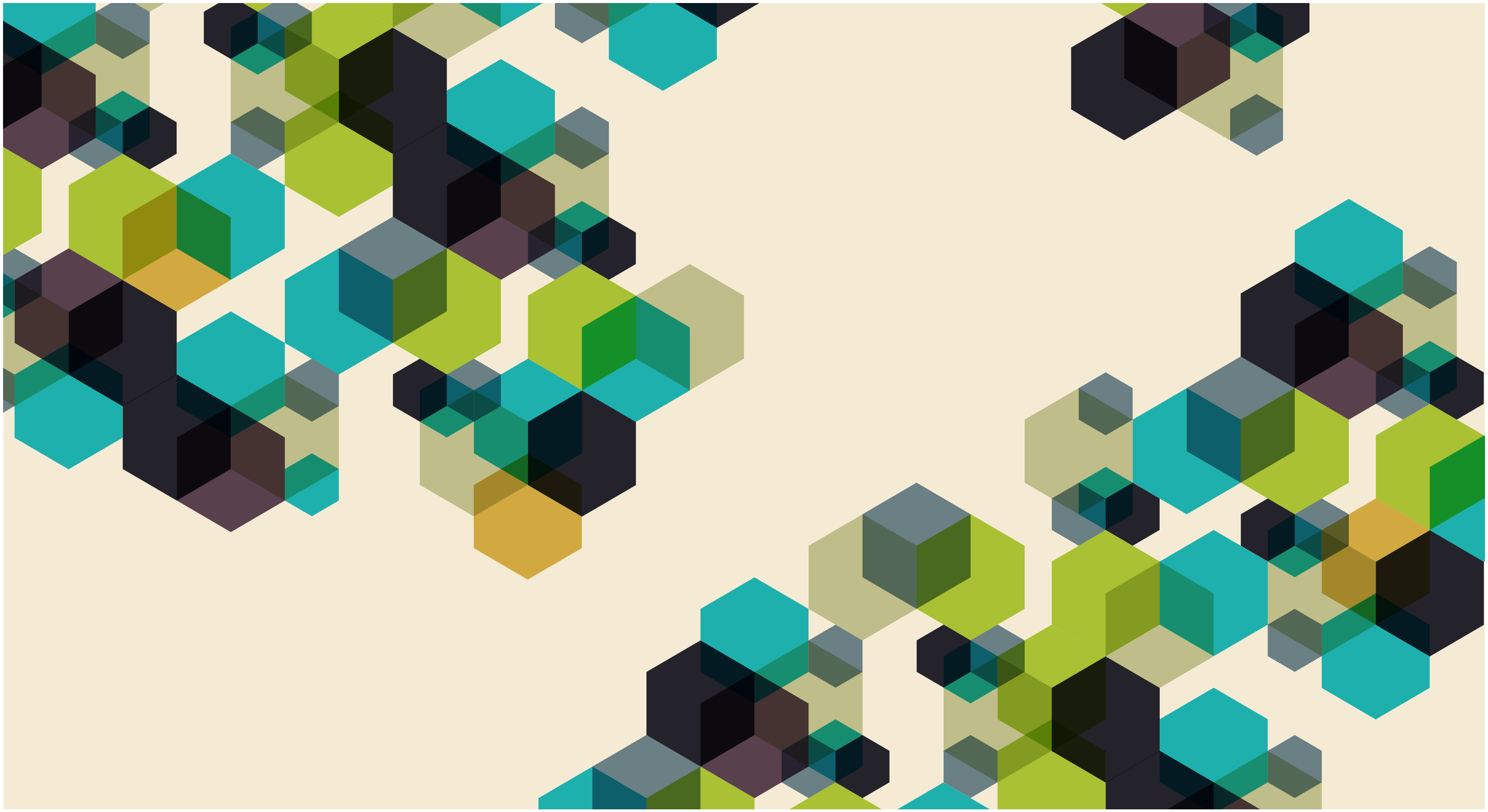
GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT



WWW.GREENBOOK.ORG/GRIT

2017 Q3–Q4

CONTENTS

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Go to GREENBOOK.ORG/GRIT to read the GRIT Report online or to access all GRIT data and charts via an interactive dashboard which you can use for your own analysis.

COMMENTARY

OUR PARTNERS...

WELCOME

Welcome to the 22nd edition of the **GreenBook Research Industry Trends Report**, using data collected in Q3 & Q4 of 2017.

We continue our efforts to make the GRIT sample globally comprehensive with 1,533 completed interviews and participants from 75 countries. As with previous editions, we consider this GRIT Report to be highly directional providing a meaningful and reliable snapshot of the market research industry. In many cases regional analysis is possible with this sample. In keeping with the GRIT spirit of transparency and collaboration, we are making all data available to everyone for further exploration.

Length of interview continues to be a challenge, as does maintaining consistency for tracking questions due to changes in the industry. We feel the same pain that many clients and suppliers do when trying to reconcile new modes and emerging best practices with pragmatic considerations of data needs. We asked GRIT respondents for ideas on how to improve the experience and the results were telling in their inconclusiveness, reflecting the lack of consensus in the industry around dealing with such challenges.

In this edition, we explore a variety of topics, some new and some that our readers have come to depend on GRIT to cover. These include: adoption of emerging methods, the use of traditional methods, satisfaction levels with suppliers, the perception of challenges & opportunities (and what to do about them), financial outlook and projected spending, how research professionals use their time and what tools they use most to do their jobs, buzz topics such as automation or AI, and the next iteration of our industry benchmark.

The result of all this? A report that dives deeper to explore the key drivers of our industry and offer better guidance as a strategic planning tool. We hope this GRIT Report will help you and your team to understand what is happening, what it means, and what you should do to adapt and thrive.

GRIT is a community effort and our authors, commentary providers, sample partners, advertisers, and most especially research partners make it all possible. Special thanks go out to the organizations who helped with data collection and analysis, including AYTM, Azure, Cannon Gray LLC, Gen2 Advisors, Ipsos, Knowledgehound, Lightspeed, NewMR, OdinText, OfficeReports, ORC, Research Now, Researchscape International, Stakeholder Advisory Services, and students from the Michigan State University MMR program.

As always, I think you will find the story this report is telling (with your help!) informative, and useful. Enjoy!

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Go to www.GreenBook.org/GRIT to read the GRIT Report online and to access all GRIT data and charts

EXECUTIVE SUMMARY

Infographic by aytm

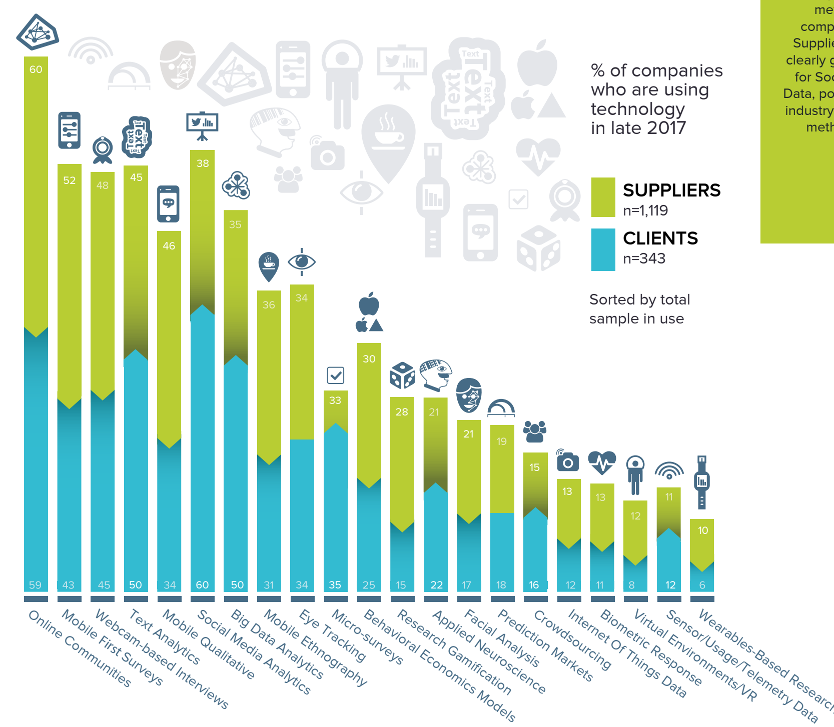
A DAY IN THE LIFE OF RESEARCHERS

The three primary duties of the insight professional's job are analysis, meetings, and non-research tasks.

These functions leave little time for focusing on strategic positioning of the role.

EMERGING METHODS IN USE BY CLIENTS VS. SUPPLIERS

Adoption of emerging methods is similar comparing Clients and Suppliers, but buyers are clearly going outside of MR for Social Media and Big Data, possibly indicating the industry is left with "asking" methods as our core offering.

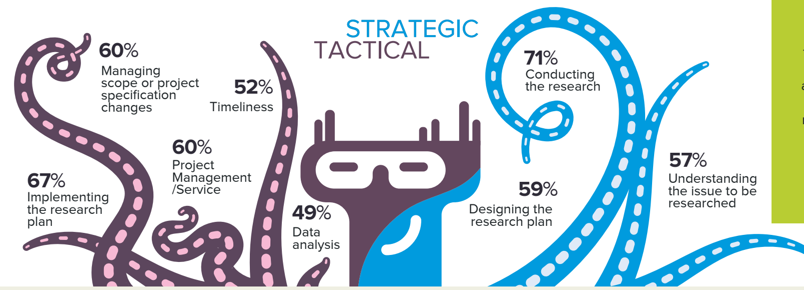


DOMINANT DATA COLLECTION METHODS

Online surveys are the go-to method for Quant, but in person focus groups still rule Qual.

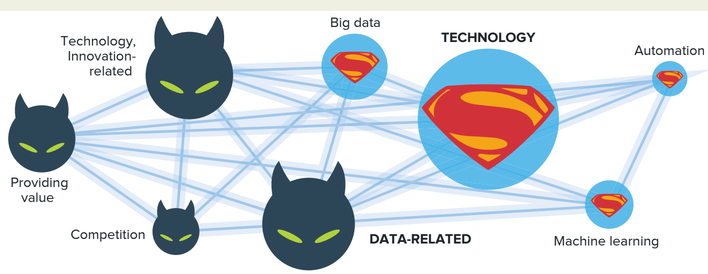
KEY ISSUES TO IMPROVING CUSTOMER SATISFACTION

To improve customer satisfaction, research providers will need to focus on the right issues: being more consultative and better helping clients understand research results, while maintaining their high degree of executional excellence.



THREATS & OPPORTUNITIES DRIVING THE CHANGE

GRIT respondents clearly understand the industry is under immense pressure to change, and many of the issues that are threats *(AI, automation, Big Data, training and education, sample quality)* are also potential solutions.



KEY QUALITIES FOR PROJECT SUCCESS

Clients & Suppliers agree that these five qualities are essential for project success.

METHODOLOGY AND SAMPLE

GRIT respondents are recruited by email and social media channels via GreenBook and GRIT partners. These lists are comprised of both research providers and clients. The sample size for this latest wave is generally in line with previous waves, although some differences in countries and regions exist, so some variances should be expected in certain findings based on sample artifacts. However, we have strived to call out regional differences in our analysis when that appears to be a significant factor in results.

As has been true for the past several editions, more of the respondents come directly through GreenBook email invitations than all other sources combined, and respondents from the United States comprise about half of all responses. For this report, the analysis is based on 1,533 completed interviews, although for some questions, base sizes may be lower due to skip patterns, rotations, routing, and other factors. Unless otherwise noted, all analyses should be assumed to be based on the total sample.

Here is a comparison of sample size of the most recent GRIT editions:

For this report, the analysis is based on 1,533 completed interviews

GRIT SAMPLE SIZE TREND

GRIT edition	Q1-Q2 2014	Q1-Q2 2015	Q3-Q4 2014	Q1-Q2 2016	Q3-Q4 2016	Q1-Q2 2017	Q3-Q4 2017
Survey completes	1,342	1,551	1,497	2,144	1,583	2,942	1,533

BUYERS VS SUPPLIERS TREND

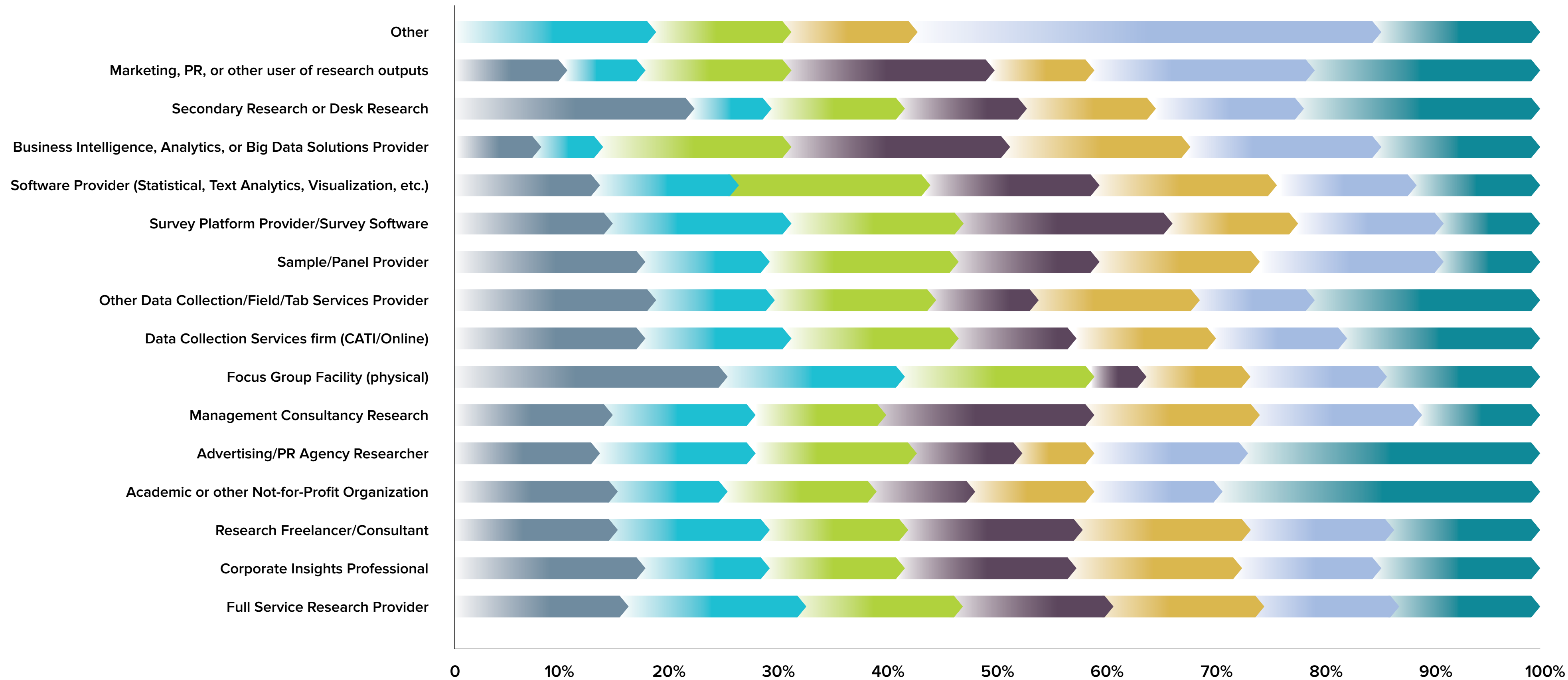
GRIT edition	Q1-Q2 2014	Q1-Q2 2015	Q3-Q4 2014	Q1-Q2 2016	Q3-Q4 2016	Q1-Q2 2017	Q3-Q4 2017
Insights buyer/client	25%	20%	22%	22%	20%	25%	22%
Insights provider/supplier	75%	80%	78%	78%	80%	75%	78%

The mix of respondents has varied wave on wave of this study, but within fairly narrow bands. We hold relatively steady at 78% of respondents identifying themselves as being suppliers (n=1,190) and 22% identifying themselves as clients (n=343).

On the supplier side, we have achieved a robust cross-section of the various sectors of the industry, even if a strong plurality of respondents describe themselves as working within full-service agencies. Proportionally, representation from all industry sectors has remained relatively constant across each wave of the study.

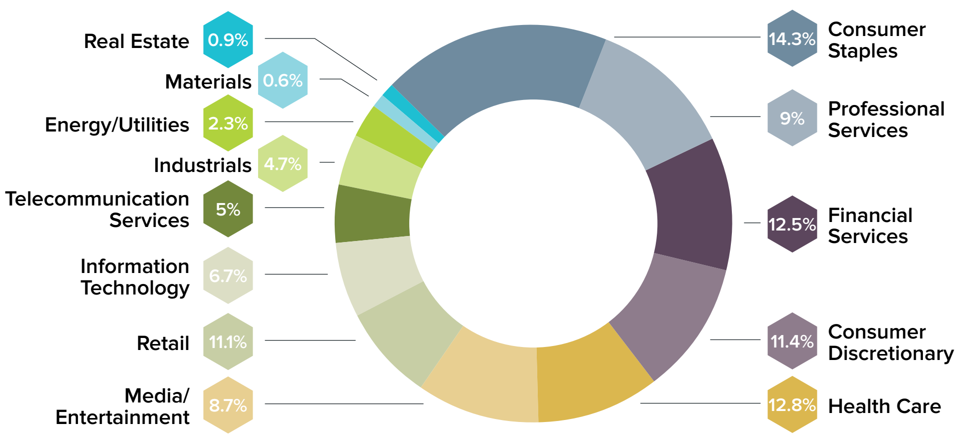
Plurality of respondents describe themselves as working within full-service agencies

PROFESSIONAL AFFILIATION WAVE ON WAVE



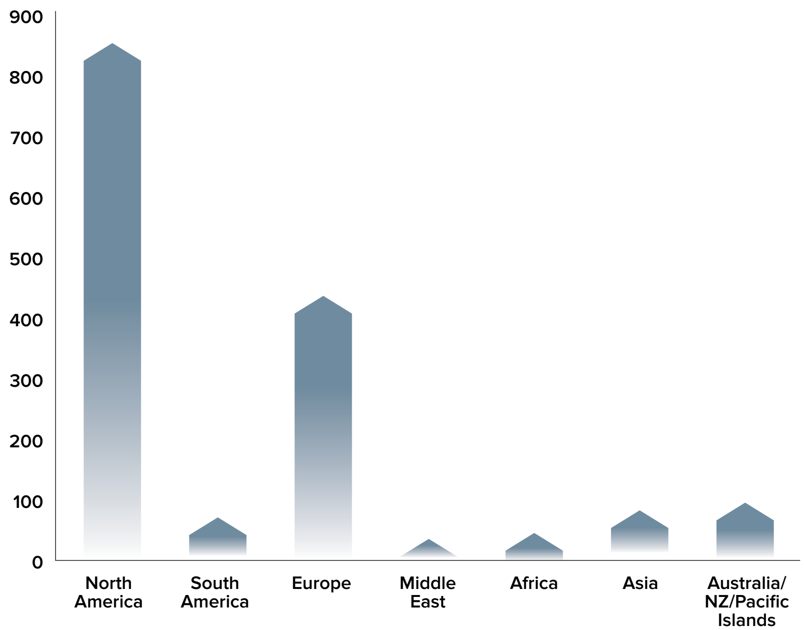
In looking at self-identified Buyers of research only (n= 343 total), we have a well-rounded sample of respondents from many sectors, ensuring a wide breadth of experience and views are represented from our client-side colleagues.

GRIT CLIENT RESPONDENTS BY VERTICAL



Regional sample sizes remained relatively consistent, with minor variances within each region.

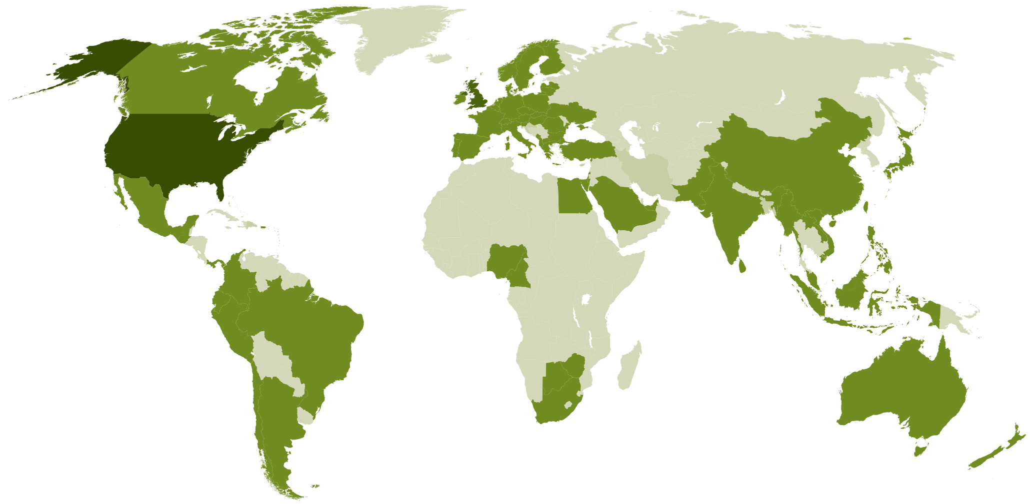
GRIT PARTICIPATION BY REGION



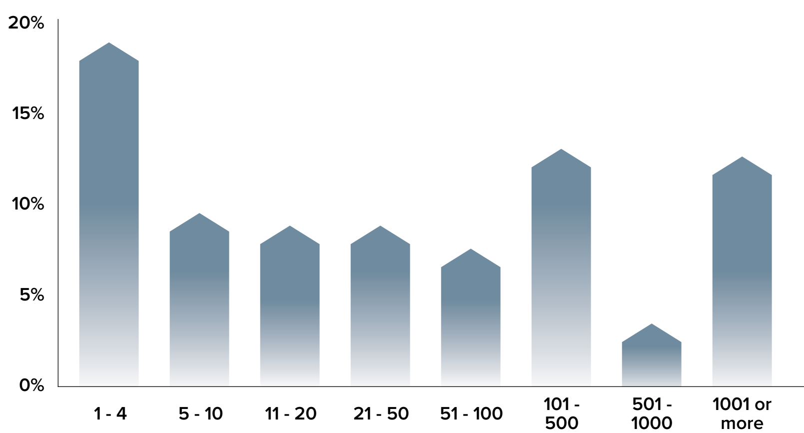
GRIT respondents generally fall into 2 camps with pluralities being from either small (under 50 people) organizations or larger (over 50 people), with well over one-third coming from companies with over 100 employees.

In total, 75 different countries are represented within the sample, with respondent density shown in the map below.

GRIT COUNTRIES



GRIT RESPONDENT BY ORGANIZATIONAL SIZE



In total, 75 different countries are represented within the sample

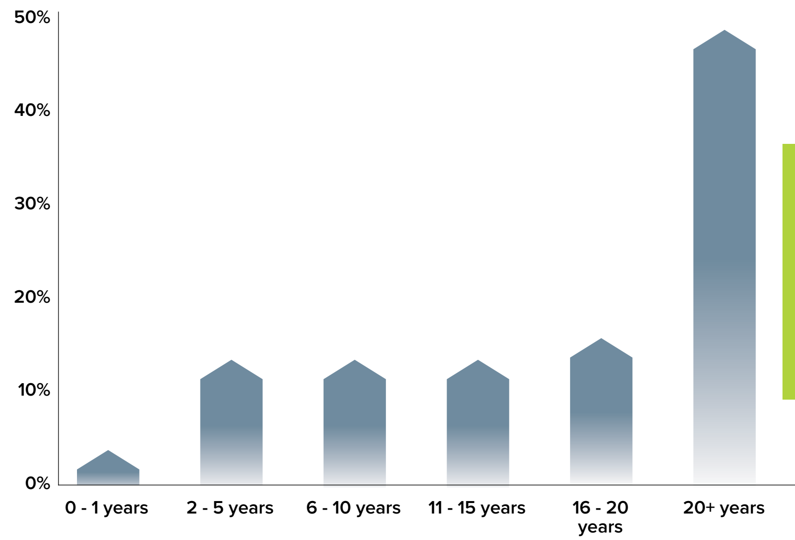
In looking at other firmographic questions, the GRIT sample is comprised of largely senior level research professionals. Almost three quarters of all client-side and almost half of supplier side respondents have worked in the industry for over 20 years.

Almost 50% of GRIT respondents are in senior-level roles within their organizations.

The combination of the large sample size globally, the diverse professional affiliation and the deeply experienced nature of our participants continues to make the GRIT Report particularly impactful and worthy of careful reading by the industry as a whole.

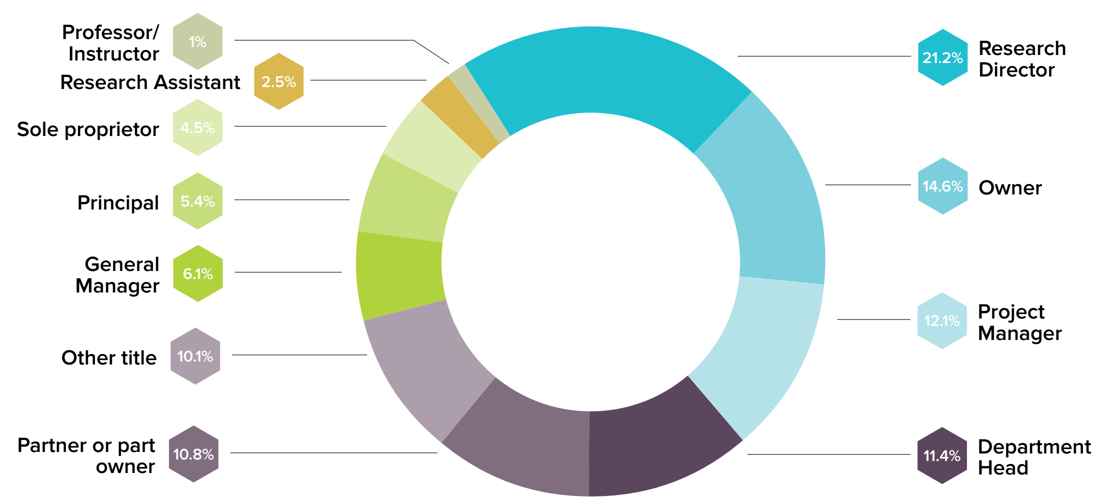
However, as always, we should remind our readers that despite the robust sample size, *the GRIT Report is not meant to be a census or representative sample,* but rather a snapshot of the widest swath of insight professionals we can achieve. The report and its findings are representative of this sample, and although we believe it to be broadly representative of the industry, there are most certainly some geographical and industry subset gaps. With that in mind, **we consider it "strongly directional"** and recommend that you view it the same way.

GRIT RESPONDENT TENURE



Almost 50% of GRIT respondents are in senior-level roles within their organizations

GRIT RESPONDENT TITLES



RESPONDENT EXPERIENCE IS THE NEW RESEARCH CURRENCY

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In recent years, there has been a lot written and spoken about survey design. The recent GRIT survey started many new conversations. As a designer and technologist, I have my own unique perspective on how design and technology can solve the problem. While I'm not a researcher by education, I do spend my days serving researchers' needs. However, it's become obvious to me that this hefty problem is not solved by technology alone. In short, I need your help and you need mine.

For all the conversation on this topic, little has changed. Why? Because we have many stakeholders, each with their own perspectives who work in the best interest of their business versus the most important person in this equation with no real voice – the respondent.

Researchers are navigating different corporate groups that don't understand how survey design impacts the user experience. As a result, researchers' hands are tied. Survey platforms allow researchers to build and program their design without restrictions and with little regard for their design output. Finally, panels have a conflicting role where they have no control over the survey output but own the respondent experience.

So what can we do to evoke change and resolve the issue? We can start by utilizing some practical approaches to collaboration, empathy, design, and technology, each of which play a role in affecting the outcome.

Researchers:
Survey design doesn't start in the design sheet. It starts in your approach. You may have people in your organization that still view market research as expensive and time consuming. You need to educate them on how automation

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can improve not only the quality of your data but the speed and cost in which you receive it. There should be a company-wide understanding that it's no longer necessary to overpack surveys to ensure every possible data point is covered. Start with clearly defined goals and build your surveys to accomplish those goals even if it means conducting multiple shorter surveys.

Survey Platforms:
As someone who has built a survey platform, I understand we should give researchers the freedom to do what they need to do. Unfortunately, with great freedom comes great responsibility. As platform developers, we need to see ourselves as stewards of the respondent experience. Rather than think of max character or question counts as limitations, we should convey them as safety nets. They are there to help researchers make choices that benefit the respondent. By enforcing these safety nets, we also impact how researchers approach design.

Panels:
We own the relationship with the respondent and since they don't have an active voice, it is on us to advocate on their behalf. Closely monitor how respondents are interacting with various survey components to create guidelines that educate and inform your platform partners. Also, respondents' preferences change as our media consumption evolves, so we must monitor it continually. From mobile first design to length of survey and preferred question types, the responsibility is on us to make sure we're advocating for them. This may require charging more for surveys that violate the best interest of your panels. The goal is not to increase profits but use it as a mechanism to drive good behaviors.

You may be reading this and thinking that what I've proposed is too difficult to execute, unless you own all three sides of the equation. Yes, it is a challenge but one we absolutely must solve as a community. If we each do our part in building an improved user experience for the greater good of the industry, the results will be felt across the board. It all starts with one step forward in the right direction.

ADOPTION OF EMERGING METHODS

In looking at what research approaches/methods are in use or under consideration it is important to remember that the GRIT sample is not a representative sample of the market research population. The GRIT sample tends to be drawn from those more engaged with the future of research, so the 'in use' figures will tend to be higher than for the wider MR population. The GRIT report's key usefulness lies in the relativities between the approaches, the trends over time, and the differences between key groups (such as the buyers and sellers of research).

One important note in the 2017 figures is that there have been several minor questionnaire changes (slight improvements to wording) and one major change. Before 2017 the term Mobile Surveys was used, and this had reached the point where 75% of participants said they were using Mobile Surveys. So, from 2017 we are using the term 'Mobile First Surveys' and this has, not surprisingly, reduced the 'In Use' figure, to 50% for the total sample in 2017.

From 2017 we are using the term 'Mobile First Surveys' and this has reduced the 'In Use' figure, to 50%

THE OVERALL PICTURE

Table 1 shows the 21 approaches included in the GRIT study ranked in terms of how many people said they were already using these techniques. Remember, 'using a technique' does not necessarily means using it heavily, it may mean it is sometimes used, and sometimes not. We are combing "In Use" and "Under Consideration" for a cumulative "Interest" metric.

Online communities are the only mainstream method amongst those examined, with 60% saying they are 'In Use' and a combined 82% saying they are 'In Use' or 'Under Consideration'. Note, the reason that the term Mobile Surveys was retired was that it was almost ubiquitous. In future editions of GRIT, it is likely that online communities will also be removed from "emerging methods" now that it is mainstream.

After online communities, the four methods exhibiting high 'Interest' scores include Text Analytics (76%), Mobile First Surveys (74%), Social Media Analytics (72%), and Big Data Analytics (70%). Three of these four are analytics and highlight the shift away from asking questions.

The next group comprises three qualitative options, that have interest scores in the range from 61% to 69%, namely Mobile Qualitative, Webcam-based Interviews, and Mobile Ethnography. These three highlight the continued strength of qual in a data-centric world.

TABLE 1

Rank	Labels	In use	Under Consideration	Interest
1	Online Communities	60%	22%	82%
2	Text Analytics	46%	30%	76%
3	Mobile First Surveys	50%	24%	74%
4	Social Media Analytics	43%	28%	72%
5	Big Data Analytics	38%	32%	70%
6	Mobile Qualitative	44%	25%	69%
7	Webcam-Based Interviews	47%	22%	69%
8	Mobile Ethnography	35%	26%	61%
9	Micro-surveys	34%	25%	58%
10	Behavioral Economics Models	29%	29%	58%
11	Eye Tracking	34%	21%	55%
12	Research Gamification	25%	28%	53%
13	Facial analysis	20%	25%	45%
14	Applied Neuroscience	21%	22%	44%
15	Prediction Markets	19%	24%	43%
16	Internet of Things	12%	27%	40%
17	Virtual Environments/Virtual Reality	11%	27%	38%
18	Crowdsourcing	15%	22%	38%
19	Wearables Based Research	9%	27%	36%
20	Biometric Response	12%	20%	33%
21	Sensor/Usage/Telemetry Data	11%	19%	30%

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The remainder of the table can be divided into strong niches and small niches. The strong niches group runs form Applied Neuroscience, with 21% of participants saying they were already using it, up to Micro-surveys with 34% saying they are already using it and 56% showing interest. The bottom six, the smaller niches, all have fewer than 20% saying they use them, and fewer than 50% showing interest.

Online communities are the only mainstream method with a combined 82% saying they are 'In Use' or 'Under Consideration'

STABILITY MORE THAN CHANGE

Table 2 shows the 'In Use' data going back to GRIT data collected in August 2014. The data shows that there are changes over the past 12 months, but few of them are large. Given the nature of the data, sampling variation etc., we suggest that you don't over-interpret anything smaller than plus or minus 5%.

The main decline has been for Social Media Analytics, which is looking like a correction, since the 2017 figure is similar to the 2015 and 2014 figures. It will be more interesting to look at this methodology when we compare research buyers and providers.

Most of the approaches that are in the group we described as the small niches do not appear to be showing any sign of expanding beyond their small group of users.

There are changes over the past 12 months, but few of them are large

TABLE 2	2014 Aug	2015 Oct	2016 Nov	2017 Oct	12 month Change
Online Communities	56%	50%	59%	60%	1%
Mobile First Surveys	--	--	--	50%	NA
Webcam-Based Interviews	34%	33%	43%	47%	4%
Text Analytics	40%	38%	46%	46%	0%
Mobile Qualitative	37%	34%	42%	44%	2%
Social Media Analytics	46%	43%	52%	43%	-9%
Big Data Analytics	32%	34%	38%	38%	0%
Mobile Ethnography	30%	31%	33%	35%	2%
Micro-surveys	25%	25%	35%	34%	-1%
Eye Tracking	34%	28%	35%	34%	-1%
Behavioral Economics Models	25%	21%	29%	29%	0%
Research Gamification	23%	20%	25%	25%	0%
Applied Neuroscience	13%	15%	16%	21%	5%
Facial analysis	18%	18%	24%	20%	-4%
Prediction Markets	19%	17%	24%	19%	-5%
Crowdsourcing	17%	12%	16%	15%	-1%
Internet of Things	12%	9%	14%	12%	-2%
Biometric Response	13%	10%	12%	12%	0%
Virtual Environments/VR	17%	10%	14%	11%	-3%
Sensor/Usage/Telemetry Data	--	7%	11%	11%	0%
Wearables Based Research	7%	8%	10%	9%	-1%
Mobile Surveys	64%	68%	75%	--	--

GutCheck

INSIGHTS POWERED BY 900 MILLION CONSUMER PROFILES: WHY BIG DATA IS NOT AT ALL HYPE

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Based on the $187B in projected spend on big data solutions, it's clear that big data is more than "hype." Given this is four times the market research industry, it's hard to argue it's anything other than mainstream. The GRIT Report shows 70 percent of respondents are leveraging big data or considering it, putting it close to the top for "Emerging and New Methods." However, based on conversations with clients and industry peers, there is a disconnect with this statistic—and what I'd characterize as experimentation versus full adoption.
I believe market researchers haven't adopted big data solutions at scale because the ones that currently exist aren't agile, nor do they drive predictable ROI like they have for the advertising and marketing industries.

In 2011, programmatic advertising spend totaled $2.8B. Enabled by big data, it's projected to grow to $32B by the end of the year. The reasons why are simple. First, the big data ecosystem that supports advertising is robust and has matured greatly over the last decade. Second, programmatic advertising provides a demonstrable ROI—marketers can target specific audiences in an automated process and close the loop with purchase data to calculate lift.
So how can market research experience similar results?

It's important to illuminate the magnitude of big data and its sources to understand its potential in research. The data management platform (DMP) we leverage at GutCheck has 900M consumer profiles with 10k attributes. Put into perspective, you'd need to run 500M surveys to produce a similar amount of data. We believe the solutions the market

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research industry will develop will combine proprietary data from client surveys and other sources with third-party big data. While anyone can leverage a DMP to drive insights, brands can augment their proprietary content (segmentations, concepts, creative tests, CRM data, etc.) with a DMP to draw out truly *unique* insights.

For example, we ran 1,500 respondents through a segmentation for a client using our Agile Attitudes & Usage™ product. Once respondents were segmented, we indexed them against our DMP with three explicit goals: create rich personas for each segment; identify potential switchers and which competitive brands provide the greatest opportunity to target; and identify which target audiences in the DMP would provide the most reach for media spending. The results were compelling. The segments had specific personality traits that are 4x more prevalent than those of the general population, which had significant implications for communications positioning. We found a large number of switchers available in the market and identified two primary brands to position against to capture the most switchers. Finally, we identified audiences that are 8x more efficient than the ones they were currently targeting. The findings provided our client the answers they needed to effectively message and activate against their retail conquests to grow market share.

Driven by a robust technology ecosystem, solutions like this can be incredibly agile in nature. Due to automation and standardization, the cost of running big data augmentation is a trivial cost of the project; the time to generate insights is measured in hours.

This is our future as market researchers. Within 2 years, you'll be hard-pressed to find a survey that's not augmented or appended with big data. Long-term, these solutions will allow us to ask consumers fewer questions and generate deeper insights. Turning this $187B spend on big data into valuable insights will significantly change our industry and the way we do research; when we understand the full impact and how to leverage big data solutions effectively, it's not at all hype.

BUYERS AND SUPPLIERS

There are two reasons why suppliers might say they are using more research techniques than research buyers:

1. Suppliers typically work with many companies, and may use a different range of techniques with different clients. Of course, it is also true that large clients use many research suppliers.
2. Suppliers need to know all of the details of the research they are providing, such as whether gamification is used in the design and what proportion of the surveys are completed via a mobile device. A research buyer may want to know this too, but in many cases the buyer of the research is less involved in these details.

Table 3 shows the 'In Use' data for buyers and suppliers of market research, and the right-hand column contrasts the results.

The pattern of techniques and approaches 'In Use' is similar between buyers and suppliers (not surprisingly) with an r-squared value of 79%. However, there are some interesting differences.

TABLE 3	Buyer	Supplier	Supplier – Buyer	Total
Online Communities	59%	60%	1%	60%
Mobile First Surveys	43%	52%	10%	50%
Webcam-Based Interviews	45%	48%	3%	47%
Text Analytics	50%	45%	-5%	46%
Mobile Qualitative	34%	46%	13%	44%
Social Media Analytics	60%	38%	-22%	43%
Big Data Analytics	50%	35%	-14%	38%
Mobile Ethnography	31%	36%	6%	35%
Eye Tracking	34%	34%	0%	34%
Micro-surveys	35%	33%	-2%	34%
Behavioral Economics Models	25%	30%	5%	29%
Research Gamification	15%	28%	12%	25%
Applied Neuroscience	22%	21%	-1%	21%
Facial analysis	17%	21%	3%	20%
Prediction Markets	18%	19%	0%	19%
Crowdsourcing	16%	15%	-1%	15%
Internet of Things	12%	13%	1%	12%
Biometric Response	11%	13%	1%	12%
Virtual Environments/Virtual Reality	8%	12%	3%	11%
Sensor/Usage/Telemetry Data	12%	11%	-1%	11%
Wearables Based Research	6%	10%	4%	9%

In several of the technical areas of research the percentage of suppliers using them is considerably higher than the buyers, for example: Mobile First Surveys (Suppliers 52%, Buyers 43%), Mobile Qualitative (Suppliers 46%, Buyers 34%), and Research Gamification (Suppliers 28%, Buyers 15%).

However, the more interesting cases are those where the buyers are more likely to be using an approach than the suppliers. The two key ones being: Social Media Analytics (Buyers 60%, Suppliers 38%) and Big Data Analytics (Buyers 50%, Suppliers 35%). This finding is consistent with earlier waves of GRIT and we believe it indicates that for these two services many clients are buying from non-MR suppliers.

In several of the technical areas of research the percentage of suppliers using them is considerably higher than the buyers

INFORMATION SOURCES – JUST A STARTING POINT FOR THE FUTURE

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It used to be so simple. Paper and clipboards. Perhaps a telephone. Surveys were person-to-person and the reports long, detailed and referred back to time and again.

Good times? Perhaps. Simpler? Certainly, but times change and as is clear from the latest GRIT report, the sources of information being harnessed by both market research providers are still at the core of what the industry is about – it's just that there are many, many more of them. And while the much-vaunted "death of the survey" has still not happened, it's clear that other sources of information have become well-established in the day-to-day workings of the MR industry.

Well over 50% of respondents to the GRIT survey are already using both online communities and text analytics on a regular basis. And over 40% of respondents consider big data to be a "game changer" which suggests that more sources of information are being readily considered for the future!

Investment in information sources also supports this. While the top two technology areas for future investment are visualization and dashboards, and analytics, data collection comes in at a very respectable third. In fact, this is a very positive state of affairs. Given the speed with which data is now being generated, it is good to see MR businesses focusing strongly on tools that will help make sense of them all and turn data into useful insight.

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This is where the future of market research lies. The changing nature of data structures and information sources delivers added pressure in helping clients to translate information into insights.

Automation is making it easier than ever for organizations to run their own research. However, it also offers opportunities to secure a position as a valued partner and business advisor. Helping to define the WHY behind the insights that are obtained – and just as importantly when they are not useful – can help to clarify end user's thinking and ensure they don't simply become bogged down in unusable streams of data.

The process of bringing together data from multiple sources is second nature to market researchers. This is an area where we can provide further value to clients – helping them to use the right methodologies to get the most from data, be that in an automated format or in a custom format.

Ultimately where market researchers really have an opportunity, though, is taking that vital step from bringing data together, to using it to tell a story and drive decisions. What was heartening in this survey was to see that over 40% of MR client respondents were either completely satisfied or very satisfied that their provider understood their business. However, there was a rather large drop off when it came to how users felt about their providers being able to recommend action based on their research – barely 25%.

In fairness, this is almost certainly a more positive picture than we would have seen ten or even five years ago. But more can be done. We need to start thinking of the next paradigm shift in the industry, both in terms of the needs of our clients and the tools we use to meet and exceed those needs, as well as the shifting changes within the economy we operate in.

If knowledge is power – market researchers are in a position to exploit that power, deliver demonstrable value and bring the MR industry into a whole new world. We're on that road, but we need to pick up the pace now.

DIFFERENCES BY REGION

There are some interesting differences by region, and if you have a chance to dive into the data you will find some interesting differences by country too. However, the main message is that the advanced market research world is essentially a similar place – comparing North America to the other three groupings gives an r-squared of 89% or higher for each region.

One interesting, but not strong, pattern is that North America tends to score slightly lower than Europe and APAC. It could be that the sample for North America is a bit more general, and the sample from Europe and APAC a bit more tech-focused.

Table 4 shows the data for North America, Europe, Asia-Pacific (APAC), and Other – regions that have been determined by sample size and geography.

Table 4	North America	Europe	APAC	Other
Online Communities	58%	66%	59%	54%
Mobile First Surveys	47%	56%	50%	54%
Webcam-Based Interviews	48%	49%	42%	36%
Text Analytics	47%	44%	56%	36%
Mobile Qualitative	42%	47%	46%	45%
Social Media Analytics	41%	46%	49%	47%
Big Data Analytics	38%	41%	37%	38%
Mobile Ethnography	32%	40%	37%	39%
Micro-surveys	31%	37%	37%	35%
Eye Tracking	28%	46%	39%	30%
Behavioral Economics Models	25%	34%	31%	30%
Research Gamification	21%	36%	26%	20%
Applied Neuroscience	18%	28%	21%	22%
Facial analysis	17%	28%	20%	17%
Prediction Markets	17%	24%	19%	19%
Crowdsourcing	16%	14%	19%	11%
Internet of Things	13%	10%	18%	10%
Biometric Response	12%	15%	8%	14%
Virtual Environments/VR	11%	12%	11%	10%
Sensor/Usage/Telemetry Data	11%	13%	13%	4%
Wearables Based Research	7%	12%	11%	8%

WHAT IS NEXT?

We also asked GRIT respondents via an open-ended question to suggest other emerging technologies not mentioned in the current selection that they are considering using. We believe that these coded responses are an effective means of looking ahead to what will might be the next major trend in research. Leading the list is AI, which is more likely to be under consideration by buyers vs. suppliers compared to any other method, a theme that is echoed throughout this GRIT Report. Video analytics, automation in general, neural networks and multiple platforms are also of far larger interest to buyers than to suppliers, although all appear to have interest on both sides of the table.

In the next wave of GRIT, we will include some of these "next generation" methods in the general adoption rankings so we can begin to identify the next great emerging technique(s).

AI, video analytics, automation in general, neural networks and multiple platforms are of far larger interest to buyers than to suppliers

TABLE 5	Insights buyer or client	Insights provider or supplier
AI(Artificial intelligence)	13.0%	9.5%
Chatbots	0%	1.9%
Data visualization	2.6%	0.8%
Implicit association experiments/Test	1.3%	2.3%
Machine learning	2.6%	3.4%
Passive monitoring	0%	2.3%
Tracking	2.6%	3.4%
Video Analytics/Video surveys	5.2%	4.5%
Neural Networks	7.8%	3.4%
Automation	6.5%	1.9%
Beacon technology	0%	0.8%
Multi platforms	5.2%	0.8%
Mobility	1.3%	1.9%
Combination of online + offline parts	1.3%	3.4%
Bots	0%	1.1%
Provide the data according to client need	0%	0.8%
Behavioral Recruitment/Digital behavior	1.3%	3.0%
Data management platforms	0%	3.0%
Neuroscience	0%	1.1%
Data gained from TV	1.3%	0.4%
Customer/Shopper Traffic Counter Devices	0%	0.8%
Weather and spatial proxemics	0%	0.4%
Virtual plan-o-grams at retail	1.3%	0.8%
Face to face mobile research	0%	0.4%
Predictive analytics	0%	0.4%
Marketing attribution	0%	0.4%
Technology mapping/illustration	1.3%	1.5%
Expression reading	0%	0.4%

Base: N=341

THE NET ON NONCONSCIOUS MEASUREMENT

For all the intense industry focus on neuroscience and behavioral science methods, it has been baffling to see what appears to be low penetration for individual "System 1" tools as reported in past GRIT reports. We suspect that this is due to the fact that "neuro tools" are *a class of methods* and that when spread out individually, they appear to be less than their shared usage and impact implies. This led us to combine the following five methods which comprise the backbone of nonconscious measurement across study types: Behavioral Economics Models, Eye Tracking, Facial Analysis, Applied Neuroscience and Biometric Response. Implicit is also a major method in this class but is not yet included in the GRIT Report.

Labels	In use	Under Consideration	Total Interest
Net Nonconsious Measures	53%	27%	80%
Eye Tracking	34%	21%	55%
Behavioral Economics Models	29%	29%	58%
Applied Neuroscience	21%	22%	44%
Facial Analysis	20%	25%	45%
Biometric Response	12%	20%	33%

When we combine the most prominent methods employed to capture nonconscious response, it appears that there already is a critical mass in the industry for both **use (53%)** and **total interest (80%).** No longer a "special occasion" consideration, nonconscious measurement has reached a tipping point and is now being embraced by the majority of the industry using one or more of the key methods available included in the GRIT Report. Considering that the neuromarketing sub-industry is only about 10+ years old, this is a massive change in the thinking and acceptance among researchers and marketers alike.

These levels would, most likely, be even more dramatic if Implicit Reaction Time Testing/IAT were included in the study as well. "Implicit/IAT" is perceived to be one of the fastest growing nonconscious methods in the industry given the tool's ability to be broadly applied and enable insight into the strength of conviction consumers hold for brand attributes and associations. It has been recommended and accepted that Implicit/IAT will be added to future GRIT Reports.

Nonconscious measurement has reached a tipping point and is now being embraced by the majority of the industry using one or more of the methods available

We wonder if almost 1 in 3 in the industry are literally applying Behavioral Economics Models, or whether the words "behavior" and "model" invite selection because of other associations

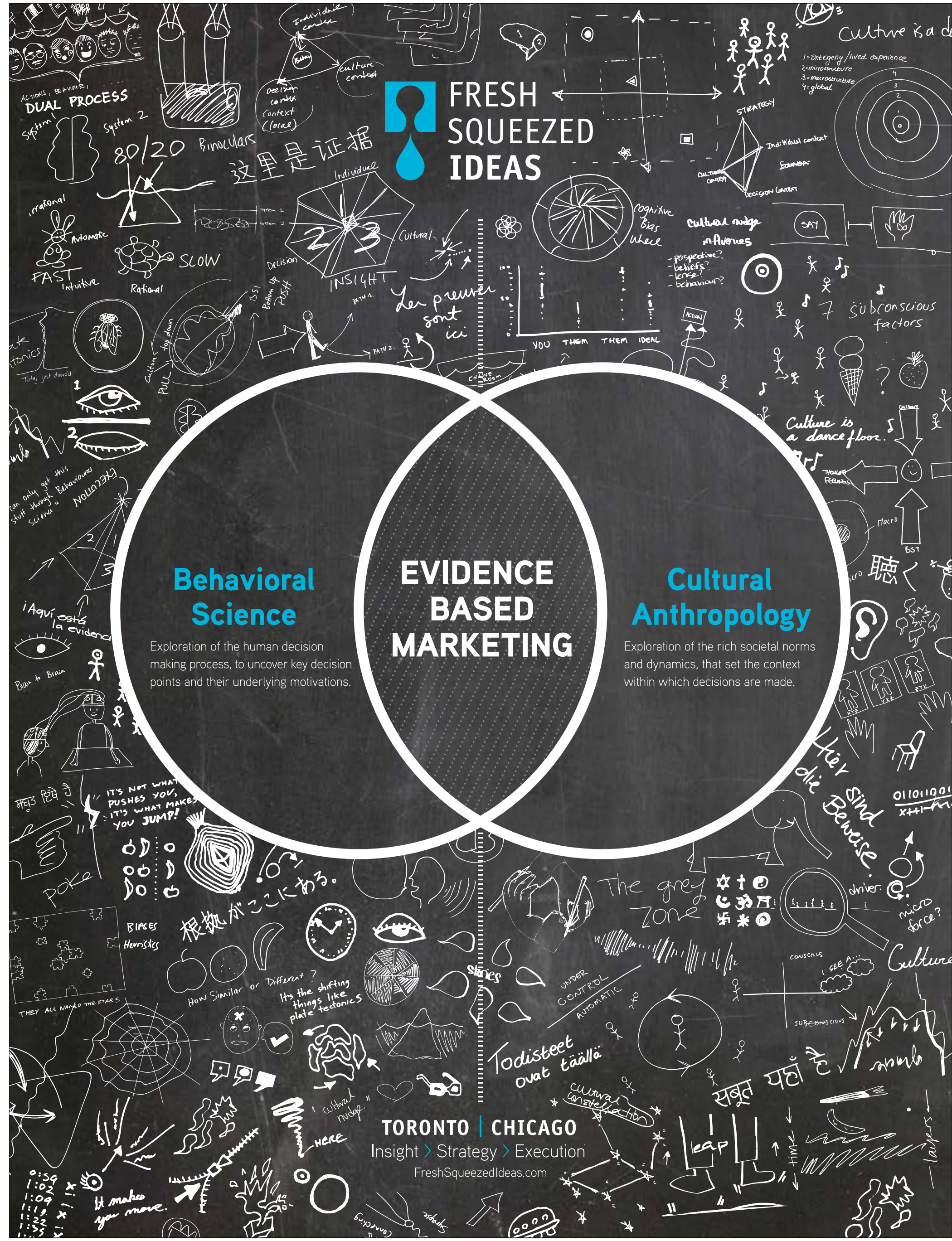
THE BIG PICTURE

The two main messages are 1) over the last three years things have been relatively stable, and 2) that the advanced research world is pretty similar globally (yes, you can find differences, but the overall pattern is one of similarity).

The message of stability might be of particular interest to those championing the exciting approaches that have yet to take off, for example Sensors/Telemetry, Virtual Reality, and Internet of Things. When and if we see these techniques becoming more mainstream, we will see them moving up the GRIT league table – but there is no sign of that happening yet. This stands in contrast to the substantial aggregate penetration of nonconscious measurement methods.

If you are running a mid-sized organization then the data suggest that unless you are an outlier, you should be using Mobile First Surveys and Online Communities, some of the techniques in the middle of the table, and perhaps one of the emergent techniques in the bottom group.

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



FUEL CYCLE

THE FUTURE OF ARTIFICIAL INTELLIGENCE

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Adoption of many new market research technologies tracked by the GRIT report is plateauing. The longitudinal nature of the GRIT report allows us to view trends, and the prognosis for many new research technologies is not great. Only one technology – online communities – has experienced double-digit growth since 2015. Some emerging methods, like wearables-based research and sensor research, are destined to remain niche for the foreseeable future.

This leads us to the question: what's next? The open-ended responses in this GRIT wave are revealing. Nearly 4% of respondents mentioned artificial intelligence (including machine learning and neural networks) in open-ended responses about emerging technologies. This is up from almost no mentions whatsoever in 2015.

At Fuel Cycle, we agree with this budding interest in artificial intelligence, believing it will have a greater impact on our industry than any other technique, tool, or company in the coming decade.

Cutting Constraints

With the advent of computers that can make decisions without constant supervision, it's safe to assume that constraints on market research will slowly slip away. In other words, where we're currently bound by capacity or by capabilities, we will no longer be bound.
Methodological recommendations can be made based on the business decision needed. Knowledge becomes decoupled from people and placed in machines. Servers don't need

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FUEL CYCLE

food, water or sleep, meaning that algorithms don't mind mining massive datasets for connections between data. In addition, the marginal cost of conducting research should decline precipitously as we place specialized knowledge into machines and spread that knowledge broadly.

AI also allows researchers to use sources like photos, videos and text to understand emotion. Right now, to classify 1000 photos by the emotion in peoples' faces, you and I would have to carefully deliberate, decide on a code frame for analyzing emotion and then have a team of people go through all 1000 photos over several days. However, there are patterns to peoples' faces when they're sad, happy, angry, or confused and machine vision can analyze facial structures in photos and instantly classify what the emotion is. So, AI not only removes the constraints on time, but it is also expansionary, meaning it allows us to collect and analyze more types of data, including unstructured data.

The Human Element

For many research practitioners, the prospect of artificial intelligence is understandably unnerving. However, we believe artificial intelligence is an enabling technology that allows researchers to do their best work. We encourage you to consider the constraints you and your team have today – what could you do if your constraints were lifted?

We see a future where business experts are coupled with highly efficient artificial intelligence and work symbiotically to produce better outcomes than they could alone. A potential example of what this looks like is for a researcher to provide the optimization constraints for an algorithm to make decisions, and then ensuring that the algorithm produces the result. Or, when an AI application dismisses an anomaly as an improbable outcome, the researcher can use their intuition to flag the anomaly for further review.

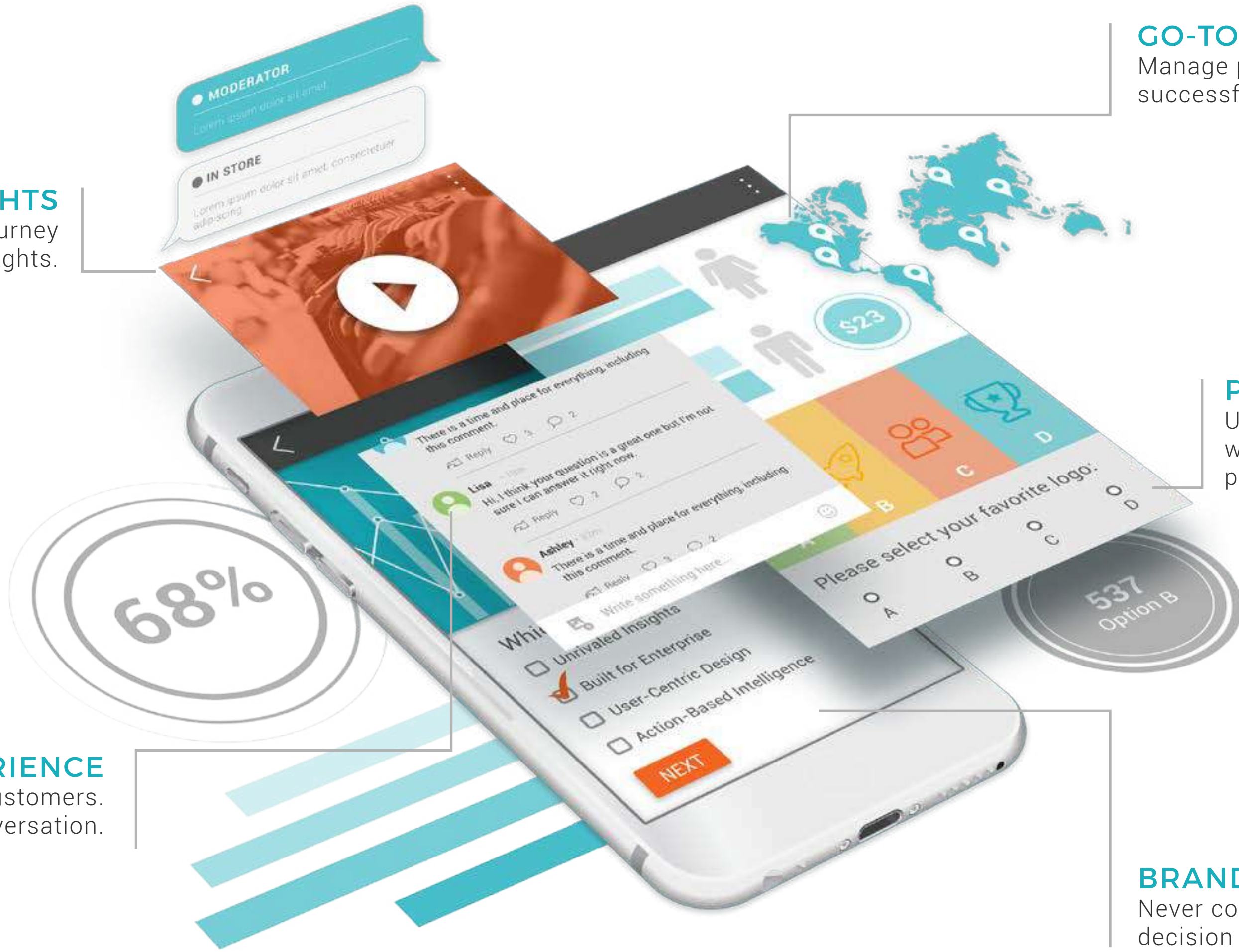
The advent of artificial intelligence and unlimited computing power is going to change our industry forever, and there will be real challenges for research vendors and corporate buyers alike as we move through an adoption curve together. While only 4% of GRIT respondents mentioned artificial intelligence in this wave, we expect nearly total industry-wide adoption over the next decade.

THE NEW STANDARD IN MARKET RESEARCH

The world's most successful brands use Fuel Cycle's market research cloud to capture, analyze, and act upon reliable data – with greater speed and relevance than their competitors.

SHOPPER INSIGHTS
Experience the shopper journey first-hand with video insights.

GO-TO-MARKET
Manage pricing & positioning to successfully launch new campaigns.



PRODUCT DEVELOPMENT
Uncover new research opportunities with fast, scientific, & automated product research.

CUSTOMER EXPERIENCE
Don't just listen to your customers. Engage in a two-way conversation.

BRANDING & POSITIONING
Never compromise again. Every brand decision is data-driven with Fuel Cycle.

USAGE OF TRADITIONAL METHODOLOGIES

Overall, 59% of the techniques used are quantitative, and 35% are qualitative

For this cycle of GRIT, we delved into the proportional usage of qualitative and quantitative techniques across projects. Overall, 59% of the techniques used are quantitative, and 35% are qualitative. A project that used both would presumably skew the average closer to 50/50.

We asked the following question:

We'd like to understand your usage of Quantitative vs. Qualitative approaches. We define Quantitative as any approach that utilizes sampling of representative segments of a population or a dataset to generate a statistical value. Qualitative is any approach that is focused on understanding a population or data source in a non-statistical manner. Please assign a percentage based on the proportion of research projects you have used them on. Your answer must total 100%.

Quantitative	59%
Qualitative	35%
Other	6%

Based upon their responses, we then asked respondents to apply a percentage to their use of "traditional" methods for both quantitative and/or qualitative.

Note: in analysing the results, we normalized the scales by removing those respondents who claimed to not use neither bucket of methods.

QUANTITATIVE METHODS

First, let's look at what we found for quantitative methods.

TABLE 1 – PROPORTION OF QUANTITATIVE METHODS USED IN PROJECTS

Method	Normalized
Online Surveys	56%
Mobile Surveys	14%
Face-to-Face	9%
CATI	9%
CAPI	4%
Mail	2%
Biometrics/Neuromarketing	1%
Automated Measures/People Meters	1%
IVR	<1%
Other quant techniques	3%

The dominance of online surveys is striking: they make up 56% of technique usage by project

The dominance of online surveys is striking: they make up 56% of technique usage by project. Mobile-only surveys remain a distant second, at 14%. However, the third survey technique that removes human interviewers, IVR (Interactive Voice Response), makes up less than 1% of all projects.

Real-time conversational techniques are now the exception. Face-to-face and CATI are under 10%, with CAPI (Computer Assisted Personal Interview) under 5%.

Biometrics and people meters each made up just 1% of projects.

CAN ONLINE TOOLS SAVE QUAL?

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According to the most recent GRIT survey data, 60% of respondents conduct quantitative research, while 35% conduct qualitative. A barely noticeable shift from the 2016 report, which measured 61% quantitative and 35% qualitative work. In both 2016 and 2017, we see that in-person interviewing still makes up the majority of methodologies being used in qualitative, at a combined total of 37% in 2017 (24% in-person focus groups, 13% in-person IDIs).

We live in a world that's obsessed with technological advances. I can barely remember life before my smartphone and services like Uber and Amazon Prime. You would think that the GRIT results would reflect this: an insights community that's just as obsessed with the technologies that make us as efficient as the rest of the population.

And yet, after in-person methodologies, telephone IDIs ranked the second most popular methodology at 10%. That's right, the phone is still a crucial technology in the market research industry in 2017, albeit a much smaller percentage of qualitative spend than a decade ago. Online communities are currently at 9% and online focus groups and IDIs using webcams came in at a collective 8%. Combined, online qual methodologies totalled 36% of all methodologies used.

Technology has been why quantitative research has maintained its dominance. Online surveys have enabled unprecedented access to respondents, while getting cheaper, faster, and good enough to totally eclipse telephone quant surveys.

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So why haven't we seen technology play a bigger part in stemming the decline of qualitative research? By and large, vendors and suppliers who enable online qual have failed to make their technology fast, easy-to-deploy, scalable, and available across the enterprise.

Older approaches to enabling in-person research are known for being very time consuming. So much so, in fact, that many organizations have been forced to avoid qualitative altogether. As more and more brands are pressed to reduce costs and time to market, they are now looking to new, scalable, online methodologies to engage consumers qualitatively. We expect this trend to continue.

The brands embracing the value of qualitative consumer input leverage technology in ways that make it practical and cost effective. Business economics, the need for rapid decision making, and increased pressure to insure "voice of the consumer" at scale all play a part in driving adoption of disruptive technologies that support online qualitative methodologies.

We believe that leveraging technology to engage consumers through conversation is absolutely critical to successful brand growth. If you want to produce marketing that truly resonates and build products that people actually want to buy, then you first have to understand them. Basic comprehension can come from the "who, what, when, where, how" of quantitative data, but a true understanding and empathy for the consumer is only possible when you understand the "whys" behind their actions and reactions. It's from these qualitative questions that insights are uncovered.

The GRIT report reveals the "call to action" for the coming year for those of us who build online qualitative research tools. We need to help brands and marketing managers to connect with customers anywhere, on demand, using robust tools to harvest data and make the resulting insights actionable for all stakeholders. These tools must be better than traditional methodologies that are impractical and too expensive for the future.

We believe that the demand for cost-effective, technology-enabled qualitative connection with consumers is on the rise, and we suspect that next year's GRIT data will prove us right.

QUALITATIVE METHODS

Now, let's look at what we found for qualitative methods.

Unlike quant research, qual research remains personal—and real-time. The main innovation has been asynchronous rather than automated data collection.

- Conversations remain the most common qualitative-research technique, still led by in-person focus groups, which make up 26% of the techniques used. Conversational techniques comprise 65% of all qualitative methods. The dichotomy is between group conversations or one-on-one: IDIs (In Depth Interviews) account for 32% of qualitative techniques used.
- Online technology has enabled asynchronous conversations, where the interviewer and participants no longer communicate during the same time period. Participants respond at their leisure, when they log into the website or app. This is the key qualitative innovation of the past 20 years, yet only 20% of the techniques used across projects are online communities, bulletin-board studies, and mobile responses and self-reports.
- Given the very human nature of qualitative methods, only 3% of techniques used across projects are automated solutions such as blog monitoring and automated interviewing.

TABLE 2 – PROPORTION OF QUALITATIVE METHODS USED IN PROJECTS

	Normalized
In Person Focus Groups	26%
In Person IDIs	15%
Telephone IDIs	11%
Discussions Using Online Communities	9%
Mobile (diaries, image collection, etc...)	7%
In-Store/Shopping Observations	5%
Online IDIs with webcams	4%
Bulletin Board Studies	4%
Chat (text-based) Online Focus Groups	3%
Online Focus Groups with webcams	3%
Chat (text-based) Online IDIs	2%
Monitoring Blogs	2%
Telephone Focus Groups	1%
Automated Interviewing via AI systems	1%
Other qual methods	6%

Unlike quant research, qual research remains personal—and real-time. The main innovation has been asynchronous rather than automated data collection

THE 'NEW' TRADITIONAL RESEARCH IS ALIVE AND WELL

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Disruptive technologies are redefining the competitive landscape of their respective markets and marketing research is no exception. This leaves what is called 'traditional market research' in need of a new definition.

The idea of what constitutes 'traditional' market research depends on where one falls in the time machine. Fifteen years ago, traditional market research was basically confined to live interviews, focus groups, and lengthy paper surveys. Then the growing ease and speed of the internet and VOIP created a world where distance became no longer a factor in our ability to interact together. These technologies led to the rise of telephone and web-enabled focus groups and online research platforms and helped to redefine the competitive landscape of market research services.

Now we are in another phase where once again dramatic ideas are changing the world of insights. Today's buzzwords are artificial intelligence, augmented and virtual reality, wearables, and the rise of robots. These emerging (and potentially cataclysmic) developments will start to supplement the way market research is conducted while gaining share from more traditional research methods over time. So where do these methodologies and others, such as applied neuroscience, biometric response, and big data analytics leave the concept of traditional research?

For most modern researchers, web-enabled IDIs and focus groups and online communities have now evolved into what is known as 'traditional.' These are now the 'new' traditional, and they are alive and well. Neither data analytics nor big data have yet replaced them. There remains the ultimate objective of market research: understanding the 'WHY'.

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GRIT COMMENTARY

For now, there are limitations in the ability of many emerging technologies to explain WHY individuals are reacting in their particular way. To get to this understanding, a sense of shared presence among geographically separated moderators and respondents needs to be established, so that people have a chance to explain themselves. The ability to conduct this type of research has become progressively possible due to the continual advances in global VOIP lines, improvements in computers, and the ubiquitous nature of built-in webcams.

One needs only to look at the historical GRIT data to understand that we are still a distance away from the demise of the 'new' traditional research. While up from 39% a year ago, somewhat less than 50% of current survey participants have yet to use webcam-based interviews as a research solution. Only about 60% have used online communities.

A 10% increase in adoption of web-enabled IDIs and focus groups is one of the largest trends reported in the latest GRIT report. As global leaders in facilitating web-enabled IDIs and focus groups, we can attest that with ongoing growth of between 10% and 20%, year over year in this line of business, that the trend remains strong.

Almost fifteen years ago, when we entered the world of online market research with our global audio platform and a web-enabled partner network, I published an article called "Distance Is Dead," which focused on the growing ease and speed of communication leading to a world where geography, borders and time zones were rapidly becoming irrelevant to the way we conduct our business and personal lives. This web-enabled global communications network will eventually connect everyone on earth. Looking ahead, there remains plenty of room for the 'new' traditional research.

A DAY IN THE LIFE OF RESEARCHERS

Way back in 2015, we wanted to understand how researchers spend their average work week: what tasks they undertook, what tools they used, and how much time was dedicated to each. Two years is a lifetime when it comes to new technologies, and we have seen a few emerge in the past couple of years that have the potential to radically change the lives of researchers. These include automation, AI and data visualization. With that in mind, we changed some of the questions (which unfortunately makes trending impossible) to establish a new benchmark for future comparisons.

In this section we'll explore what makes up a day in the life of researchers.

In a typical week 85% of researchers spend time in meetings and on conference calls related to planning research studies

TIME SPENT ON RESEARCH FUNCTIONS

Researchers and insight professional taking part in the GRIT study were asked to indicate what proportion of their time is spent on a number of research and non-research work areas. The table on right shows which tasks form at least part of the working week for insight professionals.

Nobody will be surprised to see that in a typical week 85% of researchers spend time in meetings and on conference calls related to planning research studies. From the analysis further down in this section we can see that the average insights professional is spending about an hour a day on this task, and 22% are spending at least a day per week.

TABLE 1	% undertaking in a typical work week
Conference calls or meetings related to planning research studies	85
Analyzing, interpreting, charting and/or reporting data	84
Presenting results to key stakeholders	78
Conceptually developing research studies	78
Designing questionnaires/guides/data frameworks	73
Consulting on implications or forward planning as a result of research projects	70
Managing fieldwork or vendors (internal or external)	65
Other non-research related work tasks that you spend more than an hour on in a typical week	60
Quality checks on work completed by outside partners/vendors	56
Programming questionnaires or using other data collection tools	39
Conducting groups or interviews or moderating online discussions	38

Base 983

Other frequently mentioned activities were: analyzing, interpreting, charting and/or reporting data (84%), presenting results to key stakeholders (78%) and conceptually developing research studies (78%)

Over half (60%) of participants spend more than one hour a week on non-research tasks.

The activities with the lowest levels of participation are: programming questionnaires or using other data collection tools (39%) and conducting groups or interviews or moderating online discussions (38%) suggesting that these activities are specialized.

The table on right shows what proportion of the week the average insight professional spends on each task and the proportion of researchers who spend at least 20% of their time on each task.

The data suggest that the average researcher conducts a wide range of tasks during a typical week. The largest use of time (17%) was for "Analyzing, interpreting, charting and/ or reporting data". 38% of insights professionals spend at least a day week on this task.

Analyzing and reporting was followed by seven tasks that each account for between 8% and 12% of the working week, showing the breadth of tasks carried out by research professionals.

At the bottom of the list there are three tasks that on average account for relatively small proportions of the week. In the case of "Quality checks on work completed by outside partners/vendors" this could be because it is not a time-consuming task (for most people). For "Conducting groups or interviews or moderating online discussions" and "Programming questionnaires or using other data collection tools", the issue is that fewer people undertake these tasks, making the average time taken appear low. For all three of these tasks, only a few people spend at least a day a week doing them.

There are few differences between insights buyers (clients) and insights providers (suppliers) in terms of the share of time spent on research activities.

TABLE 2	Average Share of Time %	Spending at least 1 day per week %
Analyzing, interpreting, charting and/or reporting data	17	38
Conference calls or meetings related to planning research studies	12	22
Other non-research related work tasks that you spend more than an hour on in a typical week	11	18
Conceptually developing research studies	10	17
Consulting on implications or forward planning as a result of research projects	10	19
Presenting results to key stakeholders	9	13
Designing questionnaires/guides/data frameworks	8	12
Managing fieldwork or vendors (internal or external)	8	13
Quality checks on work completed by outside partners/vendors	5	6
Conducting groups or interviews or moderating online discussions	5	9
Programming questionnaires or using other data collection tools	4	5

The average researcher conducts a wide range of tasks during a typical week

TIME SPENT ON ANALYSIS TASKS

Insights professionals who indicated they are involved in analysing, interpreting, charting and/or reporting data provided a breakdown of the time spent on various components of the analysis process, which is shown in table on right.

The top analysis activities are "Preparing charts or data visualization" and "Interpreting tables/charts and other reporting created by somebody else". These two activities take up the largest average share of analysis time with each comprising more than 20% of analysis time for approximately half of those conducting analysis.

Another core analysis activity is "Interactively exploring data", undertaken by just over three quarters of those conducting analysis and accounting for at least 20% of analysis time for 38% of those analyzing data.

The least common analysis activities are creating tables (either for self or others) perhaps suggesting that this area has been automated and creating advanced statistical analyses likely due to this being a specialist skill.

TABLE 3	Average % of Analysis Time	Conducting at all %	20% or more of analysis time %
Preparing charts or data visualization	21	87	54
Interpreting tables/charts and other reporting created by somebody else	21	76	45
Interactively exploring data. That is, starting by running some simple tables/charts, and then creating new tables/charts based on patterns you see and hypotheses that you develop	15	77	38
Interpreting a standard set of tables that you have created	11	64	25
Preparing analytical plans	10	66	19
Creating tables for an internal or external client (including data cleaning and manipulation)	9	58	18
Creating a standard set of tables for your own use (e.g. running all the questions in the study by, say, age, gender and brand)	8	53	14
Creating Advanced statistical analyses (e.g., CBC, PCA, regression)	6	41	11
Base	676	676	676

The three main aspects of the insight professional's job are analysis, meetings, and non-research tasks in case of generalists. Specialists spend considerable time on more technical/specific tasks, such as survey programming and moderating. Within analysis, most time is spent at the stage after creating tables and before making the presentation.

The top analysis activities are "Preparing charts or data visualization" and "Interpreting tables/charts and other reporting created by somebody else"

BETTER IN A DAY: MR'S BIGGEST CHALLENGE YET

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It is clear that the incredible speed of emerging technology is impacting business in general, but it's the effects on marketing specifically that will send ripples through market research.

Our fight against DIY is faster, cheaper, better

Twenty years ago, if a client wanted to understand consumer reactions, they would go to their market research department and run a survey. Today, there are multiple alternatives including social media monitoring, DIY tools, or even Google.

The now-renamed 'Insight' department is not necessarily the first port of call. We've already lost to DIY tools in the area of customer satisfaction where technology companies have mostly overpowered legacy research providers. Previously fodder for agencies, this area of business has now largely fallen to Survey Monkey, Qualtrics and Medallia, who can collect and analyse results in hours without market researchers and sometimes without market research expertise. The academic nature of research means that we have been notoriously slow to adopt new ideas (they entail years of arduous testing, validation, and peer approval). Methodology itself has been our main area of innovation, with each variation distinguishing itself by encompassing reasoning from other disciplines, such as behavioural economics, sociology, and mathematics.

This is how we have maintained our relevance until now; it means we've grown to better understand people than any other potential data provider. But as we reach a pivotal moment for the industry, this better understanding, if it is to be an integral part of the business decision making process, must also align with imperatives for speed and cost.

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Our clients are flying high

At Zappi, we harness what's called an 'accelerate week', taken from industry-leading thinkers, during which we bring together cross-functional teams across development, research, sales, and marketing. Friday mornings are always reserved for customer testing and it is this part of the process that's being adopted by our clients. If we extend this thinking into a two-week sprint, Thursday of the second week is reserved for testing, with a full day thereafter used for absorption and learning. That's our new reality.

I've been speaking on this topic for a while, and I've certainly seen big changes take hold. Several of the industry's largest customers have adopted a fundamentally different way of working (KLM airlines, for instance, presented on this topic at IIeX): agility, rapid prototyping, two-week sprints, product owners, scrum masters. They are beginning to operate in much the same way we do as a software business.

There is opportunity ahead of us

As these approaches have infiltrated the business world, speed has become an essential part of what we need to deliver. The choice for research is no longer between fast or slow but between fast or nothing.

These new business processes often come into play on a much larger scale and our clients need research within a day and their only option is DIY. If the mainstream part of the industry wants to keep up, we have no choice but to shapeshift.

The opportunity before us is to take our great research thinking and embed it within a one-day-turnaround. In doing this, our industry retains its relevance, our research maintains its quality and we can become completely embedded within businesses in a way that we have never managed before!

USE OF TECHNOLOGY

In the same "day in the life" section of the survey, we also wanted to understand who used technology to conduct specific tasks and what solutions were most used.

We asked *"Thinking back over projects that you worked on in the last 8 weeks, who mainly used the software that was used to:"* followed by series of items (i.e. research tasks). We wanted to understand who within an organization was using specific software or was responsible for particular tasks. In the table on right, we show the percentages of those who answered that they were responsible for the tasks:

OPTIONS	Checked
Create reports	67%
Create charts	56%
Analyze market research surveys	47%
Create Excel dashboards/reports	36%
Analyze open-ended questions from surveys	34%
Create advanced statistical models	24%
Create infographics	20%
Create interactive online dashboards/reports	18%
Analyze social media data	13%
Create static online dashboards/reports	13%
Analyze customer, transaction, scan and other operational data	12%
Analyze web usage	8%
Analyze automatically-collected customer feedback	6%
I did not engage in any of these tasks.	18%

The most common software activities aren't surprising: creating reports (67% of researchers), charts (56%), and analyzing surveys (47%). More surprising are some of the less common activities.

Automation is not widely embraced: only 6% of researchers use automatically-collected customer feedback and only 12% analyze transactional and operational data, despite the availability of a wide range of software automating NPS and CX measurement. This could be a reflection of the fact that the CX function has largely been removed from the research organization and is now part of Operations on client organizations, with a whole other supplier category (Qualtrics and Medallia for example) that have grown around this category.

The chemtrails that consumers leave across the cloud aren't being tracked either. Only 13% use software to analyze social media. And the analysis of website usage data is even lower at 8%. Again, this likely reflects the fact that neither social media nor web analytics lie within the research organization any more, or that it is largely outsourced to suppliers other than traditional research agencies.

Modern dashboard systems aren't widely used yet: only 18% use dynamic, interactive dashboards, while 12% use static dashboards. Instead, 36% of researchers continue to rely upon Excel for dashboards.

Automation is not widely embraced: only 6% of researchers use automatically-collected customer feedback and only 12% analyze transactional and operational data

MOST COMMONLY USED SOFTWARE

We also wanted to understand what solutions were being used for these tasks by asking an open-ended verbatim question connected to the tasks; for each function a respondent said they engaged in, we asked them to name the solutions they used to accomplish those tasks. While not necessarily a precise indicator of market share, the table on the next page gives a good general view of the tools that GRIT respondents use for each task. We have listed those mentioned by both buyers and suppliers and the top three choices by number of mentions for each.

It should come as no surprise that Microsoft Office is by far the go-to solution for most general analysis and reporting needs, followed by SPSS for more specific analytical needs. Getting into more specific needs that Office is not well suited for (but still has some applications), Tableau leads for dashboard creation with twice as many research clients mentioning it than suppliers, Crimson Hexagon appears to be the leader in social media analytics, Google Analytics reigns supreme for web analytics and Qualtrics is the clear winner when it comes to CX data, although a variety of other solutions (including other self-service survey platforms) received "tied" mentions as well as in the second and third position.

Despite the push for cloud-based analysis, reporting platforms, and online dashboards to become the standards for reporting, the insights industry still defaults to Microsoft Office as the primary tool used for analysis and reporting. Even in preparing GRIT this is true; although a variety of tools were used for some specific tasks, in the end Excel banners and charts were the tools that were most used in preparing the initial drafts of the report. Does this mean the industry is woefully behind the times? Perhaps, or perhaps it just means that no other platforms can offer the level of flexibility and ease of use that Office can. It is possible that integration with Office should be a focus for any software platform that wants to sell to researchers.

Microsoft Office is the go-to solution for most general analysis and reporting needs, followed by SPSS for more specific analytical needs

TOOLS USED BY THE INSIGHTS INDUSTRY

OPTIONS	First Most Mentioned	% Answered	First Most Mentioned	% Answered	Second Most Mentioned	% Answered	Second Most Mentioned	% Answered	Third Most Mentioned	% Answered	Third Most Mentioned	% Answered
	Clients		Supplier		Clients		Supplier		Clients		Supplier	
Create reports	PowerPoint	68%	PowerPoint	59%	Word	14%	Word	17%	Excel	7%	Excel	7%
Create charts	PowerPoint	48%	PowerPoint	41%	Excel	35%	Excel	31%	Tableau	4%	SPSS	3%
Analyze market research surveys	SPSS	22%	SPSS	29%	Excel	19%	Excel	14%	Q	10%	Q	4%
Create Excel dashboards/reports	Excel	78%	Excel	69%	Qualtrics	3%	PowerPoint/ SPSS	3%	Google Docs, Sheets, and Slides	2%	Tableau/ Qualtrics/ Google Docs, Sheets, and Slides/ Decipher/MS Office/Dapresy	8%
Analyze open-ended questions from surveys	Excel	44%	Excel	33%	Word cloud	9%	SPSS	8%	Odin Text	7%	Q	4%
Create advanced statistical models	SPSS	33%	SPSS	39%	R	10%	R	14%	SAS	8%	Sawtooth	8%
Create infographics	PowerPoint	41%	PowerPoint	35%	Excel/Tableau	16%	Adobe	6%	Dapresy/Power BI	5%	Excel	3%
Create interactive online dashboards/ reports	Tableau	37%	Tableau	16%	Excel/Power BI	16%	Dapresy	7%	Qualtrics/ MarketSight/ Dapresy	8%	Infotools Harmoni	5%

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TOOLS USED BY THE INSIGHTS INDUSTRY

OPTIONS	First Most Mentioned	% Answered	First Most Mentioned	% Answered	Second Most Mentioned	% Answered	Second Most Mentioned	% Answered	Third Most Mentioned	% Answered	Third Most Mentioned	% Answered
	Clients		Supplier		Clients		Supplier		Clients		Supplier	
Analyze social media data	Crimson Hexagon	7%	Crimson Hexagon	9%	Excel/Google Analytics	10%	R	5%	R/Google Docs, Sheets, and Slides/OdinText	7%	Excel	3%
Create static online dashboards/reports	Tableau	24%	Excel	16%	PowerPoint/ Excel/Qualtrics	36%	PowerPoint	14%	Google Docs, Sheets, and Slides/Infotools Harmoni/ Python/Power BI/In House platform	15%	Tableau	7%
Analyze customer, transaction, scan and other operational data	Excel	26%	Excel	20%	SPSS/Tableau	13%	SPSS	15%	R/SAS/Google Analytics/Word cloud/Python/ Power BI/In House platform	15%	R	13%
Analyze web usage	Google Analytics	42%	Google Analytics	28%	Adobe/ OdinText/In House platform	10%	R	8%	0	0%	Excel	4%
Analyze automatically-collected customer feedback	Qualtrics	23%	SPSS/Qualtrics	16%	Excel/SPSS/ SAS/Google Docs, Sheets, and Slides/ Decipher/Sur-veyMonkey/ Wincross/Sur-veyGizmo/Pow-er BI/In House platform	38%	Excel/R/Survey-Monkey/Survey-Gizmo	22%	0	0%	PowerPoint/ Tableau/Q/ SAS/Python/ Askia/Confirmit/ Displayr/ SynoTool	24%

HOW RESEARCH IS USED

We asked research buyers to tell us how market research is used in their organization in order to better understand the strategic role of insights and the tactical integration between primary market research and other data sources.
In the first question, we asked respondents to select all that apply from the following list.

The major finding here is that client-side organizations do not rely on primary research as the only data source; it sits within a broader framework of information sources that supports decision making. This correlates with our earlier findings regarding social media analytics and big data being far ahead on the adoption curve for buyers vs. suppliers. It's an indication that those data sources come from a different mix of suppliers (i.e. non-MR).

This being said, for 65% of research buyers, the role of market research is to answer questions not addressed by other data sources, demonstrating a strong need for research as part of the mix. Reports of the death of research at the hands of big data and social media analytics seem, at this point, to be premature.

WHICH OF THE FOLLOWING DESCRIBE HOW MARKET RESEARCH IS USED IN YOUR ORGANIZATION?

To answer important questions that cannot be answered with other data sources.	65%
Used as an input into all important customer-facing decisions.	47%
Our main way of understanding customers' experiences.	57%
It provides the stories, which we use to understand how all the different data sources fit together.	42%
Research is just one of many types of data that is an input into decision-making.	74%
Other (Specify)	5%

On a similar note, the majority of research buyers indicate that research is the main (but not only) way customer experience is understood, further underscoring its continued relevance and usefulness.

Finally, we see again internal consistency within GRIT data through the relatively low percentage of research buyers who use research to provide overarching consumer narrative, perhaps reflecting a gap in that capability (a theme observed elsewhere in this GRIT Report).

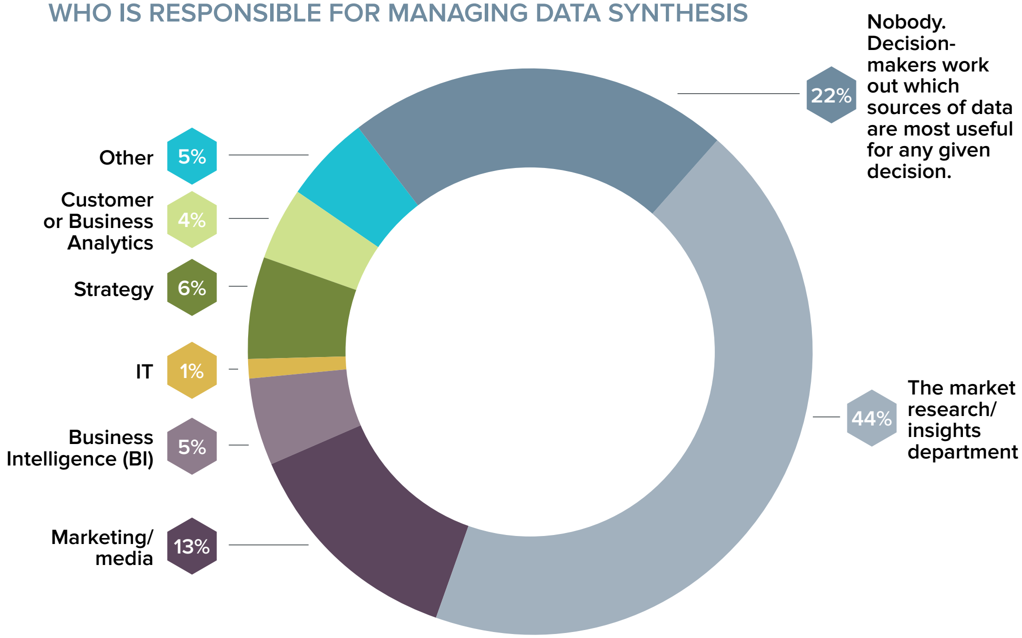
Client-side organizations do not rely on primary research as the only data source

For 65% of research buyers, the role of market research is to answer questions not addressed by other data sources

WHO OWNS DATA SYNTHESIS

Since we expected that synthesis of multiple data sources was a major aspect of buyer-side organizations, we wanted to get a handle on just who was managing this process. The good news is that a plurality of GRIT client-side respondents said data synthesis was housed within the insights organization. However, the majority described many other units collectively owning this function, with over a third indicating that a combination of Marketing and ad hoc internal decision makers owned data synthesis.

WHO IS RESPONSIBLE FOR MANAGING DATA SYNTHESIS



The good news is that a plurality of GRIT client-side respondents said data synthesis was housed within the insights organization

HOW TECHNOLOGY IS FUELING THE NEW AGE OF MARKET RESEARCH

Luke O'Brien
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Over the last few years we have seen the gap substantially widen between winners and losers in the industry.

The most significant factor that seems to determine a "winner" is their ability to hone in on the 'so what?' as opposed to merely reporting on findings. Technology is a chief enabler for freeing up time for valuable strategic thinking, automating much of the grunt work that insights professionals face.

Data Collection & New Data Types

A significant change in the marketing world has seen end-clients contracting directly with ad-tech platforms in order to build a first-party data asset from media and online data. This has helped them to unlock significant value from their data, get insights faster and have all media activities adding to that asset. Where their agency adds value is in analysis and execution of the day-to-day.

We are now seeing the research world follow suit, with global brands starting to use insights-tech like Pureprofile to tie all online panel activity and customer studies back to an individual respondent. The new asset enables the creation of cross-category insights (understanding how respondents behave within a product portfolio) and longitudinal insights (identifying switchers to and from your brand and uncovering the causes.)

Market-leading researchers are starting to build customer "profiles", as opposed to running disparate studies, and are forming partnerships with providers who they can syndicate profile data from, enabling them to build a richer data set without having to ask repetitive questions (e.g. age, gender, location) or manage a panel themselves. This is a huge step towards improving data quality for the industry.

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Pureprofile

Soon, those with the right technology will be able to append data such as social, location, app usage, web monitoring and credit card transactions to their asset. One passive data connection could automatically answer thousands of profile questions to be used for sample targeting or appending into raw data.

Analytics

Analytics provide a substantial competitive advantage, especially when competing with consultancies that lack market research pedigree. The winners here are experts in educating, communicating and selling the value that these analytics deliver against the investment required.

Visualization and Dashboards

It is no surprise to see dashboards top the charts and being used as the output of a wider automation play which templates methodologies, questionnaire design and data processing. They free the user up to focus on developing the most actionable story for stakeholders.

Dashboards are also a great tool to drive engagement within the business. For example, we see 1,000+ weekly logins from a client whose staff are remunerated based on the results displayed in their CX dashboard.

DIY Solutions

DIY tools come in handy for maximum time efficiency. Scripting a quick questionnaire or leveraging a template and setting live to gather insights within a few hours, instead of weeks is becoming the new norm.

Data Integration

The response here is low, but I believe this is because these investments are happening elsewhere within the organization. I can't see this ownership changing in the near future but am seeing some successful Insights teams starting to leverage other company data alongside traditional market research. Where is it all heading?

We will continue to see more automation, greater collision of the 'what' from big data, the 'why' from traditional methodologies and more frequent use of data visualization to drive impact.

I also predict that insights will start to be connected to other areas of the business. For example, within media execution, whereby high value customers from a brand tracker are used as a trainer set for a predictive model which can scale and be used for media targeting.

We're in-store for an exciting few years ahead!

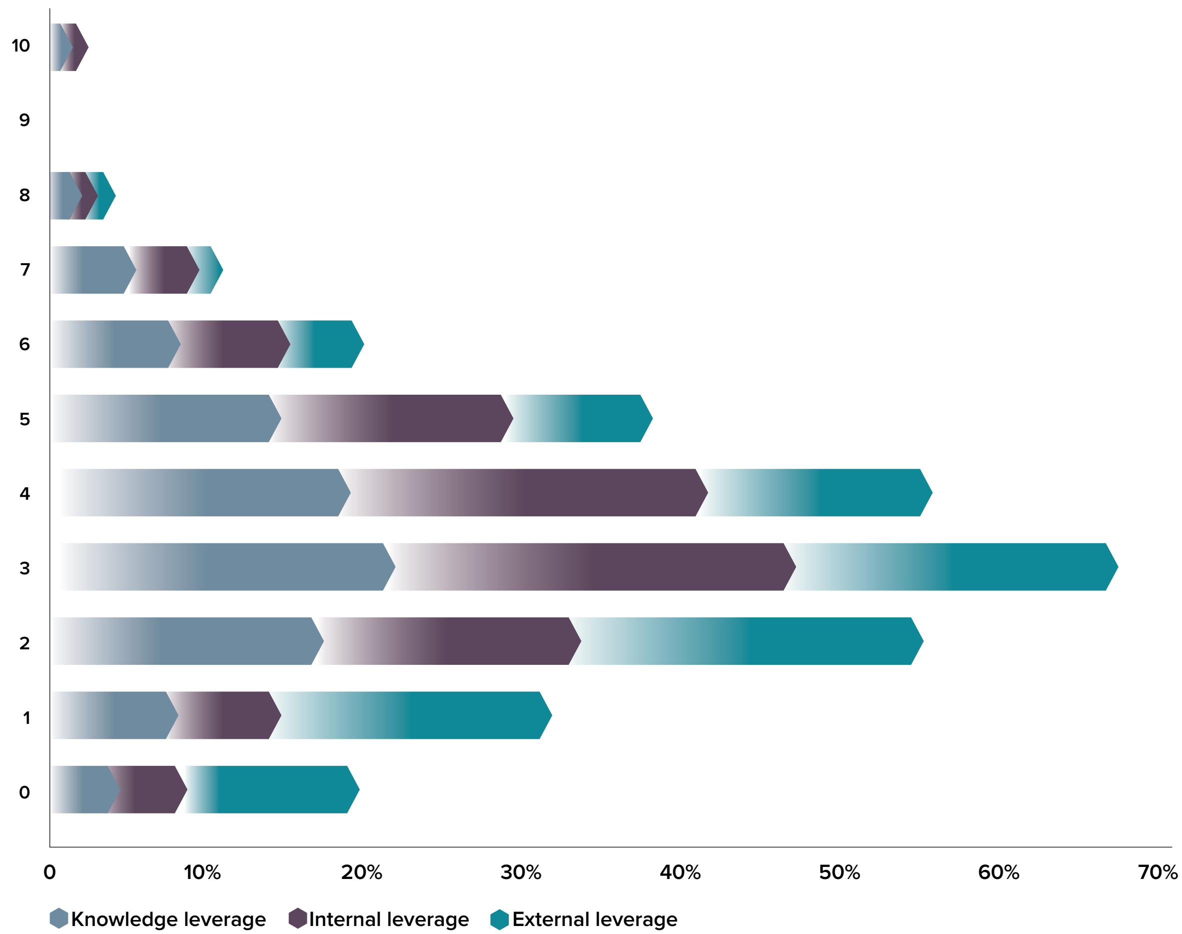
THE APPLICATION OF RESEARCH FINDINGS

Finally, we wanted to know which application of research was most important, using a scale of 1-10 for each of three core uses: knowledge leverage, internal leverage and external leverage. The results indicate a relatively tight three-way race, with internal leverage being most important but closely followed by knowledge leverage and external leverage. How do we read these results? Researchers want results that can address the needs of multiple constituencies and can be applied in multiple ways to deliver impact.

While research is an important feed into the insight and analytics process, it is not the only input and ownership of synthesising data feeds is relatively fragmented, although research organizations are still primarily the home of this function. As more and more digital data sources and channels open, will that still be the case? That remains to be seen, but at the very least market research has a claim to a seat at the table. As insights organizations focus on delivering more value and impact, their position can only strengthen.

Researchers want results that can address the needs of multiple constituencies and can be applied in multiple ways to deliver impact

HOW RESEARCH FINDINGS ARE USED



EVOLVING YOUR TRACKER: GAIN NEW INSIGHTS WHILE MAINTAINING CONSISTENCY

Mayer Danzig
SVP product Management, Research Now
Website: www.researchnow.com

In the last few years, we've seen important innovations throughout research but one thing hasn't changed: your tracker study.

To be fair, a tracker isn't supposed to change. The basis of its value is a consistent set of questions, asked over time. The resulting portrait of consumer preferences and opinions is invaluable for understanding and quantifying the progression of markets and the evolution of brand perceptions.

But that very consistency limits the kinds of insights a tracker can provide. The longer any given tracker has been in service, the more likely it is to be of diminished value. That leaves researchers with a dilemma: How can you gain new insights of depth and value from your tracker, without modifying it to such a degree that you lose the integrity and benchmarking value of the data?

Don't Change Your Tracker – Make it Smarter

One answer lies in integrating data from additional sources with your tracker survey data. The resulting overlays can reveal significant new discoveries, without changing the survey instrument or compromising existing data.

Brand managers and marketers can understand the changing preferences with greater specificity and granularity, and anticipate the near future with more confidence. They can uncover previously unseen links between consumer behavior and traits or qualities that can now be identified – and targeted.

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Consider these examples:

- **More focused insights into tracker results, from your research partner's data.** Your panel provider should have detailed, up-to-date profile data on your desired audiences. In addition to extensive demographics, it can include brand preferences, purchase behavior, employment status, and more. This panelist data allows you to analyze tracker results with greater specificity. For example, you can segment your tracker results to bring the perceptions of high-value consumers into sharper focus, and identify previously unrecognized commonalities that your brand can leverage.
- **Deeper customer and loyalty insights from your own customer data.** Matching your customer data against your tracker data – with PII stripped to preserve anonymity – can strengthen your understanding of your customers, and your brand's relationship with them. You can gain a more accurate grasp of how you're meeting customer needs by relating their perceptions to purchase and service histories. You can also get a more detailed view of how your loyalty programs contribute to customer growth and value.
- **More accurate marketing effectiveness insights from ad exposure data.** If you use your tracker to observe the effects of marketing campaigns on brand perceptions, you are probably relying on self-reported campaign exposure. Unfortunately, unreliability of consumer ad recall creates uncertainties in your results. By appending actual campaign exposure data from your research partner, you can analyze and evaluate these results with greater confidence.
- **More granular segmentation, product and brand insights from third-party data.** Appending third-party datasets to your tracker results opens a broad palette of possibilities, reflecting the variety and depth of consumer data available today. For starters, consider voter, purchase, automotive, travel, financial, and healthcare data.

The discoveries can be invaluable – and unexpected. One of our clients in financial services, for example, was puzzled by tracker results that didn't clearly reflect any of their segmentation data. Surprisingly, third-party voter and political affiliation data appended to their tracker results provided the missing link in explaining perceptions of brands and banking products, and even specific credit card preferences.

As these examples demonstrate, integrating additional data with your tracker results can deliver insights that are more powerful, relevant, actionable, and valuable to your organization – all without sacrificing tracker continuity.

SATISFACTION WITH SUPPLIERS

Returning in this wave of GRIT is our exploration of satisfaction levels of suppliers by clients, combined with how suppliers see themselves. Although many individual companies on both sides have formalized programs for capturing satisfaction data, it is a perennial challenge for the industry and GRIT is the only effort that looks at this across the industry in aggregate.

Suppliers get their lowest marks for delivering research findings

BUYER SATISFACTION WITH SUPPLIERS

First, we asked buyers of insights services to rate their satisfaction levels with their suppliers on a series of strategic and tactical attributes:

While research suppliers are skilled at execution, clients continue to be dissatisfied with providers' ability to make research relevant to the client organization

Aspect	Type	Corporate Researcher
Conducting the research	Strategic	71%
Implementing the research plan	Tactical	67%
Project Management/Service	Tactical	60%
Managing scope or project specification changes	Tactical	60%
Designing the research plan	Strategic	59%
Understanding the issue to be researched	Strategic	57%
Timeliness	Tactical	52%
Data analysis	Tactical	49%
Understanding their business	Strategic	42%
Reporting research results	Strategic	38%
Interacting with senior management	Strategic	38%
Cost	Tactical	34%
Recommending business actions based on the research	Strategic	27%
Data visualization	Tactical	23%

[Normalized to remove "Not applicable".]

The results are a mixed bag of news for the industry:

- Corporate researchers are the most satisfied with the conduct of the research (71% very or completely satisfied), the implementation of the research plan (67%), project management (60%), and management of changes to scope (60%).
- While research suppliers are skilled at execution, clients continue to be dissatisfied with providers' ability to make research relevant to the client organization. Only 42% of clients are very or completely satisfied with how their providers understand their business. Just over a quarter (27%) are satisfied with recommendations for business actions based on the research. Both impact interactions with senior management (only 38% very or completely satisfied).
- Satisfaction is the lowest for data visualization (23% very or completely satisfied), and is low for reporting research results in general (38%).

The message here is that while research suppliers seem to receive good marks on "business process" attributes such as project management, it is a very different story when it comes to "business impact" type of skills. Even more concerning, suppliers get their lowest marks for delivering research findings. This would seem to reinforce the call for more storytelling and creative communication of findings. These are indeed issues that buyers are paying attention to and penalize their suppliers for missing the boat on.

HOW SUPPLIERS RATE THEMSELVES

As a follow-up, we asked a projective question of suppliers, challenging them to think about how buyers would rate suppliers on the same attributes. The results are enlightening.

For the most part, suppliers had an accurate understanding of how they are viewed by buyers. In fact, their perceptions strongly correlated to actual ratings by buyers (0.864).

Rarely did suppliers have an inflated view of client satisfaction, and then only by a modest amount: they expected a 6-point higher rating for data analysis, 5 extra points for reporting research results, and 4 points for data visualization.

Research suppliers were most pessimistic about their clients' satisfaction with timeliness, scope change, cost, and understanding the client business, underrating each by 14 to 18 points.

Research suppliers were most pessimistic about their clients' satisfaction with timeliness, scope change, cost, and understanding the client business

Top 2 Box (% Very + Completely Satisfied)

Aspect	Type	Provider Perceptions	Corporate Researcher	Gap
Data analysis	Tactical	55%	49%	6%
Reporting research results	Strategic	43%	38%	5%
Data visualization	Tactical	27%	23%	4%
Designing the research plan	Strategic	60%	59%	1%
Conducting the research	Strategic	71%	71%	0%
Project Management/Service	Tactical	59%	60%	0%
Interacting with senior management	Strategic	34%	38%	-3%
Implementing the research plan	Tactical	60%	67%	-7%
Recommending business actions based on the research	Strategic	21%	27%	-7%
Understanding the issue to be researched	Strategic	45%	57%	-11%
Timeliness	Tactical	38%	52%	-14%
Managing scope or project specification changes	Tactical	44%	60%	-16%
Cost	Tactical	18%	34%	-16%
Understanding their business	Strategic	24%	42%	-18%

LET'S DO BETTER

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"Do the best you can until you know better. Then when you know better, do better." – Maya Angelou

Three key points surprised and concerned me when looking at 2017's overall client satisfaction ratings on collective research providers:

1. **Most corporate researchers aren't very satisfied with multiple aspects of industry research**. In fact, for 7 of the 14 areas being rated, less than half of corporate researchers claim that they're very or completely satisfied.
2. **Research provider perceptions on client satisfaction are fairly accurate**. Overall, suppliers predicted which areas their corporate researchers are most and least satisfied.
3. **These ratings are consistent with last year's results.** Ratings on the areas needing the most focus have remained within 10% of last year's top 2 box scores.

If we, as an industry, know that we're not fully meeting the needs of our corporate research clients AND we know the specific areas where they're looking for more, then why haven't we collectively stepped up?

Let's band together and strive for significant movement before next year in these key areas. On next page are some specific action steps Insights has employed to better meet client needs in each of these key areas.

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TOP AREAS TO ADDRESS:

% Top 2 Box: Completely or Very Satisfied

23% – Visualizing Results

- Train research managers in data visualization
- Bring in a graphic designer
- Explore the multitude of tools available
- Provide an infographic with every project

34% – Project Cost

- Rather than proposing one scope, present Good / Better / Best options for each study
- Carefully manage costs and honor the initial research estimate
- While you may take a margin hit on one effort, costs may fall in your favor on the next project

27% – Recommended Action

Obtain key information at the launch of every effort to enable strategic recommendations

- Business situation/background
- Key objectives for the research
- Action to be taken after the research
- Pertinent internal/political issues
- Copies of prior research to get fully up to speed

38% – Interacting with Senior Management

- Allot added time for full preparation prior to client meetings
- Host video-taped dry runs for meetings; have internal colleagues pose as the clients; view and repeat, if necessary

38% – Reporting Results

- Discuss report expectations up front
- Call out only the most noteworthy and actionable findings for the research report; keep it brief and visual so it isn't overwhelming
- Separately provide a 'full findings appendix' so clients can access details in the future

Now that we, as an industry, know better, let's do better!

DRIVERS OF PARTNER SELECTION

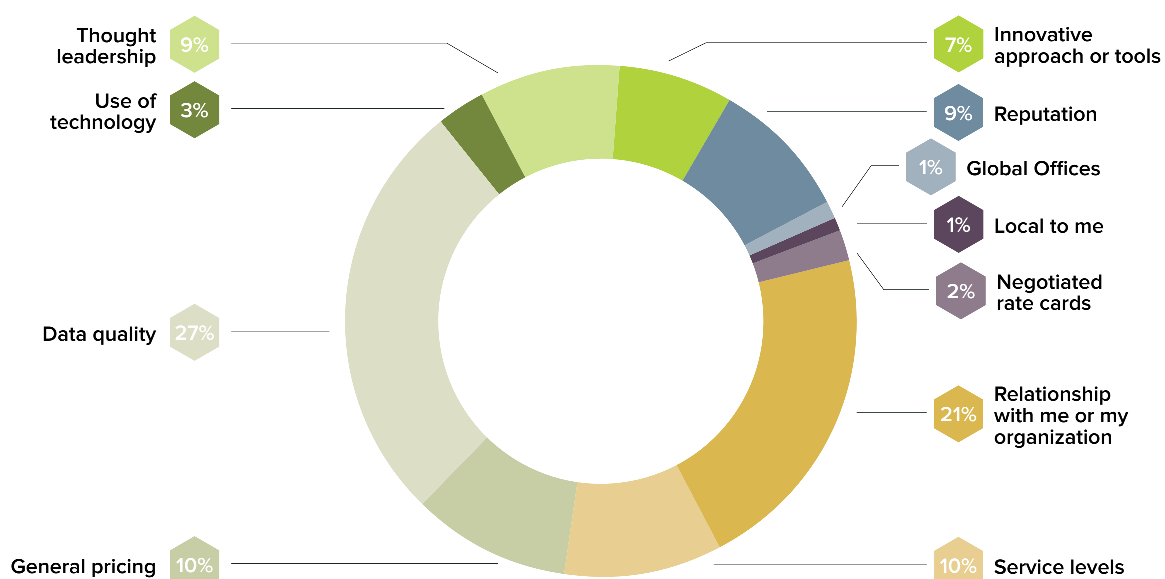
We thought we should also explore drivers of partner selection in general. We offered a list of attributes and asked respondents to weight each in their selection process. A view of the average weight for each attribute creates a useful hierarchy of the drivers of selection:

Data quality and price continue to be key considerations, but the quality of relationships and service stand out as important primary drivers as well. Next, we see attributes like innovation, technology, reputation and thought leadership as secondary considerations, and in the third tier we see negotiated rate cards, local/global presence, and overall size of the organization as being far less important. The attributes in this third tier should be very good news to smaller companies as they imply a (somewhat) level playing field for competition with larger organizations.

We can also look at the attributes of supplier selection from an absolute priority perspective:

Data quality and price continue to be key considerations, but the quality of relationships and service stand out as important primary drivers as well

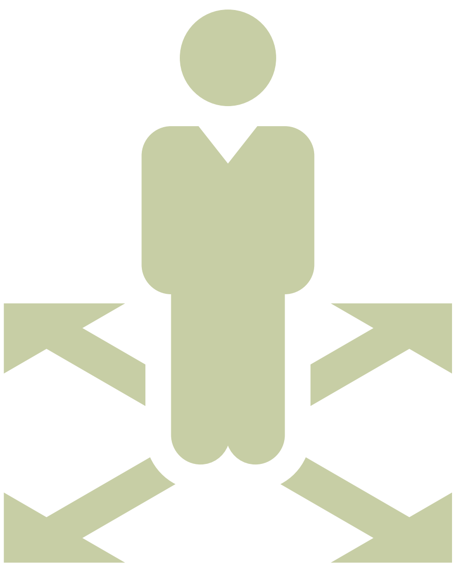
Attribute	Average
Data quality	12.2%
Relationship with me or my organization	10.9%
Service levels	10.8%
General pricing	10.3%
Reputation	9.8%
Innovative approach or tools	9.7%
Thought leadership	8.8%
Use of technology	8.1%
Negotiated rate cards	5.7%
Local to me	4.9%
Size of organization	4.5%
Global Offices	4.2%



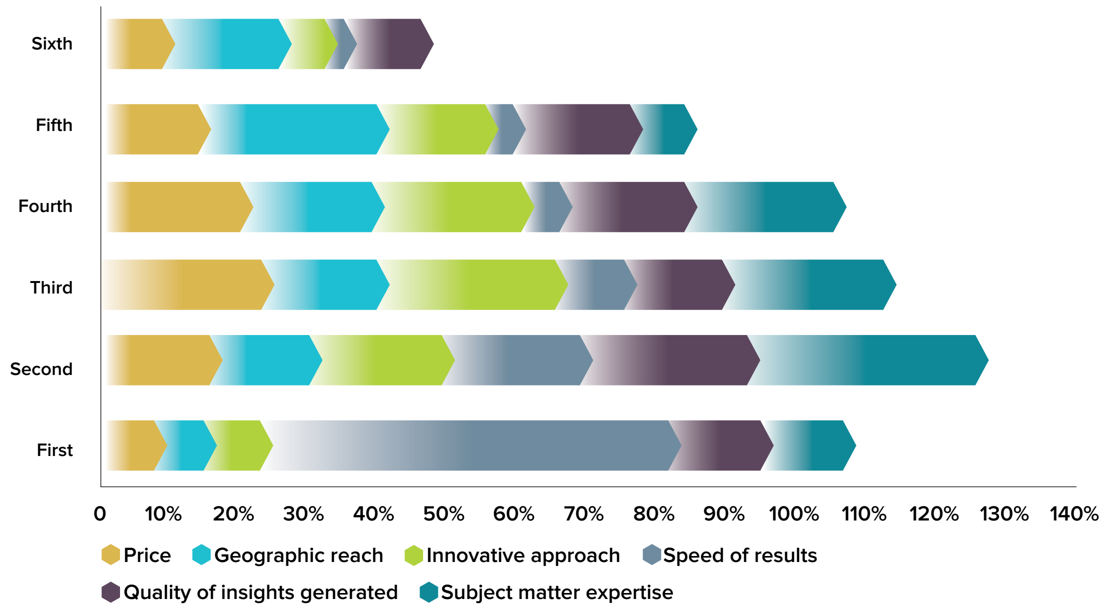
DRIVERS OF METHOD SELECTION

On a related note, we asked research buyers to prioritize a few key variables in selecting research methods for their projects.

We are happy to see that quality of insights generated is the most important driver of method selection for 59% of buyers, however subject matter expertise was a second at 24%, speed was third at 26%, price fourth at 22%, innovative approach fifth ranked for 26% and a strong sixth was geographic reach. This certainly seems to solidify the old saw of "Better, Faster, Cheaper" as the Holy Trinity of research decision making when it comes to method selection, and reinforces and echoes the message in supplier selection in general.



PRIORITY FACTORS IN SELECTING SUPPLIERS



Quality of insights generated is the most important driver of method selection for 59% of buyers

BUZZ TOPICS: HYPE OR GAMECHANGERS?

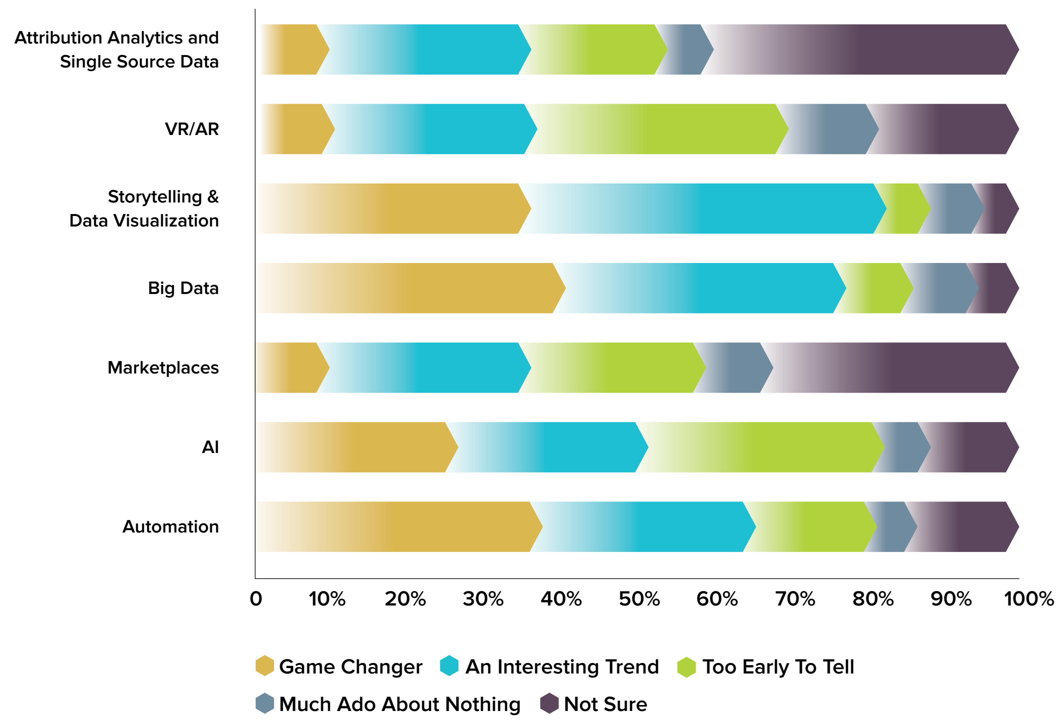
As in 2016, we returned to the industry's perception of buzz topics. We asked participants to rate 7 topics that have been ubiquitous in the research industry over the past year and to let us know whether they thought they were *game changers, an interesting trend, too early to tell, much ado about nothing or not sure*. The topics included automation, AI, marketplaces, big data, storytelling, VR/AR and attribution analytics.

What did our respondents think?

Automation, big data, and storytelling & data visualization are considered "game changers" by a plurality of respondents, followed with roughly a quarter of respondents who felt the same about AI. The remaining topics generated far less enthusiasm at under 10% perception of "gamechanger" status. On the other end of the scale, GRIT respondents were undecided on Marketplaces and Attribution Analytics/Single Source with well over a third not being sure what to make of them.

Automation, big data, and storytelling & data visualization are considered "game changers" by a plurality of respondents

2017 HYPE VS. GAME CHANGER



The only consistency we see in comparing year-on-year results is a net increase of "not sure" on every topic, with the largest increase of undecideds related to Marketplaces and Attribution/Single Source. There are substantial shifts in everything else except for Big Data and Storytelling. If we combine "not sure" with "too early to tell" it's clear that a sizeable faction of the industry is taking a wait-and-see approach on many of these topics.

The only other topic that saw growth in the "game changer" rating was AI; it does seem as if researchers are moving towards viewing this technology as something that will disrupt the industry.

No topic was dismissed by significant percentages of researchers which is also telling: GRIT respondents seem to recognize the potential in all of these technologies.

As evidenced throughout this edition of GRIT, the industry is generally embracing change, mostly enabled by technology but driven by business priorities. To the extent that these buzz topics can align with those drivers, they will likely continue to be at the forefront of discussion within the insights industry

How does this compare to 2016? There are some differences to suss out:

Automation

	2016	2017	Change
Game Changer	38%	37%	(1)
An Interesting Trend	35%	28%	(7)
Too Early To Tell	18%	15%	(3)
Much Ado About Nothing	8%	5%	(3)
Not Sure	1%	13%	12

AI

	2016	2017	Change
Game Changer	22%	26%	4
An Interesting Trend	25%	25%	0
Too Early To Tell	43%	31%	(12)
Much Ado About Nothing	9%	6%	(3)
Not Sure	2%	12%	10

Marketplaces

	2016	2017	Change
Game Changer	10%	10%	0
An Interesting Trend	37%	27%	(10)
Too Early To Tell	36%	22%	(14)
Much Ado About Nothing	12%	8%	(4)
Not Sure	6%	33%	27

Big Data

	2016	2017	Change
Game Changer	43%	40%	(3)
An Interesting Trend	36%	37%	(1)
Too Early To Tell	9%	9%	0
Much Ado About Nothing	12%	8%	(4)
Not Sure	1%	6%	5

Storytelling & Data Visualization

	2016	2017	Change
Game Changer	27%	36%	9
An Interesting Trend	50%	46%	(4)
Too Early To Tell	8%	5%	(3)
Much Ado About Nothing	14%	7%	(7)
Not Sure	1%	5%	4

VR/AR

	2016	2017	Change
Game Changer	13%	10%	(3)
An Interesting Trend	31%	27%	(4)
Too Early To Tell	42%	32%	(10)
Much Ado About Nothing	11%	12%	1
Not Sure	3%	19%	16

Attribution Analytics and Single Source Data

	2016	2017	Change
Game Changer	11%	10%	(1)
An Interesting Trend	37%	26%	(10)
Too Early To Tell	36%	18%	(18)
Much Ado About Nothing	8%	6%	(2)
Not Sure	8%	40%	32

The only consistency in comparing year-on-year results is a net increase of "not sure" on every topic

AUTOMATION: THE UNSUNG HERO OF INSIGHTS

Hugh Davis & Keith Price
CO-CEOs, Critical Mix
Twitter: @criticalmixers | Website: www.criticalmix.com

The latest GRIT report confirms trends we've seen in the insights industry over the past few years. Hot button topics fall in two camps, either "game-changer" or "much ado about nothing." As industry professionals grow more familiar with these topics, the divide becomes more distinct.

The jury is in: big data, storytelling (data visualization), automation, and artificial intelligence are the real deal. These topics are all considered game-changers or at least interesting trends by suppliers and clients across global geographic regions. MR professionals are more skeptical about topics like virtual reality (VR) and artificial reality (AR), attribution analytics, and marketplaces. GRIT respondents tend to think these latter topics are potentially "much ado about nothing" or at least claim it's "too early to tell."

Within the game-changer topics, there is a further divide between big data/storytelling and automation/artificial intelligence. It's easy to grasp the tangible benefits of big data and data visualization: **more data to analyze and better methods to communicate insights.**

The benefits of automation and artificial intelligence are more nuanced and therefore more obscure. They permeate so many aspects of our industry in small but meaningful ways but rarely get noticed for the influence they have on the industry. Interestingly, if you exclude professionals who are "not sure" about automation from the latest GRIT report, it is actually the most commonly cited "game-changer" topic among respondents—edging out big data. This suggests that although automation is less understood, those who understand it well are convinced about its critical role in our **ever-evolving industry.**

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As 2017 comes to a close, projects we're working on are launching with access to more and better information than ever before, resulting in reports and dashboards that are better looking, more intuitive, and more actionable. Big data and data visualization get the credit, but automation (often assisted by artificial intelligence) is the unsung hero behind the scenes at every step of the process, from project launch to wrap.

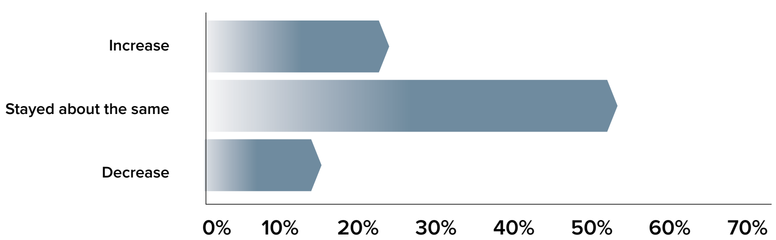
Automation provides a foundation that allows disparate parts of our process to work seamlessly. This helps MR professionals execute projects quicker with better accuracy. The human benefits are clear: survey respondents get a better experience (shorter surveys, clearer communication) and project managers are able to spend more time doing what they do best: **consulting with clients and ensuring a flawless experience!**

Automated technology has allowed Critical Mix to run a 24/7 business. Recently, we had a customer call us in a panic on Friday afternoon about a new project that needed to be complete by 9 a.m. on Monday. We collaborated with their team on our CMIX platform to create the survey, select an audience from our OneOpinion panel and, most importantly, provide the client with technology to interpret and analyze the data with impactful dashboards—all finished by Monday morning. The way we do research is evolving and with the ever-demanding digital age, insights are needed in real-time. Modern technology has allowed us to create insights for clients at a fraction of the time required in the past.

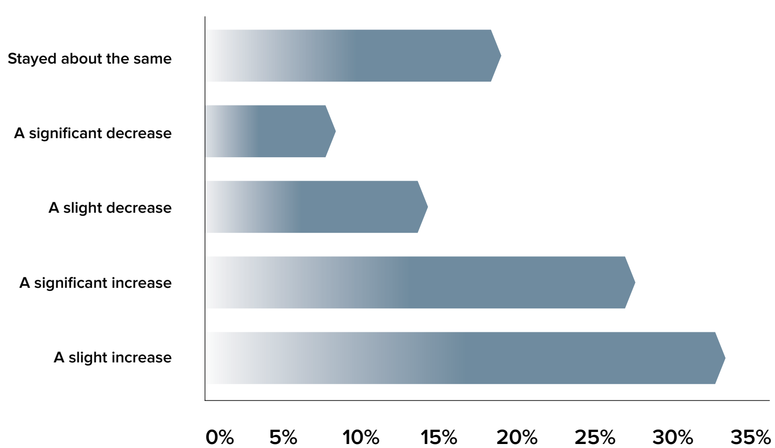
THE BUSINESS OUTLOOK

2017 was another year of moderate growth, with one-quarter (26%) of client-side respondents indicating an increase in research spend and three-in-five (60%) supplier-side respondents indicating a slight/significant increase in research and related revenue.

BUYER/CLIENT RESEARCH SPEND



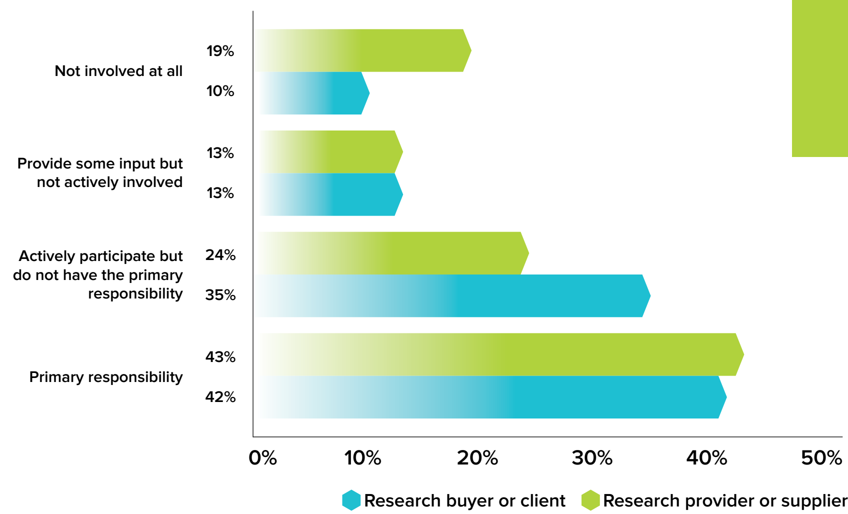
PROVIDER/SUPPLIER RESEARCH AND RELATED REVENUE



Three-in-five (59%) client-side respondents indicated that research spend has stayed about the same, while nearly one-in-five (18%) supplier side respondents indicated research and related revenue has stayed about the same.

Supplier-side optimism is not a new trend seen in GRIT reports, but perhaps this can be attributed to the fact that one-in-five (19%) supplier side respondents indicated no involvement in setting their group's budget, while over two-thirds (77%) of client-side respondents indicated active participation/primary responsibility in setting the group's budget, compared to two-thirds (67%) of supplier-side respondents.

ROLE IN DEVELOPING ANNUAL BUDGET

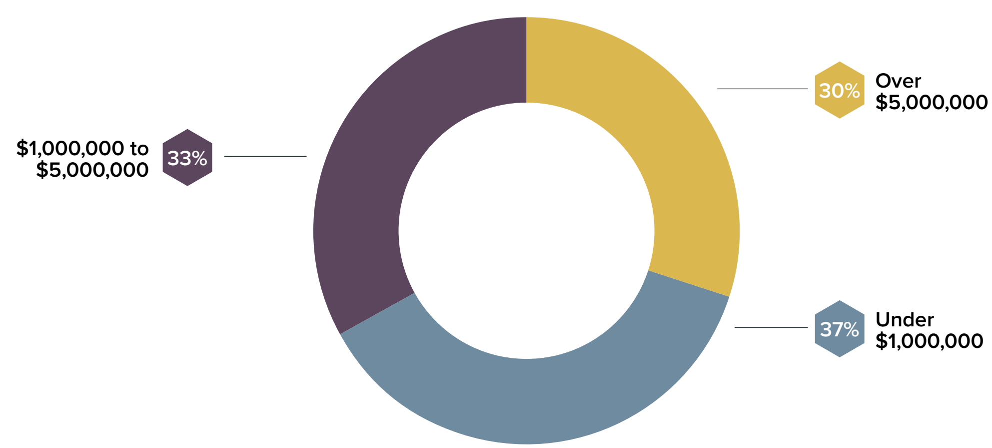


2017 was another year of moderate growth

STABILITY AND REGIONAL DIFFERENCES AMONG BUYERS

Client-side research budget figures are roughly consistent with previous GRIT reports, with over 37% having a budget under \$1m, 32% having a budget between \$1 – \$5m, and 30% having a budget greater than \$5m. The previous GRIT edition nine months ago reported 34% having a budget under \$1m, 34% between \$1 – \$5m, and 33% having a budget over \$5m. 10% of those over \$5m in the current and previous wave were for the largest clients who spend over \$30m per year on research.

BUYER/CLIENT RESEARCH BUDGET



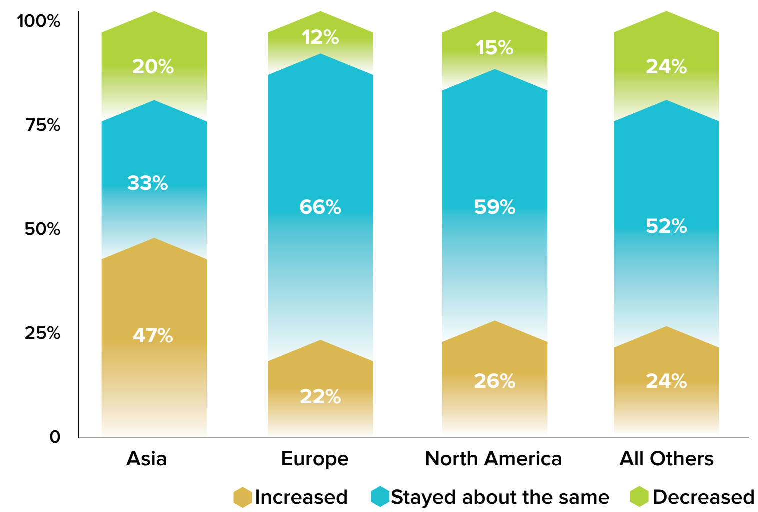
Regional differences become apparent when looking at the respondents' geographic location against their company's annual budget change patterns. Asia continues to see strong growth in research budgets, in tandem with growing consumerism and the rise of the middle class.

Nearly half (47%) of respondents in Asia reported an increase in research budget, to one-in-five (22%) in Europe, and one-quarter (26%) in North America. The majority of research buyers in Europe and North America indicate that their research budgets stayed the same, with two-thirds (66%) in Europe, and three-in-five (59%) in North America. This stagnation represents a marked difference compared to the previous GRIT wave, which saw much more optimistic figures for research spending in North America (with 45% of respondents estimating an increase and 30% estimating staying about the same).

Supplier optimism is apparent in all regions. However, differences did appear between regions when asked how revenue is expected to change this year compared to last year.

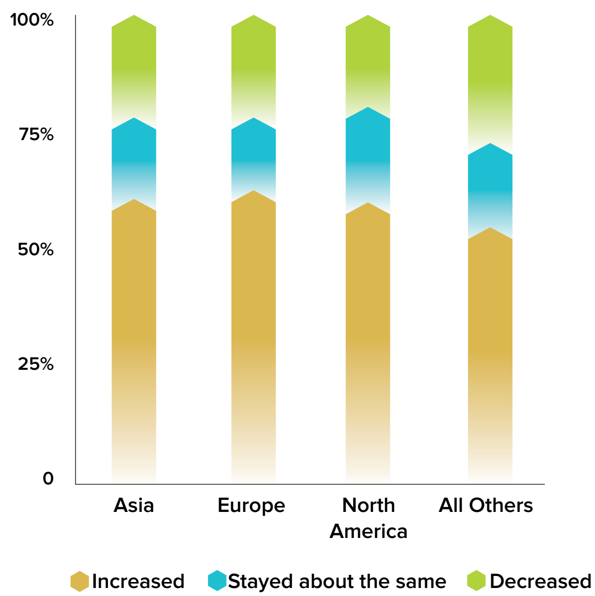
The majority of research buyers in Europe and North America indicate that their research budgets stayed the same

BUYER/CLIENT RESEARCH BUDGET CHANGE

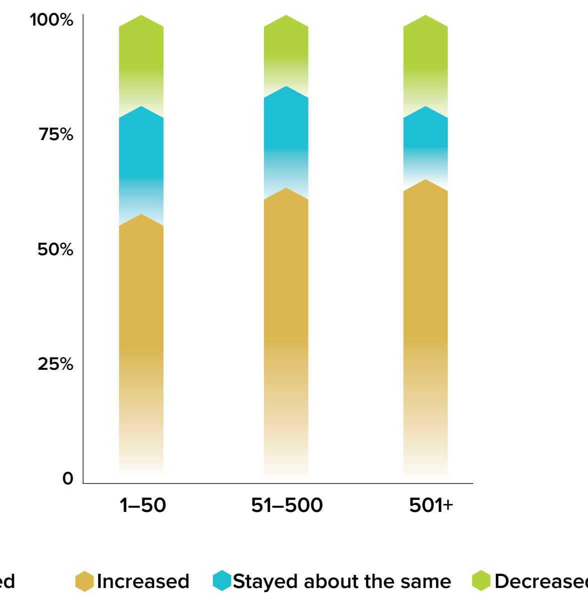


Asia continues to see strong growth in research budgets

PROVIDER/SUPPLIER REVENUE BY REGION



REVENUE DIRECTION BY # OF EMPLOYEES



BUYER ORGANIZATIONAL HEADCOUNT

The majority of respondents indicated no significant staffing changes. However, when looking at specific industries, we found some important differences. For example, 41% of respondents in Consumer Staples companies indicated decreased headcounts while 65% of respondents in Information Technology indicated increased headcounts.

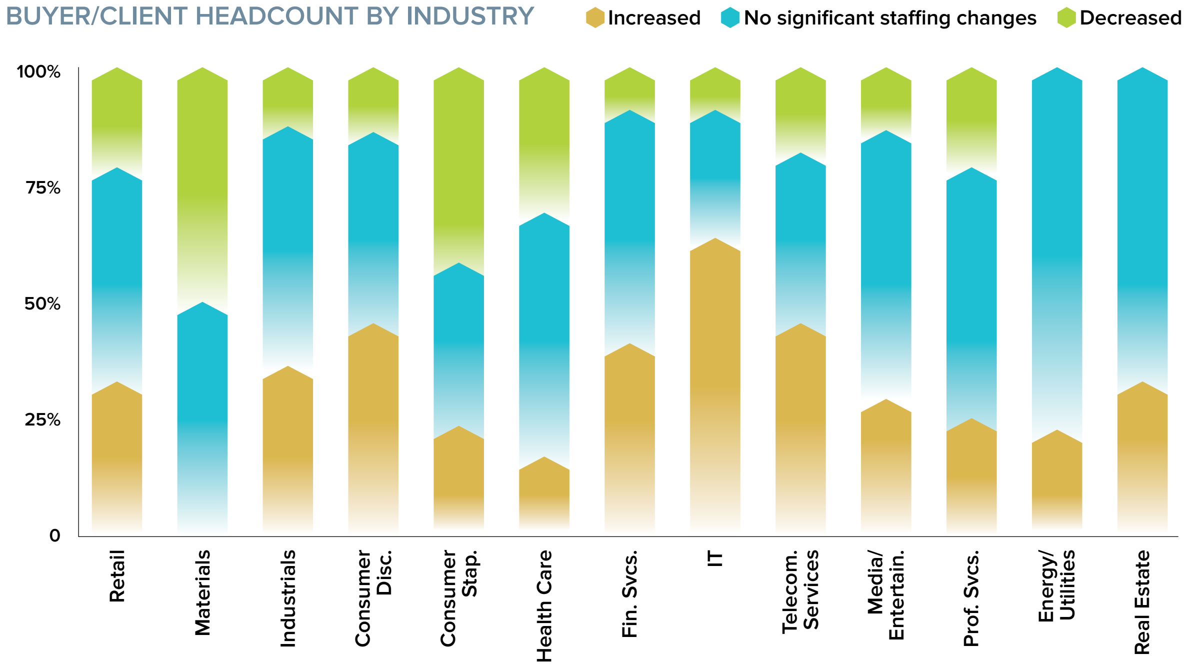
Budgets exhibit a curious correlation with company headcount. While small companies (under 50 employees) have the smallest budget, mid-size businesses (51-500 employees) have the largest average budgets. It may be that large-sized companies that participated in this study are truly spending less than mid-size companies. It may also be true, however, that in larger companies, there is money being spent on insights that is not visible to researchers.

We also wanted to understand what influences the number of projects an organization runs in a year. Overall, about 26% of respondents report running fewer than 25 projects per year (about 2 per month). 41% report running no more than 100 per year, and 33% report running over 100 per year.

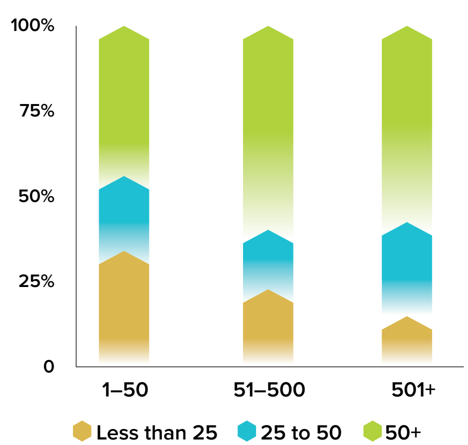
By region, respondents from companies headquartered in Europe run slightly more projects on average than in North America and Asia Pacific.

41% of respondents in Consumer Staples companies indicated decreased headcounts while 65% of respondents in Information Technology indicated increased headcounts

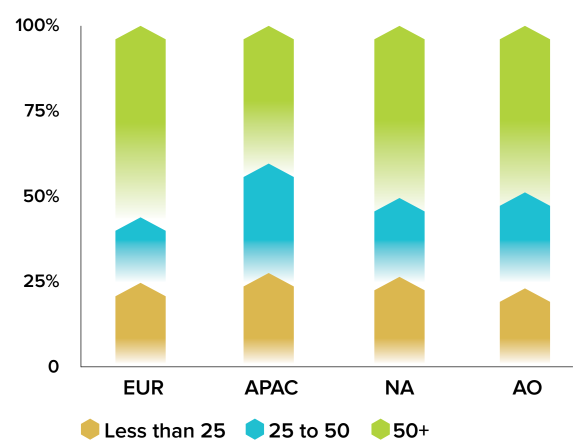
BUYER/CLIENT HEADCOUNT BY INDUSTRY



NUMBER OF PROJECTS BY # OF EMPLOYEES



NUMBER OF PROJECTS BY REGION



STAFFING TRENDS

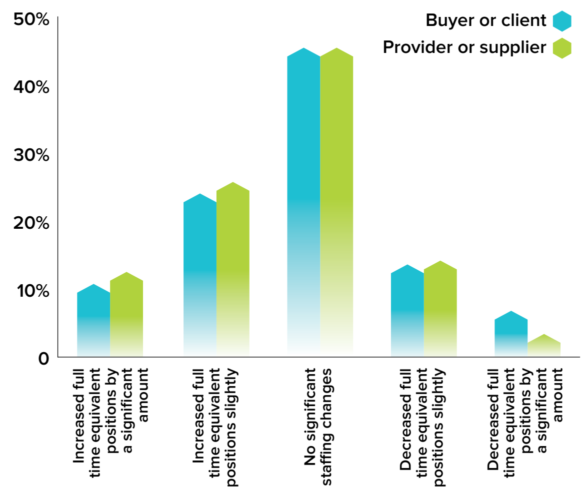
Staffing trends are consistent for both buyers and suppliers. About 45% have not made significant staffing changes. About 35% are adding positions (10% significantly so) while around 20% are reducing headcount.

Differences appear when we look at company size. Mid-size companies are faring the best, with nearly 50% indicating their teams are growing and with about 27% keeping their teams unchanged. Small companies are next, with about one-third growing and 55% keeping team sizes the same. In relative terms, big companies are faring somewhat worse than medium companies, with fewer growing and more shrinking their teams.

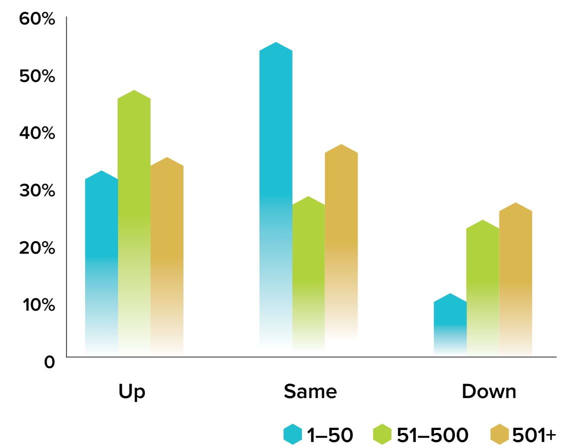
Headcounts for supplier-side firms show moderate growth. Suppliers indicating headcount growth include survey platform providers/survey software (60%), software providers (statistical, text analytics, visualization, etc.) (57%), and sample/panel providers (54%). These three types of suppliers saw more than half of respondents indicating an increase in headcount. Conversely, suppliers seeing stagnation in staff counts include focus group facilities (physical) (50%) and other data collection/field/tab services providers (55%) not included in the list provided. As the research industry continues to adopt new technologies, software emerges as the area with the most need for increased headcount.

Staffing trends are consistent for both buyers and suppliers. About 35% are adding positions while around 20% are reducing headcount

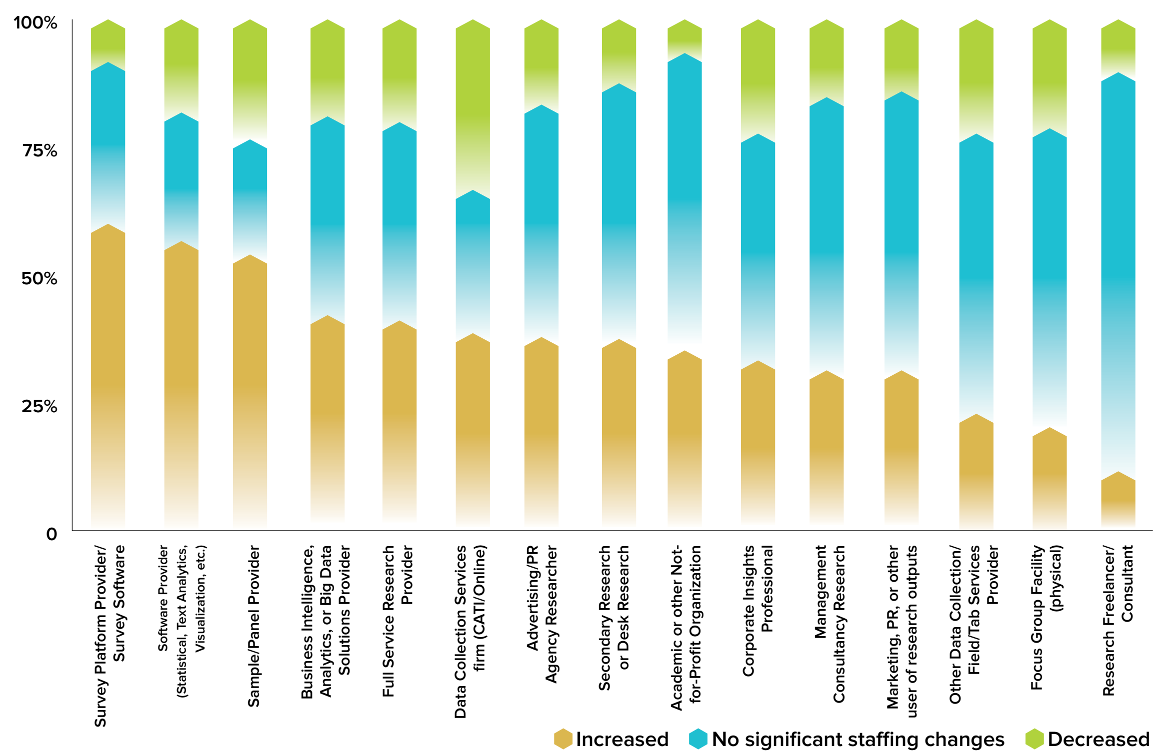
STAFFING TRENDS, BUYERS VS SUPPLIERS



STAFFING TRENDS BY COMPANY SIZE



PROVIDER/SUPPLIER HEADCOUNT BY FOCUS

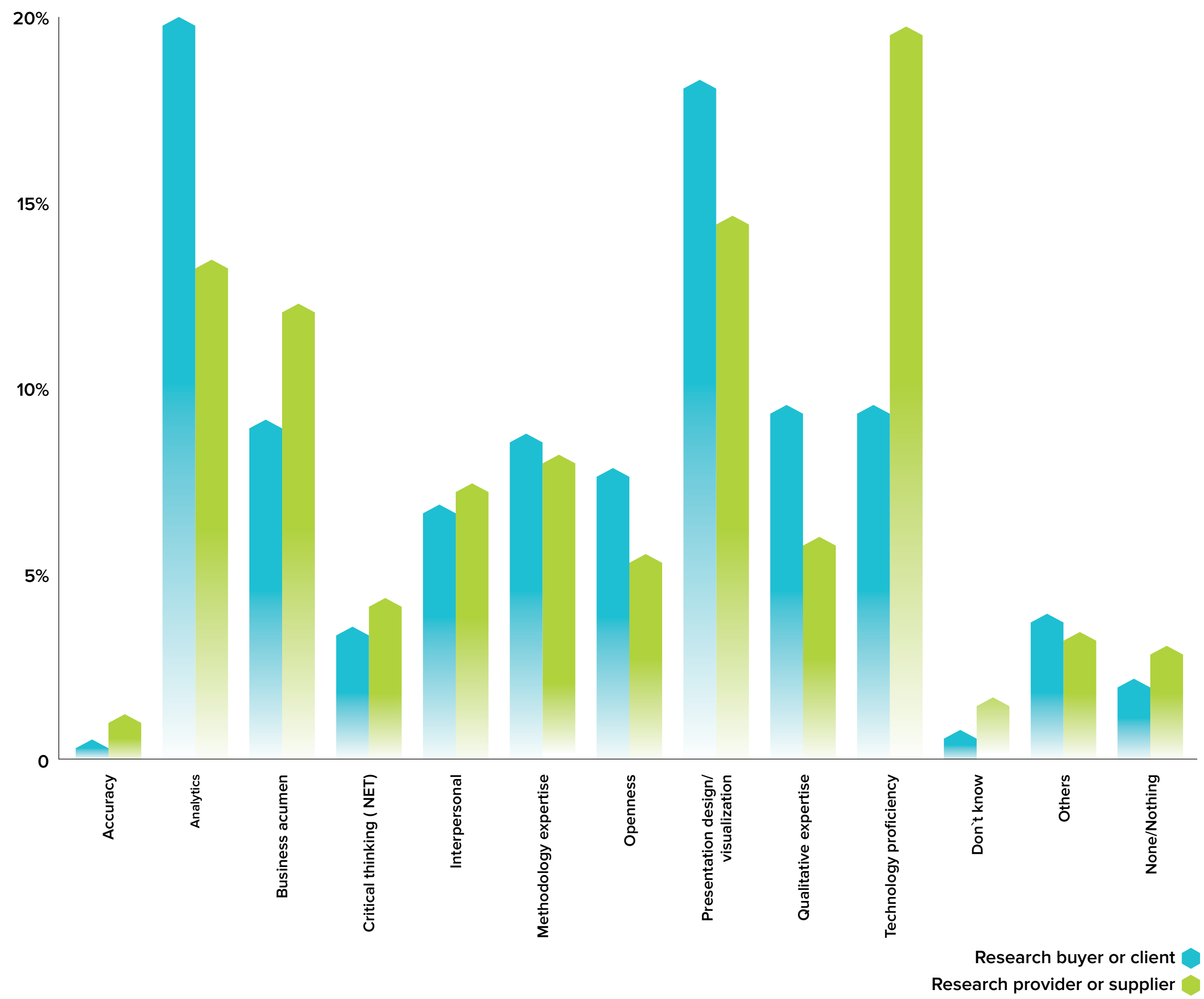


IN DEMAND SKILLS

Concurrent with an exploration of hiring trends, we asked a verbatim question of all respondents about the one skill they would hire into their organization if they could. Coding of the nets indicate minimal differences between buyers and suppliers except in two key areas: Buyers felt a much higher need (20% vs. 13.5%) to hire for analytics skills while suppliers were almost twice as likely (19.8% vs 9.5%) to be looking for technology proficiency. This may simply be a reflection of the roles of each group in the insights ecosystem with buyers feeling a greater need for in-house analytics talent whereas one would assume suppliers have a bevy of such individuals but are instead feeling a pressure to be more technologically savvy to meet the needs of a competitive market.

Buyers felt a much higher need (20% vs. 13.5%) to hire for analytics skills while suppliers were almost twice as likely (19.8% vs 9.5%) to be looking for technology proficiency

IN DEMAND SKILLS



MARKET RESEARCH INNOVATORS SIGNAL NEW DIRECTION FOR INDUSTRY

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As the pace of change continues to speed up, advancements in all things data have transformed not only the market research industry but also the way executives define and value market research.

The "on-demand" economy is reshaping all types of industries and market research is no exception. For example, one of our largest retail clients over the past three years has transitioned from 48-hour data updates to immediate updates after a transaction is completed. This type of experimentation and technology advancement is creating two types of issues:

1. The challenge of transitioning from "proven" research methodologies to "emerging" technologies;
2. The lack of or need for "proof points" (not case studies) and "norms" where none exist.

For insights on demand, being an early adopter might be a risky proposition, but the GRIT survey results make it clear that the industry may be past the tipping point and the gap between adopters and non-adopters could widen significantly in 2018.

Market Research Will Adapt to the On-Demand Economy

Today's consumers expect brands to deliver personally tailored content, products and services – all in real-time and on-demand to their location and device of choice. Companies like Lyft, Airbnb, and services like Amazon Prime Now are creating this new landscape, and consumers now expect nothing less. Brands and businesses are like consumers; they now need delivery of insights in less than 24 hours at their doorsteps.

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Researchers Will Embrace Automation to Scale Real-Time Insights

Researchers indicate they will continue to rely on the fusion of behavioral data with self-reported survey responses which opens up new horizons in path-to-purchase, media consumption, and more digital profiling. This automation and new insight is amplified by the analytics and story-telling expertise.

Automation is becoming crucial to increase efficiencies and empower researchers to do more. It's not only about increasing speed-to-insight, but also about using technology to automate our processes to allow for true real-time feedback.

We've seen companies like Pizza Hut adopt fast, automated research methodologies to foster co-creation and create micro-targets of consumers. By aligning closely with what their customers want in real-time, they're able to react to changing consumer sentiment and increase their customer loyalty.

Investments in Technology to Power Innovation Will Increase

A large majority of researchers plan to invest even more in technology that leads to improved data collection and the uncovering of new data types.

Technology and automation alone can only take you so far. In the case of Sony, we've all heard that their time to market has been compressed significantly, and for them, the period between product launch and refinement is six weeks. They need quick-turn, automated research technologies to help them obtain lightning-fast consumer insights and course-correct in real time. The real promise lies in how these tools and approaches can empower researchers to be faster and more agile than ever before.

The future of market research – what we call Insights on Demand – will encompass the tight integration of technology and people, and will be powered by the fusion of expertise, technology, and community.

Parting Thoughts

Key learnings this year from top innovators in the market research industry signal a new direction for the industry and are well aligned with our vision about the acceleration of research democratization. The combination of more agile research tactics, automation, and investments in technology will continue to make insights into consumer intent accessible and achievable for business professionals in companies of all sizes, resulting in the growth of our industry.

TECHNOLOGY SPENDING

Not surprisingly, spending on research-related technology and automation is increasing in largely equal measure for buyers and suppliers. More than half have increased their investment, while around 40% are not making any changes. Only a few are disinvesting. The Asia Pacific region leads the way, with nearly 60% increased spending.

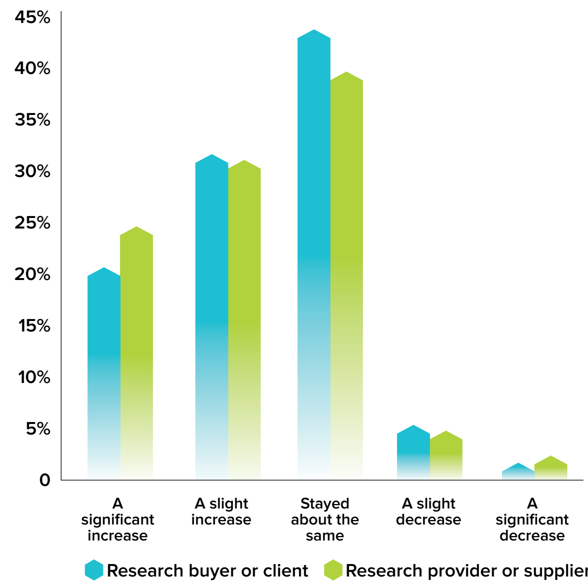
The primary differences we see in research technology spending are by company size, where the smallest companies are lagging behind mid- and large-sized companies.

Our data shows that buyers and suppliers are investing most heavily in analytics and visualization solutions. Suppliers are spending more heavily than buyers on technology for data collection and visualization, and new data sources. Buyers are investing more heavily in data integration. These differences are logical.

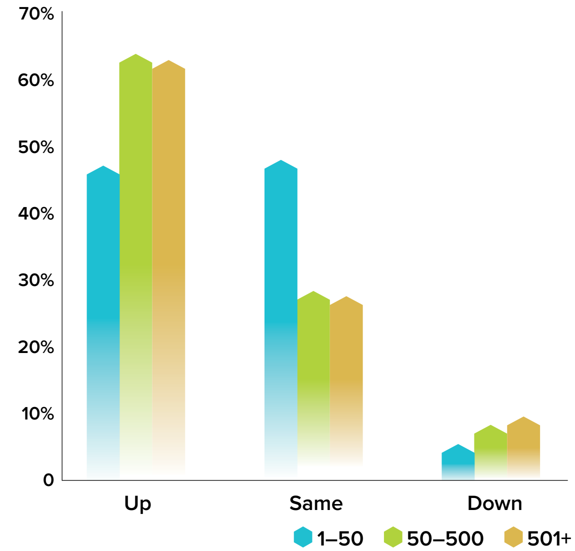
Spending on research-related technology and automation is increasing in largely equal measure for buyers and suppliers

Buyers and suppliers are investing most heavily in analytics and visualization solutions

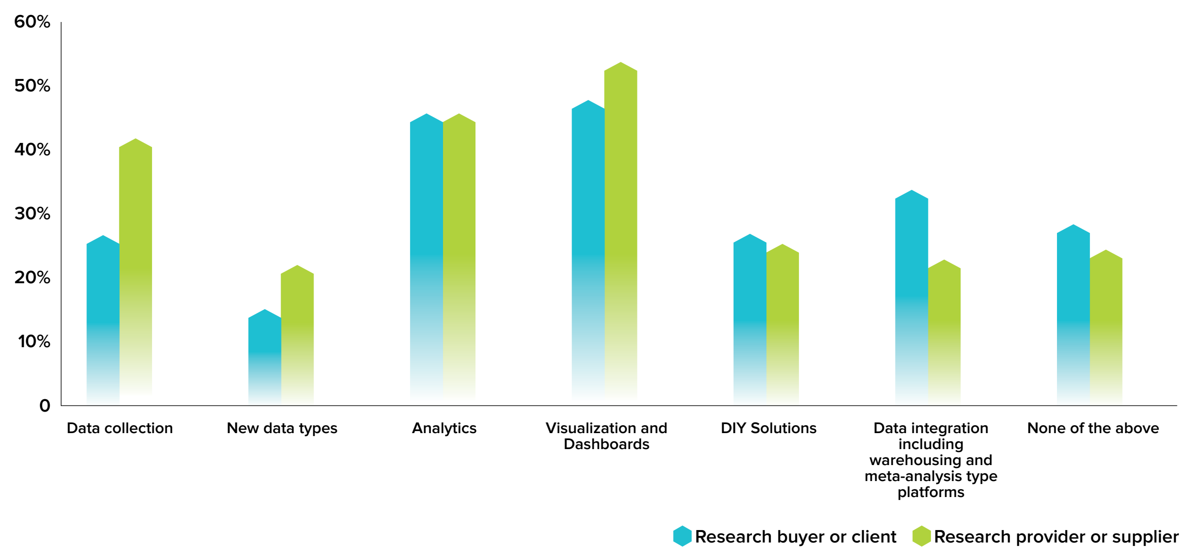
TECH SPENDING BY BUYERS AND SELLERS



TECH INVESTMENT BY HEADCOUNT



TECH INVESTMENTS, BUYERS VS SELLERS

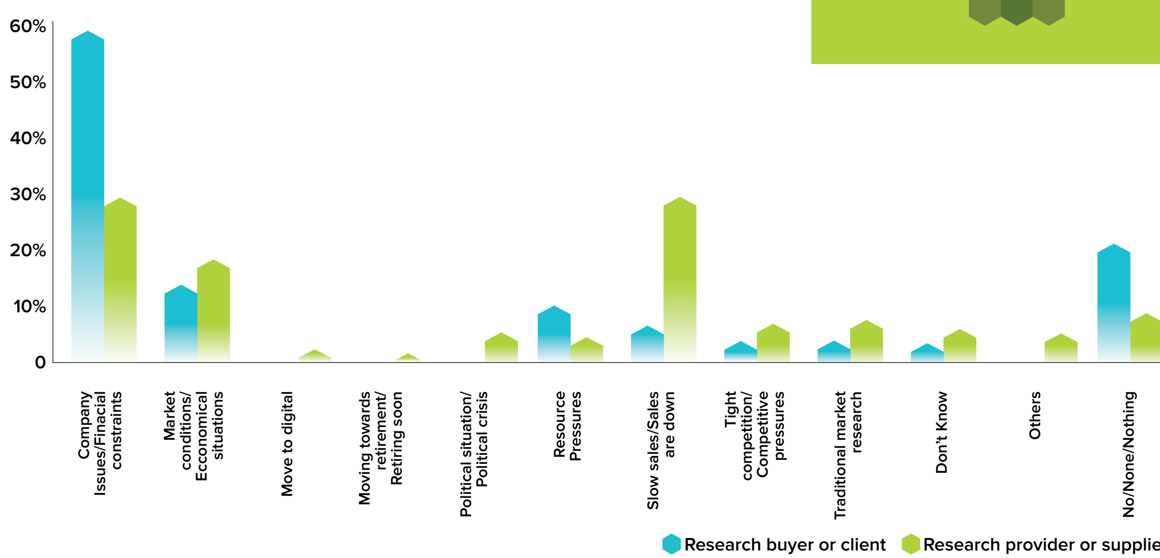


DEALING WITH DECLINE AND DRIVING GROWTH

We asked GRIT respondents what they felt was driving their optimism on budget/revenue growth as well as if they were reporting a decline, what was the cause and how they would deal with it. These were verbatim responses, and analysis yields some interesting insights that echo the themes seen throughout the rest of the report.

Unsurprisingly, the primary reason for budget declines among buyers were company financial constraints with almost half mentioning it. As one would expect, a quarter of suppliers mentioned the same, with an additional 25% citing a decline in sales which is certainly related. Overall, various dimensions of financial issues are the dominant theme for declines.

WHY A DECLINE?



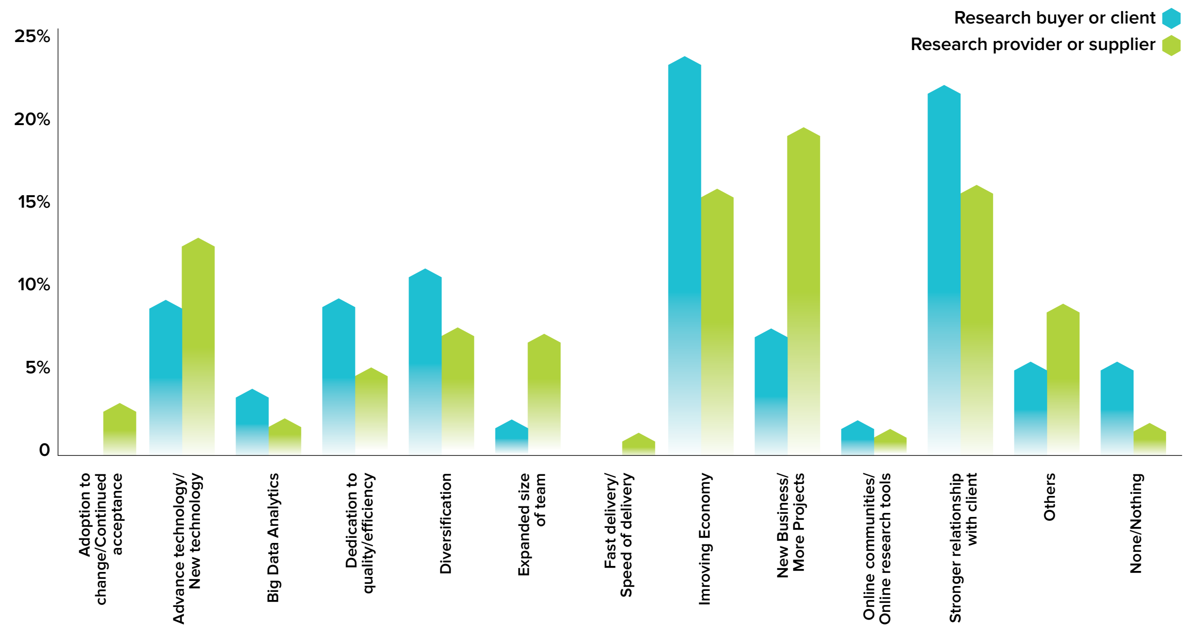
The primary reason for budget declines among buyers were company financial constraints

Conversely, when asking both buyers and suppliers, who expected an increase in budget/revenue, what was driving the growth, nearly a quarter of buyers (followed by 15.6% of suppliers) reported an improving economy as the key factor for increasing budgets, followed by improving relationships with (internal) clients at over 20%. As expected, suppliers claimed winning more business as the driver, although a subset of suppliers also mentioned new technology as a core driver of their growth. In general, just as some subsectors appear to be struggling economically, most GRIT respondents appear to be enjoying the benefits of a strong economy.

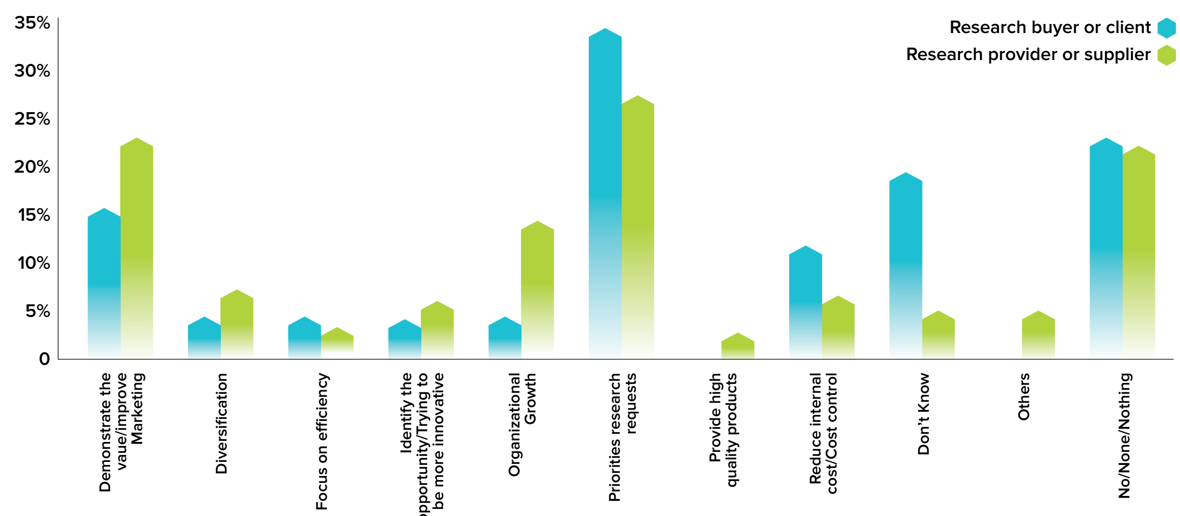
Finally, for those experiencing decline in budget/revenue, we asked what they were planning to do about it. For almost one-third of buyers the strategy is simply adaptation: prioritize requests at the top of the list, followed by reduced costs. Another often mentioned strategy to reverse decline in budget/revenue is to focus on demonstrating (and ensuring people hear about) the value of research.

Buyers reported an improving economy as the key factor for increasing budgets, followed by improving relationships with (internal) clients

WHY GROWTH



HOW TO CORRECT THE DECLINE



THE BIG PICTURE

Optimism abounds for both clients and suppliers, although as always, there does seem to be a disconnect on how much. While 45% of clients expect budget increases, 72% of suppliers expect revenue increases. Also of note is that US-based companies were possibly overly-optimistic at the beginning of this year. While 26% of North American clients expect budget increases, 61% of suppliers expect revenue increases, down from 42% and 72% in the Q1-Q2 2017 GRIT wave, respectively.

It seems as if the client-budget pie will have to be cut into many small pieces for both predictions to be true, but then again, we didn't ask suppliers by how much they expected an increase so it could work.

We did not ask clients where they would be allocating their budgets. However, the supplier-side analysis indicates that technology-oriented companies are the drivers of revenue growth within the industry, so we can assume a correlation there. Based on other results in the GRIT Report all pointing to a shift towards technology solutions within the industry, this certainly would seem to be a reasonable position to take.

Overall, the economic outlook is promising for most, with the expected exceptions of some players. As the year unfolds we hope everyone thrives.

Supplier-side analysis indicates that technology-oriented companies are the drivers of revenue growth within the industry

ADELPHI RESEARCH

UNLOCK THE POWER OF ENGAGEMENT!

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"Fun from games arises out of mastery. It arises out of comprehension... With games, learning is the drug."
– Jane McGonigal

We know that engagement directly correlates with improved outcomes: in education, better student and parental engagement leads to enhanced academic performance. In the workplace, businesses with engaged employees are more likely to be successful.

How in today's world of technology-induced distractions do market researchers keep respondents engaged? **Games can provide the solution.**

Games can subtly change behavior and interest. Take Pokémon Go, which engages even reluctant adults and children to explore their neighborhoods to capture Pokémon. While hunting for these creatures, players unwittingly exercise. The game's overwhelming impact has been documented with a recent study revealing participants averaged 2,000 more steps just one day after starting to play the game.

When used appropriately, games can motivate, including the most sceptical among us. For example, nearly half a million people attribute the game, SuperBetter, created by Jane McGonigal, with helping them achieve personal growth and tackle real life challenges. The game encourages players to challenge themselves and cope with difficult situations by motivating change.

Games help people shake off inhibitions, overcome social anxiety and share information more comfortably. In fact, games such as World of Warcraft help people on the autism spectrum learn social skills and become comfortable sharing with others in a non-threatening way.

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ADELPHI RESEARCH

Want to engage your audience? Play a game
As respondents are continually bombarded with participation requests, we see online research response and completion rates wane. Adelphi Research addresses this through gamification.

By leveraging gaming concepts, we enhance engagement during research to glean deeper insights. Using visuals, non-monetary rewards and unexpected question formats, we pique participant interest and generate more meaningful answers. Our proprietary methodologies incorporating games, including TriviaRx™, ECHO™, MessageSolitare™ and CAPMOD™, take the tedium out of message testing, attribute evaluations, message recall studies and conjoint tasks. Some games also allow us to discover insights inaccessible via traditional methods.

ECHO™, our message recall assessment game, provides an understanding of not only which brand messages respondents recall, but also how well respondents understand key messages (or not). Games identify messages to emphasize where to focus for maximum impact. In qualitative research, games not only engage respondents but also the backroom.

Our game TopThis™ challenges respondents to put forth their best objections/associations and brainstorm on new ways to handle brand objections. It's guaranteed to stir creative juices.

Engagement through games is an innovative way to activate insights with client teams. Games help participants ideate on new solutions, cooperate on implementation, and prioritize actions, all while ensuring insights are memorable. Games can even transform the driest presentations into interesting and insightful sessions. We use games for sharing insights from tracking to conjoint and segmentation studies. There are no limits.

Gamification allows you to solidify engagement, and those who use it can unlock deeper insights to motivate action. Still uncertain? We close with first-hand feedback from a recent respondent, an Academic Hematologic Oncologist:

> "It was a fun approach and quite unique. I enjoyed the interactive 'game' aspects of the survey, which was a refreshing change from other online surveys and made taking this survey more fun and thought-provoking."

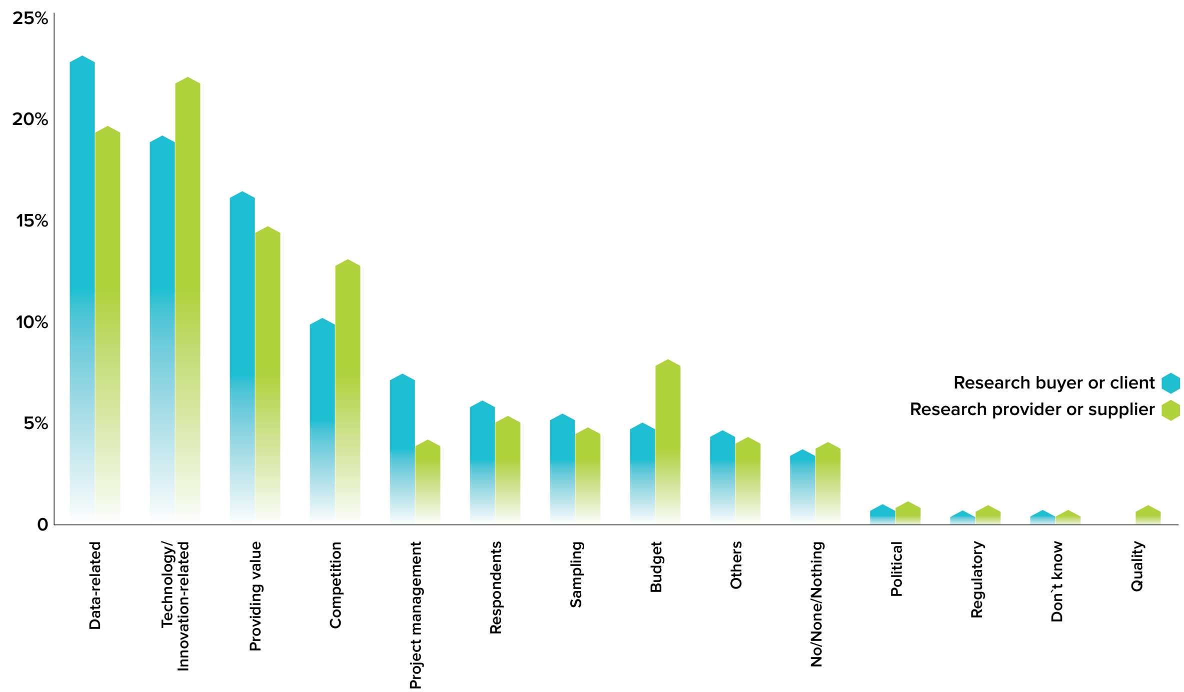
CHALLENGES TO THE INSIGHTS INDUSTRY

As we have done in some of the previous waves of the GRIT survey, we asked research professionals a series of open-ended questions focused on challenges and opportunities that exist in the research industry today. We believe it is interesting and instructive to pull out a selection of comments falling under a number of themes.

Technology/innovation (21%) is considered the biggest challenge facing the industry. As new technology and innovative methodologies become prominent, so must the industry's understanding of how to leverage them. Technology presents great advantages for collecting data. At the same time, it is challenging for most to continuously adapt to the speed at which technology is evolving and learning how to utilize & integrate its capabilities. There's also a related and growing threat of non-traditional research companies (tech/consultant) that will continue to gain market shares if traditional market research suppliers don't step up their game, as expressed by this quote:

> "Tech companies, while not market researchers, know how to leverage technology to reach consumers and deliver new differentiated offers. Traditional MR companies are stuck in the past with being too purist, too reactive, and too slow. Google and Facebook can provide what used to be the traditional domain of MR companies (i.e. consumer access) free or at low cost. Access to consumers no longer provides a barrier to entry consulting companies – McKinseys of the world. These companies are moving into the MR world, better able to present through storytelling, and better able to develop clients through the C-Suite relationships."

CHALLENGES



Technology/innovation is considered the biggest challenge facing the industry

Data-related challenges were mentioned almost as often as technology/innovation, while issues surrounding access to quality and representative sample is without doubt the single biggest individual challenge mentioned in the survey. General decline in the quality of sample with falling participation rates and accessing niche audiences is another concern.

- "Continued decline in response rates across ALL modes and methodologies."
- "Respondent quality continues to be a big pain. When we dig into the respondents at an individual level from panel providers it is frustratingly low quality."
- "Data reliability, since real consumers are often not inclined to take part in research. Also, due to lack of consumers' interest, it's difficult to generate reliable, sincere and in-depth answers – more effort is required in order to find out something new."

Tackling fraudulent respondents answering surveys is seen as a rising problem.

- "Fraudulent responses, whether generated by individual respondents for personal gain, or on a larger scale by sophisticated bots; challenge of getting quality respondents that meet client criteria to stay engaged with taking surveys over the long term."

Respondent fatigue and the impact this was having on the quality of data was a commonly voiced challenge.

- "Apathy from respondents, if we lose the sample we won't be able to do the bread and butter of our job."
- "We have to improve surveys. We continue to do too many long, tedious surveys. Clients are fooling themselves if they really think they are getting representative samples and quality data from these surveys."

Providing value is also seen as a major challenge. While suppliers have to sell the value of primary research to clients, client-side researchers have to convince their management they can provide better value out of newer, more in-depth research. The challenge for suppliers is how to become real partners by truly understanding the greater business purpose of their research.

- "There is a lack of demonstrable results that provide significant impact on the businesses we support. We promise a lot in terms of rich insights, but I think the evidence of our success is limited or needs to be better publicized. Otherwise clients will continue to gravitate towards more low-cost / DIY solutions."

Providing value is even more critical as respondents identified competition (12%) as another challenge. The inability to provide consistent value has allowed big non-market research competitors to gain momentum in our market. Consultancies (Deloitte, McKinsey, IBM), DYI survey tools (Survey Monkey) and big data companies (Google, Facebook) are all serious threats due to their strong brand names and research capabilities.

Research suppliers must prove value for clients in the face of DIY and proliferating, third-party data sources or face the inevitable continued devaluation of their services. Researchers must counter the organizational belief that "big data" can provide all the insights businesses need to be successful, and that DIY survey templates are as good as professionally designed custom research.

- "Traditional research (primary research, custom survey development, extensive high-level analysis) is under pressure from faster, cheaper, easier approaches. The newer methods can produce reasonably good results which may appeal

> Accessing quality and representative sample is the single biggest individual challenge mentioned in the survey

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to many clients. Often these new methods cannot go into the depth and breadth of a custom survey but may give a client half of what they need at a quarter of the cost and time. How do we educate clients to understand and appreciate the differences between quick and dirty research vs slower and more complete research?"

- "Google, Facebook and other tech / social media companies offering access, data, and basic analysis. Add to that consultancies, automation, DIY survey providers, and growing internal client capabilities in analytics and social media monitoring – all offer clients a variety of consumer insight-related products and services faster and at relatively lower prices."

The verbatim responses offer a deeper context to how GRIT respondents feel about a variety of other challenges. It's worth pulling out a sample on a few key issues to highlight this.

Big data disillusionment

In the Gartner hype cycle, big data has definitely reached the trough of disillusionment stage within the market research industry with a wide range of challenges identified around access, use and the analysis of new forms of big data. The key element is integrating big data with "traditional" research in order to provide a full understanding of consumers.

- "The big data challenge – actually doing something with it!"
- "No.1 challenge = big data and how to use it."

Some researchers question the real value of a lot of the new forms of data being generated and realize that in itself it is often of little value.

- "A false belief that big data can provide all the insights marketing needs to be successful."
- "Believing that big data changes behavior. Big data, machine learning, AI will all be helpful tools to the market research professional but all of it is meaningless without some thoughtful deliberation over what it means and how to use it. And none of it replaces valuable, rich insight into the human mind."

Skills shortage

Many researchers voice concerns that the market research industry lacks the skills to compete effectively...

- "We are old fashioned, specifically in terms of what data, tools and methods are used. SPSS and simple cross-tabs are widely used while the analytics industry largely uses Python, R, and more sophisticated statistical / econometric / machine learning techniques."

...and that our competitors in the world of consulting and technology have better access to big data sources and are better skilled at its interpretation and marketing, which could potentially cut research companies out of the picture.

Connection problem

The data-related challenge that many researchers voiced was not around the collection of data, access to data or the difficulties of analysing specific sources, it was more about how to connect the data they have access to all together.

- "Connecting different data sources, working with big data / identifying the relevant bits in big data."
- "Disjointed data sources scattered across the organisation."
- "Challenge = dealing with / synthesizing a multiplicity of data sources – primary / secondary, social listening, big data sources, etc."

The key element is integrating big data with "traditional" research in order to provide a full understanding of consumers

Many researchers voice concerns that the market research industry lacks the skills to compete effectively

There are worries that clients are starting to circumvent research firms as a result of access to do-it-yourself research tools

The primary concern around GDPR is its impact on sample supply

The looming threat of AI

Researchers worry about how quickly we can get to grips with AI and machine learning before our competitors do.

- "AI and the adoption of technology that will replace the traditional syndicated research model."
- "AI and IT industry becoming the competitor by out-pacing the market research industry's innovative offerings and automating away the need for traditional researchers."

The impact of DIY solutions

There is a lot of about the impact of DIY solutions. There are worries that it is dumbing down research and that clients are starting to circumvent research firms as a result of access to do-it-yourself research tools.

- "Clients who feel they can do it themselves with their own subscriptions to online survey platforms."
- "DIY market research: people without research expertise thinking they don't need to hire an expert to help them with research."

GDPR

An area of apprehension for a small but significant group of people in the industry is the impact of GDPR in 2018.

- "GDPR and the extent that it does / does not affect market research, and clients being concerned about data privacy when sharing sample information with us."

The primary concern around GDPR is its impact on sample supply.

- "GDPR – how will we get a large enough sample to be robust."

And whether or not the industry is ready and prepared for the change.

Client preference for status quo

Other researchers complain of clients not willing to try new methods and being stuck in their ways...

- "Getting clients to try new research methods. Too many still cling to traditional methods when we know that consumers are increasingly less likely to participate in traditional surveys and focus groups. This is particularly true with FMCG marketers."
- "Challenge = Getting clients comfortable with the new technologies designed to leverage better insights – many are stuck with static tools and want any new solutions to replicate their static world."

REPRESENTATIVE INTELLIGENCE

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We often talk about research in terms of projects – individual units of research. This is because research projects are the currency of the supplier. However, research really takes place in the paradigm of an iterative cycle – that is, it is a pattern which repeats & builds on itself.

The typical research cycle starts with a market question. An approach is developed to answer the question. Then, guided by that approach, data is gathered (usually from people) and analyzed. The analysis typically yields both a partial answer to the original question and new questions derived from newly surfaced unknowns. In order to answer the new questions, new research must be conducted and the cycle repeats.

The available methodologies set the cadence of this cycle. In the **era of traditional research,** when research happened door to door and on paper, each cycle represented tremendous amounts of work and could take upwards of *a year.* The rise of telephones, computers and the internet propelled us into the **era of online research.** Approaches like surveys and focus groups moved online. As a result, substantially less labor was needed to execute a single unit of research. The impact was that research cycles were reduced to only *a few months.*

Meanwhile, academics were increasingly using computer algorithms to develop automated approaches to tackle tasks that market researchers were doing by hand – like analyzing text & transcribing audio. Market research entered the **era of algorithms** as innovative companies like OdinText & Luminoso made sophisticated algorithms available to everyday researchers. These algorithms allowed research to take place faster and meant each cycle could happen in just *a few weeks.*

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Then, two advances in research collided – increasingly sophisticated AI & programmatic sample via exchanges. Companies like ZappiStore, Confirmit & AYTM leveraged these advances to take survey research from kick-off to results faster than anyone had seen in the past. Market research was brought into the **era of automation** and it is now possible for some research cycles to take place in just *a few days.*

This begs the question: What's next? There is no reason to believe that this is the end of progress in market research. We may thus conclude that the time it takes to execute a single market research cycle will continue to get shorter and shorter.

Eventually, the limiting factor is the speed of human communication rather than the analysis of data or the synthesis of results. Consequently, a single cycle of research is limited to approximately the amount of time it takes a single person to react and respond to an arbitrary stimulus — somewhere between *minutes and seconds.*

At this timescale, conducting market research takes the form of live conversation with an intelligence which engages, understands and represents the people being researched – **a representative intelligence.** As we enter this **era of representative intelligence**, everything changes.

Research becomes so fast and simple that it assumes ubiquity among decision makers. This ubiquity renders "project-based" research purchasing impractical and market research becomes a subscribed utility. Conversations with representative intelligence become commonplace with designers and product engineers at all decision points within the cycles of creation. Consumer communities grow in prominence as market research begins to look more like continuous relationship development than a transactional experiment. Corporate agility increases in importance as companies that are able to react quickly to their customers' changing needs begin to realize a sustained market advantage.

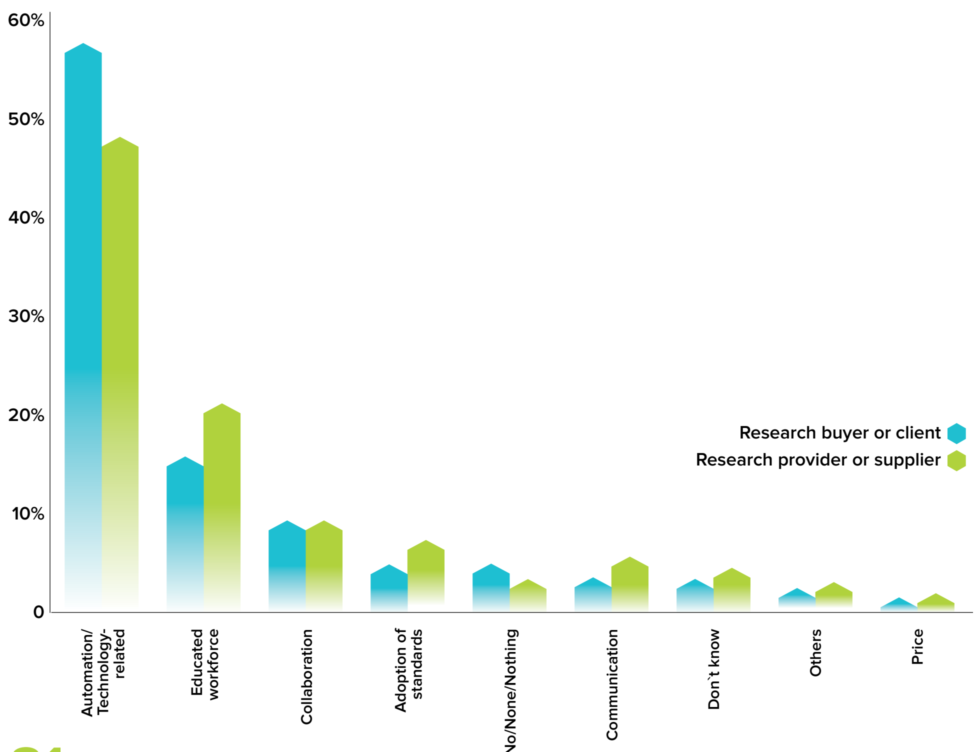
Overall, representative intelligence will not only change how market researchers operate, it will change how all organizations operate and move us closer to a world where profitability and the needs of consumers are aligned.

SOLUTIONS TO CHALLENGES

We were not content to simply provide a venue for the airing of concerns; we also challenged GRIT respondents to propose solutions to the most serious issues they saw.

As much as respondents expressed concerns related to data and technology, even more saw technology as the potential solution to these challenges, followed by more education and training as the very distant second option.

SOLUTIONS TO CHALLENGES



There is also a recognition that the rise of new forms of data provides opportunities for both new and old research solutions when they are applied together. Researchers talk about "getting the balance right" by adjusting traditional research methods to help make sense of new sources of data.

The industry is of two minds when it comes innovation, however, and a deeper exploration of the verbatims sheds light on why it's perceived in seemingly contradictory terms.

Sample quality

Encouraging shorter and more mobile-friendly surveys is a universal message.

- "Better, shorter and more challenging surveys."
- "Enhanced targeting to minimize # of questions and # of respondents screening out."

Some feel that making surveys mobile-friendly should be mandated as well as putting limits on the lengths of surveys.

- "Need to cap survey length at 15 minutes and make sure all surveys are mobile friendly."

A recognition that price pressure on panel supply was contributing to the problem, smarter use of data appending and fresher sampling methods were also mentioned.

- "Clients perceive research sample as a commodity, and almost always buy on price; this reduces the margins of suppliers and thus also the amount of resources available to combat data quality issues."
- "More onsite recruitment in out-of-the-box places like college campuses, festivals, etc. ...basically boots on the ground instead of sending more and more emails. "

Data synthesis

New data synthesis methods are emerging that blend traditional qual and quant research to make sense of big data and bring it to life.

- "We need to counter the assumption that big data provides sufficient information and insight without primary research about attitudes and motivations."
- "Professionals must find, through trial and error mostly, the right role for big data, quant and qual insights in their decision-making matrix."
- "Biggest near-term opportunity is the effective combination of big data (rational) and qualitative research (emotional) to provide insights that have impact to the business."

AI as the game changer

Many see the opportunities for AI and machine learning to become real game changers for those who can stay ahead of the game.

- "MR firms should embrace AI innovation in order to evolve."

The market research industry has always tried to develop reliable predictive modelling techniques but machine learning could revolutionise this process.

- "Predictive modelling – in the past models have been shaky at best but with the increasing amount of data points being generated & the recent developments in machine learning there is the opportunity to create far more accurate real-time models."

> Encouraging shorter and more mobile-friendly surveys is a universal message

> The rise of new forms of data provides opportunities for both new and old research solutions when they are applied together

> Data synthesis methods are emerging that blend traditional qual and quant research to make sense of big data

Solutions to DIY encroachment

There are no clear "solutions" to the challenge of DIY other than a recognition that it is up to market research firms to demonstrate their value and compete with it.

- "More communication about what a research professional brings to the table."
- "Clients need education on the importance of the research value chain – research design, measurement design, analytics and insights. Tracking a handful of metrics via survey monkey is not research."
- "Solution = innovation, working with our clients as a strategic partner to deliver rich insights, not easily gleaned from a more basic research study."

Perhaps the only way forward is to embrace it and add value...

- "By accompanying the automation and DIY trend with the proper information, tools and expertise."
- "DIY – clearly communicate the value added by expertise while reducing cost (offer modular work such as design only, design/analysis but no gathering, use of AI where applicable, etc.)."

Automation

There are serious concerns from some quarters that the race to automate is commoditizing research.

- "Automation lowering the perceived value of research will lead to the commoditization of our services."
- "Biggest challenge = data automation and the «dumbing down» of research to «cost per contact» and turning it into pure commodity data."

Whereas others see automation as the holy grail that will enable our industry to become more competitive.

- "More automation, more advanced analytical add-ins in standard tools"

"Automation of analysis would greatly decrease the time it takes our firm to create a report."

New skills, education and re-organisation

Bringing in new talent into the research industry with fresh skills is commonly identified as a medium-term solution. In the short term, organizations can begin by re-organizing themselves.

- "Our division insights team is actually undergoing a reorg to address new capabilities with specific training, but also to lift project management workload from a lean team by outsourcing to an extension team abroad. This will allow more time to focus on strategic initiatives and keep up with the ever-changing demands"

Organizations need to combine skills...

- "Combining research skills (operations and project management), data analytics (statistical analysis and data mining) and business consulting."

More education and training is viewed as vital for the industry to survive and transform itself.

- "The marketing research profession is in danger of becoming a plug and play service. There is a lack of fundamental knowledge on data synthesis"
- "Full-service organizations making the shift to technology driven methods and insights generation. Too many organizations are wasting manual effort on processes that can be automated and both their speed of delivery and costs reflect it. Companies that won't/can't adapt will be driven out by technology-driven organizations who build technology to replace manual effort and bring on specialized talent to tell stories and curate data."

It's not just market researchers who need to learn:

- "Common sense knowledge of how to interpret data to understand the outcome. Too many times the "data scientist" really has no idea about the applicability of the information to the real world."
- "Organizations should encourage cross-functional rotations into areas that are impacted by and/or use research, thereby providing an understanding of the end-user and how research applies to the business question/situation."

There are no clear "solutions" to the challenge of DIY

More education and training is viewed as vital for the industry to survive

RESEARCH PARTICIPATION: THE NEXT REVOLUTION IN INSIGHTS

JD Deitch
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Website: www.p2sample.com

"The Fourth Industrial Revolution will affect our identity and all the issues associated with it: our sense of privacy, our notions of ownership, our consumption patterns… The list is… bound only by our imagination."

– Klaus Schwab, Founder & Chairman, World Economic Forum

Some of the greatest minds of our times believe we are on the brink of a fourth Industrial Revolution. At an astonishing pace, technology is leading us to a place where physical, digital and biological lines are blurred.

We know our clients are struggling with this transition. We breathlessly speak of disruption at conferences and acknowledge what our clients already know: that the people whose behavior and feelings we should be helping them understand are changing rapidly. The truth is that, with few exceptions, very few research suppliers are addressing this dicey future in any truly novel way. We must reimagine a world of data collection and interpretation that begins from the perspective of the consumer. Yet the consumer is the last person most suppliers are thinking about: they are spending more time worrying about their P&Ls than developing new solutions. The result is a raft of half-baked, me-too rollouts that allow suppliers to claim they are forward-thinking despite being nothing of the sort.

Automating data collection is the easy problem to solve. The harder problem is research participation which available evidence suggests the industry is content to ignore. Respondents are mere laboratory mice whom, if we could just get them to stand still for long enough, we could study. The evidence is plentiful, sufficient and irrefutable: bad experiences yield bad data. More maddening still is the finger-pointing. Researchers point at sample companies and say, "You aren't doing enough to engage the respondents!" Sample companies point at researchers and say, "Your surveys are too long and not mobile-friendly!"

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The Revolution is Coming

Participation is the next place where the technology revolution will strike in our industry.

Let us quickly acknowledge how very little is being done to improve the respondent experience. It might actually be better for sample companies to say: "Please bounce around in a router that we have built purely to optimize yield, and sorry for not actually using the data we know about you or have already asked you several times to prevent you from spending multiple minutes each time qualifying for a study for which we should already know whether or not you qualify. If you cannot find a survey, then we'll send you on to another router where you can do the same thing again".

We have the tools and capacity today to do better than this. It is possible today for us to use technology and automation and AI to mitigate fraud, deeply profile respondents, and treat them respectfully by fully and correctly leveraging their data. In turn, we help them reduce the valuable time they are spending jumping through our hoops.

Most importantly, if we had the courage, we could—right now, today—listen to respondents and enable them to stop bad experiences and reward good ones in field. And in doing so, we would improve our economics, our long-term prospects as an industry (whatever the methodology), and the decisions that our clients are making.

OPPORTUNITIES FOR THE INSIGHTS INDUSTRY

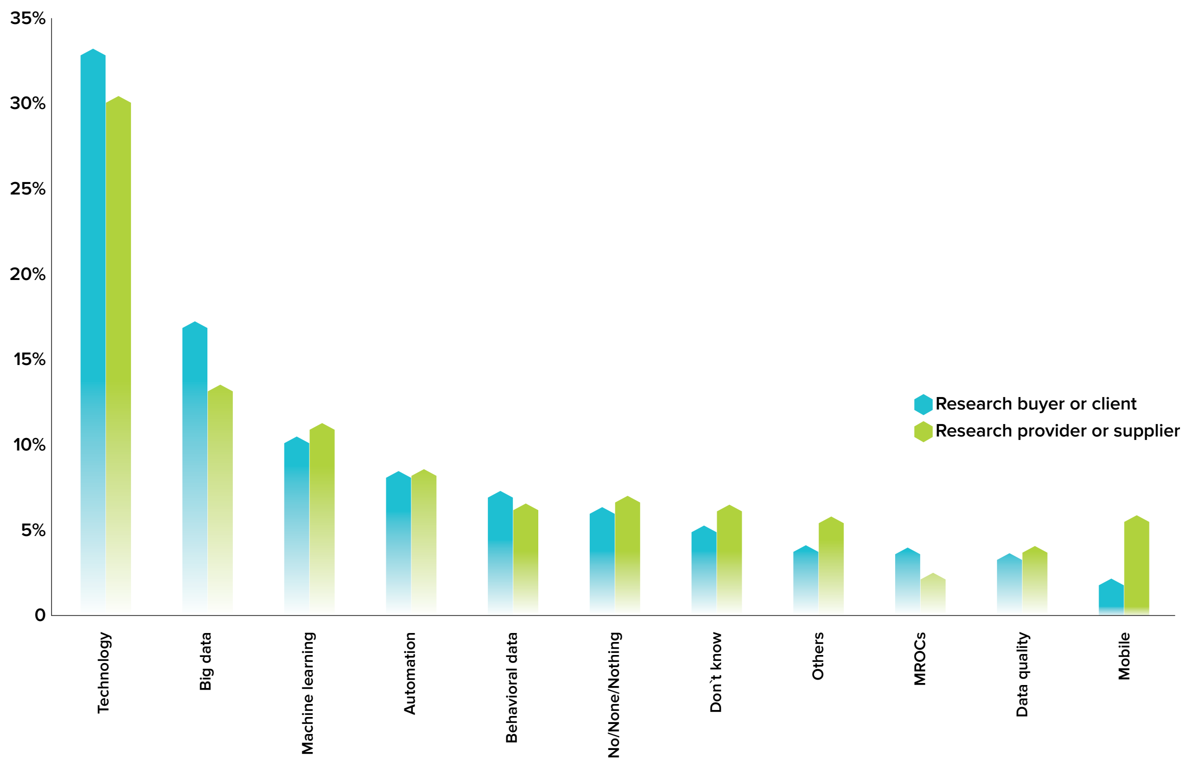
The biggest near-term opportunity facing the market research industry is Technology (31%). The main idea is that technology should improve consumer data collection and compliment and/or augment traditional research methods.

For primary research, opportunities exist to explore new ways of surveying with new platforms, new touch-points, and new approaches to engage the consumer. GRIT respondents feel that the market is currently saturated with traditional surveys and the influx of online DIY surveys. Leveraging technology to get insights where people are, where they make decisions, where they use products and services is highly valuable. As project timelines continue to shrink, the ability to reach respondents in the moment for immediate feedback is very useful.

Some of the examples mentioned in the survey include:

- Using mobile devices and geo-fencing for in-the-moment research and retail experience surveys.
- Embracing more social media platforms and using text analytics to uncover themes.
- Capturing unstated data through virtual reality, neuroscience, eye-tracking, and facial coding which in turn can be integrated with explicit data to give a full holistic view of the consumer.

OPPORTUNITIES



Leveraging technology to get insights where people are, where they make decisions, where they use products and services is highly valuable

The industry should embrace technology and be on the front-end of its implementation to strengthen the value of our insights and slow the technology and consulting companies from encroaching into our market. This requires educating both suppliers and client researchers on our emerging capabilities (enabled by technology) and how they can supplement and/or replace traditional methodologies. In turn, the industry will get better at building bridges to the other disciplines that utilize consumer behavioral data. We need to better publicize the value of research by demonstrating to clients why they should work with consumer research agencies and not entrust research to non-research agencies.

Again, here's what GRIT respondents had to say, in their own words:

Machine learning and AI capabilities

The biggest technology opportunity that researchers identify is the development of machine learning techniques to develop predictive modelling solutions.

- "Artificial Intelligence to enable the harnessing of big data to derive insights which may have been previously impossible to spot."
- "AI and predictive modelling, which, if properly used, may reduce the need for primary research."

The opportunities to do this in real time.

- "AI around analytics and MR to predict behavior online in real-time."

Pushing forward with automation

Increasing level of automation is seen as the second most important opportunity for the industry to improve its operational efficiency and become more competitive.

- "Automation of data gathering, analysis, reporting and alerts."
- "Automation, as companies collect more and more data we need systems which can sift through this data as the size of research teams become more and more unmanageable."

Becoming the why

Using traditional research methods to help better understand big data is seen as a growing opportunity.

- "Becoming the "why" answer to big data. The big data/analytics folks tell you something is occurring behaviorally, but they rarely can tell you why without talking to people exhibiting the behavior."

Diversifying data collection methods

Proactively diversify the type of data collection methods being used to take advantage of new techniques is seen as an opportunity by some researchers.

- "Adopt a greater range of data collection techniques."
- "Continued evolution to holistic use of data from various sources, as well as development of new data collection methodologies in part driven by AI."

Total market research

Exploring research opportunities outside the marketing department is seen as a growth area.

- "Applying insights across the entire organization, besides just marketing (e.g., advertising, branding). Doing so will help market research as a discipline grow and become better understood (and respected) within organizations."

The biggest technology opportunity is the development of machine learning techniques to develop predictive modelling solutions

Using traditional research methods to help better understand big data is seen as a growing opportunity

Many of the issues that are threats – AI, automation, big data, training, sample quality – are also potential solutions

Leveraging in-home technology

With in-home devices powered by intelligent personal assistants (e.g. Alexa) getting traction among consumers, many researchers see as opening for new ways to conduct research in a more spontaneous and natural way.

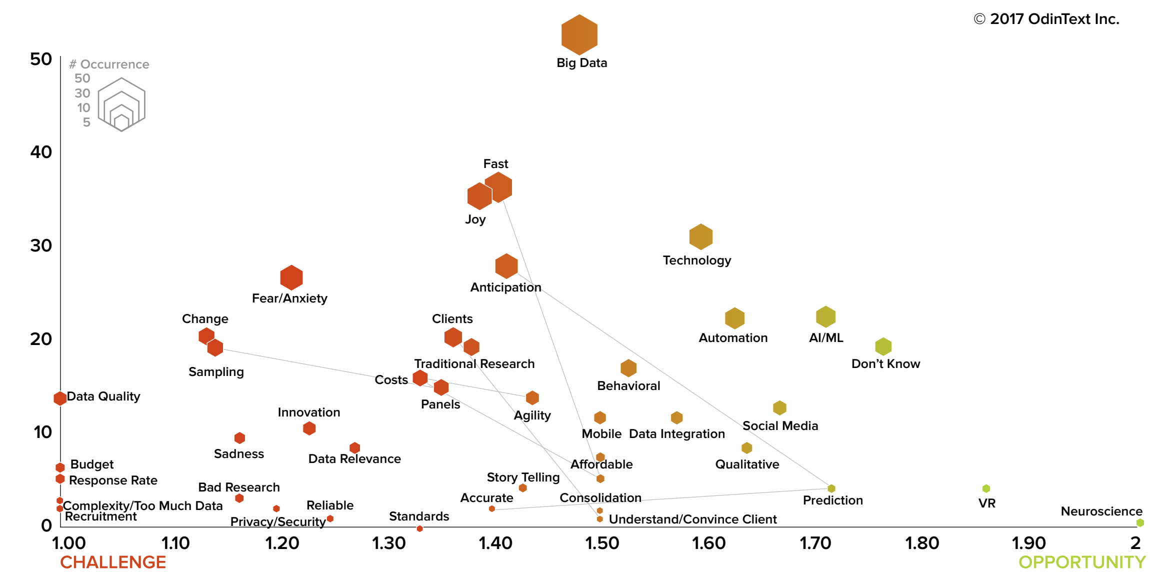
> "Integrating new technology into ethnographies, i.e. respondents giving permission for Alexa to follow you for a day."

THE BIG PICTURE

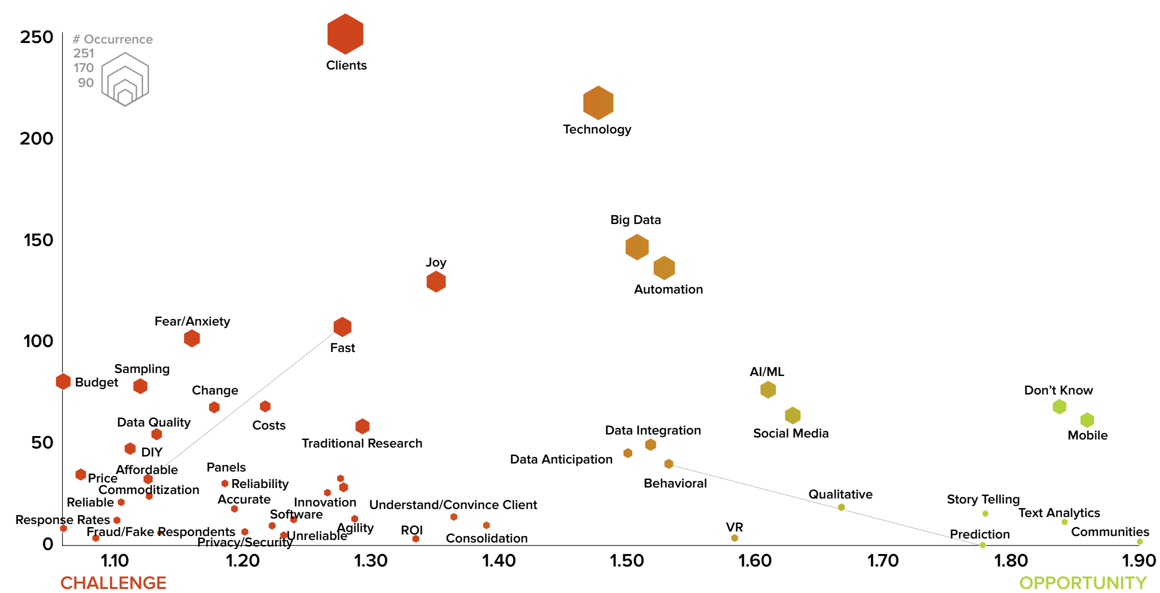
GRIT respondents are unequivocal in their belief that the industry is under immense pressure to change, and many of the issues that are threats – AI, automation, big data, training, sample quality – are also potential solutions. This is most clearly illustrated using text analytics to analyze the combination of emotional valence for each topic with the number of mentions as either a challenge and/or an opportunity, looked at separately by clients and suppliers:

The differences seem to be of pragmatism vs. purity; how do we enhance and advance the role of insights and the value it delivers when so many new tools, approaches, and business models are based on driving speed, cost, and quality via technology? This tension won't be solved any time soon, however, the good news is that optimism seems to be more prevalent than fear. As authors of this GRIT Report, we think the industry will navigate these changes well and will thrive in the long run.

CLIENTS – CHALLENGE VS. OPPORTUNITY



SUPPLIERS – CHALLENGE VS. OPPORTUNITY



OUR GRITTY FUTURE. ARE WE TREATING THE CAUSE OR REPORTING THE SYMPTOMS?

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So, what are all these GRIT-ty reports and trends telling us? And, what should I be doing different in my role tomorrow? I believe that most leaders of insights departments and supplier agencies are "leaning into" the dynamic climate we are facing, at least to the degree that their business partners, customer base, and shareholders permit (an important distinction)

As an industry, we are proactively searching for the right balance of new and traditional methods, automation, storytelling, and visual real-time delivery that has measurable business impact. And this edition of the GRIT report is again doubling down on Speed (59%), Quality/Impact of Insight (24%), and Price (9%) as the top drivers of most decisions. Which priority comes first depends on the situation, but they are all important in our competitive landscape.

We understand that the best decision making we offer our customers now, and in the future, will be a combination of System I and System II thinking and measurement. These trends have now become reality with better, faster, and cheaper as the table stakes. But, in all this information and pontification about industry transformation, we seem to struggle for the So What and the What Now?

In a future where the 1 to 1 personalization of marketing and product access wins the growth battle, and research panels are asked to compete with other web communities for member attention and engagement, where will insights, intelligence, research, and voice of the customer/consumer play a role? We need to figure that out, and fast. All the new methods, technology, and speed won't matter if we can't make it clear how it helps our customers find the next big idea and grow their business in a personalized way.

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GRIT COMMENTARY

In our business, I have noticed an opportunity, or should I say a need, in nearly every project, to integrate some level of in-context and personalized perspective for decision-making. While we are still leveraging metrics that tie to historic norms like Purchase Intent and Uniqueness, these measures alone are often not specific enough to fairly assess new ideas or messaging strategies founded in a unique insight or "Job to Be Done."

To solve this, we are creating custom context for consumer situations or brand interactions that are very personalized and specific to the opportunity that has the marketing team excited. For instance, "on the go moms looking for a healthy snack" or "middle-aged men concerned about wrinkles." And while prediction markets certainly lend themselves to this blend of projective yet rational context creation, I would argue this opportunity to push the personalization agenda exists whether you are at the front or back end of the innovation stage-gate, and whether you conduct eye-tracking, measure brainwaves, program surveys, or report syndicated data. The more personalized, yet projectable, we can make the respondent experience, decision metrics, and story, to real life situations, the higher the likelihood of influencing a decision and measuring ROI.

This notion of understanding the consumer or customer "in the moment" is certainly not new, but new techniques, technology, and automation now provide the ability to scale personalized market research and prediction in ways not previously possible. What's also clear from the GRIT data, is new open source, API, and collaborative partnership models will allow these personalized data streams to be integrated into a more holistic view of people's experiences, relationships, and decision-making processes. This confluence of knowledge is where Insights leaders are uniquely qualified to articulate personalized marketing stories in an impactful way. We should own the what, when, why, and how the customer will behave now and in the future. If we don't, where will that leave us?

INDUSTRY BENCHMARKING

An important focus of GreenBook is the development of a benchmark database to help research buyers and providers understand the most significant drivers of success. We define success for the insight function as providing value to constituents resulting in an enhanced reputation and increasing levels of revenue or funding.

ALLOCATION OF TIME AND RESOURCES FOR PROJECT SUCCESS

In this edition of the GRIT survey, we asked a subset of willing respondents to engage in a Max/Diff exercise to help us understand where they focus their time and resources to ensure project success.

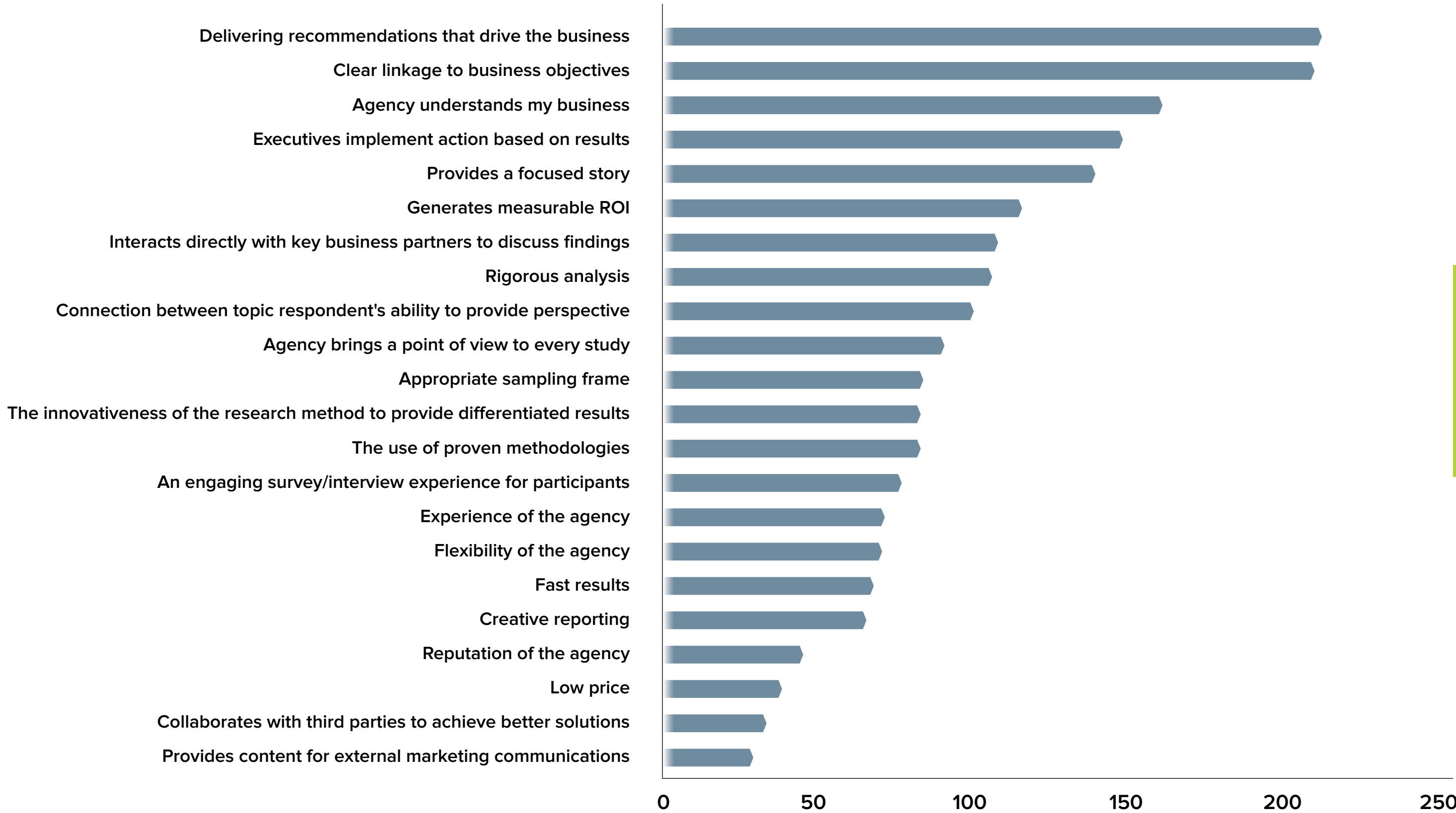
Perhaps the most important finding is that among research buyers and providers there is more similarity than difference. Participants cited several factors as highly important to achieving project success:

- Understand my business
- Have a clear linkage to business objectives
- Provide a focused story
- Deliver recommendations to drive business
- Ensure executives implement action based on results

While important to both groups, 'rigorous analysis' carries a higher weight among research providers than among research buyers. Furthermore, research buyers place a heavier emphasis on linkage to business objectives and delivering recommendations that drive business. This is not surprising. While research providers can sometimes become enamored with analytic techniques, new methods and speed (all of which are demanded by buyers), what matters to research buyers is the impact they have on their organizations.

Research buyers place a heavier emphasis on linkage to business objectives

WHERE DO YOU FOCUS YOUR TIME AND RESOURCES FOR PROJECT SUCCESS? (RESEARCH PROVIDERS)



What matters to research buyers is the impact they have on their organizations

The relative value of all 22 elements included in the Max/Diff are indexed against the average of 100. One point of note is the role of 'low price'. For research providers 'low price' indexes as the third lowest factor of project success. Among research buyers, low price indexes as the second lowest factor. This is not to say price is ignored in the consideration of project execution but rather to say a low price without impact will not result in a successful project. Intuitive, but something that routinely disappears from the radar screen of buyers and providers.

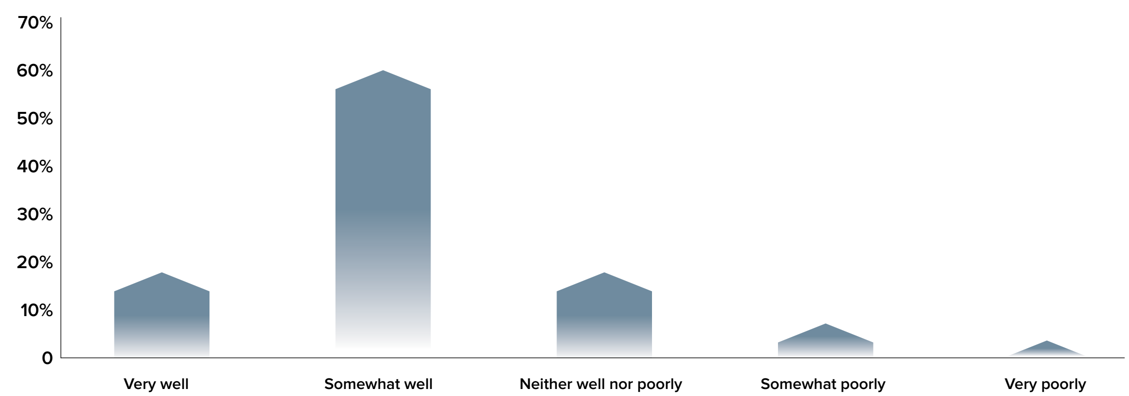
ROI is currently a hotly debated topic in our industry, including its importance and measurement. Among research buyers and providers, generating a measurable ROI falls just below the top-rated areas of focus.

WHERE DO YOU FOCUS YOUR TIME AND RESOURCES FOR PROJECT SUCCESS? (RESEARCH BUYERS)

Low price without impact will not result in a successful project

Another interesting insight was revealed when we asked a follow-up question to the "Perfect Study" exercise **on how well respondents think their average project aligns with the perceived importance of these factors.** Almost 60% believed that their organization matched up with the vision at least somewhat well, while only 16% felt they compared very well. Collectively, while this indicates strong organizational alignment to executing project success, a quarter of respondents still felt there was some mismatch between what they believed was important and reality.

PROJECT ALIGNMENT PERCEPTION



RESEARCH INDUSTRY SEGMENTATION

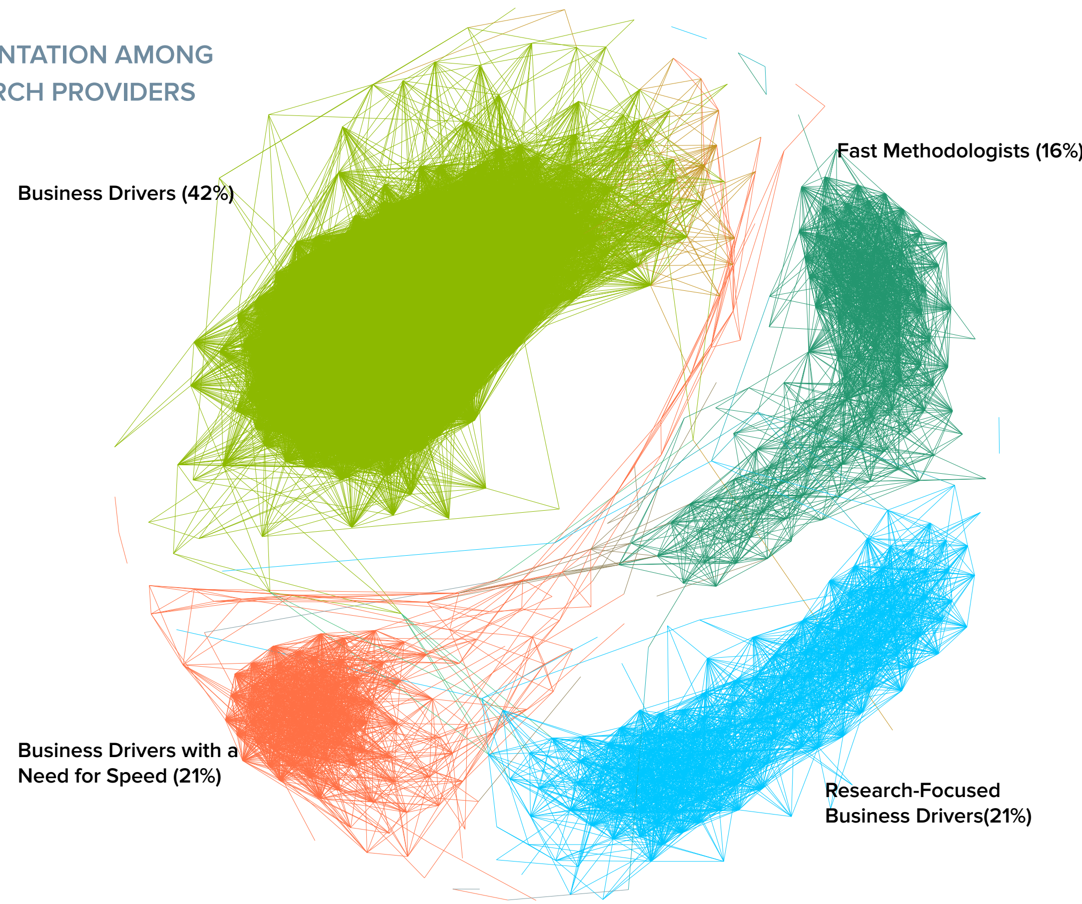
A clustering scheme was developed to identify distinct segments of research providers and buyers in terms of the factors they emphasize to achieve project success. Understanding distinct patterns of factor emphasis through a clustering technique provides deeper insight about the drivers of project success in the eyes of research suppliers and the clients they serve. It allows readers of this report to 'see where they fit' vis-à-vis others in the industry and is an important element of any benchmarking exercise.

The figure on the right visualizes segments among research providers. Four distinct segments emerge:

Business drivers (42%): The researchers in this segment are characterized by their strong degree of focus on delivering recommendations that drive the business and providing a clear linkage to business objectives. These two areas of focus dominate the segment.

Business drivers with a need for speed (21%): While the focus on delivering recommendations and linkage with business objectives are very important to this group as well, these two factors do not dominate to the extent seen in the Business Driver segment. 'Fast results' also emerges as an important factor for this segment.

SEGMENTATION AMONG RESEARCH PROVIDERS



Research-focused business drivers (21%): For this segment, the focus on delivering recommendations and linkage to business objectives remains clear but at approximately half the level of the Business Driver segment. However, selection of an appropriate sampling frame, survey engagement, and the use of proven methodologies plus a connection between the topic and the respondent's ability to provide a perspective create a more diverse profile for the segment.

Fast methodologists (16%): The three leading success factors articulated by this segment include the use of proven methodologies, fast results and use of an appropriate sampling frame. This segment is the least likely to cite delivering recommendations that drive the business or providing a clear linkage to business objectives as focal areas for project success.

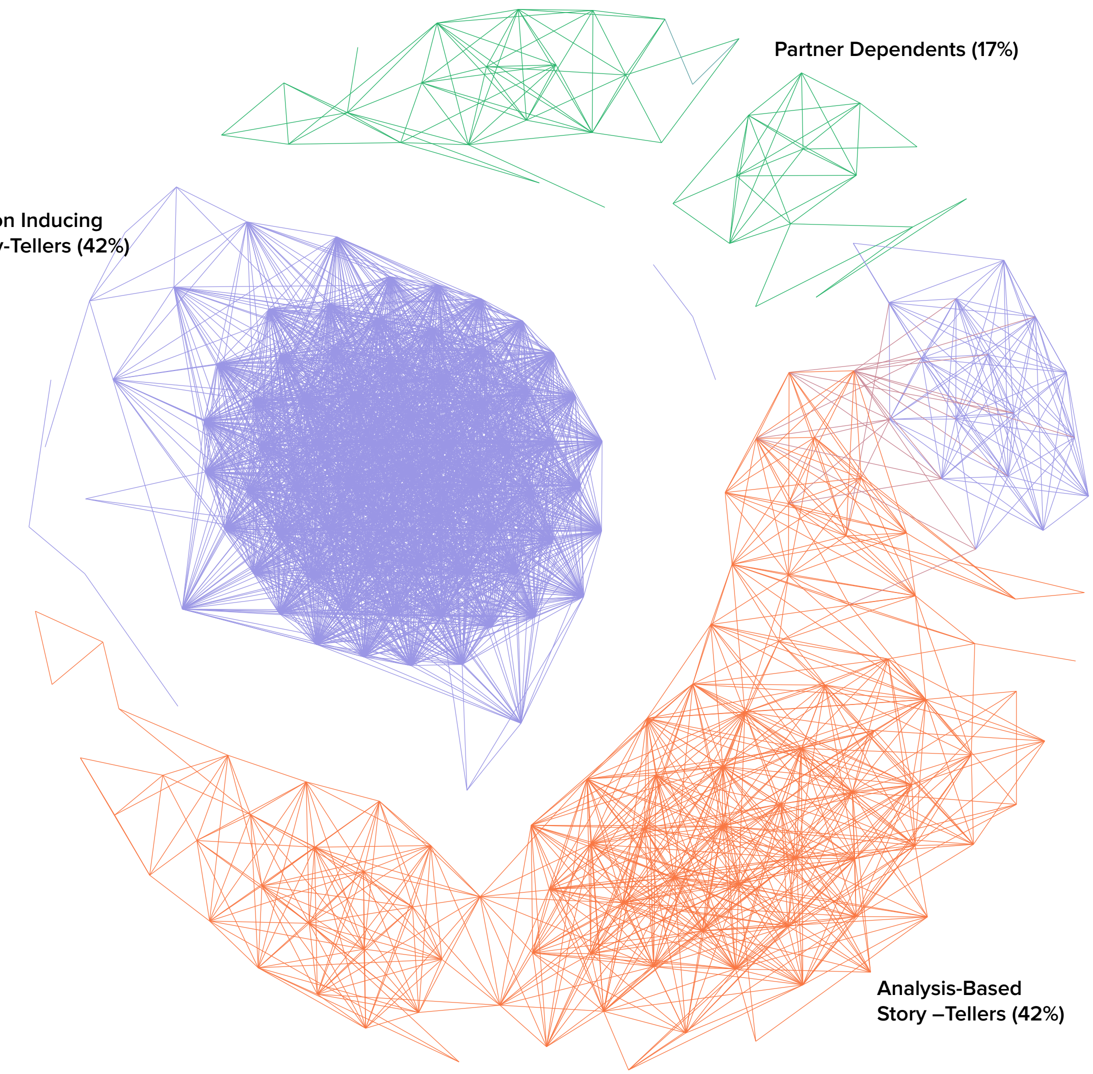
The figure on the right visualizes segments among research buyers. Three segments are identified:

Action-inducing storytellers (42%): This group is dominated by three factors associated with project success – a clear linkage to business objectives, a focused story and the outcome of executives implementing action based on the results. This segment places a higher value than the other two segments on providing a focused story.

Analysis-based storytellers (42%): As with the Action-inducing Storyteller segment, this segment also focuses on linkage to business objectives and providing a focused story. The differentiating factor for this segment, however, is the importance of a rigorous analysis as part of that process.

Partner dependents (17%): While a clear linkage to business objectives is important to the segment, it is less important than it is for the other two segments. The distinguishing factor for this segment is the importance of external partners. This segment values an agency that understands its business and which brings a point of view to every study.

SEGMENTATION AMONG RESEARCH BUYERS



BEST PRACTICES APPLICATION

As a final component of our benchmarking effort, we asked respondents to indicate how often their organization engaged in a series of evaluative best practices.

In looking at the chart on the right, we see clearly between half and two-thirds of respondents report that their organization uses multiple data sources instead of a single study to address business issues, explores new methods, technologies, business models and partners, ensures all research initiatives are aligned with senior stakeholders business objectives, interacts regularly with senior stakeholders and is focused on future growth strategy. Those are certainly seen as priorities by many, but by no means all.

On the other end of the scale, less than half follow any of the remaining best practices, with only 25% measuring ROI of projects.

Clearly, GRIT respondents acknowledge that there is room for improvement (sometimes significant room!) when it comes to implementing best practices that are linked to effective organizations and business growth.

Slightly more than 25% of organizations regularly measure the ROI of the projects they conduct

[Wave = 2017 Oct]	Never (1)	Rarely (2)	Sometimes (3)	Frequently (4)	Always (5)
My organization measures the ROI impact of the projects we conduct.	15%	27%	32%	18%	8%
My organization actively promotes the research we conduct with the broadest appropriate audiences.	5%	15%	35%	29%	15%
My organization benchmarks itself against other organizations.	9%	20%	34%	23%	13%
My organization explores new methods, technologies, business models and partners.	2%	9%	28%	37%	24%
My organization participates in clients' staff meetings.	13%	22%	34%	22%	8%
My organization ensures all research initiatives are aligned with senior stakeholders business objectives.	3%	9%	25%	34%	29%
My organization interacts regularly with senior stakeholders.	3%	6%	26%	41%	24%
My organization uses multiple data sources instead of a single study to address business issues.	4%	14%	29%	36%	18%
My organization ignores recommendations when executing marketing strategy.	25%	36%	29%	8%	2%
My organization is focused on future growth strategy.	3%	8%	21%	34%	35%
My organization is involved in strategic planning sessions at the corporate level.	6%	16%	33%	27%	18%
My organization is involved in strategic planning sessions at the business unit level.	5%	14%	33%	31%	16%
My organization gives access to active dashboards and visualization tools to our clients.	14%	20%	30%	21%	15%

THE FUTURE OF THE GRIT REPORT

Finally, we asked a series of questions about what we could do better in the future to support the readers of the GRIT Report while "walking the talk" on research best practices.

The key takeaway seems to be that we should leave most of the GRIT survey alone

HOW TO IMPROVE THE GRIT SURVEY

Some context on why we became introspective is in order here. Since its inception, GRIT has tried to be an example of best practices in survey design and data collection in action, but over the past few years, primarily because of mobile becoming a major channel for research participation, that has become harder and harder. The need to not over-survey respondents while ensuring that we collect data in a mobile-friendly, engaging way is a very tall order, one that we are sure most readers, especially those who conduct B2B research, can relate to.

Rather than just continuing as is, we decided to ask GRIT respondents what they felt would improve the experience of the GRIT survey. What did we learn? Well, the key takeaway seems to be that we should leave most of the GRIT survey alone: out of proposed suggestions, no majority-winning approach emerged. In fact, most respondents were ambivalent on the impact our suggestions would have.

	This will greatly improve the experience (1)	This will somewhat improve the experience (2)	This will no effect at all (3)	This will make the experience somewhat worse (4)	This will make the experience much worse (5)	Mean
Forget trending: redesign it to be mobile first	20%	29%	29%	14%	8%	2.6
Switching to a bi-monthly 10 question survey	12%	34%	24%	22%	8%	2.8
Why do a survey? Switch to a Community model	5%	19%	22%	31%	23%	3.5
Bunch it: ask a randomized group of questions across MR websites	5%	23%	32%	25%	16%	3.3
Leave it as is; it works well enough now	10%	17%	56%	11%	5%	2.8
Offer some kind of monetary incentive	12%	25%	47%	8%	7%	2.7

Empirically this is hard to reconcile with the feedback and comments shared in various social networks and groups by a small but vocal group (including some of our own GRIT authors!) calling for a massive reduction in length of interview and a questionnaire, despite historical trending questions, and a wholesale redesign for a mobile-first experience.

Is this a case of the cobbler's children needing new shoes, or are we making much ado about nothing regarding respondent experience? Honestly, we are unsure and unfortunately haven't gained significant clarity on how to improve the GRIT survey going into 2018. What we do know is that we will continue to try to lead by example as best we can and improve the GRIT research process on an ongoing basis.

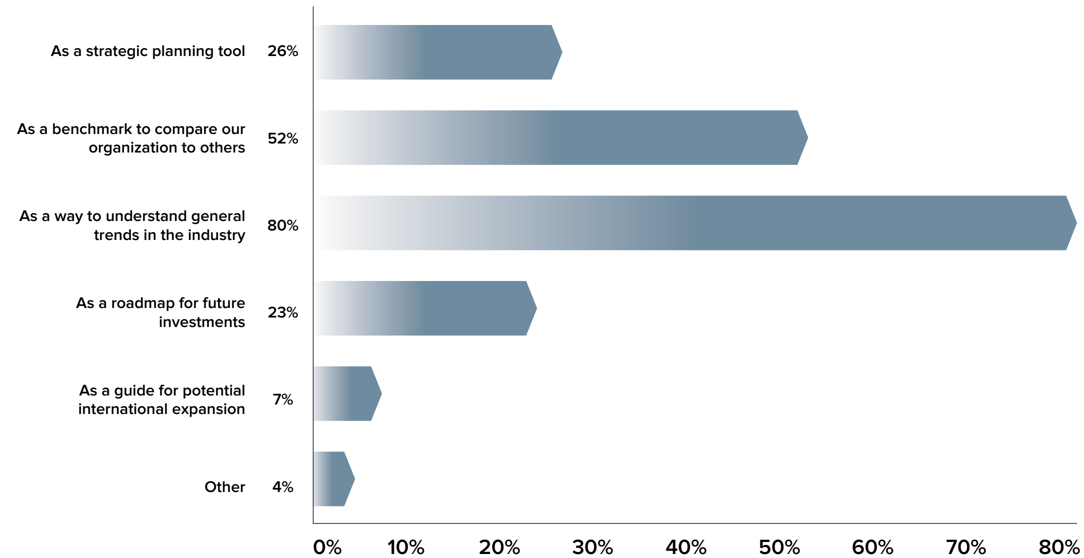
A quarter of respondents use GRIT as a strategic planning tool, while 23% use it to plan for investments

HOW IS THE GRIT REPORT USED

We have also been hearing for several years now that GRIT has emerged as one of the most important strategic planning tools used by insights organizations. We thought it would be useful to quantify this so we could take the use the industry has for the GRIT Report into consideration in future planning.

We asked respondents to tell us all of the ways their organization used GRIT, and we learned that indeed, a quarter of respondents use GRIT as a strategic planning tool, while 23% use it to plan for investments. 80% of respondents use GRIT to understand trends in the industry (a good thing indeed since GRIT does stand for *GreenBook Research Industry Trends!*), followed by 52% who use it as a benchmarking tool.

HOW IS GRIT USED



GRIT will continue to evolve to meet the changing dynamics of the research industry just like the industry itself is changing to adapt to dynamics in the world around us. Knowing better how it's used and the role it fills in the industry gives us even greater focus and a sense of responsibility to deliver insights that drive impact for our readers.

FINAL THOUGHTS

To steal from elsewhere, “the future’s so bright, I’ve got to wear shades”. These are truly exciting times to be in market research. There are challenges, to be sure, but the expanding capabilities of suppliers, new types of data collected and analyzed, innovative technology applications, and the overwhelming desire to be consultants to our organizations and clients, all bode well for our collective future.

That being said, it is noted in this report that satisfaction with our ability to conduct research – our fundamental activity – is at only 71%. And that is the attribute with the highest score. How we deliver value to our clients, communicate, and support action all score much lower than that. So, change is required. Change takes focus. And this GRIT report acknowledges that focus – in all the areas that matter:

People – To influence organizations, we are hiring people with business acumen who communicate well. To deliver on better analysis and faster and/or improved insights, we are hiring analysts and technology specialists.

Technology – Technologies that improve the speed and quality of insights are growing substantially. AI, non-conscious measures, automation, mobile capabilities, visualization, new data sources – all growing. And the investment in those areas is growing as well.

Methodology – More and more of us in research see the need and are developing the ability to integrate System One thinking into our research frameworks. More of us understand the need to be predictive and prescriptive. The tools that make this possible are growing in both capability and application – thanks to a combination of new data sources and advanced analytics. We are also seeing more investment from client-side organizations in data synthesis.

Organization – It’s not just new hiring priorities, it’s the focus of our companies and departments that’s changing. While satisfaction with our ability to demonstrate value of research outcomes is low, the focus is there. The segments described in the industry benchmarking section reflect this focus, representing the vast majority of suppliers and client organizations.

Obviously, we need to do more and do it with a greater sense of urgency. But when smart, well-intentioned people put their effort in the right places, good things get done. Based on the GRIT data and my knowledge of the industry, it’s already happening. Putting on my shades right now.

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Managing Partner,
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RESEARCH & PRODUCTION

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AYTM is a market intelligence solution that is so advanced, it's easy. Our team of research experts offers a full range of quantitative and qualitative services, providing as much or as little assistance as you need. AYTM's proprietary panels provide best-in-class levels of trust, quality, speed, and feasibility, with access to over 25 million consumers in 26 countries, along with real-time pricing, guaranteed delivery time, and blazingly fast turnaround. Try our Personality Radar for quickly creating powerful customer personas, advanced Max Diff, and Competitive Topography for animated 3D mapping of customers' brand perceptions.

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Cannon Gray

www.cannongray.com

Cannon Gray LLC is a marketing science and analytics company that partners with marketing research agencies, consultants, ad agencies and clients located in many regions of the world.

Gen2 Advisors

www.gen2advisors.com

Gen2 Advisors is consulting and advisory firm supporting the insights industry. We support corporate researchers by identifying new suppliers, tools, technologies, and methodologies to support the changing nature of marketing, budgets, and new information opportunities. Suppliers can look to us for guidance on the impact of industry trends and market opportunities.

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www.ipsos.com

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

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Keen as Mustard

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Keen as Mustard is a full service London, UK based marketing agency that specialises in marketing for data, research & insight. They have in house capabilities for PR, branding, websites, content marketing and design.

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Knowledge Hound

www.knowledgehound.com

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LIGHTSPEED

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www.marketing.broad.msu.edu/msmr

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Helping co-create the future of market research. Combining the best of the new with the best of the old.

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As the established expert in digital market research data, Research Now optimizes market research through its data assets, innovative solutions, and consultative services to drive better business decisions and results for companies and agencies around the world. Founded in 1999, we were pioneers in originating online data sampling and created the first B2B panel, and continue to provide robust research data through rigorous first-party consumer and B2B data collection for more than 3,000 clients worldwide through our 11+ million panelists in more than 40 countries. As a trusted provider of comprehensive research services and data solutions – such as survey programming and optimizing sampling, and feature-rich automated research, integrated data, and advertising measurement – we enable powerful insights for competitive advantage.

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Adelphi Research

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Discuss.io

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With an active member panel consisting of 25+ million members worldwide across more than 150 countries, P2Sample is the most sophisticated provider of programmatic sampling solutions for the consumer insights industry. Its APIs deliver rock solid feasibility and in-field performance, with round-the-clock monitoring and self-healing algorithms that automatically detect and mitigate survey problems. The platform is designed from the ground up to ensure a demonstrably superior respondent experience. It's the Right Survey, Right Person, Right Time methodology that puts an end to bouncing around in routers and mindless over-quotas.

Remesh

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The Remesh platform uses machine learning to understand and engage groups of people with real-time conversation. This is achieved by allowing a single moderator to converse with a group as if they were a single intelligence. Beyond inline conversation, the group's opinion on every response is collected, analyzed, and presented in real time.

Research Now

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FUEL CYCLE is a mobile-first community platform for supercharging the relationship between brands and customers. From discussion boards and live chats to gamification and rewards management, FUEL CYCLE offers an easily customizable and robust solution for brands and businesses to build high-impact online experiences for their customers. FUEL CYCLE provides customer intelligence for organizations across industries including media & entertainment, consumer goods, financial services, healthcare, automotive and technology. Brand communities powered by FUEL CYCLE include ELLE, Hertz, UPS, AIG and more.

Medscape Market Research

www.medscape.com/sites/public/marketresearch?src=prtpd_van_gbgrit_mscpmrk_pmr

As part of the most trusted and recognized brand in healthcare, Medscape Market Research provides physician and healthcare professional recruitment solutions that deliver high quality results. At Medscape, we know delivering research results on time and within budget is essential – but it isn't everything. If the underlying data quality isn't there, if you don't produce meaningful results, your study suffers. That's why we provide the high-value data you need with a unique combination of recruiting services, advanced targeting and research solutions that deliver the respondents you need to get the successful outcomes you're after.

RealityCheck Consulting

www.realitycheckinc.com

RealityCheck is a global partnership of experienced qualitative market researchers, creative facilitators, psychologists and strategic conceptual analysts. From moderation and recruitment, to field management and analysis, we help brands make human connections.

Schlesinger Associates

www.schlesingerassociates.com

A leading data collection company delivering intelligent recruitment and project management for any qualitative or quantitative methodology. We have research facilities in US and EU with a worldwide reach. An uncompromising commitment to your success sets us apart.

SIS International Research

www.sisinternational.com

SIS International Research is a full service global Market Research and Market Intelligence firm. We provide Consumer, B2B & Industrial, Healthcare, Automotive, Multicountry and Strategy research. Our core services include Focus Groups, Interviews, Surveys, and Market Opportunity & Entry Research. We also have Focus Group facilities in the heart of NYC and London.

SoapBoxSample

www.soapboxsample.com

Brands need insights that lead to great ideas. SoapBoxSample turns business questions into actionable insights. Our team of super likeable humans combines decades of research experience with a nimble, and disruptive startup mindset. We believe in making your life easier, saying no even when you don't want to hear it, and giving you a research experience that improves your business' bottom line. Offering a FRESH blend of research and technology, including; Community Insight Platform (icmib), mobile and app-based research, passive metering, online data collection and full-service design and analytics.

SSI

www.surveysampling.com

Celebrating 40 years in business, SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research. SSI reaches participants in 90+ sample countries via internet, telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 40 offices and remote staff in over 20 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's employees serve more than 3,500 customers worldwide.

ZappiStore

www.zappistore.com

By automating manual processes behind market research, ZappiStore enables clients and agencies to capitalize on the cost and time efficiencies technology unlocks and empower consumer insight by bringing it in the business decision process early and often.

REPORT AND QUESTIONNAIRE CONTRIBUTORS

Gregg Archibald – Gen2 Advisors

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

Tom Anderson – Odin Text

Tom H. C. Anderson is Founder of OdinText a patented SaaS (software-as-a-service) platform data mining and predictive analytics. Fortune 500 companies such as Disney and Coca-Cola use OdinText to mine insights from complex, structured and unstructured (text) data. The company is the recipient of numerous awards for innovation from industry associations such as ESOMAR, CASRO, the ARF and the American Marketing Association. Anderson tweets under the handle @tomhcanderson.

Melanie Courtright – Research Now

Melanie serves as Executive Vice President of Global Client Services at Research Now. Since joining the company in 2011, Melanie has played an integral role shaping a team that is passionate about research sampling, quality, and world class client service. She has also played a key role in guiding the product development and thought leadership advances made at the company.

JD Deitch – P2 Sample

JD is a twenty-year veteran of the market research industry. He began his career client-side in financial services, then went on to hold senior global positions at The NPD Group and Ipsos. Prior to P2Sample, he held executive positions at AYTM and Bakamo.Social. JD is a frequent speaker and a thought leader in the insights industry as it evolves to tackle the challenges of the digital age. He has a Ph.D. in Political Science with Distinction from The American University and a BA from the University of Pennsylvania. He lives in France with his wife and two sons.

Kevin Gray – Cannon Gray

Kevin (B.S., M.A.) has been a marketing scientist for more than 30 years. His background covers dozens of product and service categories and over 50 countries. In addition to Advanced Analytics and R&D Kevin's responsibilities have encompassed business development, questionnaire design, report writing, management and various other facets of marketing research.

Jeffrey Henning – Researchscapes International
Researchscape International was founded by Jeffrey Henning, PRC, a serial entrepreneur dedicated to widening the audience for market research. He is best known for founding Perseus Development Corporation in 1993 and Vovici in 2006.

Nathan Hejl – Michigan State University MMR
Nathan Hejl is a Research Analyst at BNP Media and a recent graduate of the Master of Science in Marketing Research program at Michigan State University. Nathan's interest in research began after a summer internship with Hong Kong-based Prudential Corporation Asia, and he looks forward to joining and making an impact in such a rapidly changing and globalizing industry.

Elissa Moses – Ipsos Neuro and Behavior Science
Elissa Moses heads the global Neuroscience and Behavioral Science Center at Ipsos. The "Center" develops nonconscious measurement tools for understanding consumer response, decision making and behavior. She also created the Ipsos Academic Advisory Board and leads applied R&D research. Prior to joining Ipsos, Elissa was Chief Analytics Officer at EmSense pioneering neuroscientific methods to be applied to the marketing industry.

Leonard Murphy – GreenBook
Leonard Murphy is the executive editor and producer at GreenBook: guru in residence, influencer-in-chief, and product mad scientist. Over the last 15 years, Lenny has served in various senior level roles, including CEO of full service agency Rockhopper Research, CEO of tech-driven startup BrandScan360, and Senior Partner of strategic consultancy Gen2 Advisors. His focus is on collaboration with organizations to help advance innovation and strategic positioning of the market research industry, most prominently as the Editor-in-Chief of the GreenBook Blog and GreenBook Research Industry Trends Report, two of the most widely read and influential publications in the global insights industry.

Ray Poynter – NewMR
Ray is a co-author of The Handbook of Mobile Market Research and The Handbook of Online and Social Media Research, co-founder of NewMR.org, co-editor of the ESOMAR book Answers to Contemporary Market Research Questions, a content author for the University of Georgia's Principles of Market Research course and is the Managing Director of The Future Place, a UK-based consultancy, specialising in training.

Jon Puleston – Lightspeed

Jon Puleston is VP of Innovation at Lightspeed a Kantar business, where he leads an international team called QuestionArts specializing in survey design and research methodology innovation. Over the last decade his has conducted extensive research of research spanning the fields of consumer, advertising, business and political research on a quest to find better ways to conduct research.

Ryan Soulet – Michigan State University MMR

Ryan is a recent graduate of Michigan State University Master of Science in Marketing Research program and currently working as a Research Coordinator for Gongos. He prides himself on his passion for work and inquisitive mindset. He really enjoyed working on this years Q3/Q4 GRIT Report and looks forward to his bright future as a researcher!

Jeffrey Resnick – Stakeholder Advisory Services

Jeff Resnick is the founder of Stakeholder Advisory Services. He is a thought leader, trusted advisor to clients, business strategist and mentor. Stakeholder Advisory Services provides a range of consulting services in reputation assessment, key customer relationship management, development of customer advisory boards and business transformation for the market research industry.

Sue York – NewMR

Sue is the Chief Curator of NewMR, curating and organising the Festival of NewMR, Radio NewMR and other NewMR online learning events and a Market Research Consultant. Sue has a keen interest in new methods and techniques and has co-authored a multi-country project that explored respondents.

Christopher Robson – ORC International

Chris Robson is Chief Innovation Officer and Head of Research Science for ORC International. In this role he has built a world-class methodology and data science team. Prior to this he was co-founder and Chief Scientist of Parametric Marketing, a data science and analytics consultancy specializing in servicing the insights industry

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