY tools for non-specialists rather than betting on the industry.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (TECH-LED)



Source: GRIT Report

Takeaway: Industry optimism from tech-led suppliers tumbled from 79% in 25A to 62% in 26A, the lowest in the tracked period.



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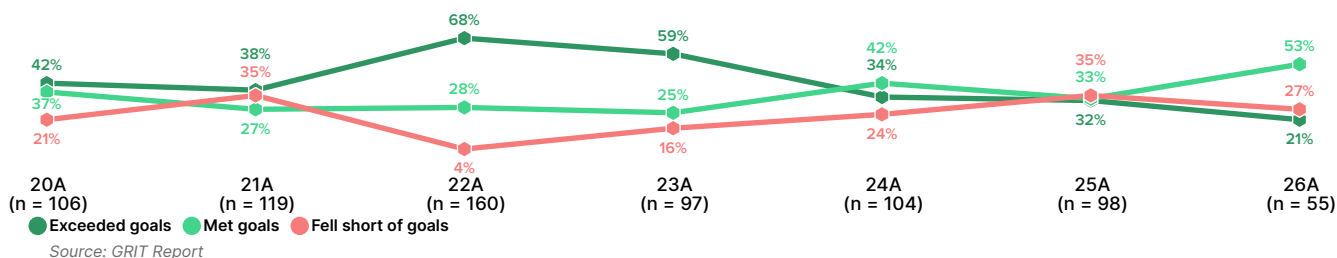
GOAL PERFORMANCE AND OPTIMISM |

SERVICE-LED: 500+ FTE POV [DATA]

More suppliers with 500+ FTE fell short of their goals this year (27%) than exceeded them (21%), and this was also the case last year, although to a lesser extent (35% to 32%). Going into the pandemic, twice as many exceeded goals (42%) as fell short (21%). It seems like

the business model that enabled very large service-led suppliers to thrive before the pandemic and genAI happened is no longer successful, and these suppliers are working to transform themselves.

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (SERVICE-LED: 500+ FTE)

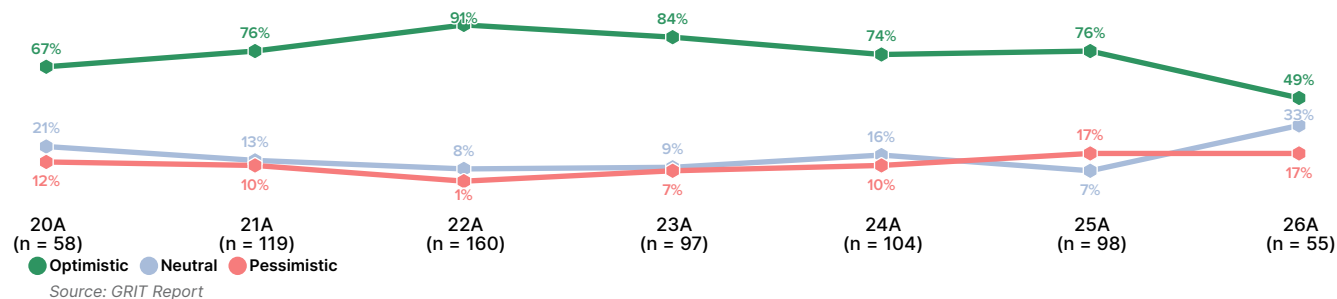


Takeaway: Service-led suppliers with 500+ FTE who exceeded goals fell from 32% in 25A to 21% in 26A, half the total going into the pandemic.

Although the percentage of service-led suppliers with 500+ FTE who fell short of goals outnumbered those who exceeded goals last year, too, at 76% company optimism was +2% higher than 24A when those who exceeded goals was more than those who fell short.

However, pessimism increased from 10% to 17% where it remains now; perhaps the spike in pessimism augured the -27% drop in company optimism to the current 49%.

OPTIMISM ABOUT COMPANY: GRIT WAVE (SERVICE-LED: 500+ FTE)

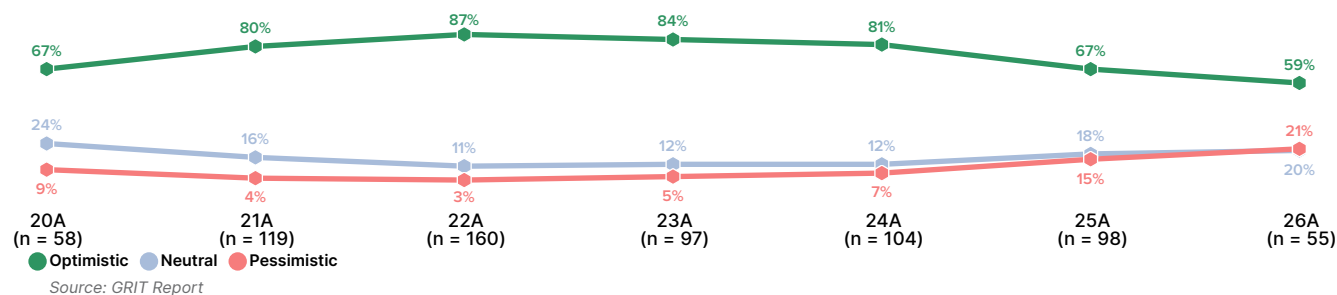


Takeaway: Company optimism among service-led suppliers with 500+ FTE dropped sharply from 76% last year to 49%, lowest in the tracked period.

Unlike tech-led suppliers, service-led suppliers with 500+ FTE now have more optimism about the future of the industry (59%) than about their company's future (49%). However, industry optimism fell -8% since last year, below its pre-pandemic level (67%).

Industry pessimism is at an all-time high (21%), after its fourth consecutive increase. Service-led suppliers with 500+ FTE seem to see their company's future as more entwined with the industry's prospects than tech-led suppliers do.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (SERVICE-LED: 500+ FTE)



Takeaway: Industry optimism among service-led suppliers with 500+ FTE declined from 67% in 25A to 59% in 26A, continuing a multi-wave fall from 87% in 22A; over that period, pessimism has increased seven-fold from 3% to 21%.



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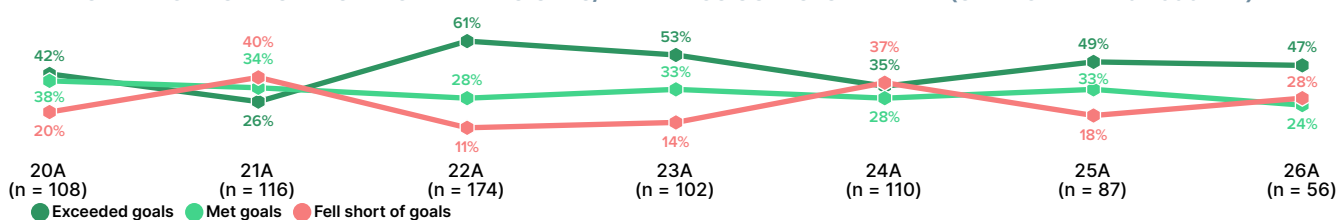
GOAL PERFORMANCE AND OPTIMISM |

SERVICE-LED: 101-500 FTE POV [DATA]

Among service-led suppliers with 101 to 500 FTE, the percentage who exceeded goals (47%) was just below last year's 49%, but still +12% over two years ago when the industry started reeling from the genAI explosion. It's higher than it was going into the pandemic (42%).

The percentage falling short of goals, however, increased +10% over last year to 28%, its third-highest level and more than those who fell short going into the pandemic (20%). The movement at both extremes could be a function of the amount of transformation occurring within the segment. However, it might also be driven by struggling very large suppliers who downsized into the segment.

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (SERVICE-LED: 101-500 FTE)

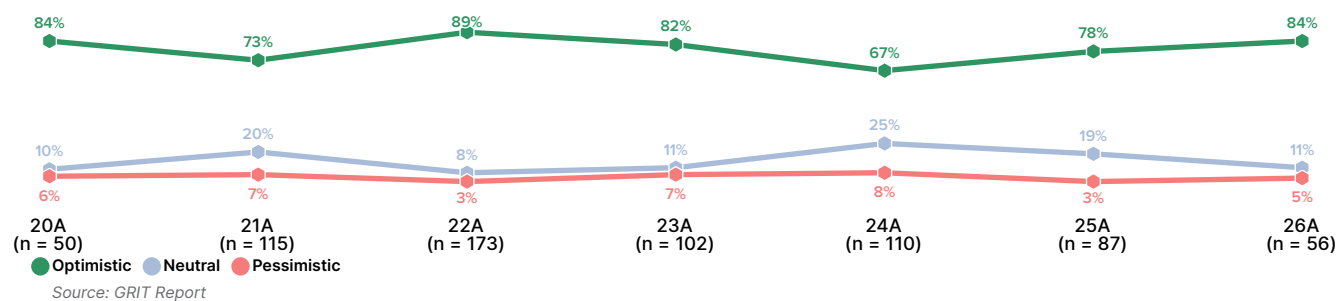


Takeaway: Service-led suppliers with 101-500 FTE exceeding goals declined slightly from 49% in 25A to 47% in 26A, while those falling short grew from 18% to 28%.

Company optimism among service-led suppliers with 101-500 FTE continued to increase from 24A's low point (67%) to the current 84%, matching the level

going into the pandemic. Pessimism (5%) is at its third-lowest value across seven years.

OPTIMISM ABOUT COMPANY: GRIT WAVE (SERVICE-LED: 101-500 FTE)

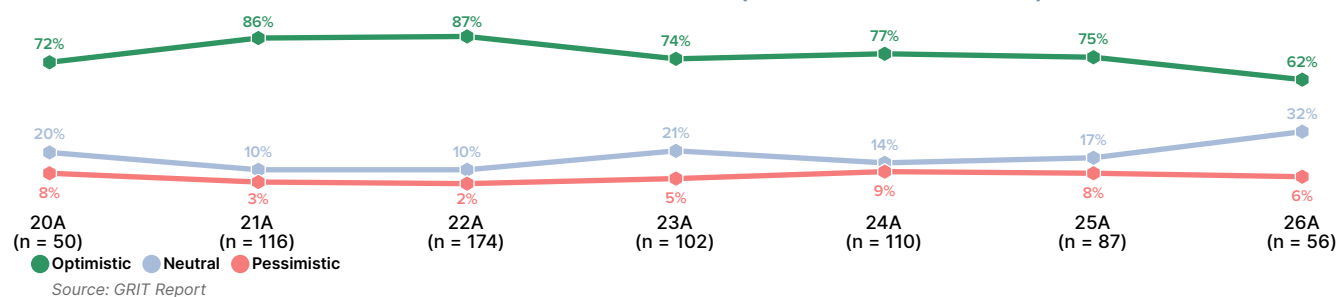


Takeaway: Company optimism among service-led suppliers with 101-500 FTE (84%) continued to increase from 24A's low point (67%), matching the level going into the pandemic.

Industry optimism, on the other hand, fell -13% among service-led suppliers with 101-500 FTE from 75% last year to 62% currently. Overall, it's down -25% from

22A's peak of 87%. Like tech-led suppliers, this seems to be another segment whose fortunes are perceived to be independent of the industry's.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (SERVICE-LED: 101-500 FTE)



Takeaway: Industry optimism among service-led suppliers with 101-500 FTE fell from 75% in 25A to 62% in 26A, lowest in the tracked period.



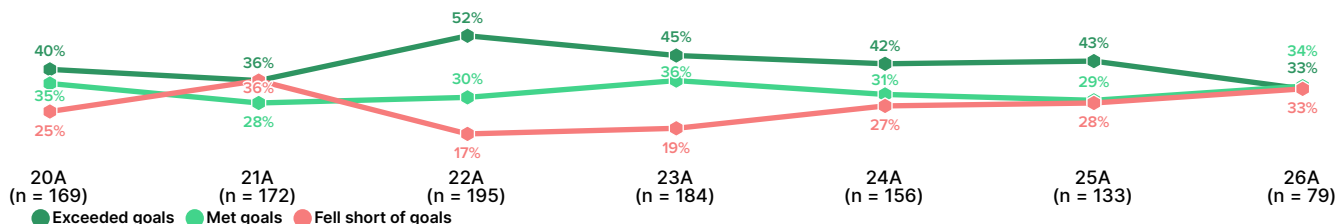
GOAL PERFORMANCE AND OPTIMISM |

SERVICE-LED: 21-100 FTE POV [DATA]

After four years during which those exceeding goals outnumbered those falling short by at least +15%, as many service-led suppliers with 21 to 100 FTE fell short as exceeded goals this year (33% each). The

only other time this happened was in the depth of the pandemic (36% each way in 21A). The percentage exceeding goals is their lowest yet.

PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (SERVICE-LED: 21-100 FTE)

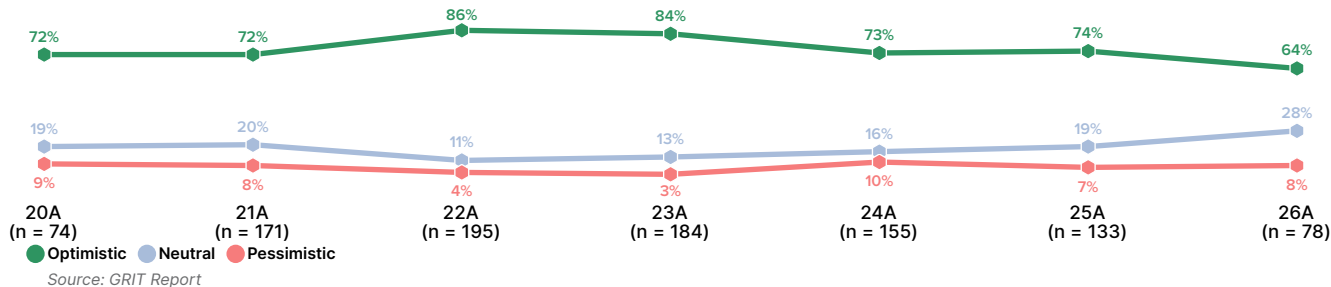


Takeaway: Service-led suppliers with 21-100 FTE exceeding goals fell from 43% in 25A to 33% in 26A, lowest in the tracked period, while those falling short rose from 28% to 33%.

Company optimism has also declined to its lowest point among service-led suppliers with 21 to 100 FTE, -10% to 64%. The previous low was 72% at the onset

of the pandemic from 20A to 21A. Pessimism (8%) as right around its historical norm.

OPTIMISM ABOUT COMPANY: GRIT WAVE (SERVICE-LED: 21-100 FTE)

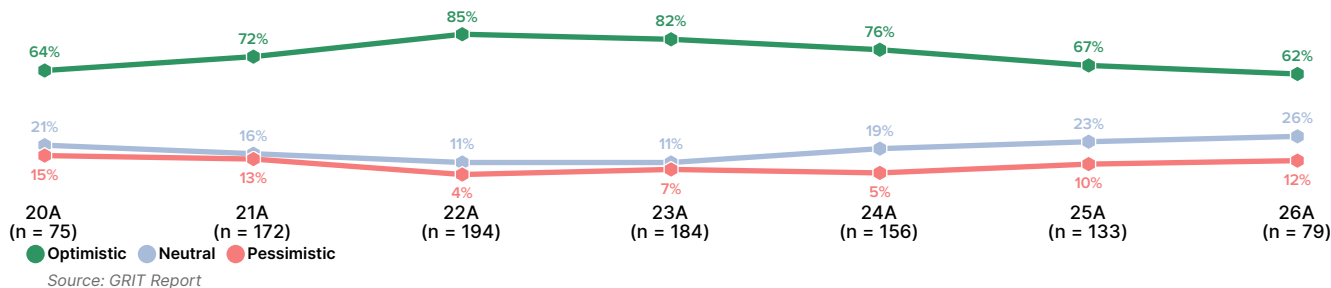


Takeaway: Company optimism among service-led suppliers with 21-100 FTE declined from 74% in 25A to 64% in 26A, lowest in the tracked period; pessimism held at 8%.

Service-led suppliers with 21 to 100 FTE's optimism about the future of the industry fell to a new low (62%) after a fourth straight decline. Peaking at 85% in 22A, it's now below where it was going into the

pandemic (64%). Pessimism (12%) is still elevated above its range from 22A to 24A (4% to 7%). Their company optimism seems to correlate with how they feel about the industry.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (SERVICE-LED: 21-100 FTE)



Takeaway: Industry optimism among service-led suppliers with 21-100 FTE declined from 67% last year to 62% currently, continuing a multi-wave decline from 85% in 22A; pessimism rose slightly from 10% to 12%.



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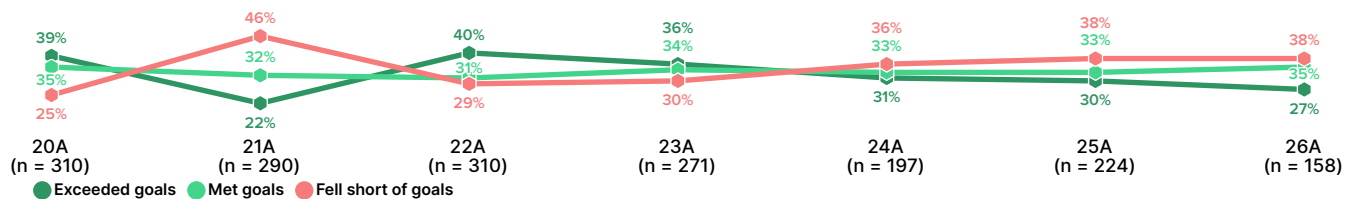
GOAL PERFORMANCE AND OPTIMISM |

SERVICE-LED: ≤20 FTE POV [DATA]

For the third year in a row, the percentage of service-led suppliers with ≤20 FTE who fell short of goals (38%) topped the percentage who exceeded them (27%). The percentage exceeding goals is the second-lowest after the pandemic's nadir (22% in 21A), and the percentage of those falling short equals last year's mark and is +2% higher than it was two years ago (36%).

Heading into the pandemic, service-led suppliers with ≤20 FTE who exceeded goals outnumbered those who fell short by +14% (39% to 25%). Although by smaller margins, this also happened during the recovery from the pandemic when goals may have been recalibrated. It certainly looks like the business realities for the smallest suppliers have become permanently more challenging since the onset of the pandemic.

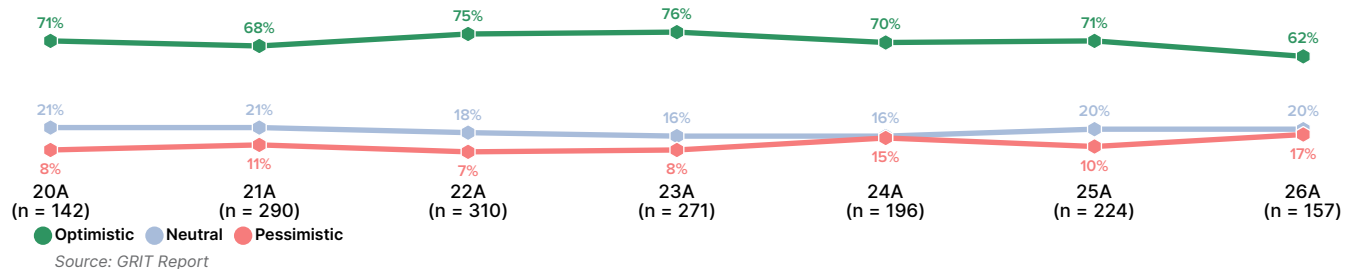
PERFORMANCE AGAINST RESEARCH AND INSIGHTS/ANALYTICS GOALS: GRIT WAVE (SERVICE-LED: ≤20 FTE)



Takeaway: Service-led suppliers with ≤20 FTE have persistently declined in goal performance since 22A: those exceeding goals fell from 40% in 22A to 27% in 26A; those falling short have remained at 38% for two consecutive waves.

Company optimism is down -9% from last year to 62%, of 17% after a +7% increase. Its lowest point ever. Pessimism is at an all-time high

OPTIMISM ABOUT COMPANY: GRIT WAVE (SERVICE-LED: ≤20 FTE)

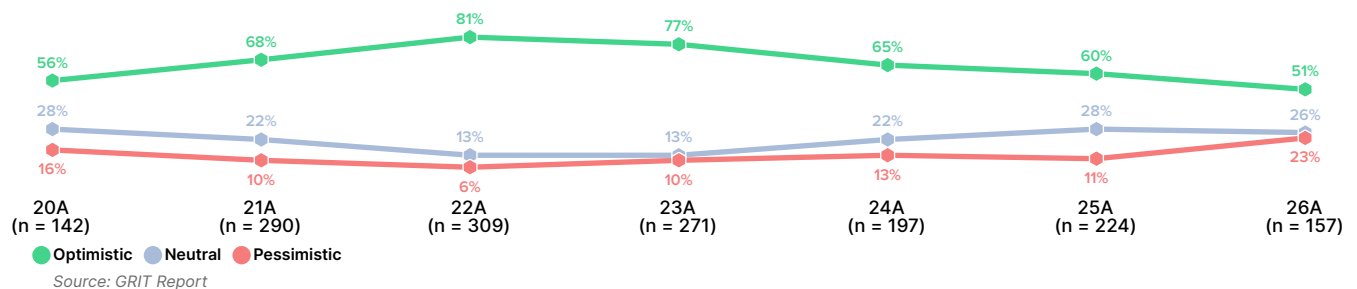


Takeaway: Company optimism among service-led suppliers with ≤20 FTE declined from 71% last year to 62% currently, lowest in the tracked period; pessimism grew from 10% to 17%, also the highest in the series.

Like service-led suppliers with 21 to 100 FTE, those with ≤20 FTE seem to see their future as dependent on the industry's future. Industry optimism fell -9% to a new low of 51% while pessimism more than doubled

since last year from 11% to 23%. Industry optimism peaked at 81% as the pandemic recovery came into focus, but has diminished for four consecutive years.

OPTIMISM ABOUT INSIGHTS & ANALYTICS INDUSTRY: GRIT WAVE (SERVICE-LED: ≤20 FTE)



Takeaway: Industry optimism among service-led suppliers with ≤20 FTE fell from 60% in 25A to 51% in 26A, lowest level in the tracked period; pessimism more than doubled, from 11% to 23%, highest in the series.

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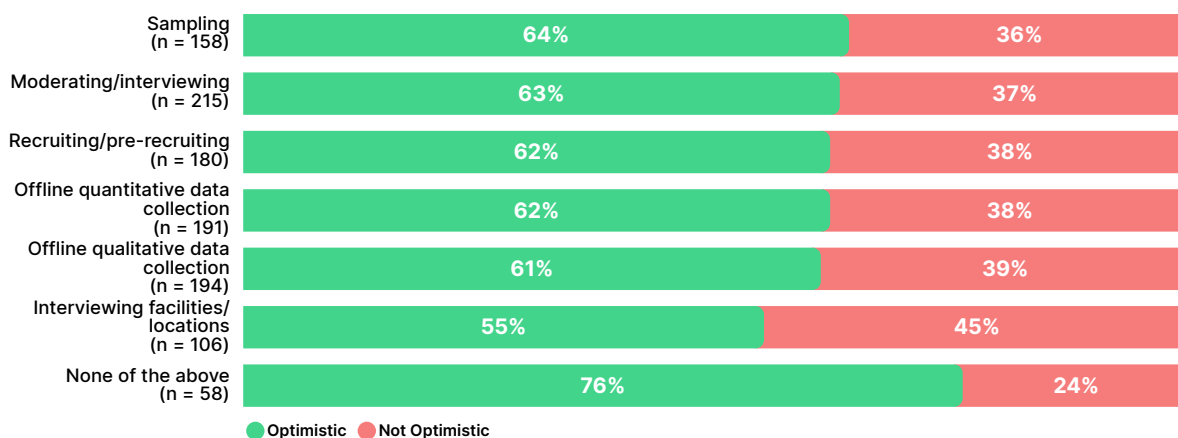


OPTIMISM & IDENTITY | SERVICE-LED SUPPLIER POV ^[DATA]

Let's take a cursory look at some of the factors that are associated with higher or lower company optimism among service-led suppliers. There are differences with tech-led suppliers and across company size bands, but we'll focus on service-led in aggregate in the interest of sample size and report real estate.

Of service-led suppliers who offer sampling, 64% are optimistic about their company's future compared to only 55% of those who offer interviewing facilities and locations. However, those who don't offer data collection services are even more optimistic (76%).

OPTIMISM ABOUT COMPANY: DATA COLLECTION SERVICES (SERVICE-LED SUPPLIER)



Source: GRIT Report

Takeaway: Service-led suppliers who offer sampling (64%) are more optimistic about their company's future than those who offer interviewing facilities (55%), but not as optimistic as those who do not offer data collection services (76%).

People are fluid. Your insight tool finally is too.

Meet Attest Explore - AI moderated interviews that uncover the real why. Fast.

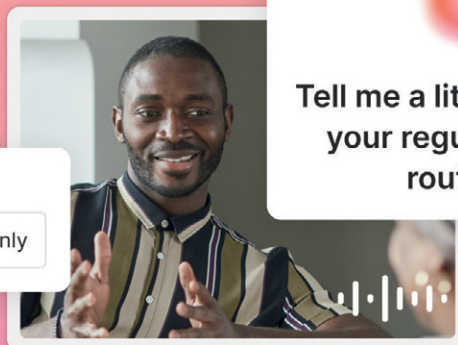
Qual meets quant, on your terms.



Interview type

Video

Audio only



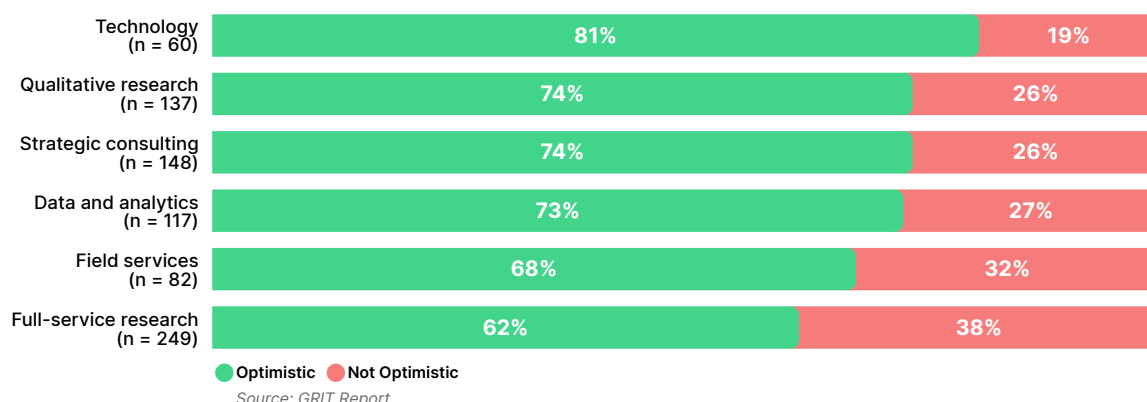
Tell me a little bit about your regular coffee routine?



Despite a lot of overlap in terms of significant revenue sources across service-led suppliers, the sources distinguish higher company optimism from lower. Those who draw significant revenue from technology are the most optimistic about their company's future (81%), followed by qualitative research (74%), strategic consulting (74%), and data and analytics (73%). Those who earn significant revenue from full-service research are the least optimistic of all (62%).

In *Evolving Supplier Landscape* and other sections, we've noted how part of the service-led supplier with 500+ FTE strategy is to pivot away from full-service research. We've also noted in *Brand-side Teams & Roles* and *Investing in Insights* how brand-side insights professionals are becoming more self-sufficient. Whereas the pandemic made it more advantageous to use full-service research suppliers as project managers, maybe the pendulum is starting to swing back toward specialist services.

OPTIMISM ABOUT COMPANY: SIGNIFICANT REVENUE SOURCES (SERVICE-LED SUPPLIER)

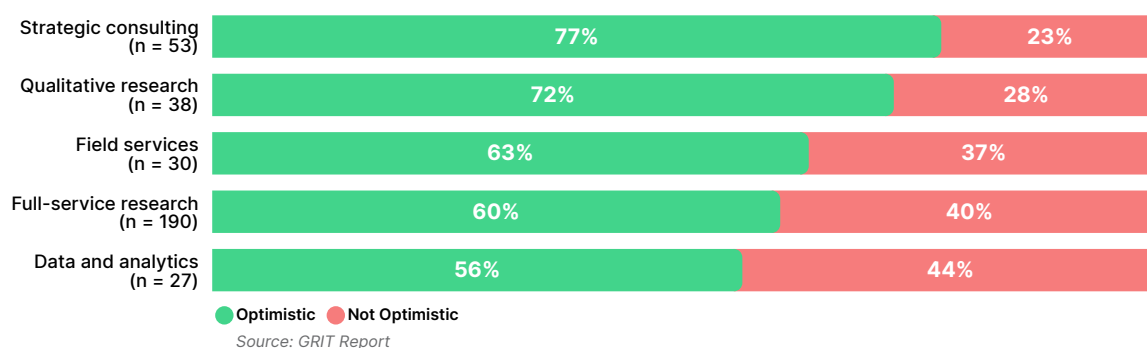


Takeaway: Service-led suppliers with who earn revenue from technology offerings are the most optimistic about the future of their company (81%).

We also see differences in company optimism according to which revenue source is considered the strongest. Strategic consultants (77%) and qualitative researchers (72%) are the most optimistic. Those defined by field services (63%), full-service research (60%), and data and analytics (56%) are

less optimistic. Recall that brand-side optimism is higher when they work with strategic consultants and qualitative researchers, so these areas could represent good synergy between supplier offerings and demand-side needs. They might also be the areas least likely to be successfully taken in-house.

OPTIMISM ABOUT COMPANY: HIGHEST REVENUE SOURCE (SERVICE-LED SUPPLIER)



Takeaway: Those whose defining source of revenue is strategic consulting are the most optimistic about the future of their company (77%) followed by those in qualitative research (72%).

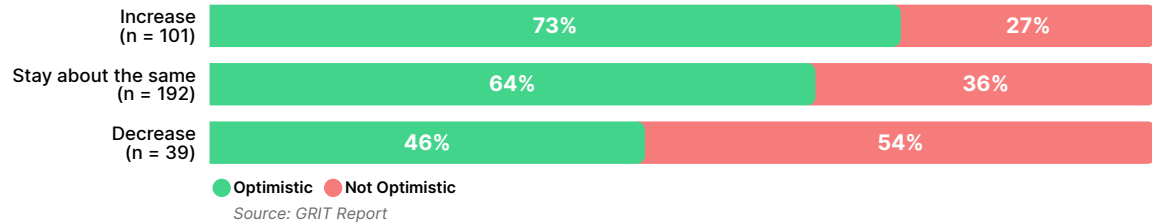




Service-led suppliers who expect outsourcing to increase are more optimistic about the future of their own companies (73%) than those who expect it to stay the same (64%) or decrease (46%). It could represent hopes they have for their own business if outsourcing

increases generally, or it could represent how much of an insurance policy it is to have the opportunity to hire people who are more expert or find relief from over-capacity demands by hiring others as needed.

OPTIMISM ABOUT COMPANY: EXPECTED OUTSOURCING TREND (SERVICE-LED SUPPLIER)

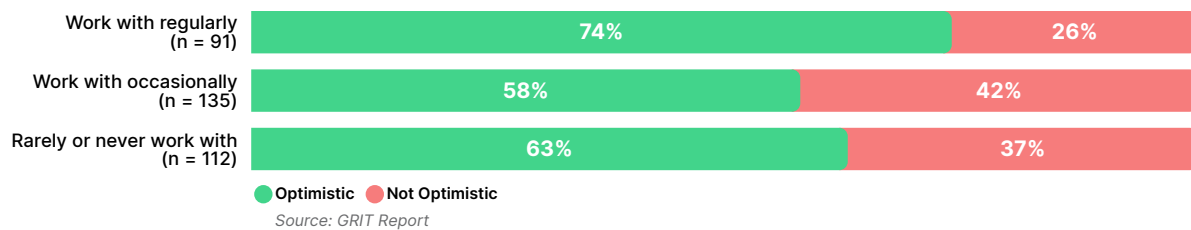


Takeaway: Service-led suppliers who expect outsourcing to increase are more optimistic about the future of their own companies (73%) than those who expect it to stay the same (64%) or decrease (46%).

In GRIT, we ask which suppliers participants work with regularly, occasionally, or rarely or never. On the brand-side, we assume it means they hire them, but, on the supplier side, it could go either way or be a partnership. These contacts are related to different levels of optimism about a company's future.

Service-led suppliers who work regularly with data and analytics suppliers are more optimistic about their own company (74%) than those who work with them occasionally (58%) or rarely or never (63%).

OPTIMISM ABOUT COMPANY: DATA & ANALYTICS SUPPLIERS (SERVICE-LED SUPPLIER)

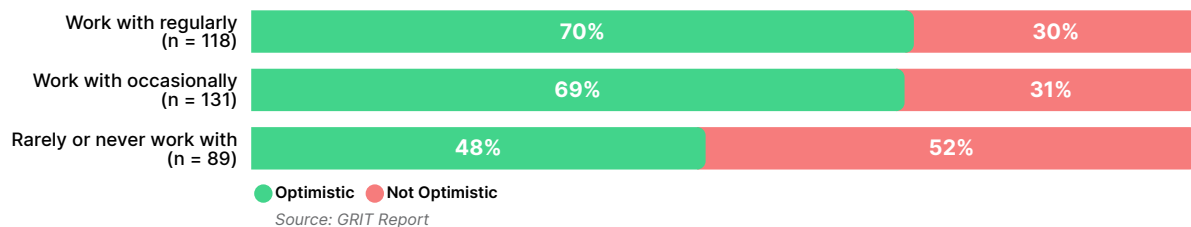


Takeaway: Service-led suppliers who work regularly with data and analytics suppliers are more optimistic about their own company (74%) than those who work with them occasionally (58%) or rarely or never (63%).

In addition to working with data and analytics providers, service-led suppliers who work with qualitative researchers regularly (70%) or

occasionally (69%) are more optimistic about their company's future than those who rarely or never work with them (48%).

OPTIMISM ABOUT COMPANY: QUALITATIVE RESEARCH SUPPLIERS (SERVICE-LED SUPPLIER)



Takeaway: Service-led suppliers who work with qualitative researchers regularly (70%) or occasionally (69%) are more optimistic about their company's future than those who rarely or never work with them (48%).





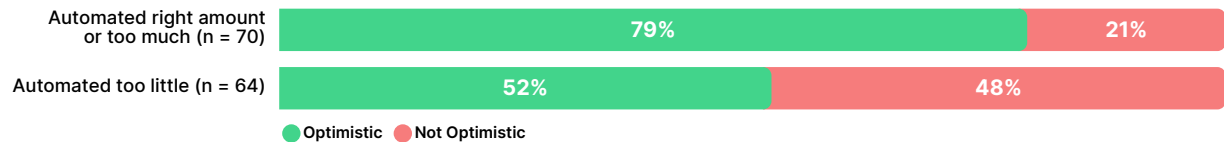
OPTIMISM & MANAGING INSIGHTS |

SERVICE-LED SUPPLIER POV [DATA]

Sometimes, the way insights work is managed is related to higher and lower levels of company optimism. When service-led suppliers think automation is used too little for sourcing participants and data,

only 52% are optimistic about their company's future compared to 79% who believe they use it the right amount or too much.

OPTIMISM ABOUT COMPANY: SOURCING PARTICIPANTS & DATA (SERVICE-LED SUPPLIER)



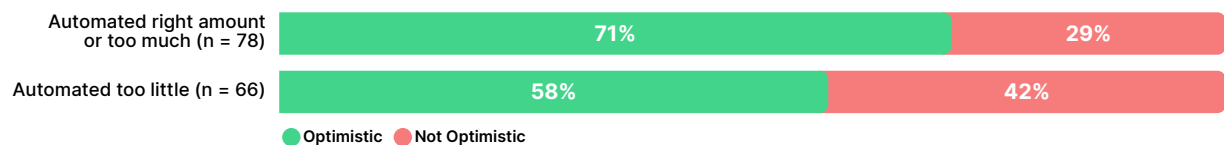
Source: GRIT Report

Takeaway: When service-led suppliers think automation is used too little for sourcing participants and data, only 52% are optimistic about their company's future compared to 79% who believe they use it the right amount or too much.

When service-led suppliers think automation is not used enough for executing fieldwork, only 58% are

optimistic about their company's future compared to 71% of those who think it is used enough or too much.

OPTIMISM ABOUT COMPANY: EXECUTING FIELDWORK (SERVICE-LED SUPPLIER)



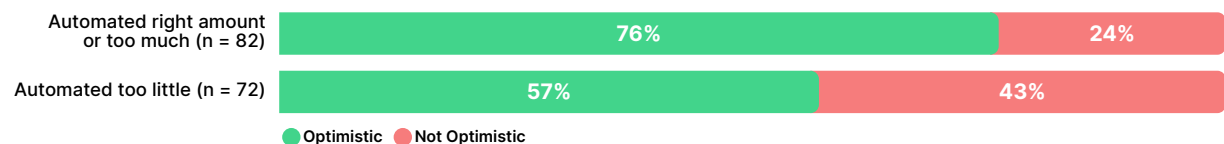
Source: GRIT Report

Takeaway: When service-led suppliers think automation is not used enough for executing fieldwork, only 58% are optimistic about their company's future compared to 71% of those who think it is used enough or too much.

When service-led suppliers think automation is not used enough for preparing and integrating data, only 57% are optimistic about their company's future

compared to 76% of those who think it is used enough or too much.

OPTIMISM ABOUT COMPANY: PREPARING & INTEGRATING DATA (SERVICE-LED SUPPLIER)



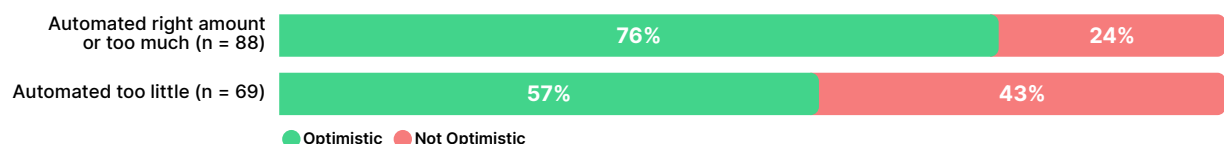
Source: GRIT Report

Takeaway: When service-led suppliers think automation is not used enough for preparing and integrating data, only 57% are optimistic about their company's future compared to 76% of those who think it is used enough or too much.

When service-led suppliers think automation is not used enough for analyzing and modeling insights, only 57% are optimistic about their company's future

compared to 76% of those who think it is used enough or too much.

OPTIMISM ABOUT COMPANY: ANALYZING & MODELING (SERVICE-LED SUPPLIER)



Source: GRIT Report

Takeaway: When service-led suppliers think automation is not used enough for analyzing and modeling insights, only 57% are optimistic about their company's future compared to 76% of those who think it is used enough or too much.



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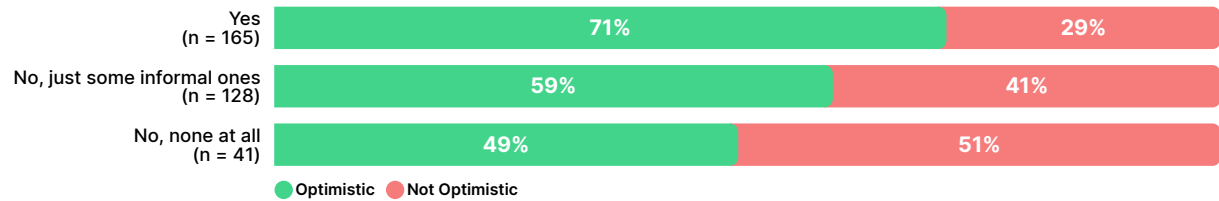
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Service-led suppliers are more optimistic about their company's future when their organization has formal

guidelines for AI use in insights (71%) than if they only have informal ones (59%) or none at all (49%).

OPTIMISM ABOUT COMPANY: GUIDELINES FOR AI USE (SERVICE-LED SUPPLIER)



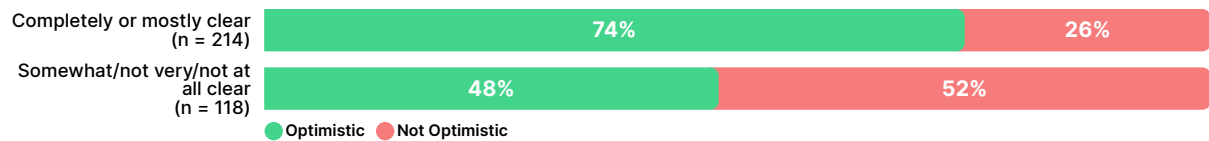
Source: GRIT Report

Takeaway: Service-led suppliers are more optimistic about their company's future when their organization has formal guidelines for AI use in insights (71%) than if they only have informal ones (59%) or none at all (49%).

When expectations for use of AI tools and automation in insights work are completely or mostly clear, 74% of service-led suppliers are optimistic about the future

of their company compared to just 48% when they are not.

OPTIMISM ABOUT COMPANY: CLARITY OF EXPECTATIONS FOR AI USE (SERVICE-LED SUPPLIER)



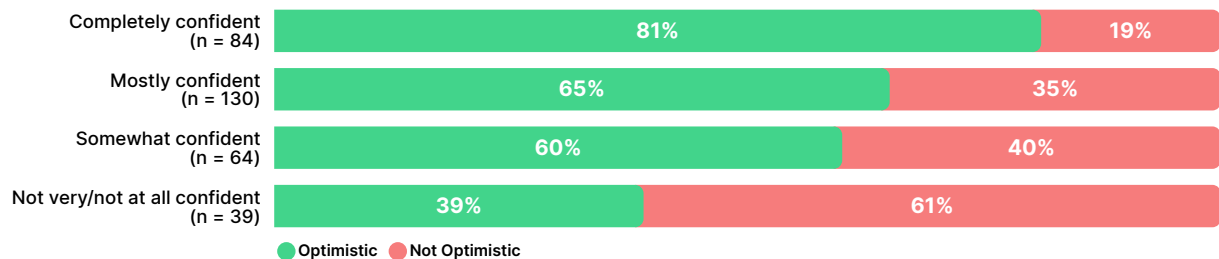
Source: GRIT Report

Takeaway: When expectations for use of AI tools and automation in insights work are completely or mostly clear, 74% of service-led suppliers are optimistic about the future of their company compared to just 48% when they are not.

When service-led suppliers are completely confident in their organization's ability to minimize risks of AI misuse, 81% are optimistic about their company's

future; when confidence is low, only 39% are optimistic. In between, optimism ranges from 60% to 65%.

OPTIMISM ABOUT COMPANY: CONFIDENCE IN MINIMIZING RISKS OF AI MISUSE (SERVICE-LED SUPPLIER)



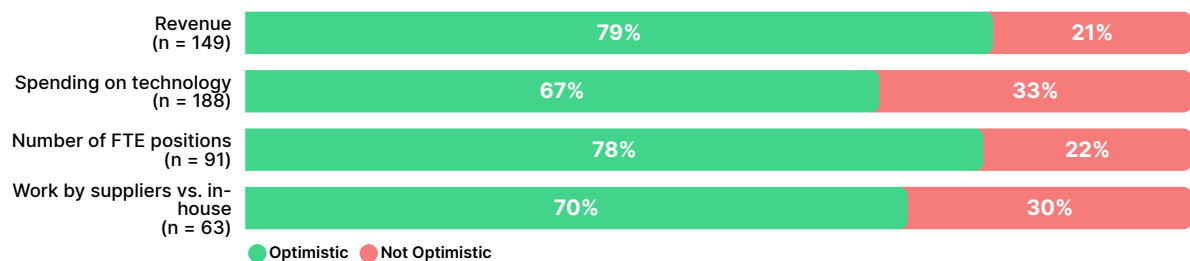
Source: GRIT Report

Takeaway: When service-led suppliers are completely confident in their organization's ability to minimize risks of AI misuse, 81% are optimistic about their company's future; when confidence is low, only 39% are optimistic.

Optimism about the company's future is high when revenue (79%), technology spending (67%), staff size (78%), and/or outsourcing (70%) increase. Staff size

increases are as strongly related to optimism as revenue increases, and it could be that the two usually co-occur.

OPTIMISM ABOUT COMPANY: INCREASES (SERVICE-LED SUPPLIER)



Source: GRIT Report

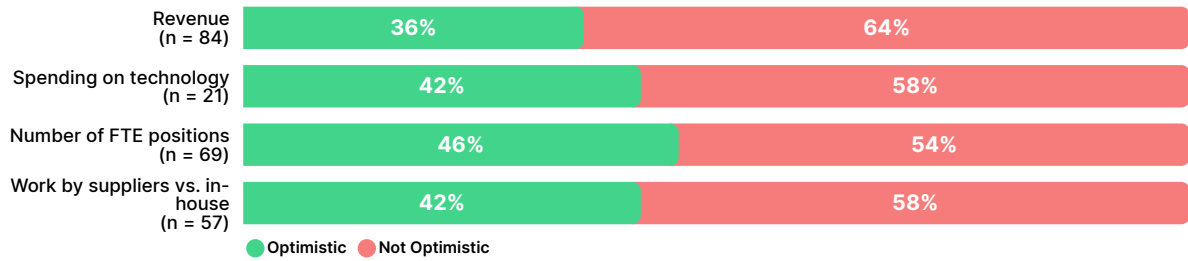
Takeaway: Optimism about the company's future is high when revenue (79%), technology spending (67%), staff size (78%), and/or outsourcing (70%) increase.



Lower levels of optimism about the company's future are associated with decreasing revenue (36%),

technology spending (42%), staff size (46%), and/or outsourcing (42%).

OPTIMISM ABOUT COMPANY: DECREASES (SERVICE-LED SUPPLIER)



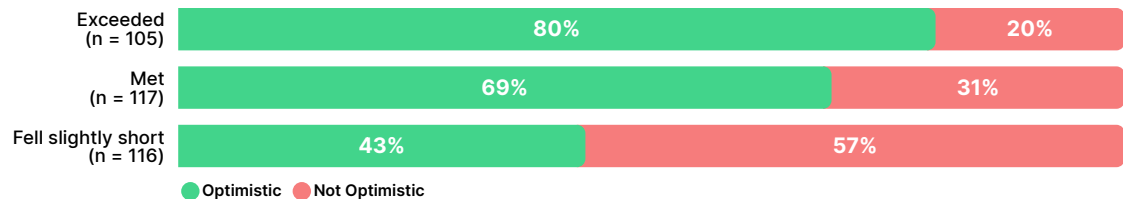
Source: GRIT Report

Takeaway: Lower levels of optimism about the company's future are associated with decreasing revenue (36%), technology spending (42%), staff size (46%), and/or outsourcing (42%).

As we would intuitively expect, optimism about the future of their company drops as their organization's performance against goals declines. Service-led suppliers are most optimistic about their company

when goals are exceeded (80%) than when goals are met (69%) and especially than when they fall short (43%).

OPTIMISM ABOUT COMPANY: PERFORMANCE AGAINST GOALS (SERVICE-LED SUPPLIER)



Source: GRIT Report

Takeaway: Service-led suppliers are most optimistic about their company when goals are exceeded (80%) than when goals are met (69%) and especially than when they fall short (43%).

THE BIG PICTURE [STRATEGIC INTERPRETATION]

When we look at mood and confidence, we find a lot of consistency with the segment themes we've developed throughout this report.

GRIT asks for optimism before asking participants about their business outlook, and now we find that each segment's economic condition clearly reverberates through their top-of-mind feelings. The confidence hierarchy with tech-led and service-led suppliers with 101 to 500 FTE at the top and those in the extreme service-led size bands at the bottom fits our *Business Outlook* expectations, and the segment performances against insights goals connects the impressions to the reality. The segments building capability are confident; the segments restructuring or under the most pressure are not.



The confidence hierarchy with tech-led suppliers and service-led with 101 to 500 FTE at the top and those in the extreme service-led size bands at the bottom fits our *Business Outlook* expectations.



Company optimism and industry optimism are diverging for the segments performing best. Tech-led suppliers are much more optimistic about their own company than about the industry. Service-led suppliers with 101 to 500 FTE show the same gap. These are the two most optimistic segments about their own situations, yet they're among the least confident in the industry's future. This is either a sign of healthy self-reliance or a warning that the industry's infrastructure is being undermined by its most capable participants.

The inverse is true for the smaller and largest service-led suppliers, whose company and industry optimism move together. Segments that believe their fortunes are self-determined are decoupling from the industry's trajectory; segments that feel more dependent on industry conditions are not.

The service-led supplier with 500+ FTE segment is struggling to realize their own capacity for self-determination. Company optimism fell to its lowest point after a sharper single-year drop than anything seen during the pandemic. Their industry pessimism has increased seven-fold since 22A. This segment knows its restructuring story better than anyone,

and the mood data suggests the uncertainty of that transition is ongoing. After two years in which more fell short of goals than exceeded them, the story is still being written.

On the brand-side, proximity to business decisions and distance from pure research execution seems to drive confidence in the role's future. Those in analytics/data science, marketing, or on the executive team are more optimistic than those in insights or research groups. Those whose primary role is insights operations are more optimistic than those whose primary role is in-house research provider. Those who lead brand management are nearly universally optimistic; those who lead consumer market insights are the least. These findings echo the yearning for direct connection to business impact we heard in *Industry Buzz Topics* and *Unmet Needs* from the *Business & Innovation Report*.

The appetite for automation we saw in *Investing in Insights* reveals itself across both brand and supplier segments: the belief that automation is under-utilized is associated with lower optimism. Meanwhile, feeling that AI expectations are clear is associated with higher optimism. The difference between formal and informal AI guidelines matters less than having no guidelines at all. These findings reinforce and extend what *Governance & Risks* established: clarity of expectations is as predictive of confidence as the existence of formal rules. Increasing automation might not impact optimism if it's not introduced in a way that convinces insights professionals that risks have been minimized.

Expected trends in outsourcing play a subtle but important role in building optimism. On the brand side, expecting outsourcing to increase is associated with 84% optimism; expecting it to decrease drops that to 58%. Among service-led suppliers, the numbers are 73% to 46%. The obvious read is that outsourcing signals budget health, but it might be the fixed cost argument that resonates more.

Increasing automation might not impact optimism if it's not introduced in a way that convinces insights professionals that risks have been minimized.



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Outsourcing preserves flexibility. You access capability when you need it without carrying the overhead when you don't. For service-led suppliers with 500+ FTE who are actively trying to reduce their fixed cost burden, the ability to outsource isn't simply convenient; it's a strategic option that automation alone can't replicate, because automation requires its own upfront investment and carries its own sunk costs once made. Across the industry, confidence that you will be able to outsource seems to increase your confidence in your role or company.

The most salient illustration of this point may be the universal connection between use of qualitative research providers and increased optimism. Qual researchers provide high-value, variable-cost access to audience understanding that would be prohibitively expensive to replicate internally. For brands, they function like trusted advisors: external expertise and objectivity that can resolve internal debate in ways internal staff cannot, precisely because they're external and expert. For suppliers, the dynamic is the same: they provide capability that's too specialized to build in-house, considering the size of the world and the number of individuals and markets in it.

Confidence is strongest where insights is closest to business impact and where operating models appear clearest. Tech-led suppliers, service-led 101 to 500 FTE suppliers, and brand-side analytics professionals are the most optimistic, while very small and very large service-led suppliers show different kinds of stress. Morale is therefore not just a feeling; it is an indicator of structural position.
– LM, ed.

Strategic consultants play a similar role for brands as optimism-boosters (although not for suppliers). Compared to other types of suppliers who are methodology experts, qual researchers and strategic consultants are experts on people, markets, and/or business matters. This expertise is expensive to build through human resources, and automation is a hollow replacement.

While some of these historically low *Business Outlook* and *Mood & Confidence* (and performance) results may make it seem like these are the last days of Pompeii, here are a few reasons to be cheerful:

- **Outsourcing availability.** The industry can't bring everything in-house; there are still specialists worth hiring, and the ability to access them on a variable basis remains crucial. For segments managing fixed costs carefully, that's genuinely good news.
- **Qualitative researchers.** Even in an era of automation and AI, the optimism lift associated with working regularly with qual researchers suggests the industry still recognizes and rewards deep audience understanding that can't be easily replicated or automated.
- **Automation.** Having it for the right activities is associated with higher optimism; not having it for those purposes is associated with lower optimism.
- **Clarity.** Establishing clear AI expectations seems to lead to optimism, and this seems to be within everyone's reach if given proper attention.
- **The planners' dreams going right.** The segments actively investing and expanding are also the most optimistic. Next year, maybe we'll see this paying off more for the restructuring segments currently struggling to find the right formula for success.

As we suggested in *Governance & Risk*, all things can work together for good if you make the effort. Outsourcing and automation, as appropriate, work together to help the planners achieve their dreams while lifting everyone's mood and confidence.



THOSE MOST CONFIDENT ARE NOT HIDING FROM CHANGE

Rick Kelly

Chief Strategy Officer, Fuel Cycle

When LED lights became cheap and energy efficient, we did not simply use the same amount of light for less money. We lit more things. Streets. Stadiums. Warehouses. Homes. Screens. Buildings. Cities.

That is Jevons' paradox. When technology makes something more efficient, total use often goes up, not down.

Market research is heading into the same pattern.

AI will absolutely compress parts of the work. Survey drafting, data cleaning, verbatim coding, charting, first-pass analysis, and report production will all get faster. Some tasks that once took days will take minutes. That will feel disruptive because it is disruptive.

But the conclusion should not be, "There will be less research." The conclusion should be, "There will be more research-like activity everywhere."

When the cost of asking better questions falls, more people ask better questions. When the cost of analyzing open ends falls, more teams use open ends.

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Rick Kelly is Chief Strategy Officer at Fuel Cycle, where he focuses on strategy, AI innovation, and the future of research technology. He works at the intersection of market research, enterprise software, and decision intelligence, helping organizations turn customer understanding into faster, better business decisions. Rick holds an MBA from UNC-Chapel Hill and a master's degree in political science.

When qual synthesis gets faster, more stakeholders want richer context. When reporting becomes less painful, insights teams can spend less time formatting slides and more time shaping decisions.

That is the real opportunity. AI does not make the need for judgment go away. It makes judgment more valuable because the organization can now generate far more inputs, faster than before. Someone still has to know what matters, what is noise, what is methodologically suspect, what the business should do next, and how to explain it in a way leaders trust.

The GRIT data points in that direction. The most confident pockets of the industry are not hiding from change. Brand-side analytics professionals, tech-led suppliers, and mid-sized service-led suppliers show some of the strongest optimism. And on the brand side, confidence is much stronger when organizations have clear expectations for AI use. That should tell us something important: anxiety does not come from AI itself. Anxiety comes from ambiguity.

So the prescription is not to slow down. It is to get clearer.

Set guidelines. Build workflows. Decide where AI can automate, where it can augment, and where human expertise has to stay firmly in control. Use AI to expand the surface area of insight, not cheapen the craft.

The market research industry should be calm, but not passive. AI will change the economics of our work. Good. Cheaper, faster intelligence should create more demand for intelligence.

That is not the end of market research.

That is Jevons' paradox coming for our industry — and for the people willing to adapt, it is very good news.





APPENDIX: SAMPLE COMPOSITION

This section includes additional information on the composition of the GRIT sample and may provide additional context for understanding the report.

WHAT IS THE PURPOSE OF THIS SECTION? [ORIENTATION]

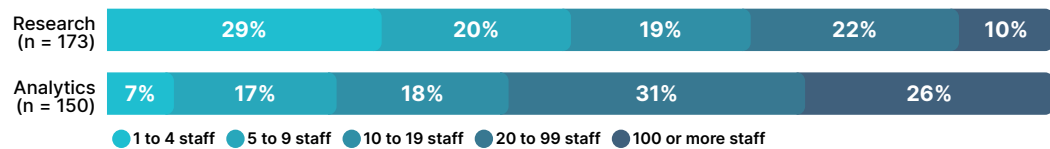
In this section, all results are weighted except for the counts by country at the end of it. The weighted sample composition helps you understand how

much influence different kinds of professionals exert throughout the report.

SAMPLE COMPOSITION | BRAND POV [DATA]

The median sizes of insights staffs are 10 to 19 staff among brand-side researchers and 20 to 99 for analytics professionals.

NUMBER OF INSIGHTS PROFESSIONALS: BRAND SEGMENT



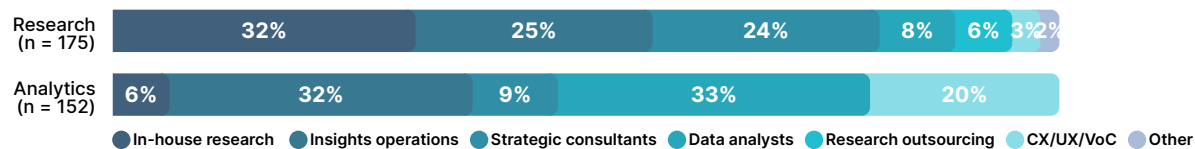
Source: GRIT Report and NewtonX

Takeaway: The median sizes of insights staffs are 10 to 19 staff among brand-side researchers and 20 to 99 for analytics professionals.

The most common primary role played by the insights staff among brand-side researchers is in-house researcher (32%). On the analytics side, the most common primary role for insights professionals at

their organization is data analyst (33%), just ahead of insights, analytics, or research operations (32%). Operations also applies to 25% of the research segment, just ahead of strategic consultant (24%).

PRIMARY ROLE OF INSIGHTS PROFESSIONALS: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: The most common primary role among brand-side researchers is in-house researcher (32%). On the analytics side, the most common primary role is data analyst (33%), just ahead of insights, analytics, or research operations (32%).

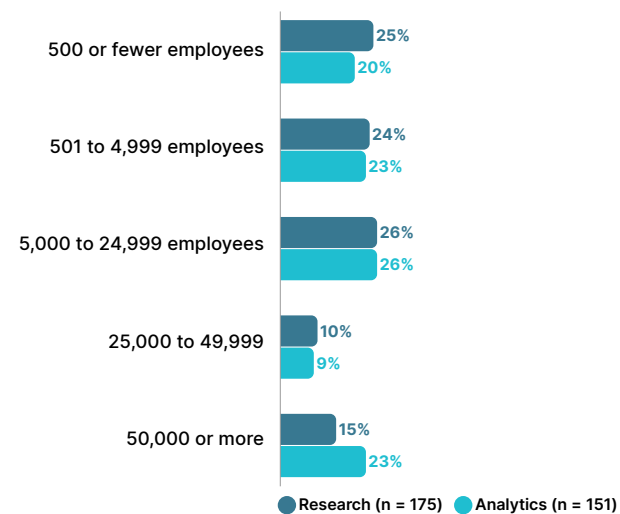




The company employee sizes in each brand-side segment are similar, although brand-side analytics professionals skew more toward 50,000 or more employees (23% to 15%).

In each brand-side segment, at least one-quarter work for companies serving markets in technology and telecom (28% research, 35% analytics) and financial services (26% and 38%). Among researchers, 25% work for consumer-packaged goods (CPG/FMCG) companies.

COMPANY SIZE: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: The company employee sizes in each buyer-side segment are similar, although brand-side analytics professionals skew more toward 50,000 or more employees (23% to 15%).

SIGNIFICANT MARKETS: BRAND SEGMENT

	Research	Analytics
Technology & telecom	28%	35%
Financial services	26%	38%
Consumer-packaged goods (CPG/FMCG)	25%	16%
Retail & ecommerce	16%	17%
Healthcare & pharmaceuticals	16%	17%
Public sector, education, or NFP	14%	6%
Media, entertainment, & sports	12%	11%
Industrial & manufacturing	11%	13%
Automotive	11%	13%
Professional & business services	10%	12%
Hospitality, travel, & leisure	9%	10%
Consumer durables & home products	8%	13%
Market research, insights, or analytics	8%	12%
Transport, logistics, & shipping	7%	6%
Other	4%	0%
n =	162	141

Takeaway: In each brand-side segment, at least one-quarter work for companies serving markets in technology and telecom (28% research, 35% analytics) and financial services (26% and 38%).

Source: GRIT Report and NewtonX



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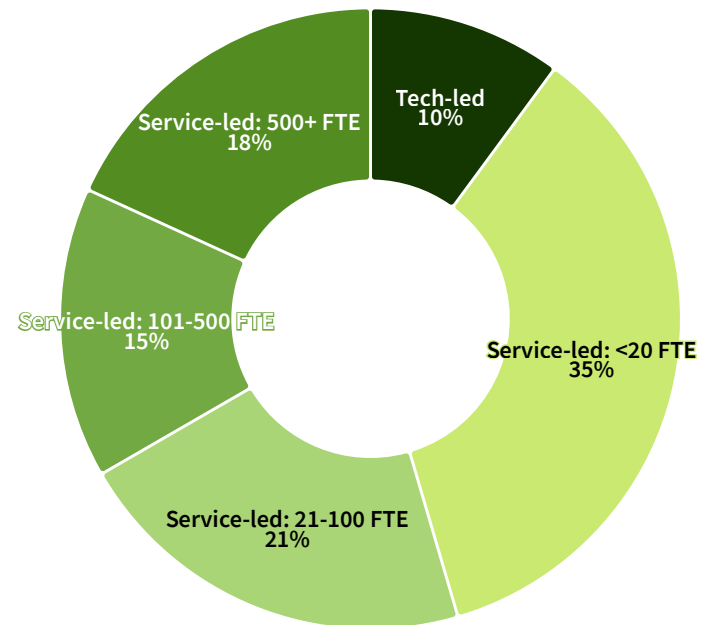
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SAMPLE COMPOSITION | SUPPLIER POV ^[DATA]

At 35%, service-led suppliers with ≤20 FTE is the most populous segment; others range from 10% to 21%.

SUPPLIER SEGMENT SIZES



(n = 387)

Source: GRIT Report

Takeaway: Service-led suppliers make up 90% of GRIT supplier-side professionals; the largest single segment is service-led ≤20 FTE (35%).

In each service-led segment, most prepare and deliver presentations, etc., manage client relationships and accounts, and design or run research projects. Most tech-led suppliers manage client relationships and accounts and sell or market insights and analytics products and services.

The appendix matters because it explains why segments behave differently throughout the report. Brand-side research and analytics professionals operate in different organizational contexts, and smaller supplier responses often reflect owner or principal-level judgment. Those structural differences should shape how every benchmark in the report is interpreted.

– LM, ed.

PROFESSIONAL ROLE: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Preparing/delivering presentations, etc.	40%	85%	77%	60%	67%
Managing client relationships/accounts	66%	91%	79%	71%	66%
Designing or running research projects	41%	84%	69%	70%	65%
Selling/marketing insights/analytics products/services	68%	74%	75%	58%	43%
Building/configuring/managing platforms/tools	41%	31%	32%	27%	36%
Designing or running modeling/analytics	20%	34%	32%	20%	33%
None of the above	2%	1%	1%	9%	8%
n =	39	158	79	56	55

Takeaway: In each service-led segment, most prepare and deliver presentations, etc., manage client relationships and accounts, and design or run research projects. Most tech-led suppliers manage client relationships and accounts and sell or market insights and analytics products and services.

Source: GRIT Report



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In each supplier segment, at least half serve consumer-packaged goods (CPG/FMCG) companies.

SIGNIFICANT MARKETS: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Financial services	59%	35%	62%	59%	58%
Consumer packaged goods (CPG/ FMCG)	69%	50%	59%	67%	57%
Healthcare & pharmaceuticals	38%	37%	49%	43%	47%
Technology & telecom	55%	21%	37%	50%	47%
Media, entertainment, & sports	47%	18%	21%	37%	42%
Consumer durables & home products	34%	30%	32%	41%	40%
Retail & ecommerce	42%	21%	37%	61%	37%
Market research, insights, or analytics	60%	38%	44%	32%	36%
Hospitality, travel, & leisure	27%	21%	16%	25%	35%
Automotive	19%	13%	21%	30%	26%
Professional & business services	18%	21%	18%	16%	23%
Public sector, education, or NFP	22%	28%	27%	25%	22%
Transport, logistics, & shipping	10%	7%	11%	9%	18%
Industrial & manufacturing	4%	13%	13%	14%	15%
Other	2%	3%	0%	0%	0%
Prefer not to answer	2%	2%	1%	2%	6%
n =	39	158	79	56	55

Takeaway: In each supplier segment, at least half serve consumer-packaged goods (CPG/FMCG) companies.

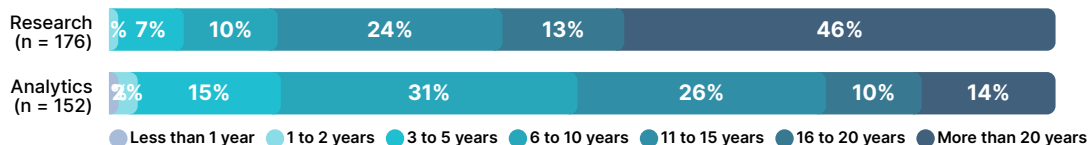
Source: GRIT Report

GRIT PARTICIPANT SENIORITY [DATA]

Among brand-side researchers, 59% have more than 15 years of experience in insights compared to 24% in

the analytics segment. Half of analytics professionals have more than 10 years' experience.

YEARS IN ROLE RELATED TO INSIGHTS, ANALYTICS, OR RESEARCH: BRAND SEGMENT



Source: GRIT Report and NewtonX

Takeaway: Among brand-side researchers, 59% have more than 15 years of experience in insights compared to 24% in the analytics segment. Half of analytics professionals have more than 10 years' experience.



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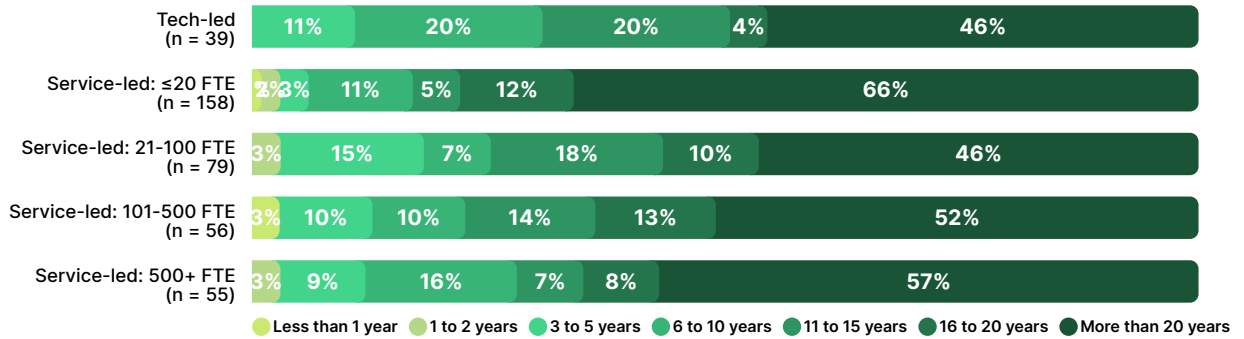
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Years of experience in insights, analytics, or research vary by supplier segment. Most service-led suppliers with ≤ 20 FTE have more than 20 years' experience (66%), as do those with 101 to 500 FTE (52%) and

500+ FTE (57%). Among the others, 50% of tech-led insights professionals and 56% of service-led suppliers with 21 to 100 FTE have at least 15 years' experience.

YEARS IN ROLE RELATED TO INSIGHTS, ANALYTICS, OR RESEARCH: SUPPLIER SEGMENT

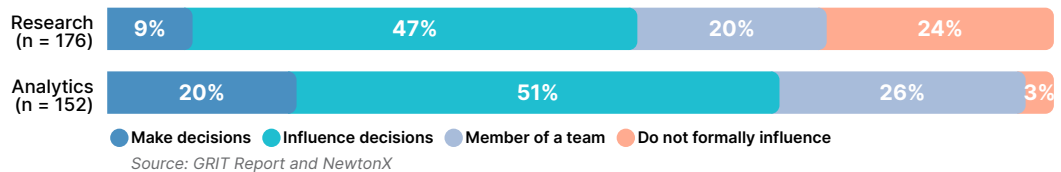


Takeaway: Most service-led suppliers with ≤ 20 FTE have more than 20 years' experience (66%), as do those with 101 to 500 FTE (52%) and 500+ FTE (57%). Among the others, 50% of tech-led insights professionals and 56% of service-led suppliers with 21-100 FTE have at least 15 years' experience.

In each brand-side segment, most GRIT participants make or influence strategic decisions. Only 3% of

analytics professionals do not formally influence decisions versus 24% of researches.

ROLE IN STRATEGIC DECISIONS: BRAND SEGMENT

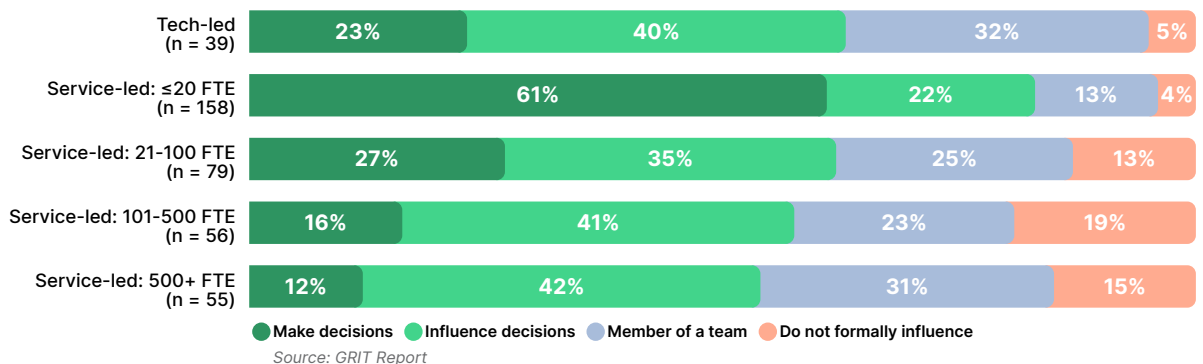


Takeaway: In each brand-side segment, most GRIT participants make or influence strategic decisions. Only 3% of analytics professionals do not formally influence decisions versus 24% of researches.

In each supplier-side segment, most GRIT participants make or influence strategic decisions. This ranges

from 54% of service-led suppliers with 500+ FTE to 83% of those with ≤ 20 FTE.

ROLE IN STRATEGIC DECISIONS: SUPPLIER SEGMENT



Takeaway: In each supplier segment, most GRIT participants make or influence strategic decisions, from 54% of service-led suppliers with 500+ FTE to 83% of those with ≤ 20 FTE.





Most brand-side researchers are in senior management (36%) or are managers (49%). Among

analytics professionals, 64% are in senior management and 28% are managers.

POSITION WITHIN COMPANY OR ORGANIZATION: BRAND SEGMENT

	Research	Analytics
Owner or partner	5%	2%
Senior management	36%	64%
Manager or team lead	49%	28%
Project staff, analyst, or specialist	10%	5%
Other position	--	--
n =	162	141

Takeaway: Most brand-side researchers are in senior management (36%) or are managers (49%); among analytics, 64% are in senior management and 28% are managers.

Source: GRIT Report and NewtonX

Among service-led suppliers with ≤20 FTE, 74% are owners or partners. Among those with 101 to 500 FTE, two-thirds are in senior management (33%) or are

managers (33%). In each other segment, more than 40% are in senior management.

POSITION WITHIN COMPANY OR ORGANIZATION: SUPPLIER SEGMENT

	Tech-led	Service-led: ≤20 FTE	Service-led: 21-100 FTE	Service-led: 101-500 FTE	Service-led: 500+ FTE
Owner or partner	21%	74%	21%	17%	3%
Senior management	46%	14%	48%	33%	44%
Manager or team lead	26%	6%	27%	34%	40%
Project staff, analyst, or specialist	7%	7%	4%	14%	13%
Other position	--	--	--	3%	--
n =	39	158	79	56	55

Takeaway: Among service-led suppliers with ≤20 FTE, 74% are owners or partners. Among those with 101 to 500 FTE, two-thirds are in senior management (33%) or are managers (33%). In each other segment, more than 40% are in senior management.

Source: GRIT Report



Most brand-side researchers are in senior management or are managers; among analytics, most are in senior management.



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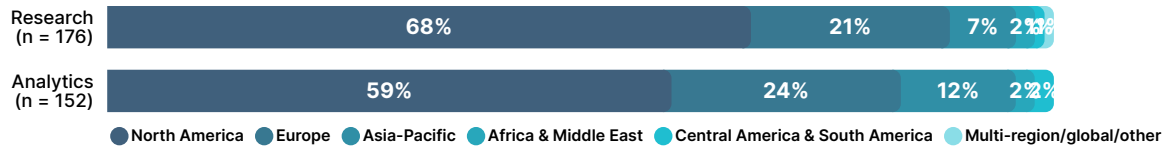
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GRIT PARTICIPANT DISTRIBUTION ACROSS REGIONS ^[DATA]

Most brand-side GRIT participants are located in North America.

PARTICIPANTS BY REGION: BRAND SEGMENT

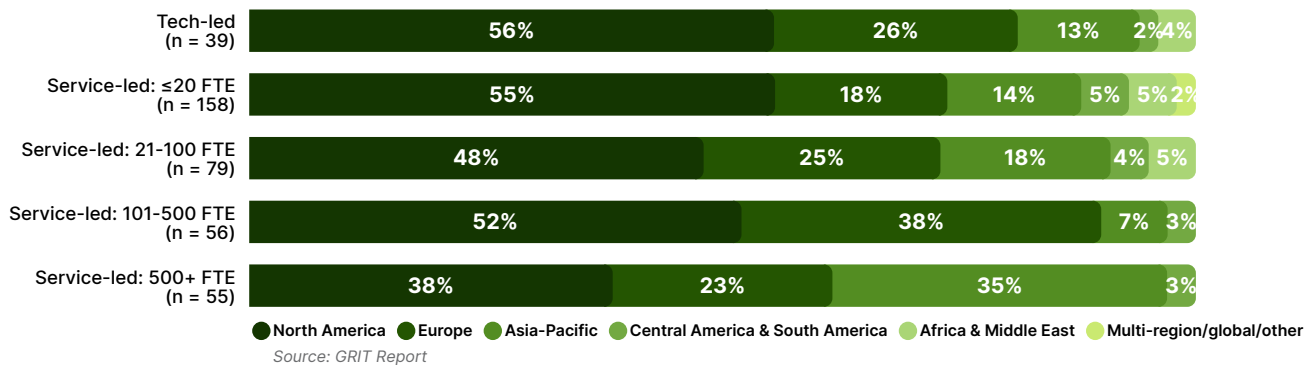


Takeaway: Most brand-side GRIT participants are located in North America.

Most supplier-side GRIT participants are located in North America in the tech-led (56%), service-led with ≤20 FTE (55%), and service-led with

101-500 FTE (52%); among those with 21 to 100 FTE, it's 48%, and it's 38% for those with 500+ FTE.

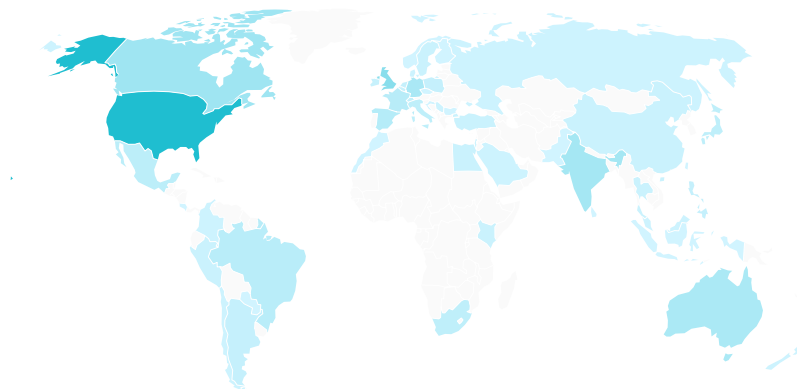
PARTICIPANTS BY REGION: SUPPLIER SEGMENT



Takeaway: Most supplier-side GRIT participants are located in North America in the tech-led (56%), service-led with ≤20 FTE (55%), and service-led with 101-500 FTE (52%); among those with 21 to 100 FTE, it's 48%, and it's 38% for those with 500+ FTE.

Current GRIT participants are located across 50 different countries, and a few work across regions or globally.

PRIMARY LOCATION FOR PROFESSIONAL WORK



Source: GRIT Report and NewtonX



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ACKNOWLEDGEMENTS

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Nelson Whipple – Greenbook
Jasmine Matthews – Greenbook
Dana Stanley – Greenbook
Nancy Cardenas – Greenbook
Mariah Read – Greenbook

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With over 20 years of high-visibility leadership

roles in the Market Research industry, Leonard “Lenny” Murphy is widely considered one of the most influential insights & analytics industry thought leaders and advisors in the world. As the CEO of several successful companies, most notably full-service agency Rockhopper Research, tech-driven start-up BrandScan360, CSO of data-privacy platform Veriglif, Board Member at Savio RXC, and Founding Partner of strategic consultancy Gen2 Advisors, his experience is vast and sought after. In 2010, he leveraged that experience into building the world’s leading platform for content and marketing support for the research industry as Chief Advisor for Insights and Development at Greenbook.



**Jasmine Matthews –
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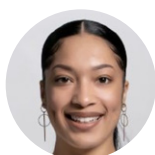
Jasmine Matthews helps organizations connect more meaningfully with their audiences. With 15 years of experience in brand strategy, integrated marketing, and content development, she specializes in translating research and audience insights into messaging that is clear, credible, and relevant. Her work spans industries and formats, from brand positioning to content strategy, always with the same goal: helping organizations articulate what they do, why it matters, and how to better reach the people they serve.



**Nelson Whipple –
Greenbook**

Nelson brings 40 years of market research

and insights experience to his role as Director of Research for GRIT, where he has led survey design, data analysis, and content development for several years. Prior to Greenbook, his career revolved around quantifying and modeling customer preferences to support product and marketing decisions in B2C and B2B markets, ranging from personal devices to large industrial equipment to omnichannel shopping experiences. He holds a B.A. in Behavioral Science from the University of Chicago.



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Mariah Read is a Business Development

Manager at Greenbook, where she is responsible for identifying new opportunities and driving revenue growth. She has a background in the market research industry from her previous roles at Veridata Insights and Offerwise, where she focused on data collection with niche and diverse audiences. Mariah works remotely from Charleston, South Carolina, and, in her free time, she enjoys spending time at the beach.



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Greenbook**

Lukas Pospichal is Managing Director at

Greenbook, a media company serving the market research, consumer insights, and analytics industry. He works across partnerships, content, events, and industry programs, including GRIT, ILEX, webinars, podcasts, and buyer resources. His work focuses on connecting insights professionals with relevant ideas, tools, and business opportunities.



**Nancy Cardenas –
Greenbook**

Nancy plays a key role in managing the Greenbook

Directory and supporting the GRIT Report, helping connect industry professionals with the information, resources, and trends that shape the future of insights. In addition, Nancy serves as the Chief of Operations for AMA New York - Greenbook’s parent company. There, she oversees chapter operations and helps bring programs and events to life for the marketing community.



**Dana Stanley –
Greenbook**

Dana is responsible for Greenbook’s client

relationships and revenue across all lines of business. He’s been a research practitioner, speaker, marketer, and business developer for companies like Greenfield Online, Research Now, and Survey Analytics. He studied Psychology at Bowdoin College, and he works from home just outside Portland, Maine.



RESEARCH AND PRODUCTION PARTNERS

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Displayr is AI-powered analysis and reporting software built for market research. It combines advanced statistical analysis, automated reporting, dashboards, and AI-driven workflows in a single platform. Researchers can go from raw survey data to interactive reports, presentations, and answers while maintaining visibility into the analysis behind the results.



Gen2 Advisors

Gen2 Advisors constantly scan and track ways to manage insights, keep up with the latest tools and technology, and predict the impact of all this information on the future before it's here. Through syndicated reports, advisory services, and consulting engagements, we present emerging management, applications, and technology in a systematic overview, and tell you how to apply it to your individual business.

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Forsta powers Research HX — a suite of comprehensive experience and research solutions that break down the silos between teams and data so that companies can get a deeper, more complete understanding of the experiences of their audiences. Forsta's technology, combined with its team of expert consultants, helps thousands of organizations across a variety of industries, including financial services, hospitality, market research, professional services, retail, and technology.

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NewtonX

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Idea Highway

Idea Highway is a strategic design studio with offices in Bucharest, Romania and Lisbon, Portugal.



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As a Top 25 Insights & Analytics company, we're known for our relentless business decision focus and cutting-edge creativity. Our passion is to help the world's leading brands engage, innovate, and grow. We leverage the best of advanced analytics, consumer psychology, and market strategy to tackle game-changing initiatives and business challenges for our clients.



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Conveo is an end-to-end AI-led insights platform that turns research into compounding market intelligence. By means of AI-moderated video interviews and observation with real humans, we generate deep understanding to quantify the "why". Use cases span consumer understanding, brand equity, concept optimization as well as UX. Conveo is also used as an always-on operating system for consumer knowledge, bringing the consumer voice directly into the boardroom with every decision made.



Displayr

Displayr is AI-powered analysis and reporting software built for market research. It combines advanced statistical analysis, automated reporting, dashboards, and AI-driven workflows in a single platform. Researchers can go from raw survey data to interactive reports, presentations, and answers while maintaining visibility into the analysis behind the results.



Discuss.io

Discuss believes research should never sleep, but instead be a living, continuous conversation that turns curiosity into confidence. Through AI agents, human-led research options, and advanced quant and open-ended analysis, we help organizations collect, analyze, and share insights. Research compounds over time, enabling you to ask anything and answer everything. Global brands and agencies rely on Discuss for emotionally rich customer understanding, and the flexibility to blend AI-moderated and human-moderated approaches within a single solution.



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Dynata is the world's largest and highest-quality first-party data company, powering actionable insights that shape global business decision-making at scale. We deliver the highest quality first-party data to help businesses around the world gain precise insights, activate the right audiences, and confidently measure impact. With industry-leading respondent accuracy, reliability, and commitment to continuous improvement, we are the trusted foundation for smarter decision-making.



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Fuel Cycle

Fuel Cycle

Fuel Cycle is the research infrastructure built for AI. We give enterprise insights teams one platform to run every method, own and deepen their audience over time, and build the connected data layer that makes AI-powered analysis actually work. From always-on communities to fast, flexible quant-qual research — Fuel Cycle gives insights teams the infrastructure to move at the speed of the business.

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recollective

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