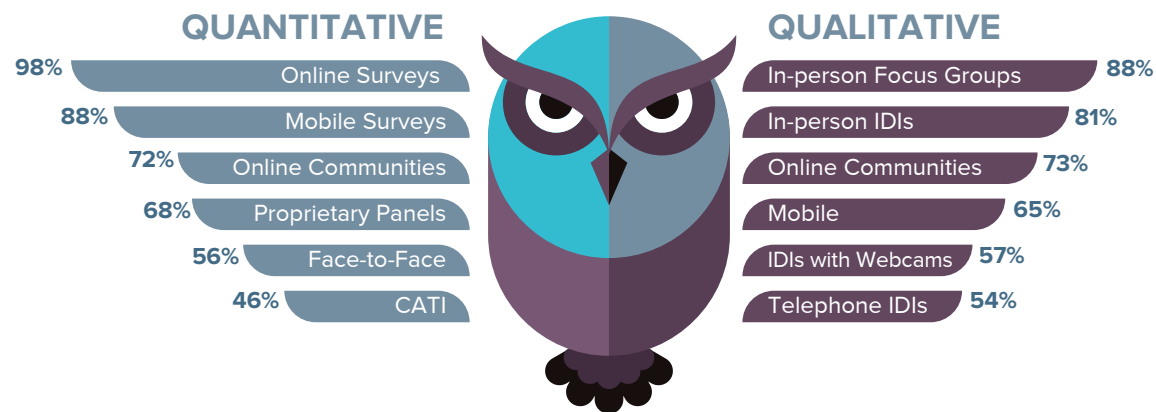


EXECUTIVE SUMMARY

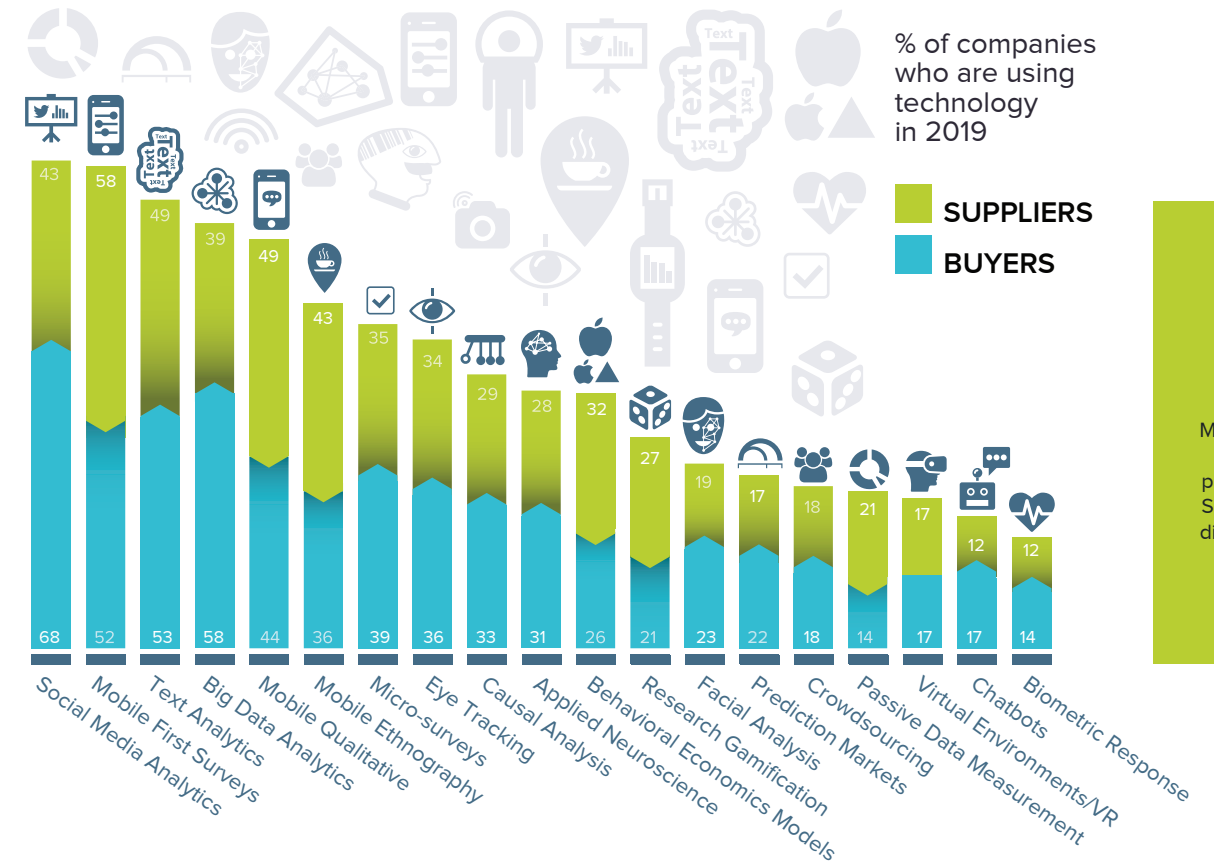
BUYER USE OF QUANT & QUAL METHODOLOGIES

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

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



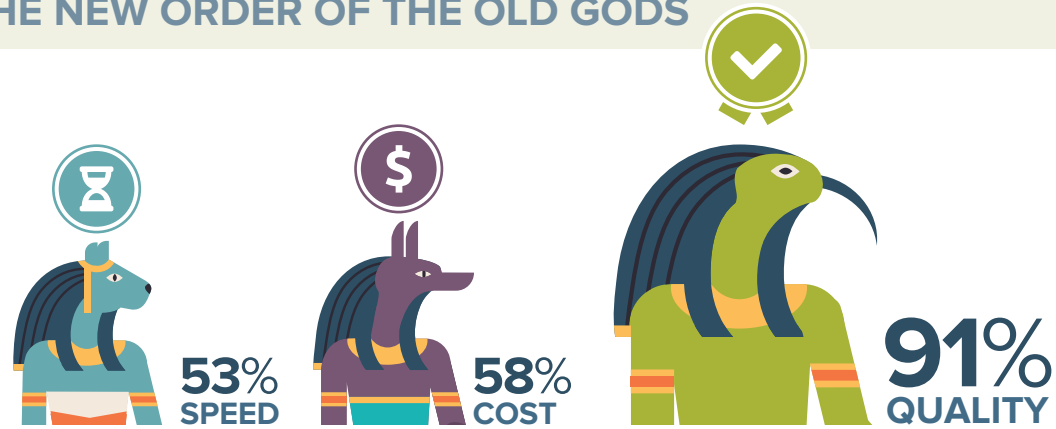
EMERGING METHODS IN USE BY BUYERS VS. SUPPLIER



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

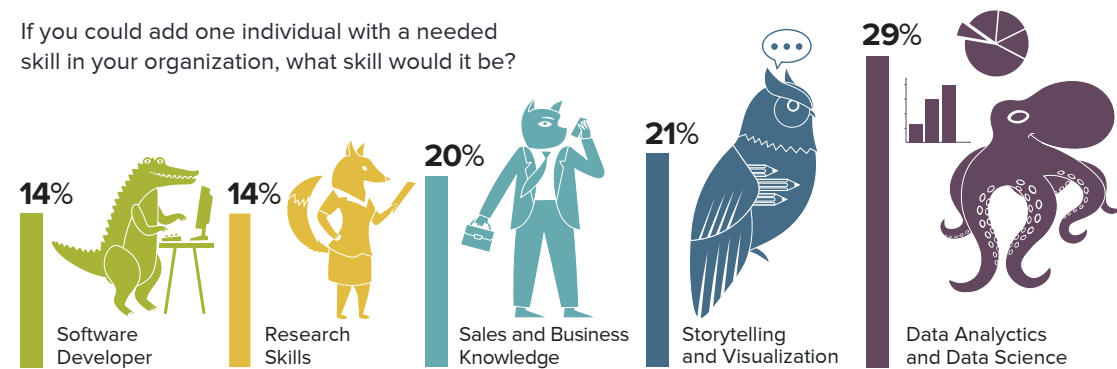
THE NEW ORDER OF THE OLD GODS

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



IN-DEMAND SKILLS

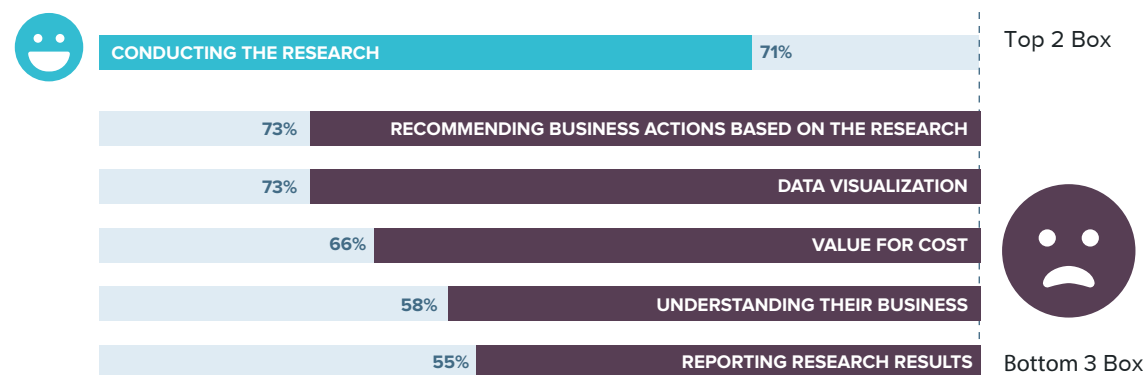
If you could add one individual with a needed skill in your organization, what skill would it be?



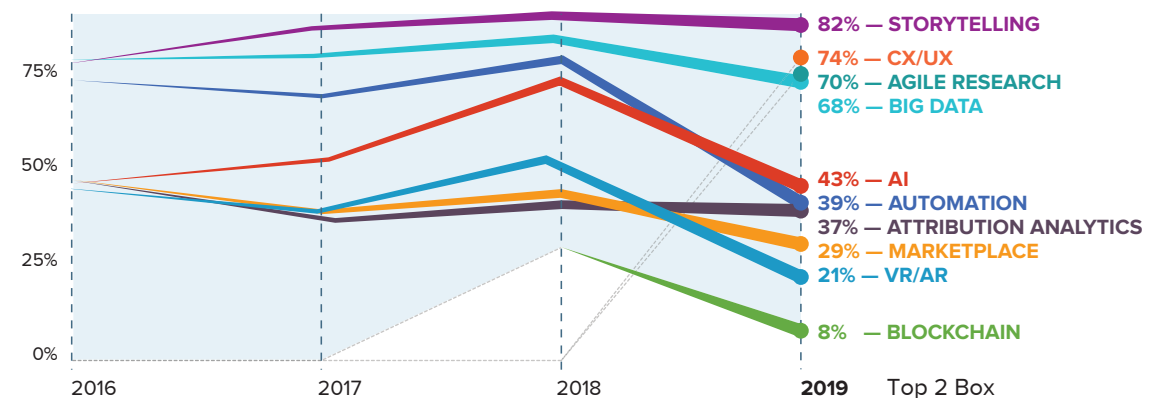
To future-proof their careers, a focus on Data Analytics and Data Science is by far the most important skill companies are looking for. The "general researcher" of the past will have a hard time staying relevant in the near future.

BUYER SATISFACTION WITH SUPPLIERS

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



BUZZ TOPICS: HYPE OR GAME CHANGERS?



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