



# GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT



NEW IN THIS EDITION: **THE GRIT FUTURE LIST**  
Meet the honorees leading our industry into the future (page 39)



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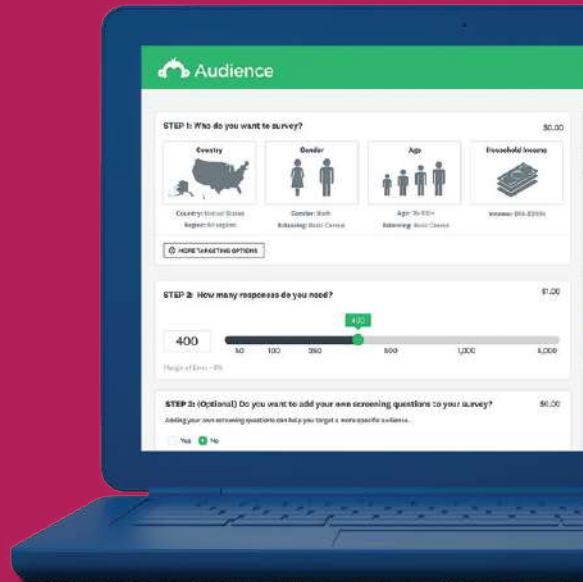
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# OUR PARTNERS...



# FOREWORD

Welcome to the 24th edition of the **GreenBook Research Industry Trends Report**, using data collected in Q3 & Q4 of 2018.

Perhaps more than ever before, GRIT is emblematic of both the need and the challenge of the market research industry. The need to provide clear direction for key stakeholders via the research process only continues to grow in importance, and part of the way to do that is via looking at trends over time. However, the survey as an instrument, especially a large tracker like GRIT, is becoming increasingly challenging to field.

In preparing for this wave of the study, issues with balancing form factor considerations (mobile vs. desktops), keeping respondent engagement high, ongoing optimization of question design, and of course the tension between tracking questions and new areas we want to explore on length of interview are real challenges that impact not just us, but the industry as a whole. We feel your pain colleagues!

What does that mean for this report? Well, one is a slightly smaller base size than previous waves, although it is still large enough that the study is more than simply directional, while being shy of what we would call entirely representative. However, GRIT has always walked that line, so that is not a significant issue.

Perhaps a more important question is what does it mean for the future? We're examining that now, and although we don't have clear answers yet, it is safe to say that GRIT will continue to evolve and in the years ahead we'll continue to be "in the trenches" with the rest of the industry to adapt to the same changes impacting us all.

Now, on to the "good stuff"! In this edition, we explore a variety of topics, some new and some that our readers have already come to depend on GRIT to cover. These include: adoption of emerging methods, the use of traditional methods, satisfaction levels with suppliers, the drivers of supplier selection, investment priorities for researchers, the financial outlook and projected spending, the evolving role and activities of researchers, buzz topics such as automation or AI, and the next iteration of our industry benchmark. All "meat and potatoes" topics that the industry can use to help provide strategic direction in the year ahead.

Also, new in this edition is the debut of the **GRIT Future List**, a crowdsourced submission process but expert curated and judged list of those researchers who are making a real impact now and should be watched as industry leaders in the future.

The result of all this? A report that we think is insightful, impactful, and actionable just like any good research report should be.

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: AYTМ – Ask Your Target Market, Deckchair Data, Gen2 Advisors, Infotools, Ipsos Neuro and Behavior Science, Lightspeed, Nelson Whipple Consulting, NewMR, OfficeReports, Potentiate, 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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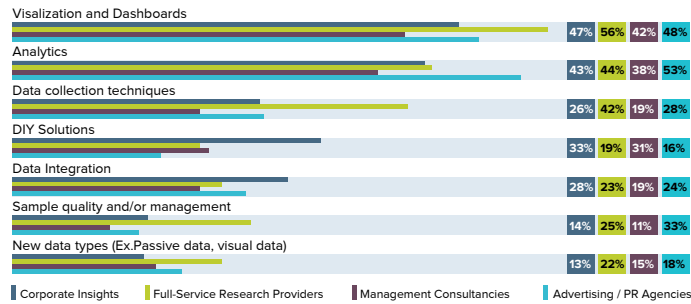
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to access all GRIT  
data and charts



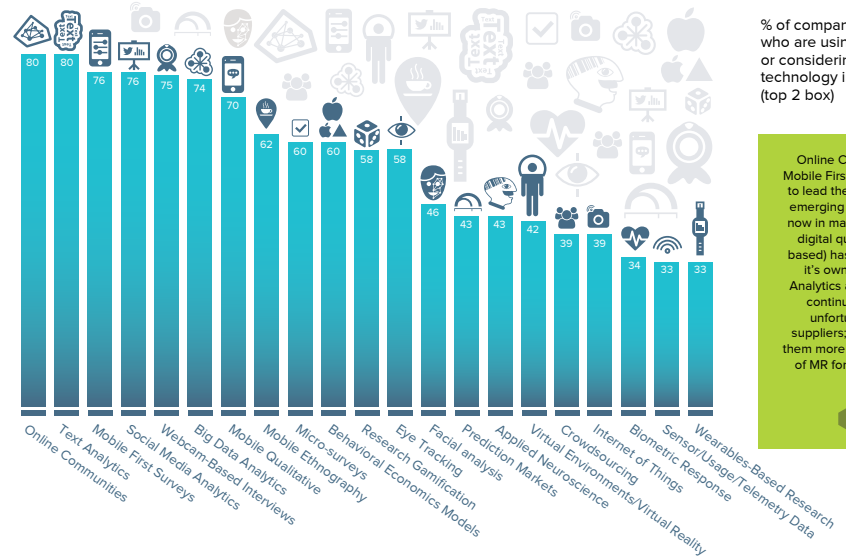
# EXECUTIVE SUMMARY

What is being invested in highlights the cannibalization that is currently going on within the industry. All stakeholders are vying to control more of the process and leverage it for greater value delivery, often competing with one another for positioning. Technology is the great equalizer, but who owns the value prop is very much up for grabs.

## INVESTMENT PRIORITIES



## EMERGING METHOD ADOPTION

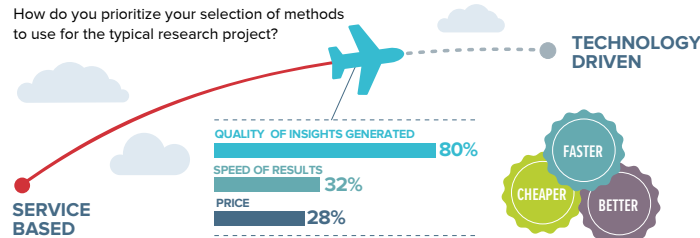


% of companies who are using or considering technology in 2018 (top 2 box)

Online Communities and Mobile First Surveys continue to lead the pack as formerly emerging methods that are now in mainstream use, and digital qual (mobile & PC based) has finally come into its own. Social Media Analytics and Big Data also continue to grow, but unfortunately not by suppliers; clients are using them more and going outside of MR for those solutions.

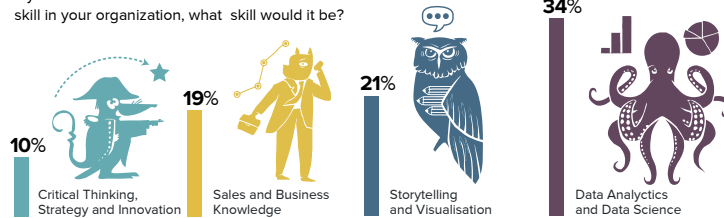
## PRIORITY FACTORS IN METHOD SELECTION

Research is becoming far more technologically driven vs. service based, with the focus on "cheaper, faster, better" (quality of insights) being the driving trifecta for making both investment decisions and methodology selection.



## IN-DEMAND SKILLS

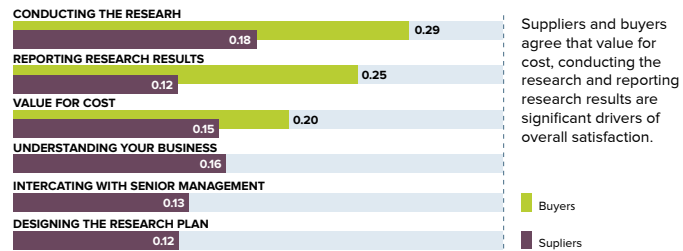
If you could add one individual with a needed skill in your organization, what skill would it be?



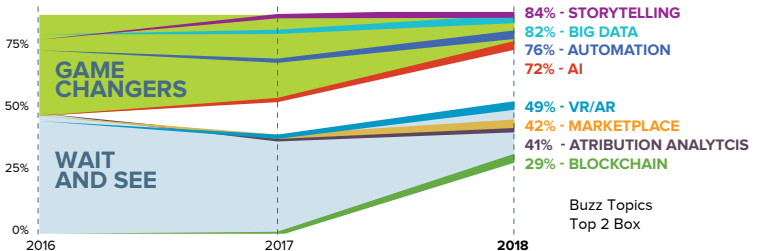
Organizations not only need employees who can tell a story but are also proficient in handling data; the long predicted era of polymaths who are both comfortable with data from any source, and most importantly can deliver business impact with that data, seems to have arrived.

## DRIVERS OF SUPPLIER SATISFACTION

Winning relationships is one thing, keeping them is another. For most Buyers, research has become a **transactional relationship**, not a partnership. Buyer satisfaction with suppliers depends on measurable drivers (cost, timeliness) and providers' overall ability to execute the work and report the results.



## BUZZ TOPICS: HYPE OR GAME CHANGERS?



Big Data, Automation, AI and Storytelling/Data Visualization are considered gamechangers, with other buzz topics still largely in "wait and see" mode. The combination of technology to innovate the process and good analytical skills combined with strategic thinking to get to business impact is the dominant trend in insights.



# METHODOLOGY AND SAMPLE

GRIT respondents are recruited via email and social media channels by GreenBook and GRIT partners. These lists are comprised of both research providers and clients.

As has been true for the past several waves, more of the respondents come directly through GreenBook email invitations than all other sources combined, and respondents from the United States comprise over half of all responses.

For this report, the analysis is based on 1,260 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.

The sample size for this latest wave is less than previous waves, although not significantly so. As mentioned in the Foreword, we have found that issues of form factor, length of interview, and engagement do play a role in the completion rate of the study and in future waves we will continue to try to adapt to that reality.

Some differences in countries and regions exist as well, 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. Overall, we see the composition of the sample remaining fairly stable both in terms of firmographics and regionality.

Because of the unique sampling approach we use, once field is completed we go through a rigorous cleaning process to remove duplicate responses, low quality responses (it does happen, even with researchers as the sample universe), and any other type of response that we determine to be subpar.

A note on naming convention for all trending data: GRIT editions are described by the time period each study was fielded and published. This is the Q3-Q4 2018 edition because data collection occurred in November and December of 2018 and it is being published in Q1 2019.

We have found that issues of form factor, length of interview, and engagement do play a role in the completion rate of the study



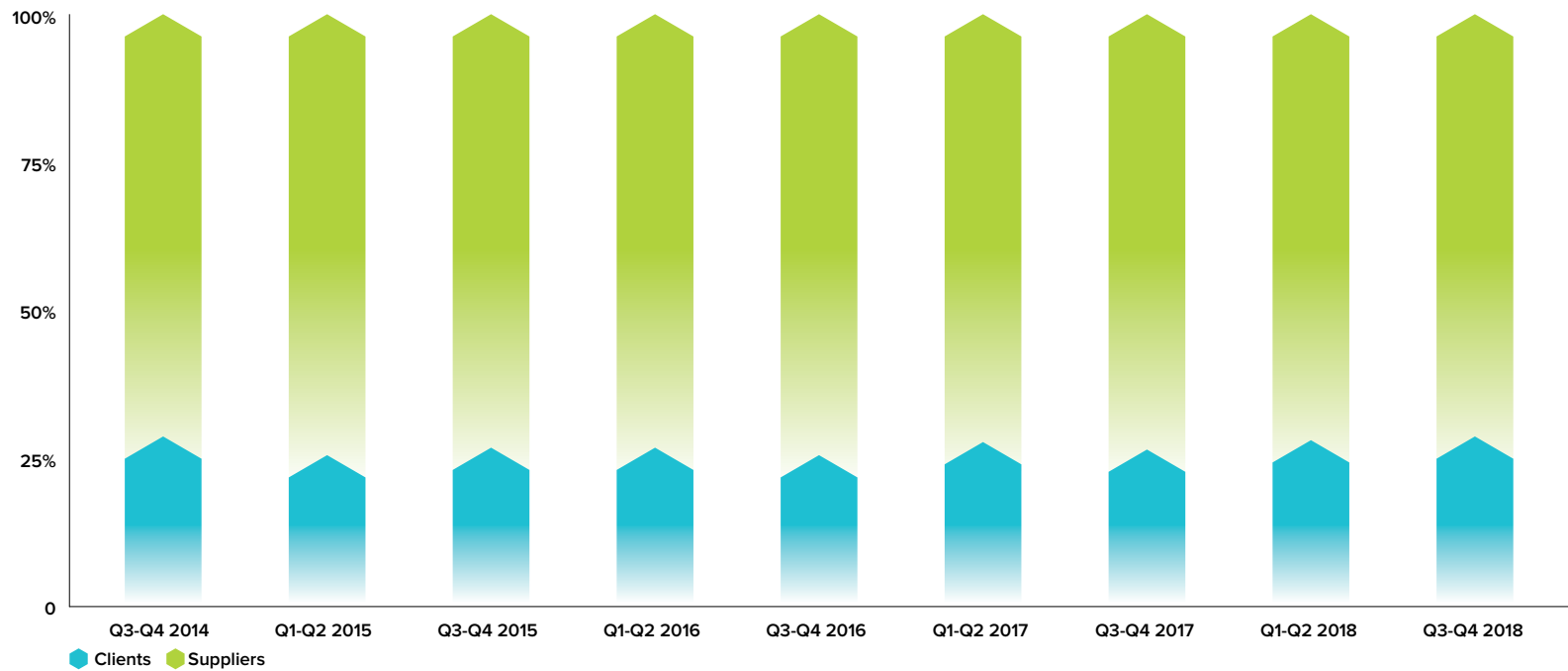
## METHODOLOGY AND SAMPLE

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

### GRIT SAMPLE SIZE TREND

GRIT Edition	Q3-Q4 2014	Q1-Q2 2015	Q3-Q4 2015	Q1-Q2 2016	Q3-Q4 2016	Q1-Q2 2017	Q3-Q4 2017	Q1-Q2 2018	Q3-Q4 2018
Sample size	2030	1879	1585	2144	1637	2942	1533	4241	1260

### BUYERS VS. SUPPLIERS TREND



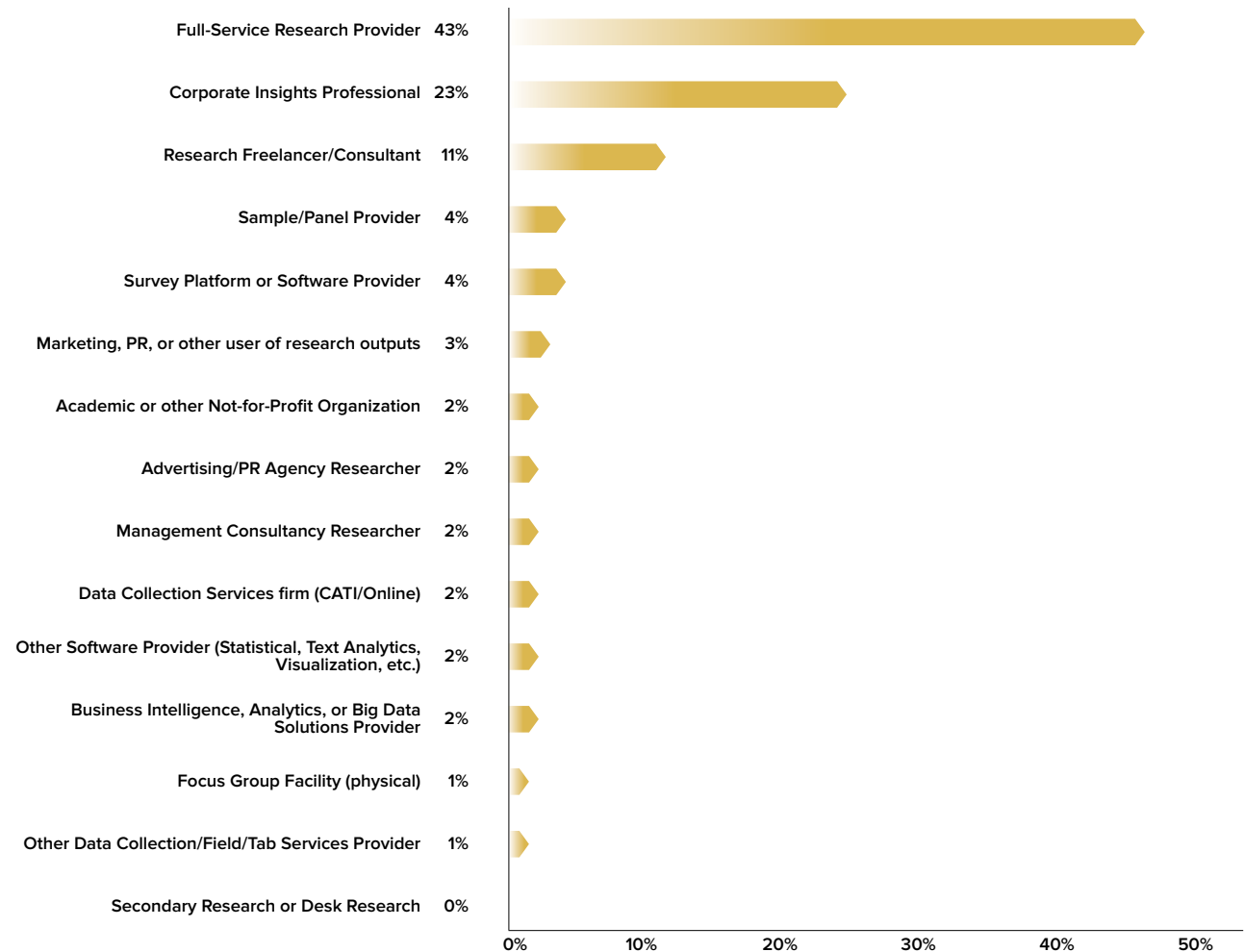


## METHODOLOGY AND SAMPLE

The mix of respondents has varied slightly wave on wave of this study, but within narrow bands. For this edition, we hold steady at 74% of respondents identifying themselves as being suppliers (n=931) and 26% identifying themselves as clients (n=329). There is little difference regionally in this mix.

On the supplier side, we have achieved a good cross-section of the various sectors of the industry, even if over 40% 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. Interestingly, participants who identify themselves as “Freelancers/Consultants” are the third largest segment of respondents at 11%, while the combination of more “tech-centric” suppliers such as sample providers, technology providers, etc.. collectively make up 12% of the sample population.

### GRIT SAMPLE ORGANIZATIONAL AFFILIATION OVER TIME

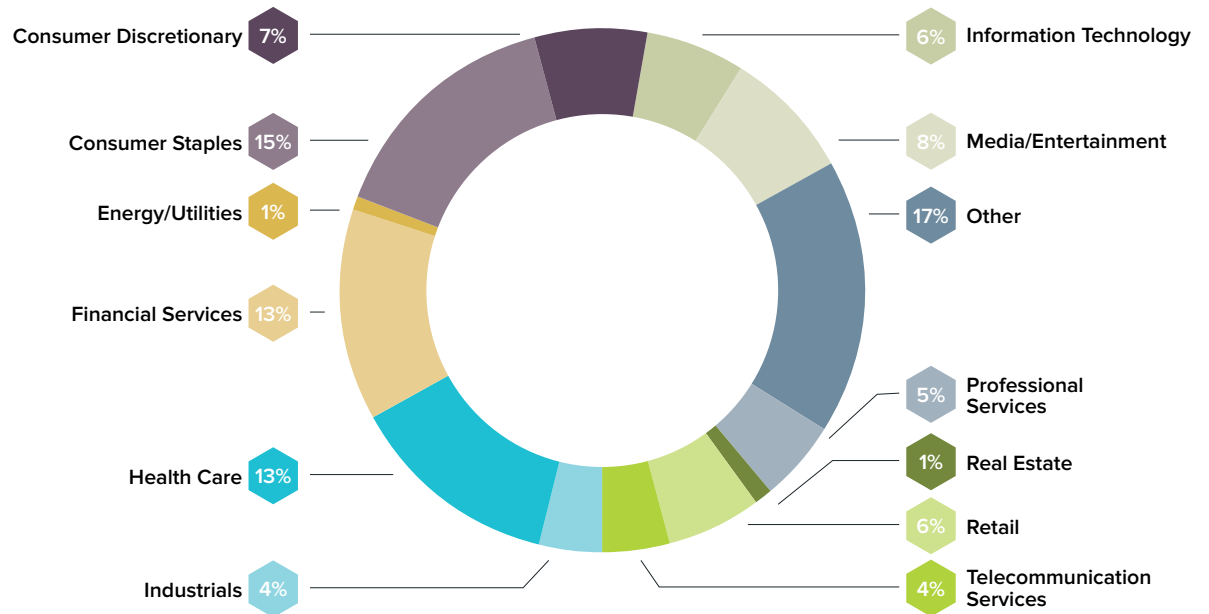


## METHODOLOGY AND SAMPLE

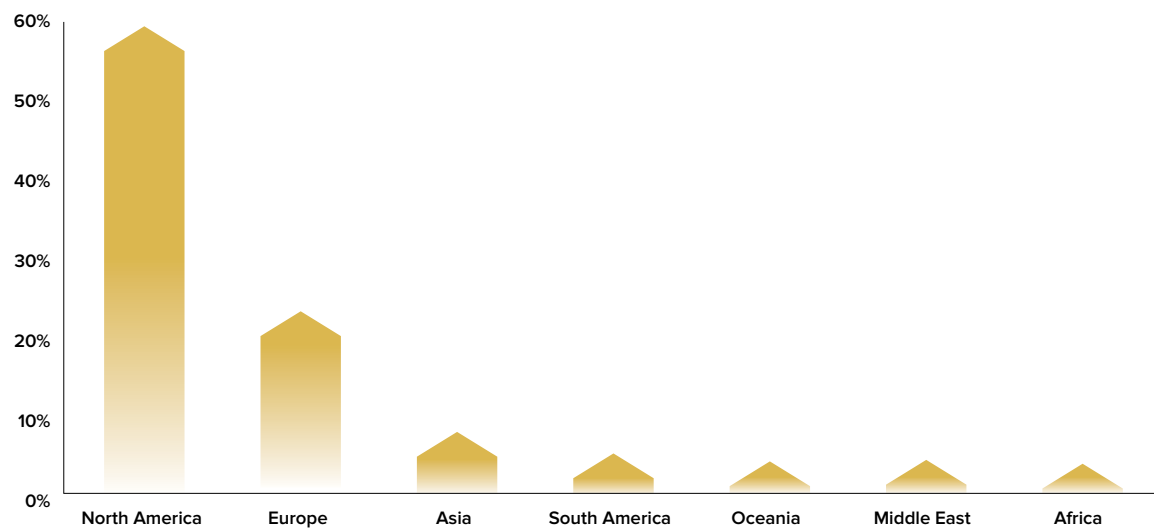
In looking only at self-identified Buyers of research, we have a well-rounded sample of respondents from many sectors, ensuring a wide breadth of experience and views are represented from our client-side colleagues. The proportion is also roughly analogous to the categories of largest buyers identified in other industry reports with Consumer Staples, Healthcare, Financial Services and Media making up over half of the sample.

Regional sample sizes remained relatively consistent, with minor variances within each region. As previously noted, North American respondents comprised nearly 60% of the sample, with Europe at 23% and Asia at 8% and the rest of the world making up the balance.

GRIT CLIENT RESPONDENTS BY VERTICAL



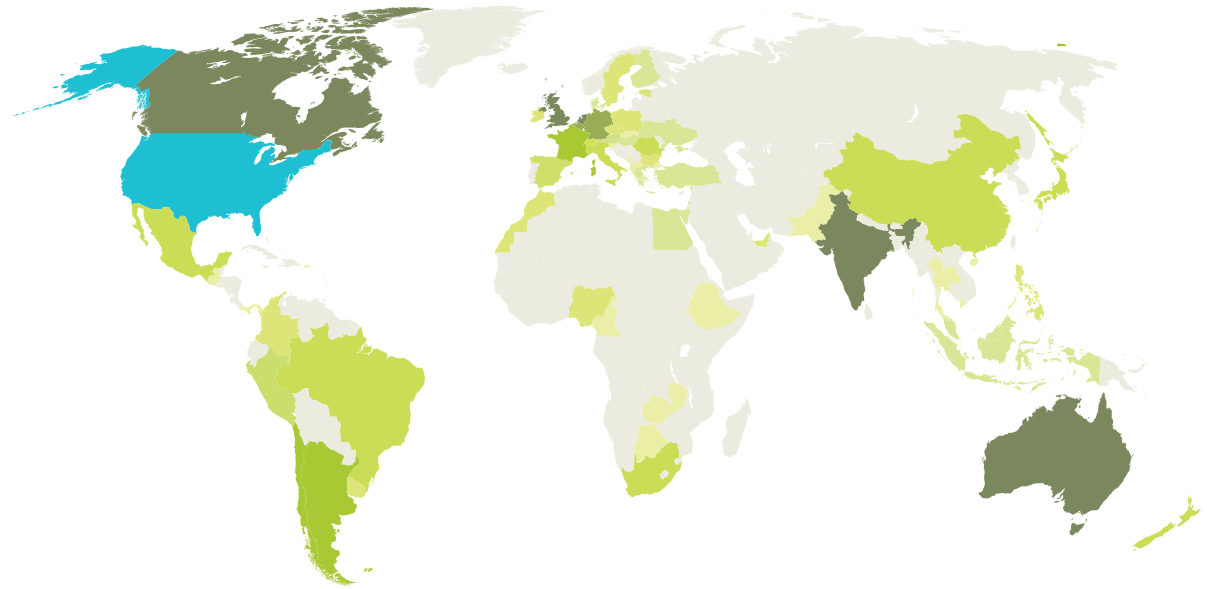
GRIT PARTICIPATION BY REGION



## METHODOLOGY AND SAMPLE

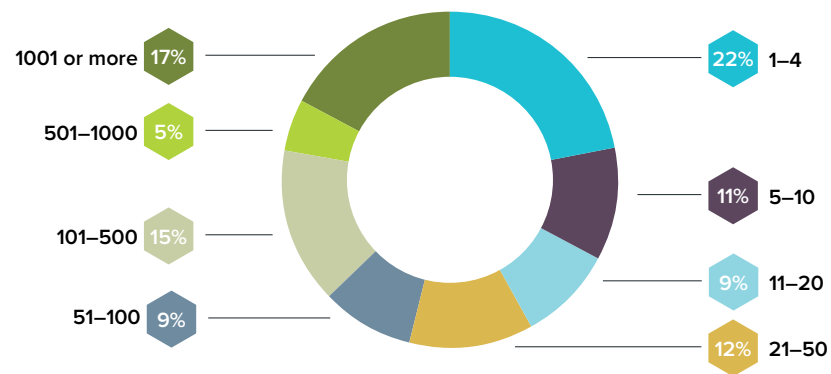
In exploring the physical location of GRIT participants via IP matching, we find that 72 different countries are represented within the sample, with respondent density shown in the map on the right.

GRIT RESPONDENTS BY COUNTRY



GRIT respondents generally fall into 3 camps, with each representing roughly one third of the sample: small organizations (under 11 people), mid-sized organizations (11 to 100 people), and large organizations with over 100 employees. This has remained broadly consistent over the last several waves.

GRIT SAMPLE BY SIZE OF ORGANIZATION

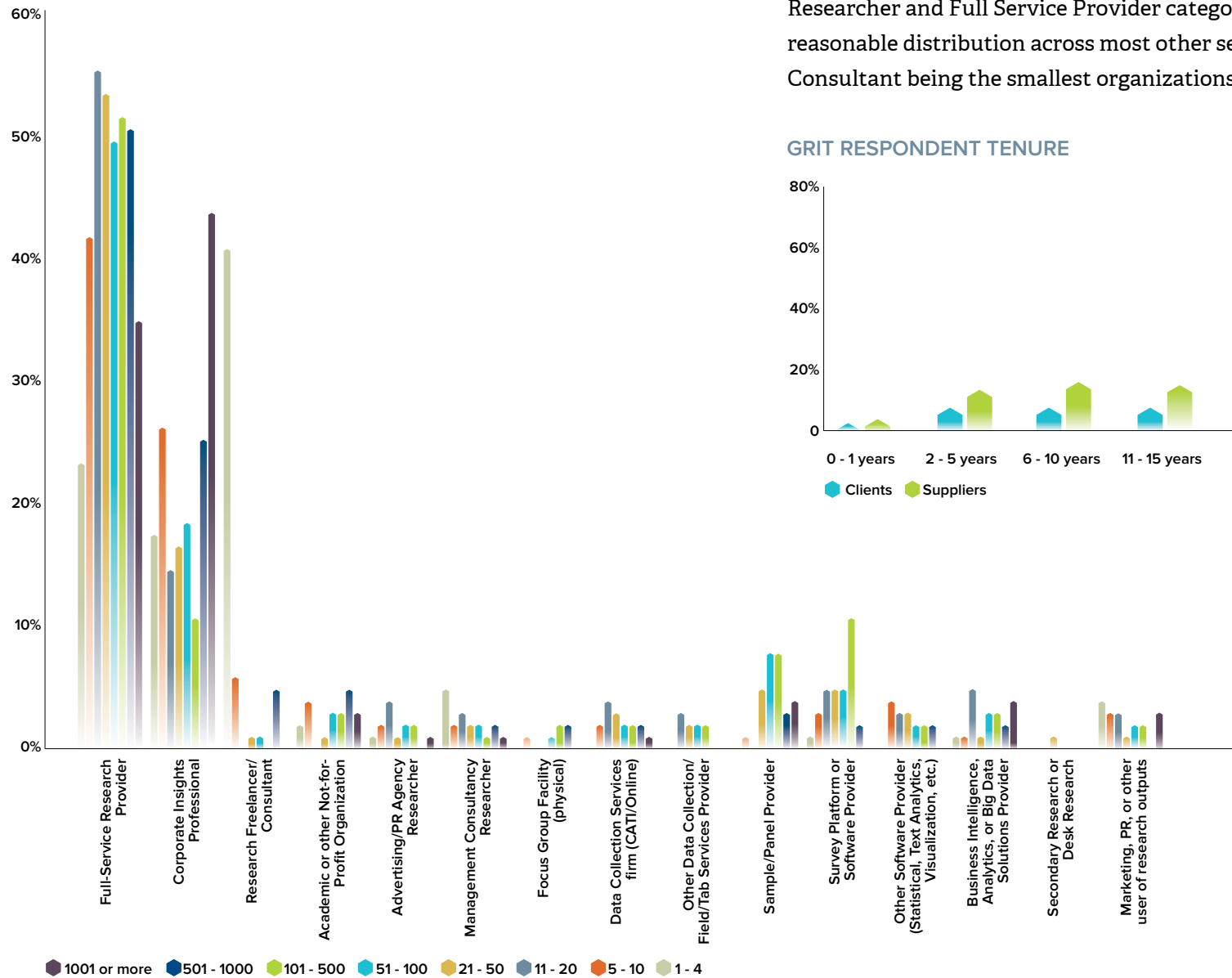


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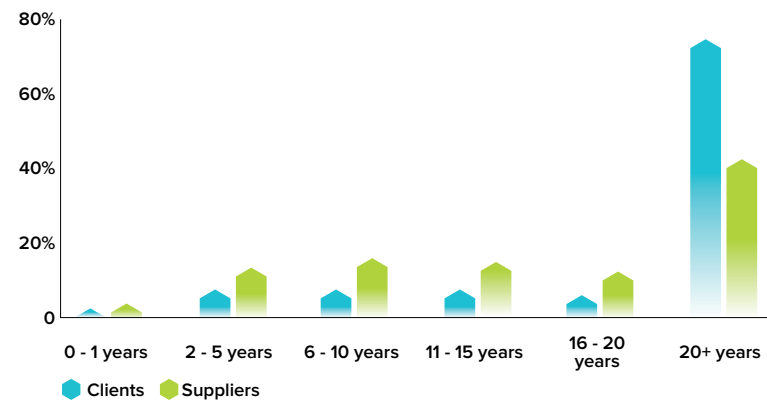
## METHODOLOGY AND SAMPLE

### ORGANIZATIONAL FOCUS BY COMPANY SIZE



When looking at organizational focus, unsurprisingly we see a higher incidence of large companies in the Corporate Researcher and Full Service Provider categories, with a reasonable distribution across most other segments; Freelancer/Consultant being the smallest organizations by employees.

### GRIT RESPONDENT TENURE



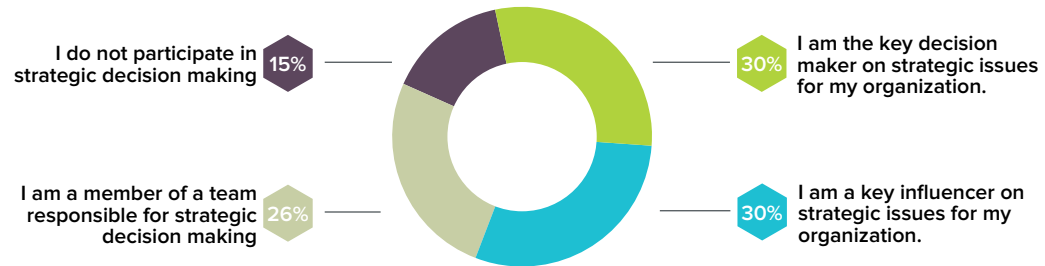
## METHODOLOGY AND SAMPLE

In analyzing other firmographic questions, the GRIT sample is comprised of largely senior level research professionals. A whopping 74% of all client-side and 42% of supplier side respondents have worked in the industry for over 20 years.

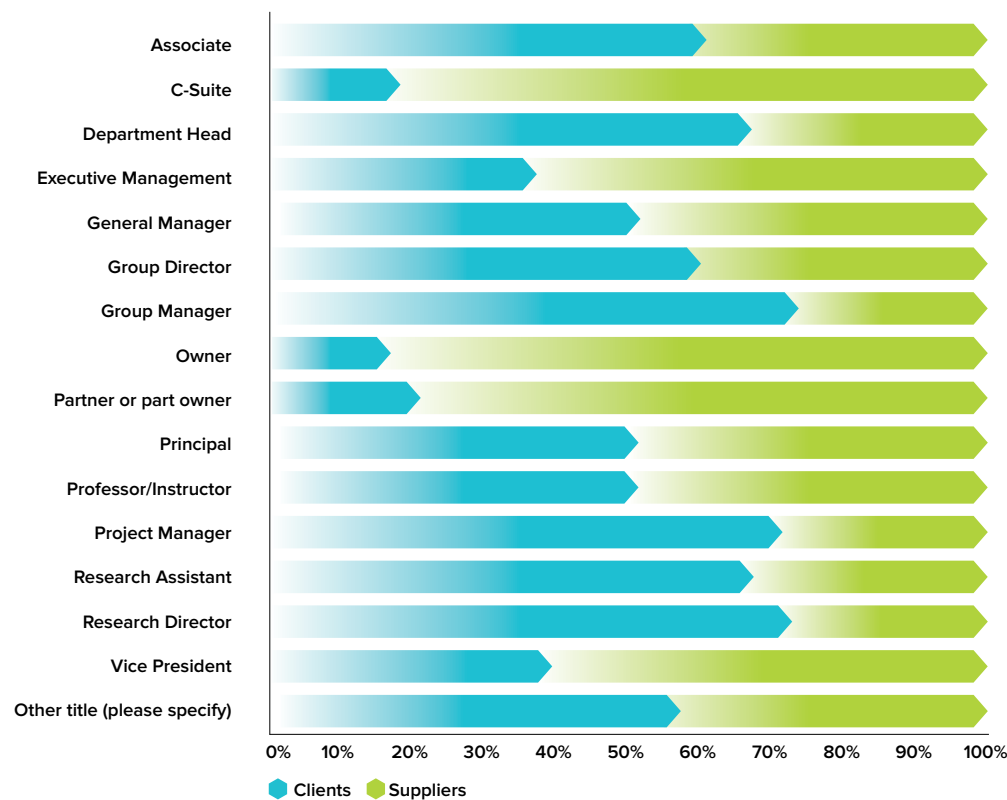
If tenure is a proxy for role seniority then it should be no surprise that 60% of GRIT respondents identify themselves as key decision makes/influencers on strategic issues within their organizations.

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

### DECISION MAKING ROLE



### GRIT RESPONDENT TITLES



The GRIT sample is comprised of largely senior level research professionals. A whopping 74% of all client-side and 42% of supplier side respondents have worked in the industry for over 20 years

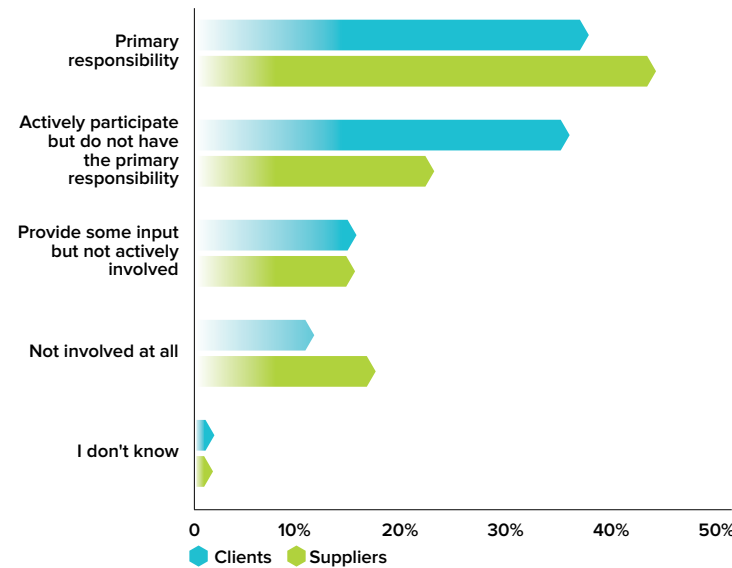
# BUDGET DECISION MAKERS

Among those completing the GRIT survey, more than two-thirds have primary responsibility for or actively participate in their research group's annual budget within both buyers and suppliers.

Those who are the key decision makers for strategic decisions for their organization also tend to have primary responsibility for their group's annual research budget. Of those who are key influencers of decisions for their organization, more than two-thirds are either the primary decision-maker for their group's annual research budget or actively participate in developing it.

As one might expect, smaller companies are more likely to have an owner, partner or part-owner who has primary responsibility or strong influence in both strategic decisions for the organization and for the research budget. In fact, for companies with fewer than 100 employees, the owner has a strong influence on research budgets; this likely accounts for much of the overlap we see between responsibility for the organization's strategy and for the research budget.

ROLE IN DEVELOPING ANNUAL BUDGET FOR RESEARCH GROUP



More than two-thirds have primary responsibility for or actively participate in their research group's annual budget within both buyers and suppliers

EMPLOYEE SIZE (Buyers and Suppliers)	Likely Key Decision Maker or Influencer for Research Budget							
	Darker green indicates position is among the most likely to be influential; lighter green indicates lesser, but substantial, likelihood to influence							
	Owner/ partner/ part owner	Principal / C-Suite / Executive Man- agement	General Manager / Vice President	Group Director/ Group Manager/ Department Head	Research Director	Project Manager	Associate/Re- search Assistant	Other
1 to 4 employees	Dark Green							
5 to 10 employees	Dark Green							
11 to 100 employees	Dark Green	Light Green						
101 to 1000 employees		Light Green		Light Green				
1001 or more		Light Green		Light Green				



# IN GOOD COMPANY

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## ROLE IN DEVELOPING ANNUAL BUDGET FOR RESEARCH GROUP

	Strategic decision-making role within your organization			
	The key decision maker	A key influencer	Member of a team	Do not participate
Primary responsibility	86%	38%	19%	4%
Actively participate, but not primary	8%	43%	31%	19%
Provide some input	3%	11%	29%	27%
Not involved at all	3%	8%	21%	49%

Corporate insights professionals stand out for having responsibility assigned to a Group Director, Group Manager, Department Head, or Research Director





## METHODOLOGY AND SAMPLE

At companies with more than 100 employees, budget responsibilities are more likely to belong to Principal/C-Suite/Executive Management or the Group Director/Group Manager/Department Head.

In terms of professional focus, owners are heavily involved in the research budget process among buyer/supplier organizations with few employees. Corporate insights professionals stand out for having responsibility assigned to a Group Director, Group Manager, Department Head, or Research Director.

PROFESSIONAL OR ORGANIZATION FOCUS (Buyers and Suppliers)	Likely Key Decision Maker or Influencer for Research Budget <small>Darker green indicates position is among the most likely to be influential; lighter green indicates lesser, but substantial, likelihood to influence</small>							
	Owner/ partner/ part owner	Principal / C-Suite / Executive Man- agement	General Manager / Vice President	Group Director/ Group Manager/ Department Head	Research Director	Project Manager	Associate/Re- search Assistant	Other
Full-Service Research/Ad/PR agency								
Corporate Insights Professional								
Sample/Panel Provider								
Data collection agency								
Platform/Software Provider								
Marketing, PR, or other user of research outputs								
Research Freelancer/Consultant								
Management Consultancy Researcher								
Business Intelligence, Analytics, or Big Data Solutions Provider								
Academic or other Not-for-Profit Organization								
Other								

## METHODOLOGY AND SAMPLE

The allocation of decision-making responsibility for research budget within buyer industries is likely a function of the distribution of employee sizes within each category. While the goal of categorization is usually focused solely on maximizing within-category similarity and between-category differences, the categorizations in this section have the added requirement of creating useful sample sizes within each category. This requirement may have reduced some within-category similarity, resulting in a larger proportion of light green boxes in the table.

Buyers with the largest budgets tend to be at larger companies, so responsibility for the research budget tends to be assigned to a Group Director, Group Manager, or Department Head, or Research Director.

As larger project volumes tend to be associated with larger budgets, decision-making for companies with higher project volumes also tend to assign budget responsibility to a Group Director, Group Manager, or Department Head, or Research Director.

As we consider the value of the GRIT Report for providing strategic direction, the composition of senior level respondents with budget responsibility or influence adds extra credibility to the analyses herein as important insights that accurately reflect the trends we have identified as worthy of careful evaluation across the industry.

INDUSTRY (Buyers)	Likely Key Decision Maker or Influencer for Research Budget Darker green indicates position is among the most likely to be influential; lighter green indicates lesser, but substantial, likelihood to influence							
	Health Care	Principal / C-Suite / Executive Management	General Manager / Vice President	Group Director/ Group Manager/ Department Head	Research Director	Project Manager	Associate/Research Assistant	Other
Consumer (discretionary, staples)	Light Green	Light Green	Light Green	Dark Green	Dark Green	Light Green	Light Green	Light Green
Consumer (media/entertainment, retail)	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green
Health Care	Light Green	Light Green	Light Green	Dark Green	Dark Green	Light Green	Light Green	Light Green
Services	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green
Tech	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green
Other	Light Green	Light Green	Light Green	Dark Green	Dark Green	Light Green	Light Green	Light Green

TOTAL ANNUAL RESEARCH BUDGET (Buyers)	Likely Key Decision Maker or Influencer for Research Budget Darker green indicates position is among the most likely to be influential; lighter green indicates lesser, but substantial, likelihood to influence							
	Health Care	Principal / C-Suite / Executive Management	General Manager / Vice President	Group Director/ Group Manager/ Department Head	Research Director	Project Manager	Associate/Research Assistant	Other
Under \$1M	Light Green	Light Green	Light Green	Light Green	Dark Green	Light Green	Light Green	Light Green
\$1M to \$3M	Light Green	Light Green	Light Green	Dark Green	Dark Green	Light Green	Light Green	Light Green
\$3M to \$5M	Light Green	Light Green	Light Green	Dark Green	Dark Green	Light Green	Light Green	Light Green
\$5M \$30M	Light Green	Light Green	Light Green	Dark Green	Dark Green	Light Green	Light Green	Light Green
More than \$30M	Light Green	Dark Green	Light Green	Dark Green	Light Green	Light Green	Light Green	Light Green

METHODOLOGY AND SAMPLE

ANNUAL NUMBER OF PROJECTS (Buyers)	Likely Key Decision Maker or Influencer for Research Budget Darker green indicates position is among the most likely to be influential; lighter green indicates lesser, but substantial, likelihood to influence							
	Health Care	Principal / C-Suite / Executive Management	General Manager / Vice President	Group Director / Group Manager / Department Head	Research Director	Project Manager	Associate/Research Assistant	Other
Less than 25	Light Green	Light Green	Lightest Green	Light Green	Light Green	Lightest Green	Lightest Green	Lightest Green
25 to 50	Lightest Green	Lightest Green	Lightest Green	Light Green	Dark Green	Lightest Green	Lightest Green	Lightest Green
51 to 100	Lightest Green	Lightest Green	Lightest Green	Dark Green	Dark Green	Lightest Green	Lightest Green	Lightest Green
101 to 250	Lightest Green	Lightest Green	Lightest Green	Dark Green	Dark Green	Lightest Green	Lightest Green	Lightest Green
More than 250	Lightest Green	Light Green	Lightest Green	Dark Green	Light Green	Lightest Green	Lightest Green	Lightest Green

## THE BIG PICTURE

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 insights 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.

The composition of senior level respondents with budget responsibility or influence adds extra credibility to the analysis





## THE MISSING INGREDIENT TO PRODUCT INNOVATION SUCCESS: AGILE AUDIENCE INTELLIGENCE

### Matt Warta

CEO and Co-Founder, GutCheck

Twitter: @mwarta | Website: [www.gutcheckit.com](http://www.gutcheckit.com)

LinkedIn: [www.linkedin.com/in/matt-warta/](http://www.linkedin.com/in/matt-warta/)

With more than 79% of respondents from larger companies (500 people +) indicating that both automation and big data analysis, including synthesis of multiple data types, are game changers or interesting trends, these techniques have taken center stage in our industry. Automation has been applied in tactical areas like concept, copy, and claims testing, allowing brands to sort through opportunities faster and more affordably, quickly killing bad ideas to focus on the good. While the use of big data and multiple data types hasn't been fully utilized yet, it's certainly picking up steam in the industry when it comes to obtaining and applying deeper, more holistic insights to gain a competitive advantage. The true opportunity brands now have is in combining these two techniques in an agile way and applying them to *audience intelligence* upstream in the innovation process.

Brands know the path to growth is through innovation. More than 75% of respondents from large companies are focused on their company's growth strategy; more specifically, insights buyers have top priorities of delivering recommendations that answer business objectives (74%) and help grow their business (66%). So how can brands innovate and get better at creating strategies to drive even more success? By connecting these two seemingly disparate game changers—automation and big data—to better identify and understand their most profitable audiences upstream in an agile, actionable way. This enables the right audience-centric decisions that quickly lead to successful innovations that help grow their business.

CONTINUED ON NEXT PAGE



Traditionally, audience insights have been incomplete and limited to what a survey or qualitative can do, and the methods are slow and expensive. Traditional audience intelligence is where concept and copy testing were six years ago before automation. Moving and iterating quickly in the front end of the innovation process leads to agile audience intelligence, the key to competing with disruptive brands that steal share—like Dollar Shave Club, who identified a highly sought-after market niche, put that audience at the center of everything, and used modern marketing to activate against that audience. This allowed them to scale from \$0 to \$200M in revenue in five years before being acquired by Unilever for \$1B. Traditional audience understanding is ill-equipped to drive the real-time, specific insights needed to compete in today's dynamic market.

By using a connected data approach (fusing survey and behavioral data), there are a number of ways to identify and understand audiences quickly and affordably. For example, to capitalize on their most profitable group of customers, one of our clients in the tech space needed to identify and profile an early adopter audience within their segmentation. They

combined survey and big data to identify and understand this sub-segment. The combined data allowed them to determine the size of the prize; pinpoint the features that warranted focus during development; understand how to apply this audience's personality insights to communicate effectively; and determine which digital attributes and which channels to activate against for optimal reach. These insights were gathered in a couple of weeks for the cost of a couple of focus groups.

By adopting modern solutions that bring agility to audience understanding—upstream in the innovation process—brands can accelerate time to market and compete in a smarter way using multi-layered insights that enable them to take a more personalized, effective approach leading to successful consumer-based strategies. The next frontier of agile is about building audiences and agility up front and applying this rational connection to each stage of development to win. Enabled by big data and automation, we get agile audience intelligence to drive growth at scale through innovation.





# 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 market research 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/insight).

The 2018 questionnaire (in terms of emerging technologies) is the same as the 2017 version. 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 have used the term 'Mobile First Surveys' and this has, not surprisingly, reduced the 'In Use' figure, to 50% for the Total sample in 2017 and 54% in 2018.



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## ADOPTION OF EMERGING METHODS

## 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 mean using it heavily, it may mean it is sometimes used, and sometimes not.

As in 2017, Online Communities top the list with 59% saying they are In Use, and a further 21% listing them as Under Consideration, giving a total Interest score of 80%. Just behind Online Communities there are a group of four techniques that are perhaps (along with Online Communities) the new mainstream (or the mainstream of the new). These four are: Mobile First Surveys (54% In Use, 76% Interest), Text Analytics (51%, 80%), Webcam-based Interviews (51%, 75%), and Social Media Analytics (49%, 76%).

The remaining 16 items can be divided into three groups, Strong Niche, Middle Niche and Small Niche. The Strong Niche ranges from Behavioral Economics Models (32% In Use) to Big Data Analytics (45% In Use). These items are in widespread, but not mainstream use.

The Middle Niche runs from Applied Neuroscience (20% In Use) to Research Gamification (26% In Use). This group tends to be the provenance of specialized agencies and researchers.

The Small Niche ranges from Wearables Based Research (9% In Use) to Crowdsourcing (18% In Use). These approaches are by any measure small and not in widespread use.

Rank	Label	In Use (%)	Under Consideration (%)	Interest (%)
1	Online Communities	59	21	80
2	Mobile First Surveys	54	22	76
5	Text Analytics	51	29	80
3	Webcam-Based Interviews	51	23	75
4	Social Media Analytics	49	26	76
6	Big Data Analytics	45	29	74
7	Mobile Qualitative	43	26	70
8	Eye Tracking	38	19	58
10	Mobile Ethnography	38	24	62
9	Micro-surveys	33	27	60
11	Behavioral Economics Models	32	28	60
13	Research Gamification	26	32	58
12	Facial analysis	24	22	46
15	Prediction Markets	21	22	43
14	Applied Neuroscience	20	22	43
16	Crowdsourcing	18	22	39
17	Virtual Environments/Virtual Reality	17	25	42
18	Biometric Response	16	18	34
19	Internet of Things	15	24	39
20	Sensor/Usage/Telemetry Data	13	20	33
21	Wearables Based Research	9	24	33



## STABILITY WITH SOME INCREASES

Table 2 shows the 'In Use' data from August 2014 to November 2018, a period of four years. The data shows that there are changes, but only a few of them are big enough to catch the eye. Given the nature of the data, sampling variation etc, we tend to ignore anything smaller than plus or minus 5%.

The main increases amongst the more mainstream approaches are: Big Data Analytics (+7%), Social Media Analytics (+6%), and Text Analytics (+5%). All three of these share the characteristic of focusing on non-survey data – an area that other studies suggest is the main driver of growth in market research and insights. The only other approach that showed a shift of more than 5% was Virtual Reality, which is perhaps a combination of an increase and a correction, since the 2018 estimate of 17% was also the score in 2014.

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

We also checked the open-ended suggestions for emerging techniques that were not part of the existing survey. The most common responses were Chatbots and Machine Learning.

Table 2	2014 Aug (%)	2015 Oct (%)	2016 Nov (%)	2017 Oct (%)	2018 Nov (%)	12 month Change (%)
Online Communities	56	50	59	60	59	-1
Mobile First Surveys	--	--	--	50	54	4
Text Analytics	40	38	46	46	51	5
Webcam-Based Interviews	34	33	43	47	51	4
Social Media Analytics	46	43	52	43	49	6
Big Data Analytics	32	34	38	38	45	7
Mobile Qualitative	37	34	42	44	43	-1
Eye Tracking	34	28	35	34	38	4
Mobile Ethnography	30	31	33	35	38	3
Micro-surveys	25	25	35	34	33	-1
Behavioral Economics Models	25	21	29	29	32	3
Research Gamification	23	20	25	25	26	1
Facial analysis	18	18	24	20	24	4
Prediction Markets	19	17	24	19	21	2
Applied Neuroscience	13	15	16	21	20	-1
Crowdsourcing	17	12	16	15	18	3
Virtual Environments/VR	17	10	14	11	17	6
Biometric Response	13	10	12	12	16	4
Internet of Things	12	9	14	12	15	3
Sensor/Usage/Telemetry Data	--	7	11	11	13	2
Wearables Based Research	7	8	10	9	9	0
Mobile Surveys	64	68	75	--	--	--

## BUYERS AND SUPPLIERS

There are a couple of good reasons why Suppliers might say they are using more research techniques than research Buyers/Users:

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 researcher suppliers.
2. Suppliers need to know all of the details of the research they are providing, such as whether Research Gamification is used in the design and what proportion of the surveys are completed via 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 Sellers (not surprisingly) with an r-squared value of 83%. However, there are some interesting differences.

In several of the technical areas of research the percentage of suppliers using them is higher than the buyers, for example: Research Gamification (Suppliers 29%, Buyers 17%), Mobile Qualitative (Suppliers 46%, Buyers 35%), and Mobile First Surveys (Suppliers 56%, Buyers 48%).

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 63%, Suppliers 45%) and Big Data Analytics (Buyers 55%, Suppliers 41%). 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.

Table 3	Buyer (%)	Supplier (%)	Supplier – Buyer (%)	Total (%)
Research Gamification	17	29	12	26
Mobile Qualitative	35	46	11	43
Mobile First Surveys	48	56	8	54
Mobile Ethnography	33	40	7	38
Webcam-Based Interviews	49	52	3	51
Wearables Based Models	8	10	2	9
Virtual Environments/ Virtual Reality	16	17	1	17
Biometric Response	15	16	1	16
Behavioral Economics Models	31	32	1	32
Applied Neuroscience methods	20	21	1	20
Micro-surveys	33	33	0	33
Text Analytics	52	51	-1	51
Eye Tracking	39	38	-1	38
Facial Analysis	25	24	-1	24
Internet of things	16	14	-2	15
Crowdsourcing	20	17	-3	18
Prediction Markets	24	20	-4	21
Sensor/Usage/ Telemetry Data	16	12	-4	13
Online Communities	64	57	-7	59
Big Data Analysis	55	41	-14	45
Social Media Analysis	63	45	-18	49

Base

329

931

13

## ADOPTION OF EMERGING METHODS

## DIFFERENCES BY REGION

There are few interesting differences by Region. However, the main message is that the advanced market research world is essentially a similar place.

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

The cells highlighted in light green are higher than the other regions, the cells in orange are lower than the other regions – i.e. they have differences that are likely to be significant. Given the small sample size for Other (and its diverse nature) we have not looked at the differences in detail.

There are relatively few cells that show differences, and in most cases these are simply a difference in degree, for example, in Europe the 'In Use' figure for Applied Neuroscience Methods is 26%, compared 17% for North America and 18% for APAC. However, this difference still means that Applied Neuroscience Methods is one of the less-adopted techniques.

The one standout difference, that will be worth monitoring in the future, is the very high score for eye-tracking in Europe (51%) compared with North America (35%) and APAC (33%).

Table 4	North America (%)	Europe (%)	APAC (%)	Other (%)	
Online Communities	58	62	59	60	
Mobile First Surveys	51	56	55	65	
Text Analytics	52	51	53	45	
Webcam-Based Interviews	55	49	47	39	
Social Media Analysis	48	48	52	59	
Big Data Analysis	47	38	45	49	
Mobile Qualitative	45	44	34	49	
Eye Tracking	35	51	33	40	
Mobile Ethnography	40	33	39	43	
Micro-surveys	31	34	35	49	
Behavioural Economics Models	30	37	33	33	
Research Gamification	24	32	23	26	
Facial Analysis	22	32	21	25	
Prediction Markets	20	20	23	39	
Applied Neuroscience methods	17	26	18	30	
Crowdsourcing	18	17	17	21	
Virtual Environments/ Virtual Reality	17	18	11	16	
Biometric Response	15	18	15	20	
Internet of things	15	11	19	13	
Sensor/Usage/ Telemetry Data	13	16	10	9	
Wearables Based Models	10	9	8	9	
	Base	743	287	150	80

## ADOPTION OF EMERGING METHODS

## THE BIG PICTURE

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

The stability message is of particular interest to those championing the exciting approaches that have yet to take off, for example Biometrics, Wearables, IoT and Neuromarketing. 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 yet.

If you are running a middle-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 Big Data and Social Media Analytics – something the GRIT report has been showing for some time now.



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## NEW QUALITATIVE METHODS ARE POISED FOR GROWTH

### Rick Kelly

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Since the 2014 wave of the GRIT report, the fastest growing methods under use or consideration are qualitative - webcam-based interviews (+10%), text analytics (+9%), and facial analysis (+7%). At Fuel Cycle, we are deeply committed to bringing qualitative research into the modern era and are excited to see this trend. We expect this to continue as machine learning and new technology becomes more commonplace.

#### The Unique Value of Qualitative Methods

A hammer isn't the best tool for a screw, and not every insights question can be solved with a survey. While we are very strong proponents of surveys, qualitative research provides unique benefits that are not easily replaced by surveys or other highly structured research methods. Below are three ways qualitative methods can be better than quantitative:

- **Qualitative research often provides the highest fidelity data**  
Qualitative research often gives room for consumer expression in a way that surveys cannot. No matter how easy-to-use a survey platform is, it still is an imposition on respondent behavior (in other words, respondents conform to the researcher's framework, rather than being able to express themselves freely).
- **Qualitative research provides richness not available in surveys**  
The adage "a picture speaks a thousand words" is very true. Substantial differences exist between viewing aggregated Likert scales representing how consumers feel about cooking dinner versus observing actual dinner preparations in a consumer's home.

CONTINUED ON NEXT PAGE



- **Qualitative research enables discovery not available in surveys**

Because of its tendency toward organic interaction, qualitative research often aids in discovery of customer use cases, jobs-to-be-done, and emotions in a way that highly structured research cannot.

Without reservation, Fuel Cycle believes that the research question at hand should dictate the research methodology and never the other way around. There are many business questions better served through deep, exploratory work rather than traditional quantitative methodologies. Fortunately, the barriers to conducting rapid qualitative research are declining rapidly.

### **The New Era of Qualitative Methods**

Traditionally, qualitative research has been time-intensive, expensive and entirely unscalable. These barriers prevented the adoption of qualitative research by many organizations. But now, ubiquitous computing (due to smartphones), easy-to-use software, and machine learning are giving researchers capabilities to conduct qualitative research at a pace and cost not possible a few years ago.

Without the intention of being self-indulgent, I'll share some of the steps Fuel Cycle has taken to make qualitative research accessible to organizations that need to operate in a fast-paced business environment.

- Enabled text analytics: Using machine learning, text is analyzed, categorized, and tagged in real-time to provide summaries of frequent topics and sentiment analysis around themes of interest.
- Enabled computer vision: Again, using machine learning, photos and videos are analyzed for objects, emotions and text meaningful to researchers. We are able to extract brand names, emotions on faces, and identify landmarks of interest...in near real-time.
- Began mobile-first video interviewing: Using consumers' smartphones, we're able to conduct video interviews on the fly, wherever respondents are - whether that's in a grocery store, at their desk, or at an event.

We expect researchers to increasingly adopt machine learning and mobile-first technologies for qualitative research because they allows researchers to conduct research faster, more efficiently, and with many of the benefits of traditional qualitative methods. It is our expectation than in another GRIT report in four years, we will see near universal adoption of qualitative methodologies that are now considered emerging.





# THE NET ON NONCONSCIOUS MEASUREMENT

As we began in 2017, we continue a deeper dive on the emerging methods that fall under the “Nonconscious Measurement” umbrella due to continuing strong interest in how these approaches can deliver value to the insights function.

Eventually we expect to see “neurometrics” (defined as any metric capturing nonconscious response) playing a major contributory role to predicting behavior



## NONCONSCIOUS MEASURES TRENDING SLIGHTLY UPWARD IN 2018

With over half of the research industry using some form of nonconscious measurement tools, it is apparent that the role of the nonconscious in capturing response to advertising and marketing stimuli has hit critical mass. Moreover, the numbers continue to trend upward, albeit slowly, which is also encouraging.

This can be perceived as a triumph of the scientific revolution in market research. Advances in understanding of brain and perceptual science, along with psychology and behavioral science, together with the tools available to measure these response phenomena, have opened doors to understanding of consumer response in a far more thorough and holistic manner than ever before.

Labels	In Use 2018 (%)	In Use 2017 (%)	Delta (%)
Net Nonconscious Measures	57	53	4
Eye Tracking	38	34	4
Behavioral Economics Models	32	29	3
Facial Analysis	24	20	4
Applied Neuroscience (EEG)	20	21	-1
Biometric Response	16	12	4

N=1260

N=1533



## THE NET ON NONCONSCIOUS MEASUREMENT

With the expansion of nonconscious measures integrated into conscious questioning, we can now answer questions that evaded us for decades prior. Some memorable examples: “Why didn’t people buy the leading brand at the same rate after the package change?” Eye tracking proved they never noticed the brand name. (Tropicana); “Why didn’t the ad for a beloved snack item succeed in the market?” (EEG revealed that the photos of the food were negatively received, and later confirmed with qual to be unappetizing.) “Why do shoppers buy more under certain conditions?” (Biometrics support that getting a gift or free sample puts people in a better mood and leads to less defensive purchasing.)

Eventually we expect to see “neurometrics” (defined as any metric capturing nonconscious response) playing a major contributory role to predicting behavior. This is already evident in some early modeling work and academic research conducted by Professors Brian Knutson (Stamford), Carolyn Yoon (University of Michigan) and others.

It is also worth noting that “Total Interest,” that is, the combination of using nonconscious measures on an individual or aggregate basis already, plus “Under Consideration”, reflects a solid majority of the industry at 82% for all nonconscious measures combined, and continues to trend upward.

Levels of interest in individual methods, shown below, is essentially holding steady year-to-year with Behavioral Economics, Eye Tracking and Biometrics showing slight

	In Use 2018 (%)	Under Consideration 2018 (%)	Total Interest (%)
Net Nonconscious Measures	57	25	82
Eye Tracking	38	19	58
Behavioral Economics Models	32	28	60
Facial Analysis	24	22	46
Applied Neuroscience (EEG)	20	22	43
Biometric Response	16	18	34

growth. There may be multiple factors contributing to this increase in interest. For instance, advances in biometrics now make it possible to test multiple respondents with results in virtual real time. This was demonstrated in the Super Bowl Study Ipsos conducted in 2018 testing reaction to the Super Bowl ads with a live theater audience and reporting the response to all game ads the next morning. Second, biometrics are sensitive to all kinds of stimuli while being relatively easy and inexpensive to administer.

Increased usage and growing interest in Biometrics suggests that the market is responsive to practical solutions that deliver immediate results along with high value for relatively low cost



## THE NET ON NONCONSCIOUS MEASUREMENT

Increased usage and growing interest in Biometrics suggests that the market is responsive to practical solutions that deliver immediate results along with high value for relatively low cost.

We also see, anecdotally, large increases in use of Reaction Time Testing baked into studies for all types of topics including brand asset evaluation, image tracking, communication impact, as well as product and package alternative perceptions. We are hoping that Reaction Time Testing will be included in next year's Grit Report to measure this trend more fully.

	Total Interest 2018 (%)	Total Interest 2017 (%)	Delta (%)
Net Nonconscious Measures	82	80	2
Eye Tracking	58	55	3
Behavioral Economics Models	60	58	2
Facial Analysis	43	44	-1
Applied Neuroscience (EEG)	43	45	-2
Biometric Response	34	33	1

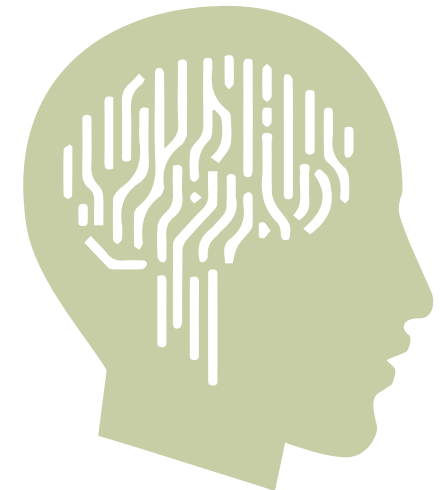
n=1260

n= 1533

## THE BIG PICTURE

In sum, it was a good year for Neurometrics and an even better year for science in the realm of understanding consumer response. This is not to say that marketing will ever stop being an art, but that our ability to understand the “why” of consumer response and ultimately predict the “how” of better achieving marketing goals is finally on the fast track to achievement.

In sum, it was a good year for Neurometrics and an even better year for science in the realm of understanding consumer response





## FORGET FASTER AND CHEAPER: WHY THE VENDOR-CLIENT RELATIONSHIP MATTERS MORE THAN YOU THINK

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With trillions of available data points to help brands power their marketing efforts, brands today are being paralyzed by the amount of customer data they have coming in.

But herein lies a problem; as organizations evolve to become more customer-centric they often struggle to keep up with the research demand and tell a meaningful story with the data they have.

Data is the most valuable brand asset. Technology advancements like automation, AI and machine learning are making data collection just that much easier. In this edition of the *GreenBook Research Industry Trends Report*, data quality tops the list for both clients and agencies as the most important factor in selecting a supplier or partner. But let's be honest, that's simply table stakes in the business of market research.

Ranking second is the relationship the vendor has with the client and their organization—and in my opinion, this is the most significant differentiator considering the power automated market research has to transform the way brands are making business decisions today.

With the availability of new automated online research platforms rooted in proven scientific methods, brands can now collect customer feedback within 24 hours or less, garnering customer insights on a more regular basis to help steer them in the right direction. This ability to bring customers “into the boardroom” more often throughout product and marketing development is accelerating decision making; we're finally able to keep up with the pace of the customer.

CONTINUED ON NEXT PAGE



For many organizations, though, the shift to involve customer feedback more often through this test-and-learn approach will require a significant amount of change management. Rather than be structured around their products or services, they will need to reorganize themselves around the consumer. However, we still see many organizations trying to figure out how they can use automated market research to reach their customers, instead of understanding how to connect it across all parts of their organization so that it truly becomes a hub of customer intelligence and validation.

Companies like BMO Harris Bank have seen the positive business impact this iterative research process can have on their business. In fact, it's led to the creation of a human-centric design group that supports new product development and programs while keeping the customer at the heart of the decision-making process. As a result, their insights professionals are getting called into strategy meetings with marketing teams because their marketing teams know that they can deliver insights they need when they need it. They are increasingly realizing that data being delivered at the right time can help them make decisions in almost near real-time, instead of waiting weeks or months before they get their insights.

As with any paradigm shift in the way people work, finding the right technology partner is vital. Automation in market research opens the door to new ways of collaboration, new skills and new roles. At Methodify, we work with our clients to not only adapt and customize the technology for their respective organizations; we also help them evolve through this transformation.

The right technology partner shows passion for the client's business and focuses on the outcomes. They ensure companies have access to better information to power their decision making, ultimately leading to stronger business results. They also help solve problems and make sense of the technology, so that every level of the organization across different departments understands its potential and those who will use it regularly are empowered to do so.

After all, as the hugely successful serial entrepreneur Richard Branson once said, "Any fool can make something complicated. It is hard to make something simple."



# USAGE OF TRADITIONAL METHODOLOGIES

For many years GRIT has been tracking the shifts in usage of traditional methodologies as a counter-balance to emerging approaches in order to provide a more holistic view of how

researchers are incorporating the new with the tried and true. In this section we explore that topic more fully.

## QUANTITATIVE AND QUALITATIVE RESEARCH

The split between quantitative and qualitative research has remained stable over the past three years: 62% quant, 34% qual, and 4% other.

There was little meaningful difference between suppliers and buyers or regionally in this mix, although there is a slightly greater usage of qualitative methods in “emerging markets”.

The key takeaway is that the research process still largely follows the “qual followed by quant” process and dichotomy, despite the emergence of “qualiquant” hybrid approaches.

First, we'd like to understand your usage of Quantitative vs. Qualitative approaches. We define Quantitative as any approach that utilizes statistics to analyze the data. Qualitative is any approach that is not dependent on statistics to analyze the data. Please assign a percentage based on the proportion of research projects you have used them on. Your answer must total 100%.

	2016 (%)	2017 (%)	2018 (%)
Quantitative	62	60	62
Qualitative	33	35	34
Other	5	5	4










The key takeaway is that the research process still largely follows the “qual followed by quant” process and dichotomy, despite the emergence of “qualiquant” hybrid approaches


## USAGE OF TRADITIONAL METHODOLOGIES


## QUANTITATIVE RESEARCH


Those who used quantitative research were asked to rank the top three data collection methods that they had used the most in 2018.

Automation continues to dominate data collection for quantitative projects.

	Elements	3 Most Used Quantitative Methods (%)	First (%)	Second (%)	Third (%)
	Online Surveys	79	59	14	5
	Mobile Surveys	53	5	38	11
	CATI	30	6	13	11
	Face-to-Face	23	6	7	10
	CAPI	17	4	6	7
	Mail	7	1	2	4
	Biometrics/Neuromarketing	7	2	2	4
	Automated Measures/People Meters	6	1	1	3
	Other quant technique(s):	4	1	1	1
	IVR	2	0	1	2

 The majority of researchers use online and mobile surveys in their portfolio of their top three techniques. In fact, 59% of quant researchers rate online surveys the number-one method, with no other method being ranked first by more than 6% of participants. Mobile-only surveys are ranked second by 38%. However, the third survey technique that automates the interviewing process, IVR (Interactive Voice Response), was ranked in the top three by only 2% of researchers—even during an election year in the United States, when the method is more prevalent.

 Real-time conversational techniques take a back-seat to driverless surveys: 30% of quants rate CATI (Computer-Assisted Telephone Interviewing) in their top-three methods, 23% put face-to-face there, and 17% rate CAPI (Computer-Assisted Personal Interviewing) in their top three.

 Biometrics and people meters were each a top-three method for only 6-7% of quantitative researchers.















## USAGE OF TRADITIONAL METHODOLOGIES


## QUALITATIVE RESEARCH


While the most popular quantitative methods have removed the human from the loop, qualitative research is still highly personal. Instead of looking to automation,


qualitative research has innovated by embracing asynchronous communication.

Please rank your most frequently used qualitative methods from the Most used at the top to the Least used at the bottom.

		Qualitative Methods Ranked	Elements			
			3 Most Used Qualitative Methods (%)	First (%)	Second (%)	Third (%)
	1:N	In Person Focus Groups	58	33	16	9
	01:01	In Person IDIs	42	11	20	11
	01:01	Telephone IDIs	27	11	8	7
	N:N	Discussions Using Online Communities	25	9	8	8
	1:N	Mobile (diaries, image collection, etc.)	19	3	7	9
	01:01	Online IDIs with webcams	15	4	5	5
	01:01	In-Store/Shopping Observations	14	3	4	7
	N:N	Bulletin Board Studies	13	3	5	5
	1:N	Online Focus Groups with webcams	10	2	4	4
	N:N	Chat (text-based) Online Focus Groups	8	2	3	3
	0:N	Monitoring Blogs	5	1	1	3
		Other qual method(s):	5	2	2	1
	01:01	Chat (text-based) Online IDIs	4	1	2	1
	1:N	Telephone Focus Groups	3	0	1	2
	01:01	Automated Interviewing via AI systems	2	0	1	1

 In-person focus groups continue their domination of qualitative research and were the only technique rated in the top three by a majority of qualitative researchers (58%). Its domination as a technique is unmatched: it would be as if the dominant quant method today still were surveys delivered by mail! Moderator-led discussions (1:N) have moved to the virtual world, with online focus groups with webcams rated in the top three by 10% of respondents, and beating out telephone focus groups (3%). IDIs (In Depth Interviews) are the next most widely used technique after traditional focus groups, with 42% ranking in-person IDIs in their top three techniques, 27% ranking telephone IDIs there, 15% for Online IDIs, and 4% for chat-based IDIs.

 The traditional dichotomy between one-on-one and group interviews was long ago split by Bulletin Board Studies, which allow many-to-many conversations, initiated by other participants and continued asynchronously, as members and moderators log on at different times. Online communities are the most popular many-to-many technique, ranked in the top three by 25%, followed by Bulletin Board Studies at 13%, and text-based groups at 8%.

 In stark contrast to quant work, automated techniques are among the least widely used methods of qual work: blog monitoring is a top-three technique for only 5% of researchers, and automated interviewing for only 2%.

## THE BIG PICTURE

The day may come when humans are engineered completely out of quant work, but today is not that day: qualitative research will remain a manual, interactive, engaging process for the foreseeable future. As AI and Machine Learning technology increases in efficacy we may see an increase in

“chatbots” usage in these methods, as well as perhaps the growth of hybrid methods that do “qual at quant scale”, but for now incremental innovation in the process vs. the method is the story.

Instead of looking to automation, qualitative research has innovated by embracing asynchronous communication







# ACCELERATE YOUR INSIGHTS GATHERING: FOCUS ON DRIVING EFFICIENCIES WITHIN YOUR SAMPLE SUPPLY CHAIN

## Richard Thornton

COO & Deputy CEO, Cint

Email: [richard.thornton@cint.com](mailto:richard.thornton@cint.com) | Website: [www.cint.com](http://www.cint.com)

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The market research industry is in a constant flux, with more and more companies either embarking on or currently in transformational phases, shifting their businesses to survive and thrive within this ever increasingly digital world. Opportunities are rife, driven by brands looking to make decisions based on consumer and business insights to stay relevant and eye-catching to consumers. This trend drives the need for more and better quality data, as well as faster and smarter ways to collect data, especially traditional survey data and behavioral data.

Underpinning this all is both technology and compliance – never before have we seen the market research industry, typically relatively conservative and slow-moving, change and be as disruptive (or disrupted!) as we are today. Technology is helping to shape the future of an entire industry, while legislation such as the EU's GDPR is governing and prioritizing consumer consent and data

privacy protection. Given this evolution, one area marketers and researchers are starting to focus on and optimize is the market research sample supply chain. It remains today an area of friction for many buyers, lacking in standardization, optimization and overall efficiency.

In commerce, the supply chain consists of the purchasing of goods (procurement), the delivery of products (fulfillment) and the storage of products to be sold (warehousing). In this process, sample supply chain management and technology adoption are at the top of all successful MR / Insights gathering companies' priority lists. This is especially true if they wish to reduce their operating costs and streamline their research processes to gain faster, smarter and less costly access to actionable insights.

CONTINUED ON NEXT PAGE



### **What we can learn from Apple's supply chain management**

It's not just e-commerce companies that focus on supply chain management and making every single step more efficient. Big Players like Apple also focus on supply chain efficiencies. Specifically, Tim Cook – Apple's CEO and former Chief Operating Officer – is known for believing that supply chain management is key to running a successful business. His efforts to overall haul Apple's supply chain operations were a cornerstone in Apple's turnaround in the late 1990s. This change to the supply chain helped Apple to introduce the iPhone to the world at a cost that the market could bear, from its inception, a leading factor in their business' profitability.

The supply chain is also a fundamental part of the market research process, which watered down, consists of five key steps: 1 – the concept phase, 2 – the survey/data collection tool development phase, 3 – the sampling or data collection phase, 4 – the data analysis phase, and 5 – the action taking / storytelling phase based on the research results (the insights). The sample supply chain is concealed in the middle step – the sampling process. Here, the purchase of sample (research participants) represents the purchase of products, connecting the purchased sample (research respondent) equals the fulfillment, and panels housing the

available sample to participate in the research process is the equivalent of warehousing or the storing of goods.

It is here that marketers and researchers can implement strategies and technologies to speed up the process of gaining actionable insights faster, smarter and in a less costly way – especially in the sampling/data collection phase of the research process.

### **Transforming the research process**

The broader trend of digital transformation is putting the spotlight on market research organizations, who are also under significant pressure to evolve their own businesses in order to keep pace with the modern buyers' demands for less expensive, but still highly efficient and agile research methods. It is vital that marketers and researchers adopt concepts, tactics and emerging technologies to properly manage and transform their sample supply chain.

Marketers are being held to higher standards and are setting greater goals for reaching the exact survey respondents required to receive relevant audience insights while driving speed, agility, profitability and performance, all while reducing operating costs. Market research organizations who adopt agile and bleeding edge technology to optimize the sample supply chain will experience a dramatic efficiency and scale gain.



*Presenting:*

# THE GRIT FUTURE LIST

*Insights' Next Generation of Leaders*

The GRIT Future List recognizes leadership, professional growth, personal integrity, and a passion for excellence in the next generation of insight creators, users, and communicators. We are pleased to present and honor the sixteen rising stars in the expanding insights universe.

Presented by:



GreenBook

THE GUIDE FOR BUYERS OF MARKET RESEARCH

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# TO THE FUTURE OF INSIGHTS

GreenBook and Zappi are proud to announce the inaugural **GRIT Future List** — an awards program to inspire, support, and celebrate young leaders who are driving consumer insights forward in important and unexpected ways.

The List recognizes leadership, professional growth, personal integrity, and a passion for excellence in the next generation of insight creators, users, and communicators. These honorees have exceptional academic backgrounds, advanced career performances, and a wide variety of research and volunteer roles. They've published research, received numerous collective awards and accolades, and performed at conferences (including TED) around the world.

With hundreds of nominations of incredibly impressive submissions, this year's judging process was a challenge. Greg Archibald of Gen2 Advisors, a Future List judge, describes his experience while reviewing the candidates: "We couldn't have asked for a better group of leaders to feature this first year. This list makes me feel incredibly optimistic about the future of our industry."

## A big thank you to this year's judging panel:



Anouar El Haji  
**Veylinx**



Greg Archibald  
**Gen2 Advisors**



Ivy Esquero  
**WE Communications**



Jacob Ayoub  
**SalesForce**



Jodie Wang  
**Midea**



Kate Hooper  
**Women's World  
Banking**



Kristi Zuhlke  
**KnowledgeHound**



Lukas Pospichal  
**GreenBook**



Marie Wolfe  
**Unilever**



Steve Phillips  
**Zappi**

Each of these honorees has less than a decade of experience in the insights industry, yet all are paving their way to being a recognizable and lasting name in our field. We are pleased and excited to bring to you the future leaders of insights.

## GRIT FUTURE LIST HONOREES



### ANA IORGA

CEO and Chief Neuroscientist, **Buyer Brain**

LinkedIn: [www.linkedin.com/in/anaiorga/](http://www.linkedin.com/in/anaiorga/)

**FROM THE NOMINATOR:**  
“Ana is a pioneer of the industry, using Neuroscience techniques to uncover non-conscious insights.”

Dr. Iorga is a Medical Doctor with a PhD in Consumer Neuroscience and a double MBA in Marketing & Finance. She founded Buyer Brain, a consumer neuroscience company that delivers non-conscious insights. She is the co-editor/author of Ethics & Neuromarketing and serves as a Mentor with the Founders Institute, the world’s premier pre-seed startup accelerator. Ana is the youngest and only female Board Member of NMSBA.



### ARUNDATI DANDAPANI

Volunteer, **Generation1.ca**

LinkedIn: [www.linkedin.com/in/arundati/](http://www.linkedin.com/in/arundati/)

**FROM THE NOMINATOR:**  
“Her gaze is set on the future, even as her actions shape the present in her quest for a more inclusive, diverse and interesting industry that’s truly representative of our world.”

Arundati is a resilient and proactive digital media, communications and marketing research professional. As a new immigrant to Canada, she is focused on intersecting North American research infrastructure with the entrepreneurial economics of other geographies to address complex global challenges. She has served Canada’s MRIA in multiple capacities and is the upcoming Vice-Chair of the Emerging Leaders Task Force Committee.



### BRITT CALVERT

Director, **Ipsos**

LinkedIn: [www.linkedin.com/in/brittcavert/](http://www.linkedin.com/in/brittcavert/)

**FROM THE NOMINATOR:**  
“Britt is committed to mentoring young researchers to ensure they respect the importance of consumer focused quantitative research, all while bringing genuine integrity to everything she does.”

Britt is a researcher with a passion for helping companies make better products. She works within Ipsos’ Innovation service line to guide her clients’ product and packaging development initiatives. Britt dedicates her time to offering training sessions for junior analysts and is always looking for new ways to get closer to ‘real’ insights. Britt hopes to someday compete in Supermarket Sweep.



### DAN ROBBINS

Director, Head of Ad & Programming Research, **Roku**

LinkedIn: [www.linkedin.com/in/drobbins2/](http://www.linkedin.com/in/drobbins2/)

**FROM THE NOMINATOR:**  
“Dan is continuously seeking new opportunities to better advance the field and the organization.”

Dan oversees measurement and insights across Roku’s media businesses and recently steered the launch of Roku Ad Insights. Two years ago, he was the first and only ad researcher at Roku and today leads a team that produces 120+ studies yearly. He has presented at a number of conferences and published Op-Eds on platforms like Media Village and AdExchanger. Dan was named to the 2018 Broadcasting & Cable 40 under 40.

## GRIT FUTURE LIST HONOREES (CONT.)



### FRANK BEIRNE

*Vice President, Technology and Data Science, **Dig Insights***

**LinkedIn:** [www.linkedin.com/in/frankbeirne/](http://www.linkedin.com/in/frankbeirne/)

**FROM THE NOMINATOR:**  
“Frank leads an interdisciplinary team that is bringing market research into the next generation. He shares his knowledge in order to mold new researchers and further advance the industry.”

After just 3 years in market research, Frank leads a cross-disciplinary team of scientists and developers that’s bridging the gap between buzzword and business solution. One of his greatest accomplishments has been supporting Dig Insights move from a traditional market research company to an innovative tech market research company through the creation, implementation and ongoing support of Upside and Dig Sandbox.



### JEANNE MILAM

*Director, Customer and Market Insights, **Salesforce***

**LinkedIn:** [linkedin.com/in/jeannemilam](http://linkedin.com/in/jeannemilam)

**FROM THE NOMINATOR:**  
“Jeanne transformed the Salesforce annual global relationship study, which now provides actionable results that drive strategic decisions for the CEO & Board of Directors.”

Jeanne leads business benchmarks that inform strategy and drive action across Salesforce. She is passionate about quantitative research and being a champion for the voice of the customer. Jeanne is constantly learning new tools and technologies (like the Einstein Discovery AI product) to elevate the quality and effectiveness of her research. Prior to Salesforce, she was at Millward Brown.



### JACCI WEBER

*Manager, Consumer Insights, **The Wendy’s Company***

**LinkedIn:** [www.linkedin.com/in/jacciweber/](http://www.linkedin.com/in/jacciweber/)

**FROM THE NOMINATOR:**  
“Jacci is a passionate, creative, and innovative market researcher and advocate. She is an influential champion in connecting students/ alumni with the business world.”

As a proud Marketing Research M.S. graduate from Michigan State, Jacci is passionate about promoting insights careers, especially to college students. She is a driving force behind MSMR’s alumni activities and has helped provide invaluable input on a student/alumni mentoring program. At Wendy’s, she has incorporated virtual reality into studies, started the Consumer Insights internship program, and is a highly requested team member by senior leaders.



### JOHN PAPADAKIS

*CEO, Co-Founder, **Pollfish***

**LinkedIn:** [www.linkedin.com/in/papadakisjohn/](http://www.linkedin.com/in/papadakisjohn/)

**FROM THE NOMINATOR:**  
“John has founded a company that commits itself to changing the speed, cost, and quality of market research for the better.”

John Papadakis has led Pollfish since its inception in 2013. As co-founder and CEO, he manages corporate direction and strategy across all departments, as well as leads communication of Pollfish’s vision and strategy to clients, investors, and partners. John used his experience in mobile development and love of genuine insights to create an entirely new methodology to formalize the process called Organic Sampling.

GRIT FUTURE LIST HONOREES (CONT.)



**KESHAV MALANI**

*CEO, Powr of You*

LinkedIn: [www.linkedin.com/in/keshavmalani](http://www.linkedin.com/in/keshavmalani)

**FROM THE NOMINATOR:**  
 “Keshav has something special—he is great to work with and uniquely positioned to drive innovation in the industry.”

Keshav is bringing a new ethos and authenticity to the Market Research industry with innovative passive behavior tech solutions—from instant data and analytics to smart surveys. His background is in Strategy and Data Analytics, while working at Deloitte, LinkedIn, and Telefonica.



**LEIGH CALDWELL**

*Co-founder, Irrational Agency*

LinkedIn: [www.linkedin.com/in/leighcaldwell/](http://www.linkedin.com/in/leighcaldwell/)

**FROM THE NOMINATOR:**  
 “Leigh is pioneering new methods for understanding System 3 thinking. His research is truly innovative.”

Leigh is a cognitive economist, bringing cutting-edge science, like the new System 3, into market research. He builds advanced nonconscious technology at Irrational Agency, wrote *The Psychology of Price* and recently gave a TEDx talk on how computer-simulated worlds can solve social challenges like the gender pay gap. He is working on a number of new endeavors, including ‘micro-market-research’ for the microfinance industry.



**LIZ GROSS**

*Founder and CEO, Campus Sonar*

LinkedIn: [www.linkedin.com/in/lizgross/](http://www.linkedin.com/in/lizgross/)

**FROM THE NOMINATOR:**  
 “Dr. Gross and her team are pioneering the art and science of listening in higher education marketing, communication, and fundraising at a time when the industry desperately needs help.”

Dr. Gross is a researcher, marketer, and entrepreneur committed to establishing social listening as a source of business intelligence in higher education. She is an award-winning speaker, author, of *The Higher Ed Social Listening Handbook*, and enthusiastic traveler. Liz was named a ‘Mover and Shaker’ by the 2018 Social Shakeup Show. Find her on Twitter: @LizGross144.



**MELINDA HAN WILLIAMS**

*VP of Data Science and Analytics, Dstillery*

LinkedIn: [www.linkedin.com/in/melindahan/](http://www.linkedin.com/in/melindahan/)

**FROM THE NOMINATOR:**  
 “Melinda is a trailblazer widely-recognized for reshaping the consumer insights landscape through innovative marketing technology tools. She is a thought leader, leveraging her expertise to educate the industry about machine learning.”

Melinda works to demystify AI and Machine Learning through talks, articles, blog posts, and publications. Her peer-reviewed journal publications have been cited over 8,000 times. She invented a consumer segmentation process called Audience Mix. Previously, Melinda worked as a physicist developing nanoscale transistors and third generation photovoltaics. Melinda holds a Ph.D. in Applied Physics from Columbia University.



GRIT FUTURE LIST HONOREES (CONT.)



**PRERIIT SOUDA**

Director, **PSA Consultants Ltd**

LinkedIn: [www.linkedin.com/in/preritsouda/](http://www.linkedin.com/in/preritsouda/)

**FROM THE NOMINATOR:**  
 “Prerit pushes the boundaries of what can be learned from digital analytics: from text, pictures, and much more.”

For last 10 years, Prerit has been developing new ways to extract data from hundreds of otherwise untouched data sources and analyzing them with a variety of AI-enabled methods leading to better outcomes for businesses and society. He previously led Kantar TNS UK’s offering on Digital Media analytics and recently started his own company consulting with clients from a range of sectors around the globe.



**REMY DENTON**

Director of Research and Atlanta Location Manager, **SKIM**

LinkedIn: [www.linkedin.com/in/remyldenton/](http://www.linkedin.com/in/remyldenton/)

**FROM THE NOMINATOR:**  
 “Remy is the heartbeat of our company. She is committed to the growth of the marketing research industry, as well as the next generation of researchers.”

Remy has a passion for training new researchers and innovative solutions. At SKIM, she is responsible for the growth and development of a team of researchers in Atlanta, evolving internal processes throughout North America, and serves on the company’s global transformation team. She is a proud board of advisers member for both UGA MMR and UTA MSMR, UGA mentor, and has founded MMR internship program at Ipsos and SKIM.



**SARA PICAZO LUTTON**

Head of UK Ad Research, **Twitter**

LinkedIn: [www.linkedin.com/in/sara-picazo-lutton-237b9aa/](http://www.linkedin.com/in/sara-picazo-lutton-237b9aa/)

**FROM THE NOMINATOR:**  
 “Sara is one of the best young research leaders I have ever worked with. Her project on Twitter Global B2B positioning was the single most impactful research project Twitter has done in the last 2 years.”

Sara works to prove the value of Twitter advertising through insights and measurement. She has led award winning research, winning Best Paper Award at the 2017 ESOMAR Congress and the Peter Cooper Award for Qualitative Excellence, as well as the 2017 MRS New Consumer Insights award. Previously in a commercial role, Sara developed Twitter’s commercial presence across EMEA including Spain, Italy and the Nordics.



**TRICIA HOUSTON**

Founder / COO, **MMR LIVE**

LinkedIn: [www.linkedin.com/in/patriciabhouston/](http://www.linkedin.com/in/patriciabhouston/)

**FROM THE NOMINATOR:**  
 “Houston is a marketing research expert consultant, experiential marketing aficionado, and innovative entrepreneur. She has created a new niche in marketing research and is a rising star who exemplifies the spirit of our industry.”

Tricia applauds brands that create human-centric feedback experiences. She and MMR LIVE are on a mission to help organizations apply the same care to the experience of feedback touch points as they do to crafting overall CX. They then operationalize the results to help brands go further, faster. She is the President-elect of the Insights Association’s Southeast Chapter, a UGA MMR Board Member, and a WIRe Exec Member.



# BUZZ TOPICS: HYPE OR GAME CHANGERS?

Measuring sentiment around new concepts and topics as they enter the research and data industry has proven an effective tool in predicting their traction and adoption. In previous years, automation, big data, and storytelling/ visualization have had stronger sentiment, and in the past three years we have certainly seen progress in the tools, techniques and interest in these topics.

In 2018, those three topics remain the strongest scores for being a game changer and an interesting trend. This year, the big change is in enthusiasm for Artificial Intelligence, gaining 21 points, and now with 41% of participants calling it a game changer. Artificial Intelligence was also a theme in emerging and new research approaches including chatbots, machine learning, and voice recognition technologies. These findings are very similar across both buyers and sellers, and when looking at the data by regions.

When we combine “Top 2 Box” of “A Game Changer” and “An Interesting Trend” we see a “league table” similar to the Emerging Methods analysis that give a combined score that clearly demonstrates those topics that are the ones to watch as they impact the industry.



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## BUZZ TOPICS: HYPE OR GAME CHANGERS?

Buzz Topics – Top 2 Box	Wave		
	2016 Oct (%)	2017 Oct (%)	2018 Oct (%)
Automation	70	66	76
AI (Artificial Intelligence)	45	51	72
Marketplaces (such as for sample, talent, software, etc.)	45	37	42
Big Data (including synthesis of multiple data sets/types)	76	77	82
Storytelling & Data Visualization	74	83	84
VR/AR	43	37	49
Attribution Analytics and Single Source Data	46	36	41
Blockchain applications	N/A	N/A	29

This year, the big change is in enthusiasm for Artificial Intelligence, gaining 21 points, and now with 41% of participants calling it a game changer



Not surprisingly, blockchain as the new entrant has the highest “too early to tell” scores, and when combined with “not sure” results in 56% of participants indicating uncertainty about its future. Attribution Analytics had the highest “not sure” scores, likely due to its specific application

to the advertising sector. Marketplaces may be the oldest trend among the topics, but still hasn’t reached high potential with 22% of people saying it’s too early to tell and 27% saying they aren’t sure.

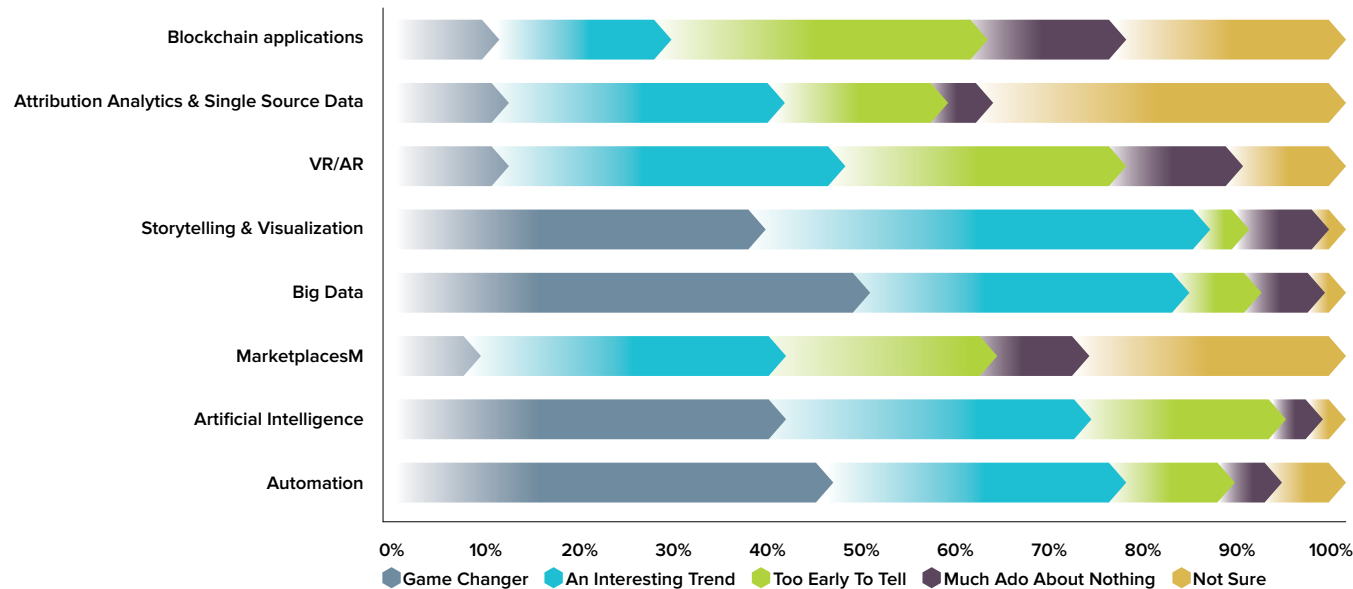
Buzz Topics	Automation (%)	Artificial Intelligence (%)	Marketplaces (%)	Big Data (%)	Storytelling & Visualization (%)	VR/AR (%)	Attribution Analytics & Single Source Data (%)	Blockchain applications (%)
Game Changer	45	41	9	49	39	13	13	11
An Interesting Trend	31	31	32	33	46	35	29	18
Too Early To Tell	11	20	22	7	3	28	16	33
Much Ado About Nothing	4	4	9	8	9	12	5	14
Not Sure	9	4	27	4	4	12	38	23

## BUZZ TOPICS: HYPE OR GAME CHANGERS?

If these results are directional guidance for potential areas to focus on investing time and resources in the year

ahead, clearly automation, AI, Big Data, ad Storytelling & Visualization should be at the top of the list for consideration.

### BUZZ TOPICS 2018 SENTIMENT



Automation, AI, Big Data, ad Storytelling & Visualization should be at the top of the list for consideration



## THE BIG PICTURE

As an industry, we are incredibly aligned on our opportunities. Buyers, sellers, and all regions are focused on using broader, more integrated data, along with AI and automation, to tell better stories and yield more value in business decision-making. While marketplaces and blockchain are focused on improving the supply chain, they haven't yet proven their efficacy. Later in the report,

we will focus on growth drivers, which presents a theme of new products, services, and markets. Following emerging industry trends, especially when aligned with research buyers, enables suppliers to evolve their strategies and make more informed choices regarding talent, skills, training, and technology investments.



## PROGRAMMATIC SAMPLING... THE RIGHT WAY

### Michael McCrary

CEO & Founder, PureSpectrum

Twitter: @SpectrumChoice | Website: [www.purespectrum.com](http://www.purespectrum.com)

LinkedIn: [www.linkedin.com/in/michael-mccrary](http://www.linkedin.com/in/michael-mccrary)

**A**s an industry, we've been sold that programmatic sample buying is better, faster, and cheaper. Sadly, it is often harder or inferior to working directly with your favorite sample providers. When founding PureSpectrum, my goal was to drive value for buyers and suppliers through time savings, improved quality, and fulfillment confidence. Our mission was to clean up the mess before the industry lost faith in self-serve, automation, and DIY altogether.

You've probably heard online sample compared to online advertising or ad-tech over the past few years. Online sample is like ad-tech in a lot of ways with two major exceptions:

1. Advertising has virtually an endless supply of websites on which to serve ads, whereas survey panels are much more finite.
2. The process of participating in surveys is downright gnarly.

We all know that poor sample quality is damaging to all parties. However, I'd like to represent the supplier's perspective. Suppliers spend millions of dollars a year — and rising continuously — on marketing to acquire members. To survive, they're often forced to find lower cost member acquisition strategies, resulting in sending lower quality traffic when project economics demand it.

Additionally, there's a major user experience issue that doesn't get enough ink: surveys are often dreadful. At scale, only 10 to 20% of people that start a survey successfully complete it. This is overwhelmingly due to asynchronous information to the suppliers. Why? On average, a newly recruited member must attempt 5 to 10 surveys before they receive a positive reward for the effort. Keep in mind, one bad experience from an early

CONTINUED ON NEXT PAGE



## GRIT COMMENTARY

termination is often enough to sour the panel member for life. This is a messy and complex issue but has a huge opportunity to improve everyone's life who relies on data to make decisions.

It turns out that when done properly, automation starts to solve these issues through what we call End-to-End Automation. End-to-End goes beyond DIY, self-serve and programmatic.

So, how does End-to-End work? Surveys have lots of quotas that are constantly changing and are rarely available in real-time to suppliers. The quota information lives inside data collection platforms like FocusVision's Decipher, Qualtrics, Confrimit, Simple Opinions, CMix and others, and we refer to that information as "The Truth".

When PureSpectrum's sample management platform is integrated with the data collection platforms and suppliers are integrated into PureSpectrum, this converts your normal individual 50/50 male/female quotas into specified quotas with nested age and gender, which is all setup and managed by automation. When done right, good things start to happen!

For example, one of our clients realized a 300% improvement in delivery after switching to End-to-End Automation! Without changing any screener criteria, the number of survey attempts resulting in quota failure was reduced to almost zero. By tripling the qualifying ratio, the respondent experience radically improved and overall conversion skyrocketed, boosting the per-click economics of their projects. This leads to better performance with suppliers, resulting in higher delivery. Furthermore, after optimizing their workflow, both their employees and suppliers can focus on adding value to clients instead of sending hundreds of emails and tracking quotas over the course of a weekend.

The hype about programmatic and automation is true and, if done properly, has huge time and monetary benefit to your firm. At PureSpectrum, we are helping both brands and agencies get to the heart of their consumer faster through automating their workflows.

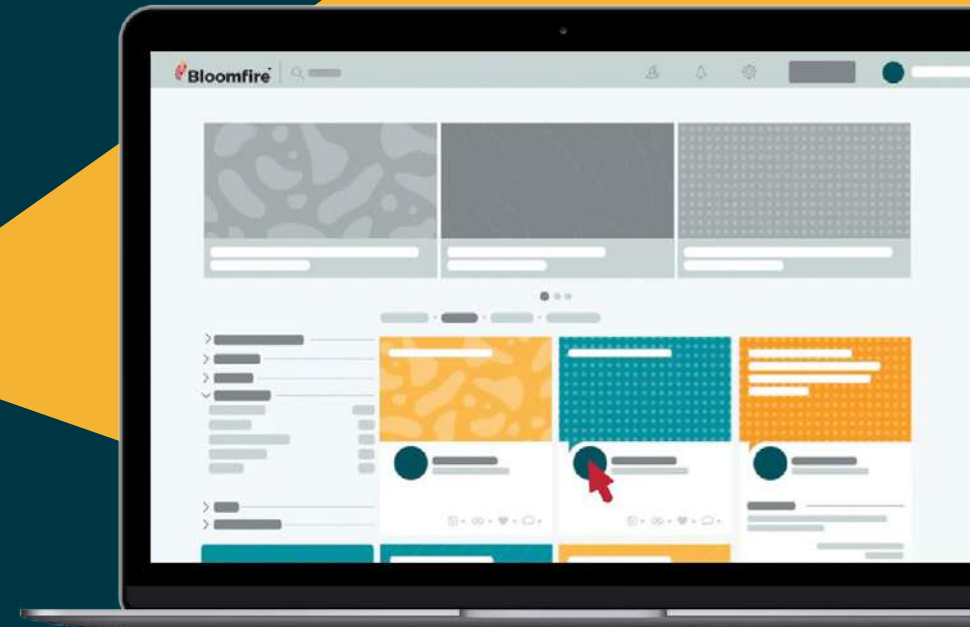


# SATISFACTION WITH SUPPLIERS

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.

## BUYER SATISFACTION WITH SUPPLIERS

The satisfaction of corporate researchers with suppliers has remained steady across a range of strategic and tactical attributes since the GRIT report began measuring this three years ago. The majority are very or completely satisfied with how providers design the research plan (60%) and conduct the research (66%). Value for cost remains in last place, hovering between 14-16% the past three years.



## Knowledge sharing software for insights teams















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## SATISFACTION WITH SUPPLIERS

Corporate researchers have become even less satisfied with business recommendations (24% in 2016 to 17% in 2018) and data visualization (24% to 17%).

	Top 2 Box		2016 Oct (%)	2017 Oct (%)	2018 Oct (%)
	Conducting the research	Strategic	67	71	66
	Designing the research plan	Strategic	-	60	60
	Understanding the issue to be researched	Strategic	45	45	44
	Project Management/Service	Tactical	-	46	44
	Implementing the research plan	Tactical	-	47	43
	Data analysis	Tactical	45	43	40
	Reporting research results	Strategic	38	43	36
	Timeliness of deliverables	Tactical	33	29	32
	Managing scope or project specification changes	Tactical	-	34	32
	Interacting with senior management	Strategic	-	34	31
	Understanding their business	Strategic	24	24	23
	Recommending business actions based on the research	Strategic	23	21	19
	Data visualization	Tactical	24	21	17
	Value for cost	Tactical	15	14	16

 Project management related    Research relevant to organization    Data analysis and reporting

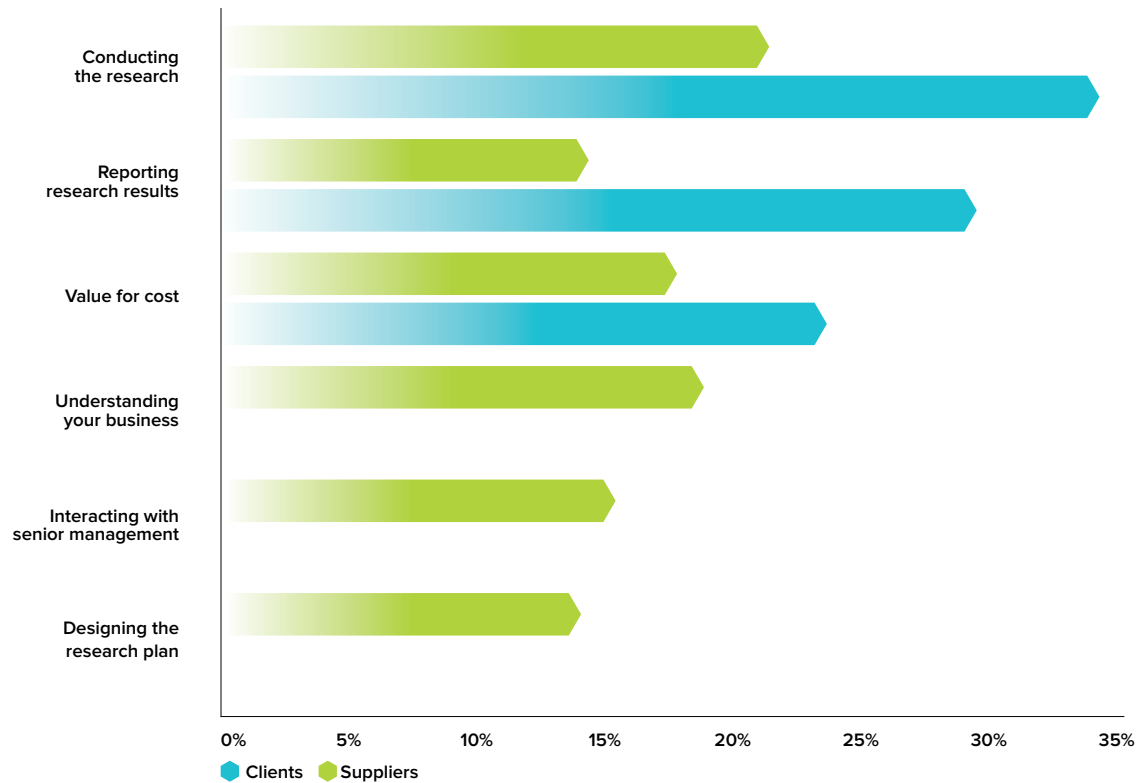
## SATISFACTION WITH SUPPLIERS

Overall, 49% of corporate researchers are very or completely satisfied with their research providers. A regression analysis of each attribute to overall satisfaction suggests that buyer satisfaction with suppliers depends on measurable drivers (cost, timeliness) and providers' overall ability to execute the work and report the results.

Buyers may think suppliers have a limited role short of “business partners;” buyers don't seem to value *understanding the business, interacting with senior management, or recommending business action from the research*.

Providers, on the other hand, think satisfaction depends on nuances that either don't matter to buyers (understanding client's business, interacting with senior management) or that the buyer takes for granted as part of *conducting the research* (i.e., *implementing the research plan*).

### DRIVERS OF SATISFACTION (ALL POTENTIAL DRIVERS)



Buyers and suppliers agree that *value for the cost and conducting the research* are significant drivers. Buyers and suppliers also agree that *reporting research results* is a significant strategic driver. Buyers, however, place more emphasis on *data visualization* than do suppliers.

Overall, 49% of corporate researchers are very or completely satisfied with their research providers



## SATISFACTION WITH SUPPLIERS

## SATISFACTION DRIVERS

To improve satisfaction, rather than maintain it at the same levels it has been at these past three years, research suppliers need to pay more attention to those factors that most drive

the perceptions of corporate researchers: conducting the research, reporting research results, and value for cost.

SATISFACTION DRIVERS  
REGRESSION OF STRATEGIC AND TACTICAL SATISFACTION QUESTIONS ON OVERALL SATISFACTION

	Buyer All	Supplier All	Buyer Strategic	Supplier Strategic	Buyer Tactical	Supplier Tactical
Understanding your business		0.16		0.18		
Understanding the issue to be researched						
Designing the research plan		0.12	0.3	0.13		
Conducting the research	0.29	0.18	0.28	0.2		
Reporting research results	0.25	0.12	0.28	0.15		
Recommending business actions based on the research						
Interacting with senior management		0.13		0.14		
Implementing the research plan						0.1
Data analysis					0.17	0.16
Data visualization					0.21	
Timeliness of deliverables					0.21	
Project Management/Service						0.11
Managing scope or project specification changes						0.12
Value for Cost	0.2	0.15			0.22	0.16

## SATISFACTION WITH SUPPLIERS

In this analysis, all suppliers have been pooled together regardless of focus area, region, or other variables. Analyses that take supplier profiles into account may provide different results and insights. For example, *data visualization* was not significant for suppliers (although it was for buyers). This may be due to the mix of suppliers in the sample; sample providers, for example, might not encounter *data visualization* issues, and this might confound the results. Inclusion of other variables may increase the variance explained. For example, length of relationship may have a significant influence on satisfaction.

## THE BIG PICTURE

Despite the ongoing discussion in the research industry for suppliers to be considered “integrated partners”, according to this analysis of research buyers the relationship appears to be far more transactional in most cases. That isn’t to say the drive to be more consultative and generating insights that help deliver real organizational impact isn’t a worthy goal, and certainly there are advantages to developing deep relationships, but perhaps driven by the rise of automation and DIY tools, the opportunity for most “traditional” suppliers may be limited to winning the business based on the “cheaper, faster, better” rubric on a case by case basis. We would argue that the more strategic the research, the greater opportunity for partnership may be, while the more tactical the effort is, the less opportunity there is.

Final note: this is a regression-based analysis, so any variable with low variance will not be significant. For example, if all buyers are highly satisfied with suppliers on *implementing the research plan*, it will not be a significant driver (even though it may, in fact, be critical). Similarly, if all have low satisfaction, it will also not be significant (though it may represent an opportunity to create differentiation). The distinctions between strategic and tactical may not be significant and are worthy of re-examination in future waves.

Of course, another factor that we did not ask in this wave is whether the mix of strategic suppliers is changing with more strategy consultancies, marketing agencies, and niche suppliers taking the “partner” role vs. research suppliers. Concurrently, as we witness the merger of large technology platforms into global IT organizations, even the tactical research may be squeezed by far larger and scalable technology partnerships offering the promise of enterprise wide synergies vs. ad hoc implementations. Time will tell how this changing competitive landscape impacts the industry.

Research suppliers need to pay more attention to those factors that most drive the perceptions of corporate researchers: conducting the research, reporting research results, and value for cost





## SUCCESSFULLY CURATING ONLINE QUAL IS NOW THE GREATEST CHALLENGE

### Rebecca West

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**Y**ou're a star at online qualitative research. You've just completed an important set of focus groups, or a long list of IDIs. You've got tons of great video. Now what do you do with it?

It wasn't too many years ago that clients would actually sit through entire interviews, joining a live focus group event on mute so they could be present virtually during the actual research. They were entranced with the ability to sit right in their office and be part of insights-gathering in real time as it happened live in another part of the country or elsewhere in the world. It was fascinating to be a silent participant. In those days, we had up to ten clients at a time who would join on mute to watch an entire set of interviews or groups.

Those days ended five or more years ago. This was when researchers started clipping chunks of content from each interview and patching it together into a set of insights and clients realized they didn't have to sit through live sessions to get the gist of the message. At that time, an insights video made from a set of 30 IDIs or six focus groups might run for an entire hour. Typically, these clips would each run at least five minutes.

Those days are over too. Clients are like the rest of us. The average human attention span used to be about twenty minutes. It's now fallen to about eight seconds. This is in general due to social media. The average video on Instagram is 30 seconds, on Twitter 45, on Facebook one minute. Over fifteen percent of Superbowl ads are under 15 seconds.

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It seems impossible to hold people's attention in this day and age. Clients spend hours a week or even a day viewing short, concise videos on Instagram, Facebook and Twitter, that condition them to get the point within 15-30 seconds. As a result, in presenting a client report, you don't have a captive audience. You have just the opposite: an easily distracted, easily bored client that wants to be surprised and delighted. And this is the older crowd. Soon millennial clients will run the world - quickly followed by digital natives, and as a rule, you can count on the fact that they will not read lengthy text-based research reports.

This is a lot of pressure for you, the researcher. You became a researcher because you had an expertise in identifying insights, and not necessarily an interest in becoming a Hollywood-level media director. But this is the role you now find yourself thrust into in order to get your point across to your client when delivering your report. You have to ask yourself, can you get the client's attention long enough to make your case and prove your worth in this new short-clip visual environment?

The key is to capture the client's attention long enough to make your point and have them get it. Start with viewing some video on the key social media sites while thinking about your amassed video content and your client's point of view.

Keep your videos brief so they meet viewer expectations. If there's something that you really want your client to internalize, put it in the absolute very first frames of your videos. Keep your videos under two minutes each. Research shows that after two minutes, viewers lose interest. The last thing you want is a client audience that ignores the fruits of your labor. If you follow simple guidelines to hold your client's attention, you'll stand a better chance of having them value your work.

You have to solve the pain points of curating the overwhelming amount of video content that today's research studies produce. To do so, start with a video management and curation tool such as Glide Central® from Civicom® that can help you make sense of all of this content while enabling you to easily generate the great clips you need to make your presentation sing. Then on top of already being a proficiently expert researcher you will also be a savvy content curator with know-how that can handle any client demographic you are faced with serving.



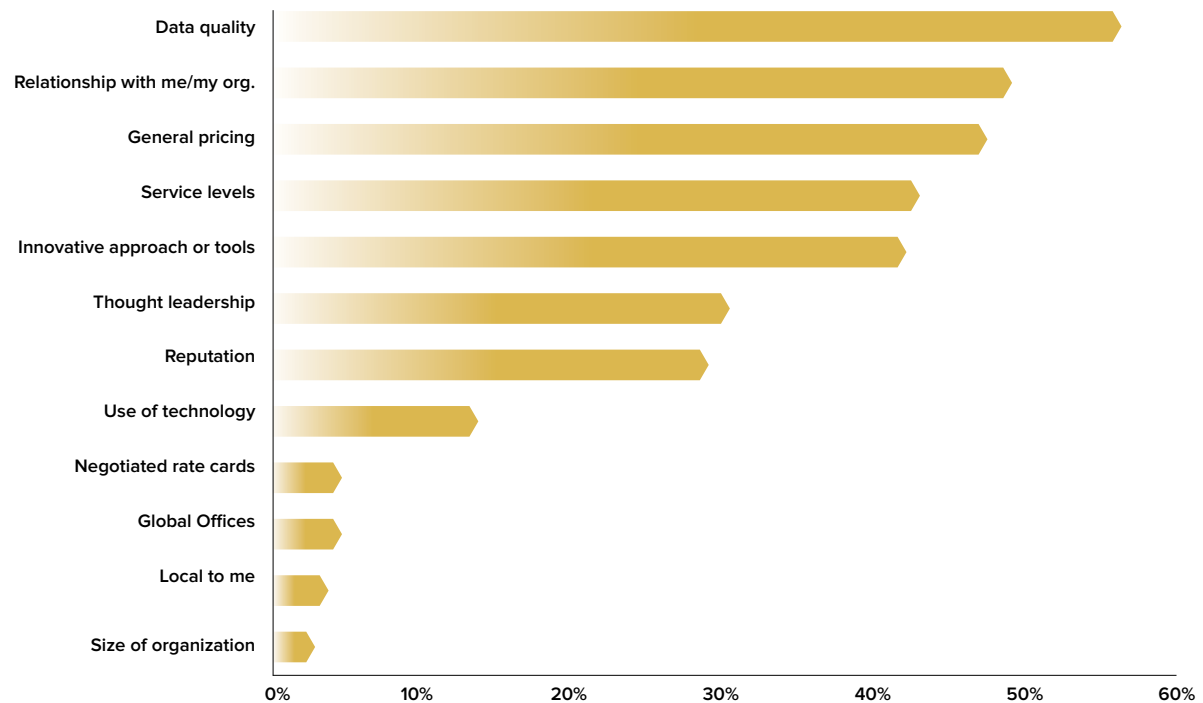
# DRIVERS OF SUPPLIER SELECTION

In the previous section we explored the drivers of supplier satisfaction and the relationship as a whole between buyers and suppliers; we also wanted to understand fundamentally what factors are important for picking a supplier.

To get to that insight we asked “Thinking about the decisions that go into choosing partner/supplier relationships, please select the 3 attributes you think are the most important from the list below.”

The most frequently selected item was Data Quality. One of the things to keep in mind is that this sort of question tends to reflect two elements, a) how essential is it to get this right and b) whether it is easy to get this right. So, for example, if all or most suppliers were offering high quality data it is likely that Data Quality would not be the most important item on the list. That suggests that buyers have experience with subpar data quality, making it high in their consideration set.

## IMPORTANT FACTORS IN SELECTING A SUPPLIER/PARTNER



Buyers have experience with subpar data quality, making it high in their consideration set





## DRIVERS OF SUPPLIER SELECTION

Behind Data Quality there are four closely-grouped items: Relationship With Me and My Organization, General Pricing, Service Levels, and Innovative Approach or Tools. It is interesting to note how important Innovation is compared with the much more lowly ranked Use of Technology. In the middle-ground there are two 'softer' attributes, Thought Leadership and Reputation.

The bottom four were rated as important by very, very few people. Negotiated Rate Cards are much less important than General Pricing. Global Offices, Local to Me, and Size of Organisation are not relevant in the sense that if these are right, but if Data Quality, Relationship, Pricing and Service levels are not right they don't swing the decision.

## CLIENTS AND AGENCIES

Contrasting the views of clients and agencies produces five differences that are large enough comment on, as shown in the table below.

Clients had an even higher score for Data Quality than Agencies (58% versus 50%). This may reflect the fact that Agencies are in a better position to monitor and control data quality. For example, if they are using a panel company or data scientist as a supplier, they can manage the project in ways likely to produce better data. For clients, the number of levers (for controlling the data) are often fewer.

Thought Leadership is lower for Agencies, perhaps they feel they are able to add the Thought Leadership. But on the other hand, Reputation is higher amongst Agencies, perhaps because it is a factor that helps sell their products and services and supports high prices.

Key factors in Choosing Suppliers/Partners	Client (%)	Agency (%)	Difference (%)
Data quality	58	50	8
Thought leadership	36	25	11
Relationship with me or my organization	40	47	-8
General pricing	36	46	-10
Reputation	19	29	-10

Base                      329                      931

The other two items are both ones that are of higher importance to agencies than clients, namely Relationship with Me and My Organization and General Pricing. In both of these cases, these are factors that help shape the product and profitability of the product the agency is delivering to the end client.

The other two items are both ones that are of higher importance to agencies than clients, namely Relationship with Me and My Organization and General Pricing



## DRIVERS OF SUPPLIER SELECTION

### REGIONS

The sample size permits analysis of three distinct regions, North America, Europe, and Asia Pacific. This analysis identified just four of the factors as showing meaningful regional differences. All four cases are most clearly described in terms of North America being higher or lower than the other regions.

North America shows more stated importance for Data Quality and Thought Leadership. In terms of Data Quality we believe that this is being driven by a greater awareness of data quality issues, rather by differences in either data quality or the need for data quality.

The two factors where North America has lower stated importance values than the other regions are Service Levels and for Use of Technology.

### THE BIG PICTURE

A buyer may want all twelve (12) of the items on this list, but there will often be a hierarchy. For example, they may want Negotiated Rate Cards, but what is really driving the business choice is whether the Pricing they achieve is good

Key factors in Choosing Suppliers/Partners	North America (%)	Europe (%)	APAC (%)	Other (%)	
Data quality	55	48	45	49	
Thought leadership	33	22	24	14	
Service levels	37	45	41	40	
Use of technology	10	13	20	15	
	Base	743	287	150	80

enough or not. They may like it when the supplier is “Local to Me”, but it is the Relationship and Service that will determine whether they are happy.



# QUALITY IN SURVEY DATA STARTS BEFORE THE RESEARCH

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**A**s researchers, we regularly (and rightly) focus on quality at a micro level – within a set of survey data, for example.

For consumers of research insights, however, quality is a broader and more fundamental issue, as a client reminded me when explaining what quality meant to his organization:

“Quality is being confident that you can trust the data to accurately represent the audience, so you can make the right decision at the speed of business.”

Achieving this level of quality requires a multi-faceted commitment to high standards and best practices throughout the research process. It starts with the data for the sample used to conduct research, particularly online.

Because online research is nonprobability sampling, it requires greater rigor in sourcing if the sample is to be accurately representative and yield data to support important business decisions.

Optimizing the sample frame to minimize bias and variance. The bias-variance dilemma is typically associated with data modeling and machine learning. However, it also affects sample frames in nonprobability research.

Bias in a sample is an inverse measure of representativeness; a high-bias sample delivers results that are not representative. Picture a tight grouping of darts, all to one side of the dartboard.

Variance is an inverse measure of representativeness over time, or consistency; imagine darts scattered randomly across the dartboard. A high-variance sample will deliver results that change unpredictably – especially problematic for tracker studies.

Fortunately, quality-conscious sample data providers can use multiple techniques to minimize both faults.

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Reducing bias requires a diverse sample frame incorporating a wide population reach, best achieved by data sources recruited from multiple channels:

- Loyalty programs, often associated with travel, yield high-worth individuals and are a good source for professionals for B2B sample;
- Open recruitment through mass-market digital advertising draws sample from all over the internet and broadens representativeness nationally and internationally;
- Affiliate networks utilize partnerships with web-centric companies to build traffic and reach innovators, early adopters and hard-to-reach segments;
- Mobile apps are a valuable source for younger sample and data sharers – and increasingly important to representativeness as mobile Internet use surges past desktop access.

By using all these channels to gather data and recruit a large and diverse sample frame, research providers can bring together samples that are accurately representative for a broad range of studies.

Beyond recruiting, providers should support client research with a variety of rewards that reflect different interests and motivations, such as calibrated gratuities for B2C surveys and access to results for B2B participation. Finally, providers should ensure that their sample is exposed

to a range of surveys, to avoid burn-out or over-familiarity with research interests.

Reducing variance requires consistency in the sample and the research experience. Providers need to establish a stable recruiting effort to avoid imbalances from intensive short-term recruiting. They should bring sample into panels using a tested, consistent data-based approach that they can demonstrate and explain.

Providers should also strive to ensure a consistent, high quality research experience, with fit-for-purpose survey designs, robust technology to ensure accessibility, and an expert delivery team to assist clients as needed in creating and administering studies.

How do you know if your provider is successfully minimizing bias and variance? Ask for measures of representativeness: How does their sample frame compare to objective benchmarks in the general population for characteristics like home ownership, TV viewing, employment, and illness? How does it compare to these benchmarks over time?

Optimizing the bias-variance tradeoff in your sample is just one element of a multi-faceted commitment to quality in research data – and absolutely essential for insights that can be used to advance business goals with confidence.



# INVESTMENT PRIORITIES

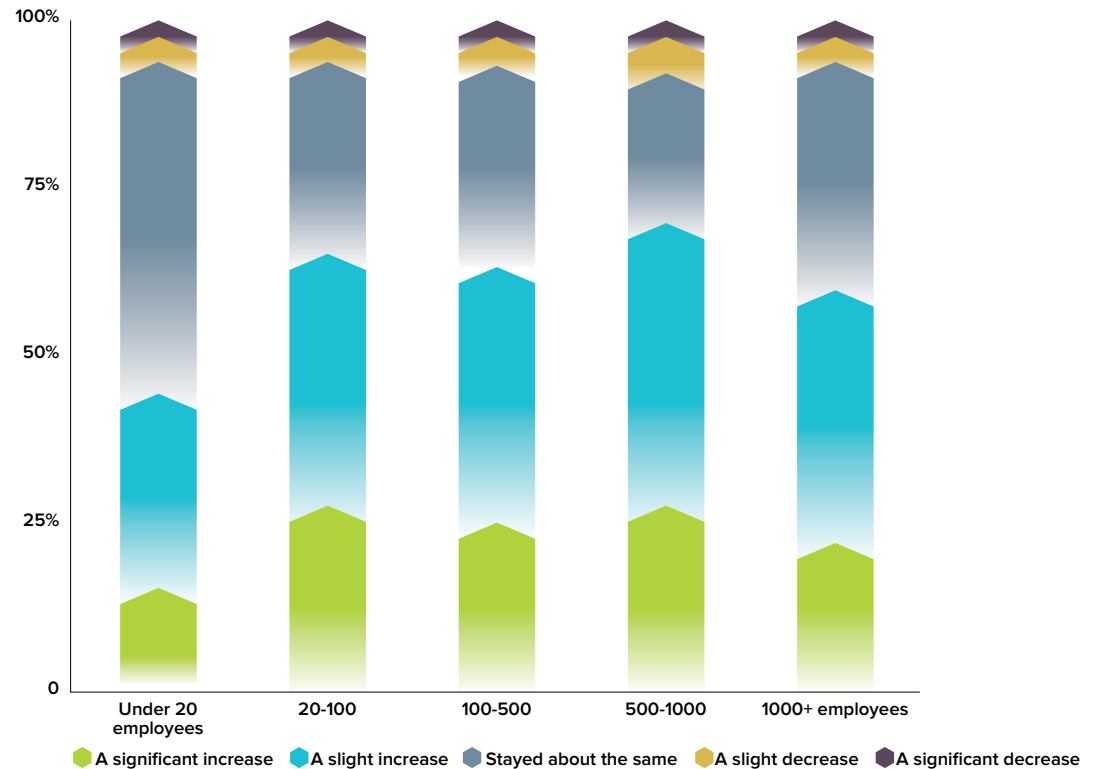
The headline news from this data is nearly every part of the research industry has been investing more in technology and automation over the last year. Half of respondents claimed their businesses were spending more money and 20% spending significantly more compared to only 5% decreasing their investment.

Leading the investment charge are medium sizes research businesses and the more naturally tech led businesses – 80% of sample and survey platform business have increased their base line investment in technology in 2018 compared to 58% of full-service research business.

The research industry has been investing more in technology and automation over the last year



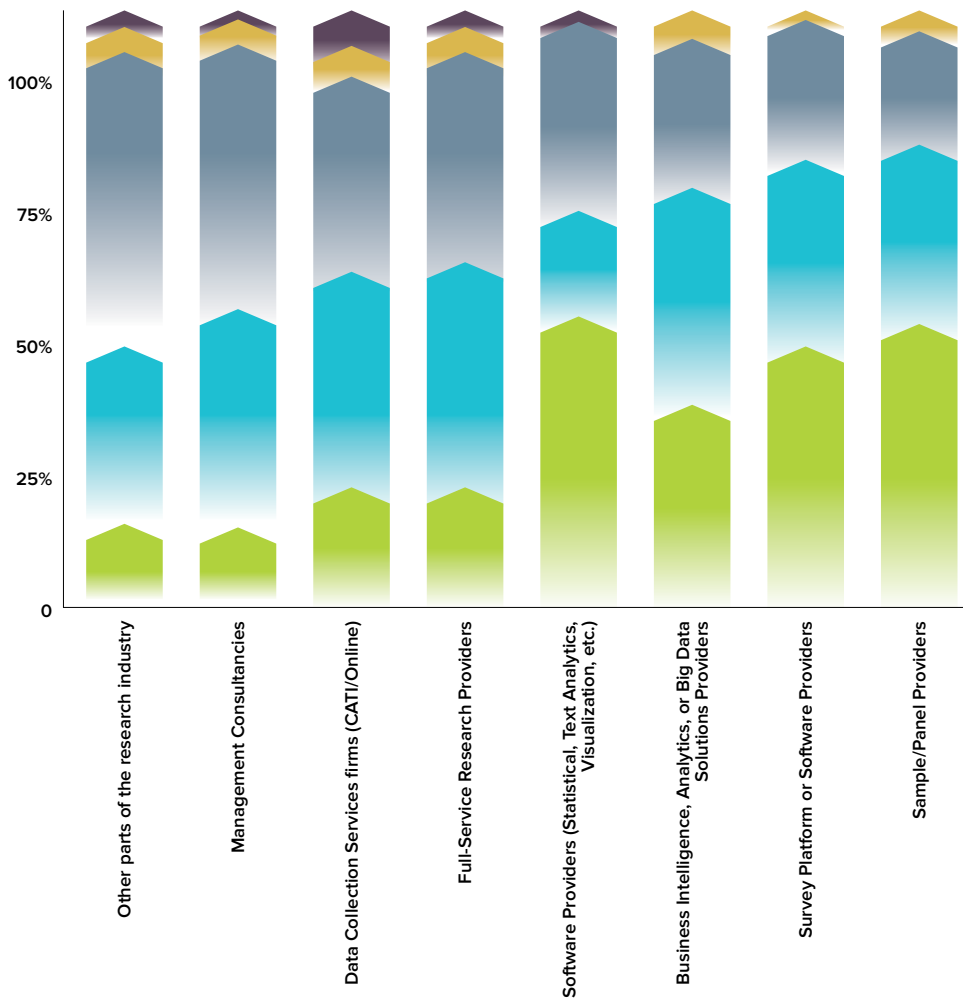
TECHNOLOGY INVESTMENT LEVELS BY COMPANY SIZE



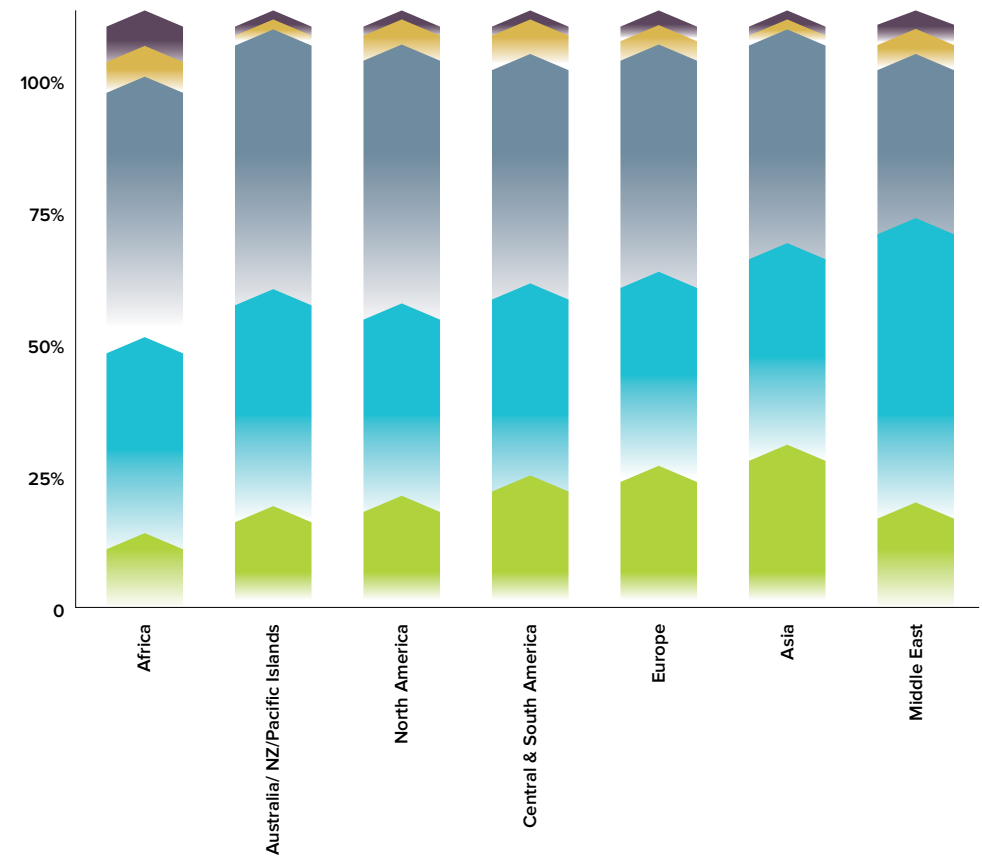
## INVESTMENT PRIORITIES

At a pan regional level, Asia and Europe appear to be pulling slightly ahead of North American businesses in terms of technology investment growth.

### TECHNOLOGY INVESTMENT LEVELS BY SUPPLIER TYPE



### TECHNOLOGY INVESTMENT LEVELS BY REGION



■ A significant increase 
 ■ A slight increase 
 ■ Stayed about the same 
 ■ A slight decrease 
 ■ A significant decrease

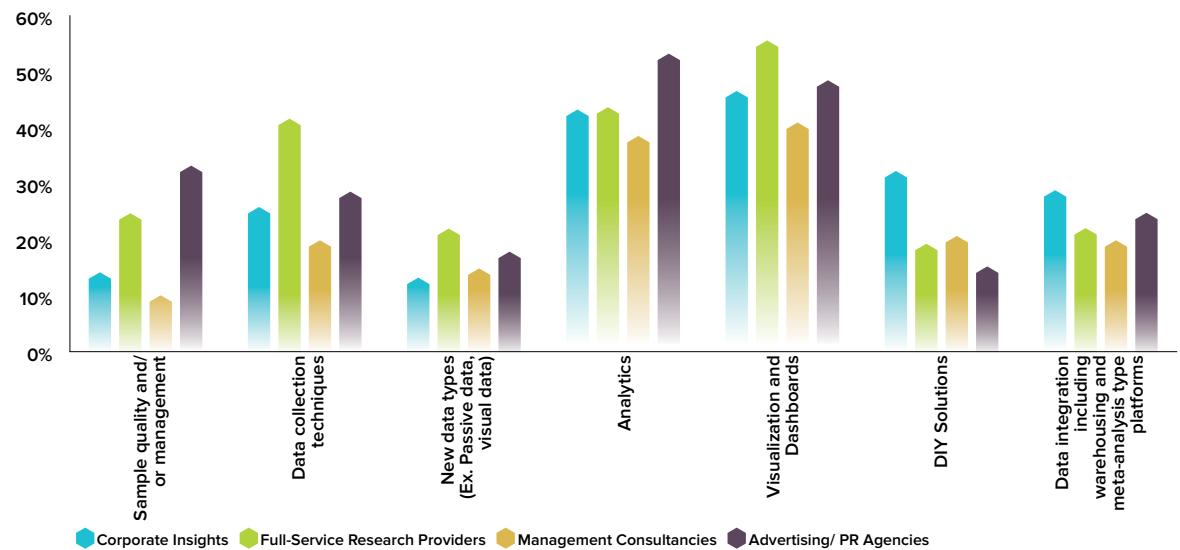
# WHAT IS BEING INVESTED IN?

What is being invested in highlights the cannibalization that is currently going on within the industry. Client based business are ramping up their analytics and data visualisation capability to enable them to take more control over their data from research companies. Full service agencies are investing more in data collection techniques, analytics and visualisation to wrest more control over the research processes from sample and big data solutions providers.

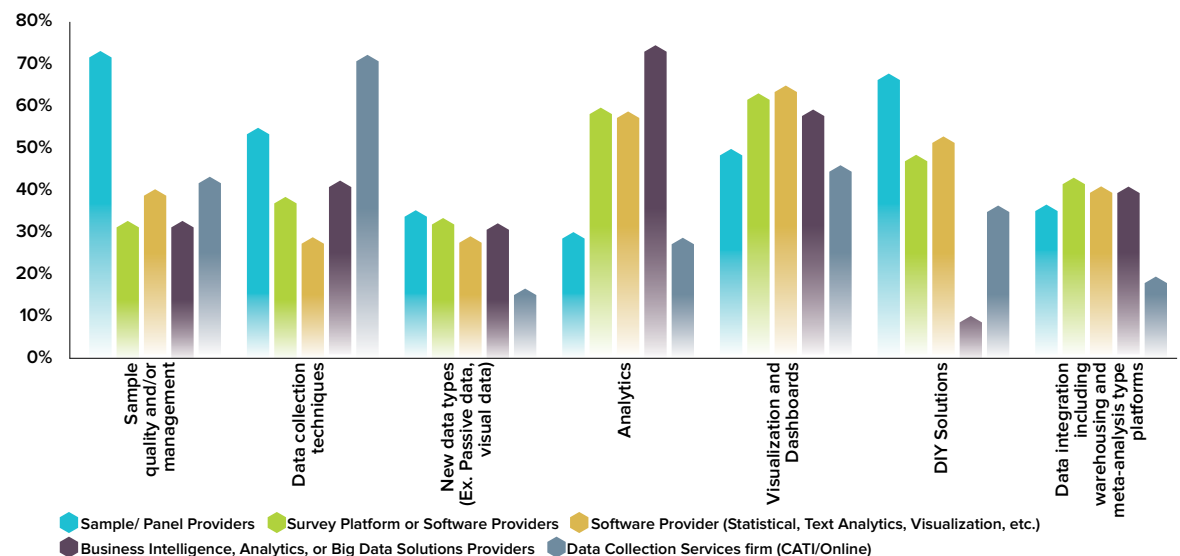
The sample businesses are investing in improving their DIY solutions and automating their sample supply to take back more control from survey platform and software providers. The survey platform and software providers are investing in analytics visualisation tools and sample provision capacities to help them more effectively circumvent sample and research business and gain more direct client business. This circular tension indicates an industry under tremendous flux, and as previously pointed out in multiple sections, the role of a changing competitive landscape anchored at strategy consulting at one end and technology at the other continues to drive the evolution of the industry.

Looking more generally, the two big areas of investment by the research industry in 2018 are improved data visualisation and analytics capabilities.

TECHNOLOGIES BEING INVESTED IN



TECHNOLOGIES BEING INVESTED IN BY SUPPLIER TYPE



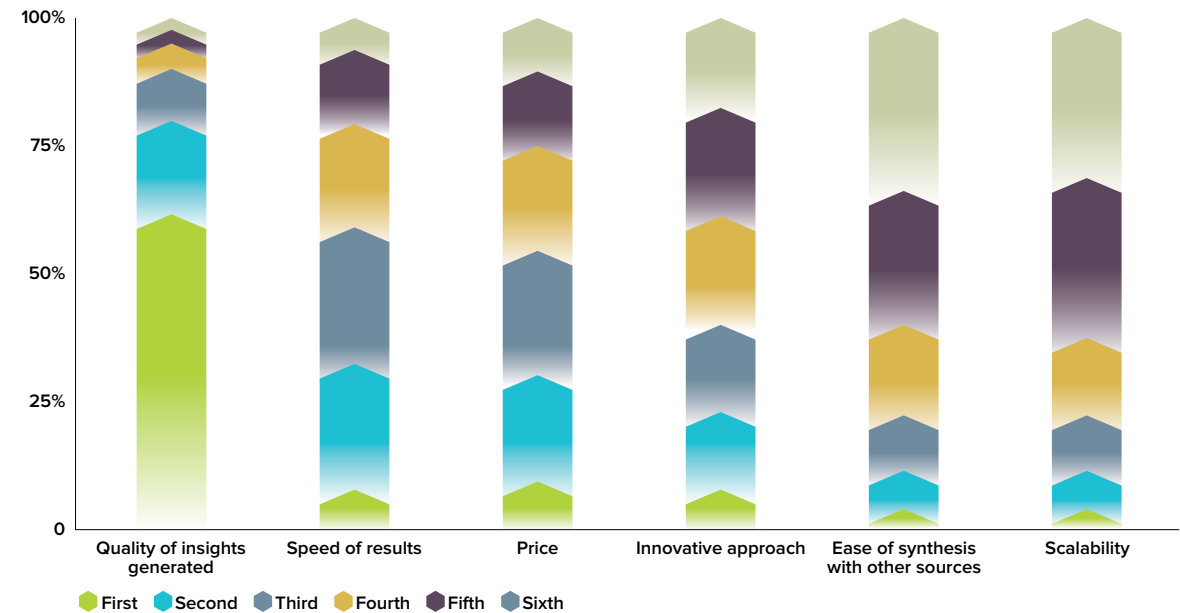


## INVESTMENT PRIORITIES

## HOW DO RESEARCHERS DECIDE ON WHAT METHODOLOGY TO USE?

Examining the answers given by researchers, they are probably not that surprising. It's all about the quality of insights each method offers. 80% rank this as the first or second most important factor. After this speed of delivery slightly trumps price as second priority and innovation factors lead secondary considerations to do with ease of synthesis or scalability of solutions. The fact that scalability is last and speed second, highlights the often very short term and tactical nature of research activity the industry conducts and perhaps is something for the industry to think about.

HOW YOU PRIORITIZE YOUR SELECTION OF METHODS TO USE FOR THE TYPICAL RESEARCH PROJECT



## THE BIG PICTURE

A consistent theme is reinforced by these data: research is becoming far more technologically driven vs. service based, with the focus on “cheaper, faster, better (quality of insights)” being the driving trifecta for making both investment decisions and methodology selection. This isn’t new per se, we have been talking about this for years, but one of the goals of GRIT is to quantify the macro-trend analysis that occurs via other channels and this edition does that.

What does this mean for the future, especially for the supplier community? We suggest a focus on productization, price and speed efficiency, and the ability to integrate with a broader business intelligence framework within client organizations may be not just fruitful, but existentially necessary.

Research is becoming far more technologically driven vs. service based, with the focus on “cheaper, faster, better (quality of insights)” being the driving trifecta for making both investment decisions and methodology selection



# YOU KNOW THE VALUE OF QUAL, HOW TECH ALLOWS IT TO SCALE

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**U**nsurprisingly, tech spend isn't going anywhere. Surprisingly, it hasn't claimed more of a piece of the market. Why is that?

According to the GRIT Survey results, above everything else, brands are looking for quality of insights, speed of results, and price from the methods in which they invest.

Technology promises us all of these, but sometimes the promise is greater than the deliverable.

Whereas only 12% of respondents said that the use of technology was an important attribute, 25% characterized innovative approaches or tools as important. This shows us that brands are looking for more than technology for technology's sake - they are looking to solve real business problems. Nonetheless, we know that the market is investing in technology (16% report a significant increase and 33% report a slight increase in spend).

When we look at the breakdown of the methods in the industry, the GRIT report heavily favors quantitative research, which makes up 62% of work, as compared to qualitative's 33%. Naturally, favor for quantitative then gets translated into the problems that people are focused on fixing and where they're investing. For example, respondents reported spending the most of their time on the execution of projects and analysis of results. So it makes sense that the greatest spend is in visualization and dashboards and analytics.

However, when you look at the breakdown of methodologies used for qualitative research, in-person continues to reign supreme, with 58% of people still using in-person focus groups and 42% using in-person IDIs. Why has the market been so slow to adapt to qualitative technologies, as they have embraced quantitative?

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Not so long ago, quantitative research went through the same transition from offline to online. People feared the change because they assumed that it would mean lower quality. However, as the industry shifted, they found that technology actually enabled them to do much more than they could in-person.

### **We predict that the qualitative space will have the same destiny**

At Discuss.io, we've automated time consuming administrative work like project setup and key moment video generation, freeing up our clients to focus on more impactful work. When we talk to our clients, they tell us time and time again that their real job is to consult internal stakeholders on how insights can inform business decisions. And yet, we see with GRIT that only 12.28% of their time is being spent on this effort. That's bad for everyone.

We see our clients using Discuss.io to scale their qualitative efforts, leveraging enterprise-wide deals to scale empathy-building initiatives (what we call Consumer Connect programs) and more formal research projects. Our clients tell us that they save 4-6 weeks when they use Discuss.io, as opposed to in-person methodologies.

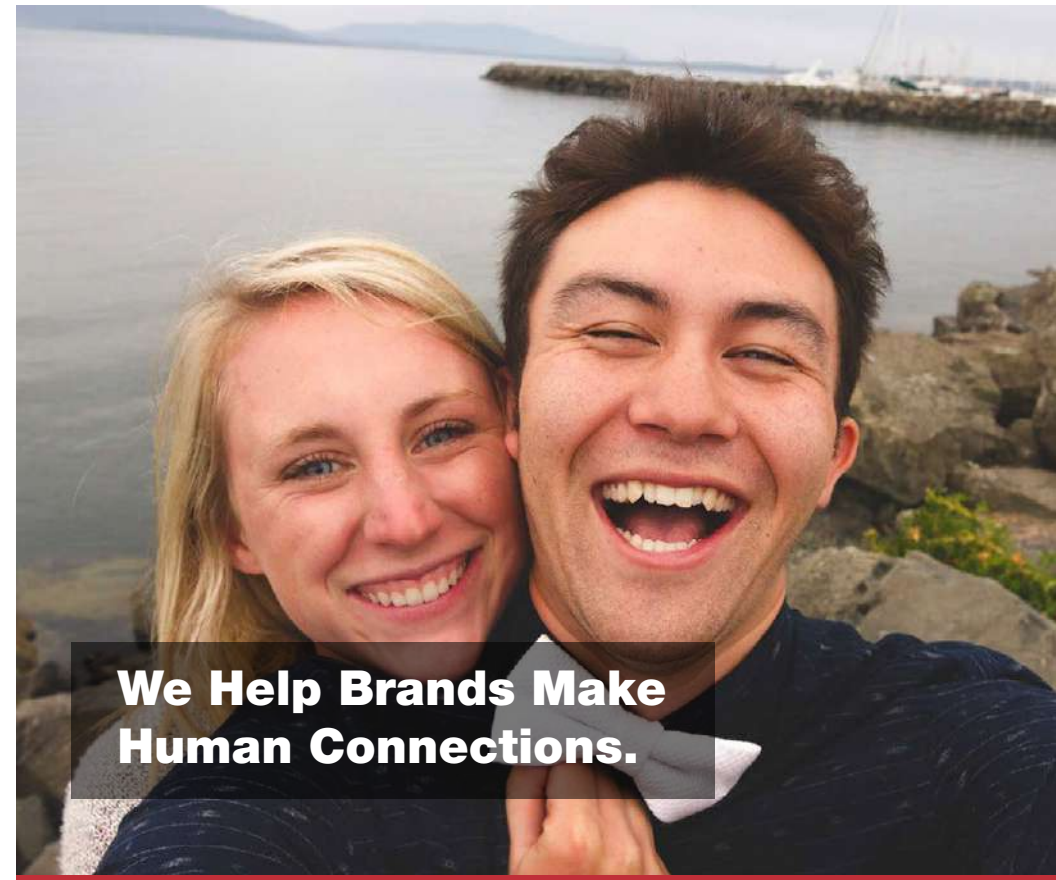
Drowning in big data, brands often struggle to connect the dots in a way that allows them to be predictive or uncover reasons behind particular behaviors. Not only do they want to understand the consumer better, but they want to enable key stakeholders beyond the Insights department as well. In a TED talk, tech ethnographer, Tricia Wang, says that true business impact comes at the intersection of big data and what she calls "thick" data (ie stories and conversations). Without both, she warns, the results can be catastrophic.

**If** in-person research will fade in favor of online methodologies is not the question. The real question is **when** full adoption will happen and **why** it's not happening faster. If the GRIT results teach us anything, it's that in order to have successful adoption, we need to provide quality results, quickly, and at competitive prices. Technology should work for you, not the other way around.



# THE BUSINESS OUTLOOK

Overall confidence in the future of the global insights industry, as a whole, is strong among both buyers and suppliers, and this confidence is mirrored in their optimism about their company (suppliers) and the insights function at their company (buyers). More buyers are experiencing research spending increases compared to those in the last GRIT report, and most suppliers continue to experience revenue increases, and these increases correlate with more investment in technology and human resources. Though the insights industry is filled with diverse players, they face a common challenge to accomplish more, faster and cheaper. One way or another, everyone seems to be grappling with the issue of whether this challenge is a barrier or an opportunity.



## Consumers don't buy brands. People do.

That's why our insight strategists focus on the whole person, not just the consumer. By recognizing a person's life experience as the biggest influencer in how they make decisions about brands, we are able to have a conversation that gets them to open up, share deeper insights and reveal bigger opportunities. The result? Insightful clarity and strategic direction that can transform a brand and a business.

Learn more at [www.realitycheck/humaninsights](http://www.realitycheck/humaninsights)



Narrative  
Mindset



Empathic  
Listening



90/10 Rule  
Analysis



Insights  
Activation



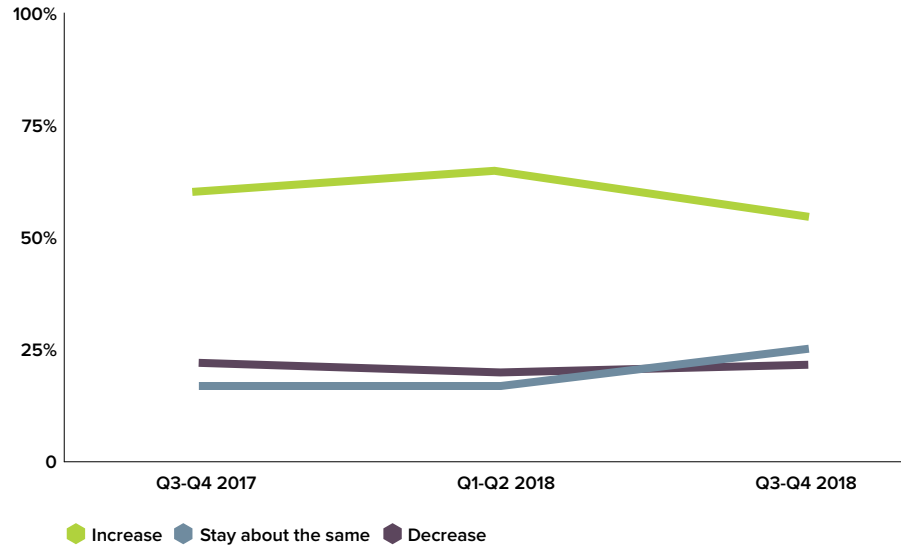
Chicago + St. Louis + London + New York City + Sao Paulo + Sydney + Louisville + Detroit + Miami + Denver + San Francisco + Seattle + San Antonio

# TREND: BUYER SPENDING/SUPPLIER REVENUE

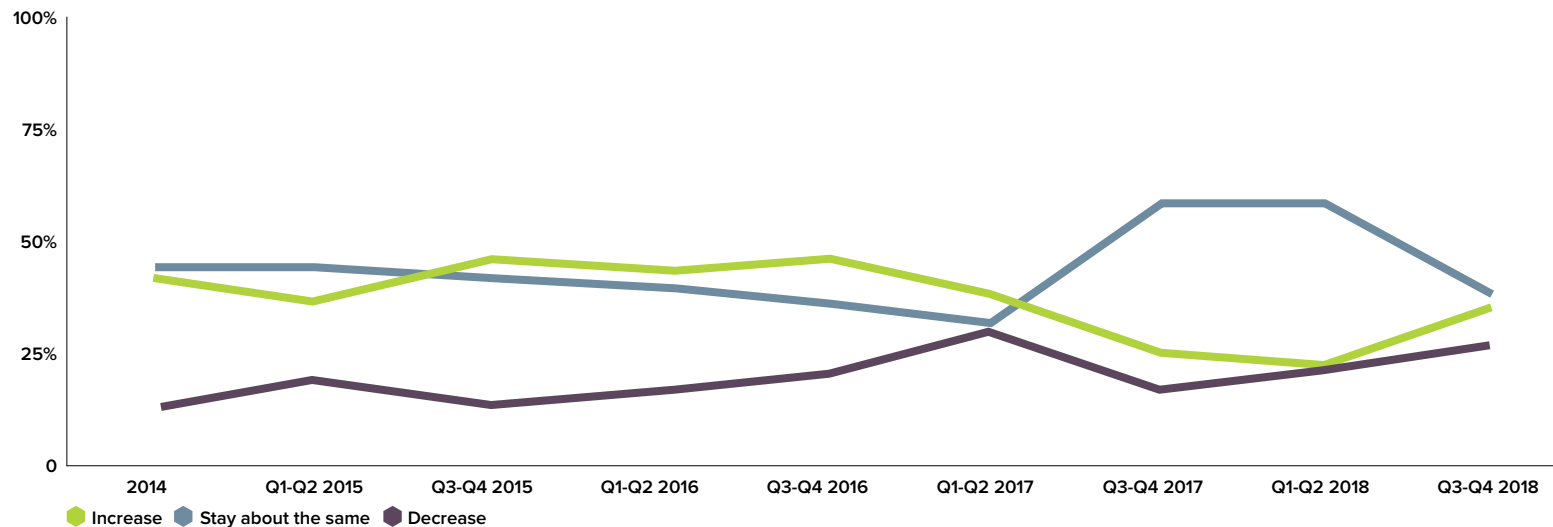
Compared to the past year, spending on research projects has been dynamic: the percentage of buyers who increased spend AND the percentage who decreased spend are at their highest points since early 2017. The Q1/Q2 2017 report documented the beginning of a sluggish spending period: buyers who decreased spend spiked while the number that increased steadily declined until the current period. The industry is once again in a period where most buyers are either increasing or decreasing spend.

Continuing a trend, most suppliers report increased revenue over the last year, although that number has declined since the last GRIT report. The difference splits nearly equally between those whose revenue stayed the same and those whose decreased.

REVENUE TREND (SUPPLIER)



RESEARCH SPENDING TREND (BUYERS)

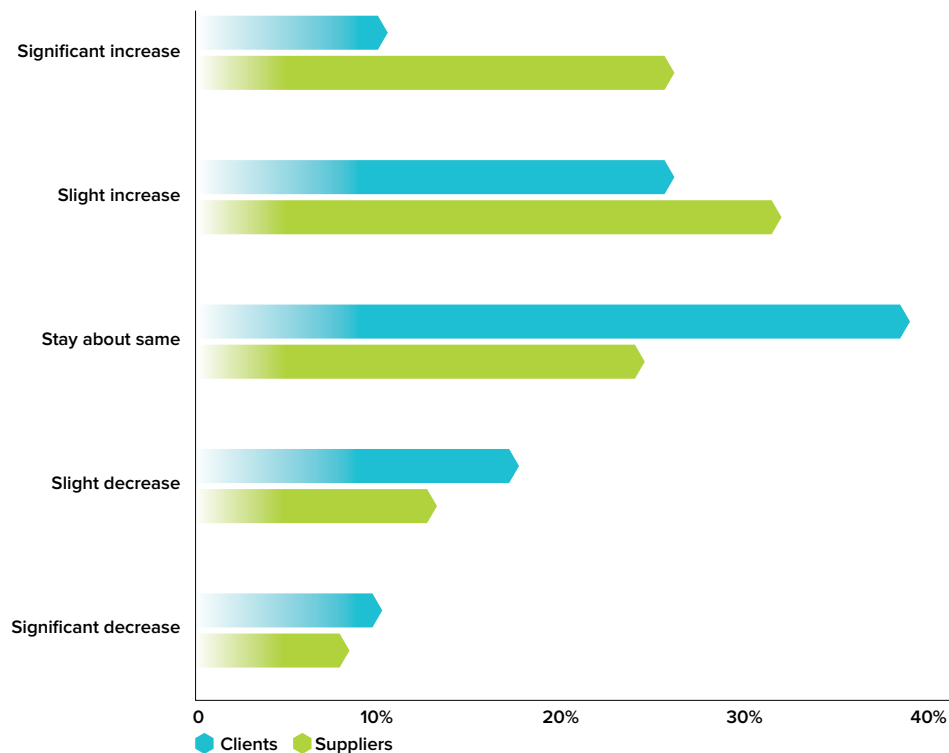




## THE BUSINESS OUTLOOK

The likelihood that a supplier increased revenue was greater than the likelihood a buyer increased spending. Further, suppliers were more likely to *significantly* increase revenue than a buyer was to significantly increase spending. If we take revenue increase as a proxy for supplier health and spending increase as a proxy for insight function or department health (acknowledging they are not perfect proxies), we can say that both groups, on average, are healthy, and that suppliers, on average, are enjoying better health than insights functions/departments at buyer companies.

### RESEARCH SPENDING (BUYER)/REVENUE (SUPPLIER) TREND



**SCHLESINGER GROUP**

**WHAT SETS US APART?**

- ✓ A collaborative and consultative approach
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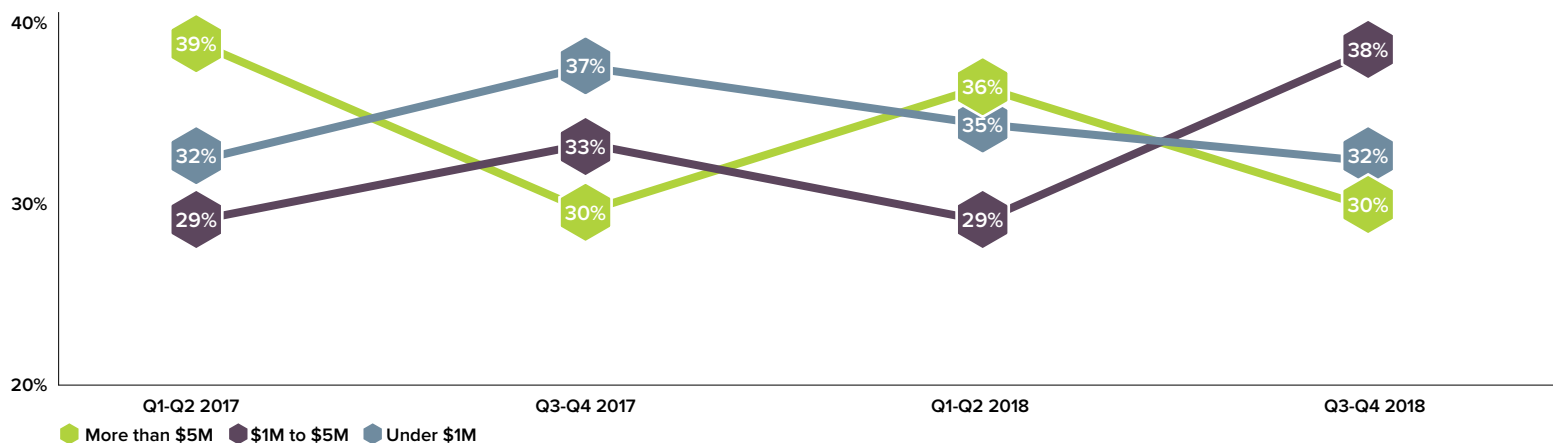
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# TREND: TOTAL ANNUAL RESEARCH BUDGET AND NUMBER OF PROJECTS

The proportion of buyers with annual project budgets of less than \$1M has been fairly consistent over time, while there has been more fluctuation across the larger budget categories.

Currently, the “More than \$5M” category has declined sharply, while the “\$1M to \$3M” category spiked, probably absorbing buyers from the higher and lower categories.

TOTAL ANNUAL RESEARCH BUDGET (BUYER)



If we take revenue increase as a proxy for supplier health and spending increase as a proxy for insight function or department health (acknowledging they are not perfect proxies), we can say that both groups, on average, are healthy, and that suppliers, on average, are enjoying better health than insights functions/departments at buyer companies

To find the point where budget category contraction begins, we break down the “\$5M or more” category and find fewer budgets of \$10M or more, while the size of the \$5M to \$10M category has increased slightly:

% of Buyers	2017 Q3-Q4 (%)	2018 Q1-Q2 (%)	Change from Preceding Period (%)	2018 Q3-Q4 (%)	Change from Preceding Period (%)
Under \$1M	37.2	34.5	-3	32.2	-2
\$1M to \$3M	22.5	19.2	-3	26.2	+7
\$3M to \$5M	10.4	10.0	No change	11.9	+2
\$5M to \$10M	8.1	8.7	+1	10.8	+2
\$10M to \$30M	12.1	13.5	+1	10.1	-3
More than \$30M	9.7	14.2	+5	8.7	-5



## THE BUSINESS OUTLOOK

This contraction at the top end suggests that overall spending for research projects may be suffering, but it is not a conclusion that can be drawn from the survey questions.

Buyers with total (current) annual budgets in excess of \$30M were far more likely to have decreases in spending than those with smaller budgets; some of those could have been in the “More than \$30M” category in the last GRIT report. The significant decreases (8%) match the significant increases (8%), but the slight decreases overwhelm the slight increases, 46% to 21%. The next largest category, those with (current) budgets of \$10M to \$30M, was the category most likely to have stagnant budgets.

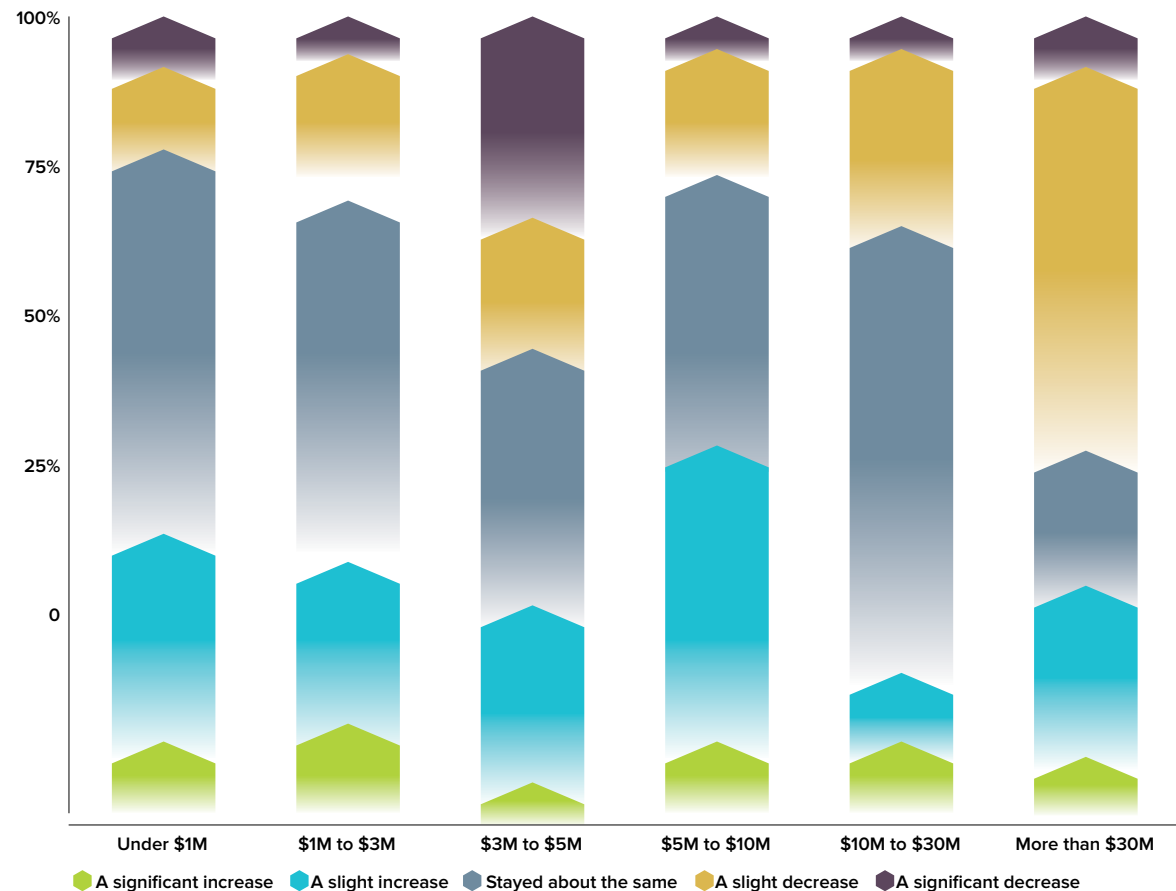
Although we get into small sample sizes (n = 21), if we look at just those buyers with a current budget over \$10M who had a spending decrease, we find:

- 57% are from consumer goods (discretionary and staples, versus 25% that increased or stayed the same)
- 48% are from companies with 51 to 500 employees (compared to 26% who increased or stayed the same)

These two sources (to the extent they don't overlap) of the contraction are buyers in consumer industries and those from companies of 51 to 500 employees. In fact, when discussing the reasons for their revenue decline, several suppliers referenced the budget situation in CPG as a factor.

Similar to annual budgets, the category representing the largest project volume contracted, (from 22% of buyers to 15%).

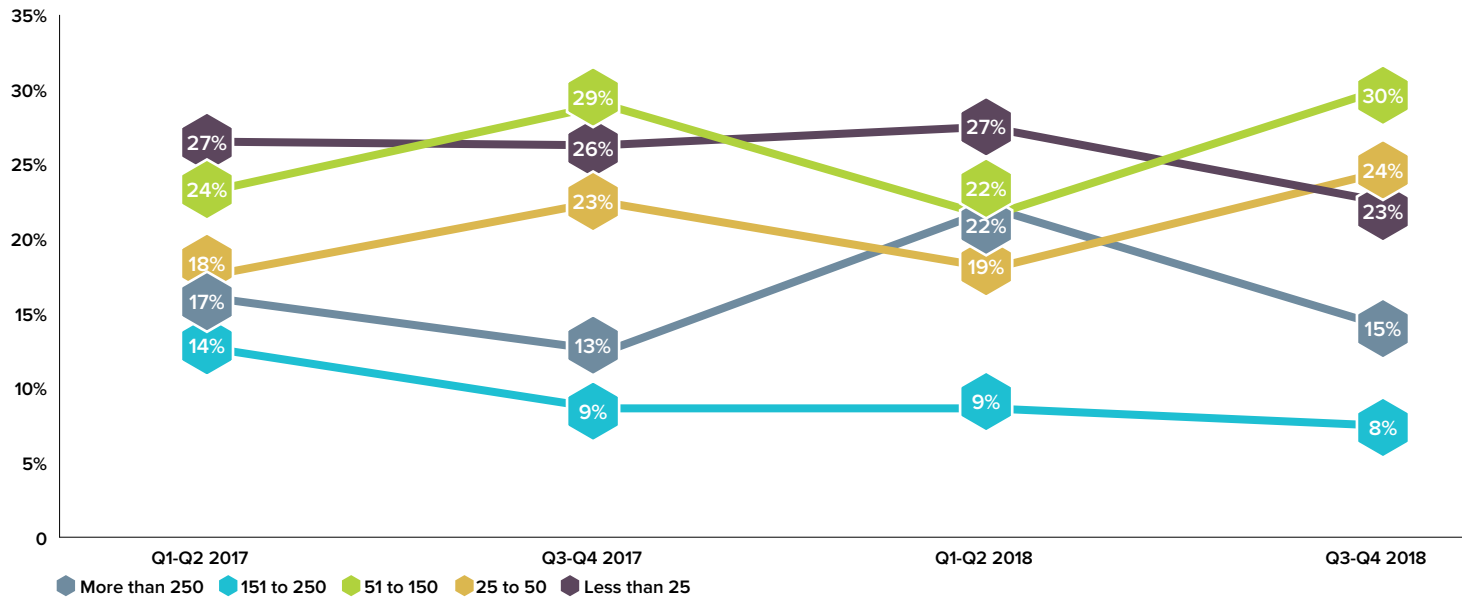
RESEARCH SPENDING TREND BY TOTAL ANNUAL RESEARCH BUDGET (BUYER)



This contraction at the top end suggests that overall spending for research projects may be suffering, but it is not a conclusion that can be drawn from the survey questions

## THE BUSINESS OUTLOOK

### ANNUAL NUMBER OF PROJECTS (BUYER)



Buyers mentioned that they are bundling more objectives into individual projects to achieve efficiencies



As with annual budgets, the upper category had experienced a spike across the preceding two periods.

Changes in project volume are difficult to interpret at a macro level. On the surface, fewer projects may suggest less work or money to go around, but a few buyers mentioned that they are bundling more objectives into individual projects to achieve efficiencies. In some cases, fewer projects may mean a smaller number of larger projects with the same objectives and relative magnitude

% of Buyers	2017 Q3-Q4 (%)	2018 Q1-Q2 (%)	Change from Preceding Period (%)	2018 Q3-Q4 (%)	Change from Preceding Period (%)
Less than 25	26.5	27.1	+1	23.5	-4
25 to 50	23.1	19.5	-4	24.1	5
51 to 150	28.6	21.9	-7	30.0	8
151 to 250	8.9	9.5	+1	7.8	-2
More than 250	12.9	22.1	+9	14.7	-7

of cost; in others, it may mean that buyers are reducing the volume of work they are doing and objectives they are addressing (one GRIT respondent mentioned that their insights department budget was being reduced in order to fund a new group that would address some of the organization's objectives in a different way).



## THE STARK TRUTH OF BEHAVIOR-BASED GROWTH IN CPG

SOME THINGS WILL NEVER CHANGE, BUT YOUR CUSTOMERS KEEP EVOLVING

### Chris Enger

Partner, Periscope® By McKinsey

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**T**he CPG industry is currently facing an unprecedented growth challenge. When looking at data from McKinsey CPA, Capital IQ and Datastream, confidence has doubled since 2011, yet growth has dropped 10% over the same period. Competition for consumer spend is higher than ever, and eyeballs are being pulled in every direction as brands seek to secure their loyalty and revenue. Shoppers are changing too: Millennials are more diverse, sophisticated and demanding than any previous generation of shoppers and increasingly shun big brands. Big brands are also suffering at the hands of smaller nimble start-ups that use technology to drive huge operational cost savings and magnify their marketing muscle. Consumers are also taking a much more ethical view when making buying decisions, and expect transparency from their brands.

There are many more challenges too, but what is true of all of them is that the only way to overcome them and find the opportunities to grow your CPG market share, is to understand how your portfolio is performing at a very granular level, the trends in the market, as well as consumer needs, occasions and behaviors. You may feel you do this already through demand planning tools, but they do not help you understand how consumers are behaving or what influences that behavior, it only tells you what they ultimately bought. Having the understanding of how they reached that final action, is the critical component to growth success.

CONTINUED ON NEXT PAGE



Many big players have tried to out maneuver competitors either through marketing spend or heavy discounting. But in the long run it won't work, it will simply train consumers to only buy a brand when it is on sale and nobody wins in a market built on that premise.

### **A behavior-based approach to growth**

Growth Mapping is the new way to align what manufacturers make with what consumers want. It combines different types of segmentation – of people (demographic), their choices (behavioral), and their underlying needs – to detect and unlock new sources of volume-driven growth, be it from existing, neighboring, or new categories, channels, markets, and brands.

Growth Mapping turns big data into a fact base for the entire organization to rally around and prioritize growth initiatives according to their prospective payoff. It helps companies to answer a series of key questions:

- What are consumers purchasing and using?
- Why are consumers choosing products and brands?
- Who are our current and potential consumers?
- How is the market evolving over time?
- What are emerging trends that are fulfilling unmet needs

By focusing on behaviors rather than simple demand, Growth Maps better enable breakthrough innovation and growth into completely new domains. It is a fact-based approach to identifying growth priorities, which decomposes drivers of consumer behavior and brings the consumer journey to life. This can then be used to drive product innovation, whether through design or marketing.

There are many variables involved in gaining these insights, that the only effective way to achieve the development of Growth Maps is through Machine Learning. This is a key component, one that uses the brute force of computing power to identify the key segmentations and their drivers, by identifying patterns in hours, that could take a human team weeks – if they found them at all! Combined with consumer sentiment analysis, these attributes can be automatically segmented and visualized in a way that allows portfolio teams to quickly make decisions on future product lines, designs, and even categories to invest in.

The future of CPG growth is not out-marketing or discounting the competition, its entirely about understanding your customers and what drives them – and that is something that has never changed.



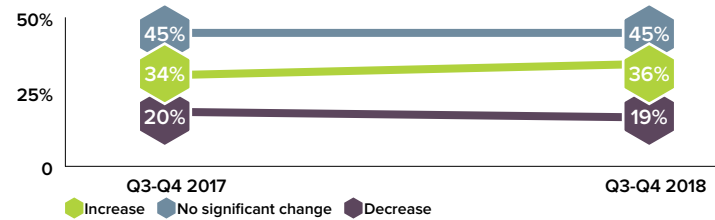
## TRENDS: DEPARTMENT SIZE & TECHNOLOGY SPEND

For both buyers and suppliers, department or research group size increased, decreased or stayed the same in similar proportions as in the 2017 Q3-Q4 GRIT report. In fact, those proportions are similar for each change category across suppliers and buyers. Whether this suggests a conservation of skills and human resources within the industry, emphasizes a symbiotic relationship between buyers and suppliers, or something else is a topic for further exploration.

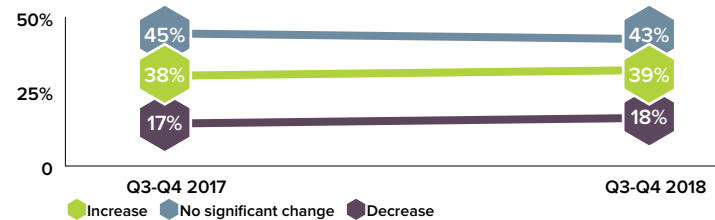
Similarly, technology spend trends display continuity from the last report. Increases and decreases among suppliers and buyers continued at similar levels, both wave-to-wave and supplier to buyer. Increasing spend continues to be more common than maintaining the same level or decreasing.

Despite what some may fear, the investment in technology does not seem to come at the expense of research head count. Overall, 52% of GRIT study participants show the same trend for technology spending as for department size, with one in four increasing both. Comments from study participants commonly mention the pressure to provide cheaper and faster solutions and that technology such as DIY tools facilitate that mission nicely. However, they also commonly mention the need to increase their capabilities and that the way to accomplish that is to add human and technology resources. Some buyers mentioned that technology enables them to become more efficient, and the benefit of that efficiency is to enable their department to handle more work that otherwise could not be addressed.

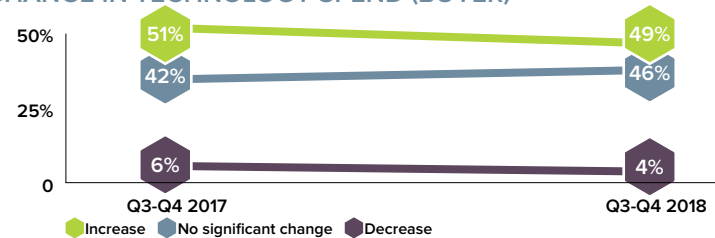
CHANGE IN DEPARTMENT SIZE (BUYER; FULL-TIME POSITIONS)



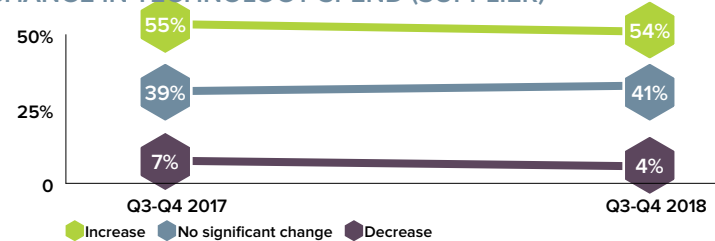
CHANGE IN DEPARTMENT SIZE (SUPPLIER; FULL-TIME POSITIONS)



CHANGE IN TECHNOLOGY SPEND (BUYER)



CHANGE IN TECHNOLOGY SPEND (SUPPLIER)





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For 10% of companies, however, the increase in technology spend coincides with a decrease in head count, a pattern consistent with the concern that automation threatens jobs. Of buyers who increased technology spend while decreasing head count, over 50% serve consumer markets (these companies comprise only one third of companies that increased tech spend but did not decrease department size).

### TECHNOLOGY SPENDING TREND

Department Size Trend	Increase (%)	Stay the Same (%)	Decrease (%)	Total (%)
Increase	26	11	1	38
Stay the Same	18	24	1	43
Decrease	10	6	2	18
Total	54	41	4	100

Despite what some may fear, the investment in technology does not seem to come at the expense of research head count



## DEEP DIVE: SPENDING AND REVENUE TREND DRIVERS

Decreases in buyer spending were driven by internal and external forces. By far, the most frequently named cause of reduced spending was *budget* and *cost constraints*. Other significant factors include *macro-environmental pressures* and adoption of *tech-enabled tools*.

In some cases, the budget/cost constraints were driven from outside the research area; other times, from within. Some buyers believe that spending will rebound once they establish a more efficient model and demonstrate ROI.

Some buyers believe that spending will rebound once they establish a more efficient model and demonstrate ROI



### Constraints from Outside the Department

- Short term economic forces impacting the entire organization has placed tremendous pressure on all departments to become leaner and more agile. Most of the cost reductions impacted areas that were considered wasteful or unnecessary. There is likely to be an increase in research investment in the future, but there will be a much stronger emphasis on proving ROI for research expenditure.
- Change in strategic direction with core business managed for stabilization, not growth.
- Business performance was weak and we needed to make big cuts to save profits.
- Our department has been reduced headcount-wise so we don't have the resources to produce as much research.
- Budget cuts, departments spend their budgets for other things than research.
- Marketing budget cuts impact the company's

### Constraints from Within the Department

- We've made a concerted effort to spend more efficiently – cutting out certain vendors, consolidating work with preferred vendors, and shifting work away from outside providers to our own team. So I haven't "lost" budget, I've intentionally reduced my spend by being more effective.
- Change in department leadership and decision makers.
- My leader screwed up our budget and is now trying to backtrack and get rid of things he deems unnecessary, even though we have tried to tell him they ARE necessary. It's going to be a rough year.

Macro Environment  
 Budget/Cost Constraints  
 Tech Enabled Tools



## THE BUSINESS OUTLOOK

When buyers cited external forces as reasons for reduced spend, explanations were vague. When they cited tech-enabled tools, the comments seem more proactive and positive and are linked to the idea of being able to do more with the same or fewer resources.

### Macro-Environment

- Government austerity.
- Economic downturns.
- Macroeconomic impact on business.

### Tech-Enabled Tools

- Automation and DIY.
- Move to tech-enabled tools has resulted in cost of research coming down, but total number of projects is up significantly.
- Automation: we conduct more surveys from online communities and tracker.
- Using faster, cheaper DIY type tools more often.

Cost constraints, the macro-environment, and tech-enabled tools were leading reasons given for decreases in supplier revenue



Some other responses cite internal restructuring that removed budget or stalled spend and unique circumstances that created a spending spike in 2017.

- Team was split and lost budget to a new non-insights team that was created.
- Acquired another company, divested key brands, no strategic direction necessitating research as the company determines future structure.
- 2017 had a peak due to strategic transformation initiatives for the business.
- Launched two new products this year so more research was done last year.

Similarly, *cost constraints*, the *macro-environment*, and *tech-enabled tools* were leading reasons given for decreases in supplier revenue. In addition, suppliers pointed to *internal changes*, *increased competition*, and *lower volume of work* due to loss of recurring work or inability to win new work. Their comments seem to reflect the interconnectedness of revenue influences and could be classified under multiple themes.

Increased Competition  
 Macro Environment  
 Budget/Cost Constraints  
 Tech Enabled Tools    New Work Lacking  
 Organizational Changes

## THE BUSINESS OUTLOOK

Budget and cost constraints arise from internal and external pressures. Internally, zero-based budgeting is mentioned often and sometimes money is invested in efforts that have not yet produced revenue. Budget constraints from outside the company include clients putting more pressure on each project to reduce price, and the pressure that clients feel,

### Budget/Cost Constraints

- Zero-based budgeting.
- Time and cost Investments in other areas to grow the company. Didn't pan out – yet.
- Client's need for services remains the same, but they want them delivered faster/cheaper/lower level of quality that could get them in trouble later down the line. We are looking for ways to deliver at their request level without giving them a “cheap” product or service. Our business culture seems to be moving to a “minimum qualifications” model rather than a model of expertise with long term value.
- Pressure on client budgets, particularly in CPG. Brand Tracking needing a significant evolution/disruption (clients and suppliers not going fast enough).
- CPG firms especially going through budget/staff cuts and not spending on custom work.
- Less FMCG income.

particularly in CPG, which ripple through to the balance sheet for suppliers. Macro-environmental factors include the industry shift away from traditional research, client adoption of automation and taking work in-house, political uncertainty, and poor economic situations.

### Macro-Environment

- Industry is changing – moving away from surveys to a broader mix of data and moving more toward automation; we need to move more nimbly in these areas.
- Clients want to pay less for more work and consumers are more and more fatigued with research so it has become harder to collect information.
- Change! Clients, market dynamics and influences that commoditize insights professionals, consolidation of large research houses that scoop jobs with bargain basement prices, and need to expand beyond Canadian market which is a small, cheap and depressed market thanks to current political and economic climate.
- Companies keeping more work in house. Decline in research budgets.
- Uncertainty in the political climate affected our main client's expenditure.
- Uncertainty in the UK market over Brexit.
- Overall, it is a decrease business across industries
- Economy is bad in many countries, and the research industry is getting extremely competitive.
- Global economic situation in particular in Latin America.
- Economical and government changes in the

The mainstreaming of tech-enabled tools translates into lost business, in the worst case, and price reductions if the supplier retains the business



## THE BUSINESS OUTLOOK

The mainstreaming of tech-enabled tools translates into lost business, in the worst case, and price reductions if the supplier retains the business. Comments relative to internal changes are reminders that researchers in larger companies are vulnerable to restructuring and that those in smaller companies are vulnerable to loss of key personnel.

### Tech-Enabled Tools

- Lower spending by clients, clients using more DIY tools.
- Clients conducting surveys themselves with Survey Monkey and other similar platforms.
- Market has changed and while working for a supply-side research firm, the demand for syndicated research has gone down. Clients have access to data online.
- More cost effective ways of research using technology.
- Our clients are using more the traditional research methods so they had decline in project amount. Automation and pricing implications are the main factor.

### Internal Changes

- Change in market and internal organization structure.
- Consolidation of research group, decrease in custom business.

Generally, those who work for suppliers see immediate and dramatic impact of sales results. Many comments focused on the lack of time for client development and the over-reliance on a small number of large clients. Others lamented their lack of competitiveness, either on price or offering, especially in the context of producing more faster and cheaper.

### Lack of Work – Need for New Client Development

- Loss of sales staff.
- Less demand, lower lead generation effort on our part.
- Largest client is dormant this year.
- Was very busy in 2017, but little time to develop new client relationships. Little carry over work from 2017 left 2018 somewhat dry. Larger client's work is cyclical and while 2017 was very strong, 2018 is less so, with 2019 already in planning.
- Main client has reduced the number of assignments/projects for which I specialise, plus decrease number of additional projects.
- Too much reliance on repeat business from existing clients.
- Corporations getting rid of the strategic insight departments and/or connections within corporations retiring/being laid off – so personal connection to decision makers being lost.

### Lack of Work: Not Competitive

- We have a sales organization that is incapable of articulating value of a research product that is outdated due to a lack of innovation, paired with ever-increasing client expectations around time to value and ROI on their spend.
- Dollars not going toward high quality custom quantitative research.
- Lack of innovation.
- Competition from non-traditional MR players.
- “Too high” price positioning leading to numerous project losses. In reaction, a decision to lower down price to get back volume, but additional volume gained not yet sufficient to compensate.
- More “do it yourself” options; also stronger competition in the marketplace.
- Tough market, big projects lost.
- Not competitive enough on price and innovative techniques.

## THE BUSINESS OUTLOOK

To address the spending decline, buyers mentioned *changing strategy* and *increasing the focus on research* (demonstrating value) throughout the company.

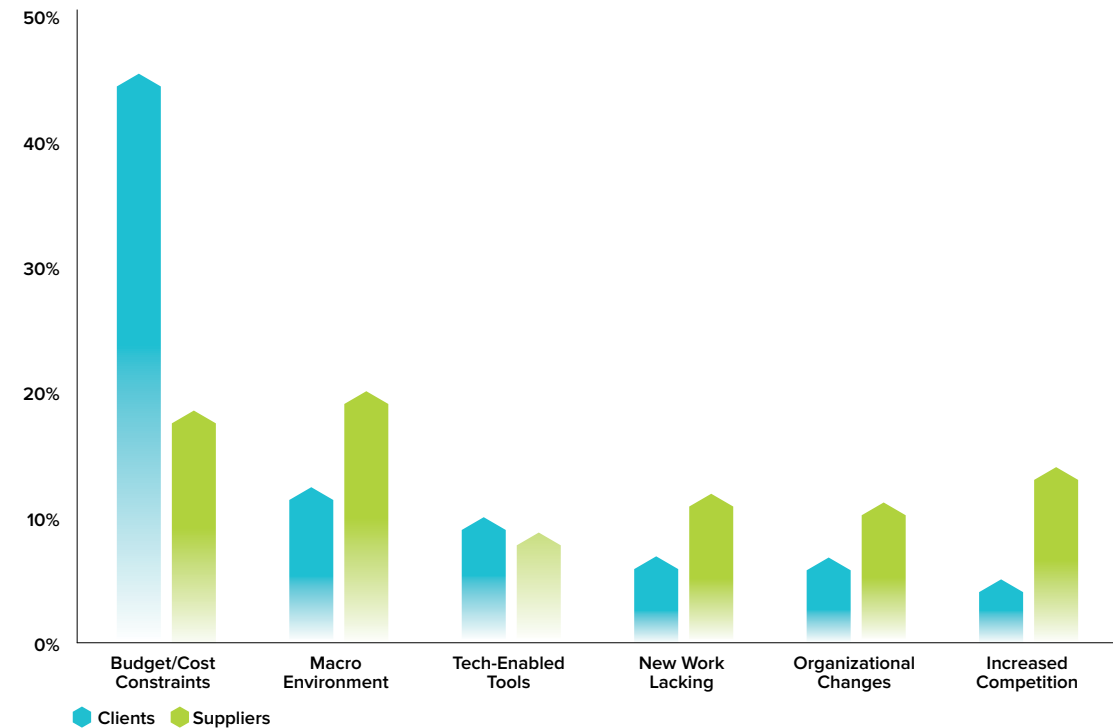
### Change Strategy

- Use more versatile research vendors and do more complex studies with multiple objectives.
- Work with other teams to co-fund projects.
- Technology is allowing us to change the way we conduct research. We have a lot of information available to be analyzed and many questions are answered not only on primary research, but using big data analytics and secondary sources.
- Lean more on communities (great value and speed).
- Keep driving to make our research more productive.
- Lower sample size, put pressure on suppliers, more “In-house research” approach, less cost demanding projects.

### Increase Focus on Research (Demonstrate Value)

- Show what research can provide for the company, its value.
- Demonstrate ROI of studies.
- Continue to emphasize that the real power is going to come from the combination of behavioral and attitudinal data. Data analytics is still the big buzz winner of the moment...eventually businesses will realize we should have focused on adding (to more traditional insights/ research approaches) instead of replacing.

### WHY DO YOU BELIEVE THERE WAS DECLINE?



- Need to manage expectations from research ... many stakeholders expect magic, new insights all the time, research to solve all their business problems, consumers to tell them what they want, etc., but, in reality, many of these cannot be answered by market research alone.

Others lamented their lack of competitiveness, either on price or offering, especially in the context of producing more faster and cheaper



## THE BUSINESS OUTLOOK

Other responses to the decline include “MR needs to deliver higher value from data and insights” and “doing nothing” because the reduction was appropriate, caused by an unusual spike, or will be offset via efficiency gains.

- Do nothing. [The reduction]’s appropriate.
- Nothing. We launched two new products this year, so more research was done last year.
- Nothing; continue to use fast/cheap tools as appropriate.

Product Innovation  
 Increase Marketing  
 And Promotion  
 Change Strategy  
**Tech Enabled Tools**  
 Diversify Client Base  
 Educate Clients  
 Wait It Out

Suppliers will address revenue declines via tech-enabled tools and improving sales and marketing efforts.

### Tech-Enabled Tools

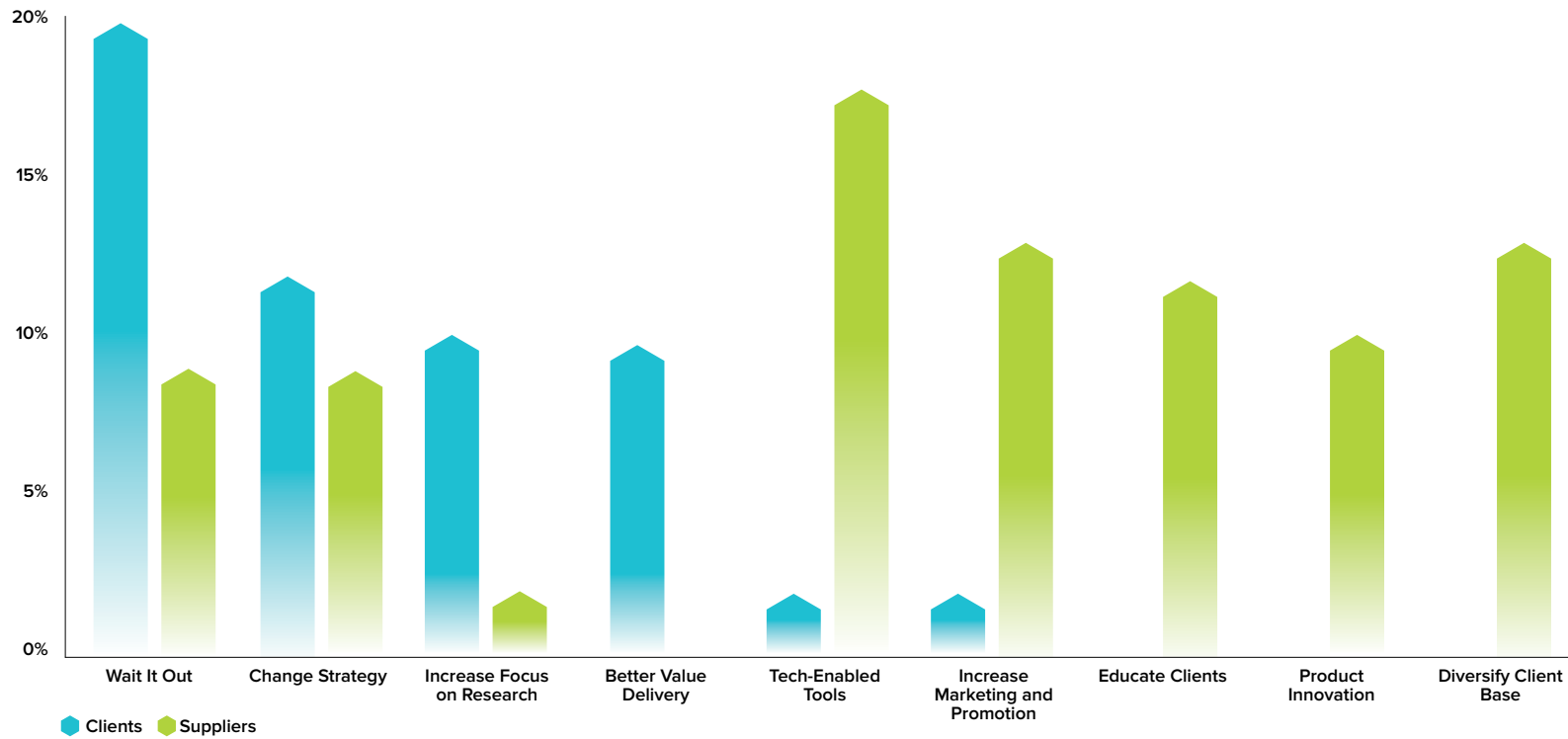
- Bring in work efficiency through automation to drive value for overhead costs incurred. Ramp up sales and business development efforts to gain more custom and syndicated business.
- Focus on custom research while looking for ways to leverage AI.
- Specialization, new approaches that can’t be replicated by clients (AI, Platforms, multi-data sources, predictive analytics).

### Improve Sales & Marketing

- Hire sales support, simplify offering, standardize and scale solutions.
- Higher priority on direct-to-client sales growth.
- Ensure we have a wider pool of clients – not be reliant on 1-2 big clients.
- Focus on forward selling.

## THE BUSINESS OUTLOOK

WHAT, IF ANYTHING, WILL YOU DO TO ADDRESS THE DECLINE?



Some will focus on innovating their offerings and the way they do business.

### Innovation

- Innovate and recruit smarter people.
- We are focusing on new revenue streams as well as affordable options for clients.
- Improving our knowledge of new technologies.
- Partner with firms delivering alternative sources of data.
- Concentrate and invest in growth areas while disrupting brand tracking.

## THE BUSINESS OUTLOOK

Buyers gave diverse reasons to explain their increased spending, including a *change in strategy* and *product innovation* (or business innovation).



### Change in Strategy

- New customer insight function
- New leadership, more focus on marketing
- Setting a goal to drive strategy from data.
- The Consumer Insights department didn't exist before this year
- The creation in 2018 of a specific Business Intelligence department to design and execute research projects for all areas of the company. This function was previously handled by the Marketing department.
- Use of an actual experimentation platform as opposed to the shams we used to use.
- Better process integration
- Return to traditional methodologies
- Management focus on having metrics and data (even if they don't know why or how to connect

### Product Innovation/Business Innovation

- New products.
- A new product added to the portfolio.
- Research and development.
- The development of a new brand for our business.
- Innovative approach to marketing & decision making which should be planned based on digitally driven market insights.
- Need to provide innovative products and make sure the ones we have are adequately serving the market.
- The need to innovate and better understand new



## THE BUSINESS OUTLOOK

Different types of focus also spurred the increase. These included enhanced focus of the company on the customer or consumer and improved focus on the end user of the research. A sense of urgency around growth and the recognition of the work produced by the insights team also lead to more spending, and improved focus in particular areas, such as digital solutions, were also credited with helping to increase spending.

### Client (& Customer)-Centricity

- A focus on customer centricity.
- Consumer centric thinking is driving the business.
- Need for customer-based insights to help drive senior management planning.

### Hard Work & Focus

- Strategic focus on business implications rather than simply results or insights. Consulting with organizations to drive change and impact of their insights work.
- Urgency around business results, limited category growth and the need to develop consumer relevant solutions to steal market share from competitors.
- Intense focus on growth from the most senior levels of management
- Intense focus on growth.
- Focus on growth sectors.
- Focusing in digital solutions.
- More targeted and focused sales strategy.
- Demand. We did good work and other people wanted to participate, so they were willing to contribute funds to the research budget.
- Providing good work including innovative methodologies and visually compelling research projects. Better insights.

Buyers also mentioned:

- Better business results, improved economy
- New needs, strategic project that is not done every year.
- Better understanding of the value it adds

A sense of urgency around growth and the recognition of the work produced by the insights team also lead to more spending



## THE BUSINESS OUTLOOK

Reasons for supplier revenue growth were diverse, and two stood out as mentioned more frequently, *product innovation* and *increasing the client base*. They mirror two of the reasons for revenue decline: lack of a competitive offering and need for new client development. These are often mentioned in tandem, and go hand-in-hand with use of *new tools and technology* and *client-centricity*. In several cases, suppliers mention that new products or technology enable them to reach out to new clients that were previously not accessible.

### New Tools and Technology

- Absorbing new technologies and data-based research products.
- Exceptional data visualization along with good press and lots of networking.
- SaaS technology platform scalability and stability; industry adoption of non-conscious techniques; industry adoption of implicit as a top non-conscious technique
- Automation, product marketing, positioning our software as 'experimentation' complementary to more traditional market research.
- Transformational software development and big partnership contracts.
- We continue to investigate new methodologies, while providing strong research that clients can base decisions on.
- Automatization, in-housing.
- Massive shift to automated/programmatic sampling.
- Adoption of programmatic and automation

## Quality Of Service Increase

More Or Bigger Projects

Sales New Tools And Technology Sector Growth

# Product Innovation

Improve Skills And Knowledge

Automation

Change Strategy

## Client Centricity

Brand Awareness Increase

# Increase Client Base

### Product Innovation

- New products.
- Unique research approaches and client relations.
- Transition from traditional to agile MR & rolling out new product solutions.
- Delivering innovative solutions.
- Innovative methods and expanded marketing focus.
- Custom studies, innovative designs, thought leadership.
- Do innovative research, not like this questionnaire. Come on guys.
- We're capturing share from the big guys due to innovation.

Reasons for supplier revenue growth were diverse, and two stood out as mentioned more frequently, product innovation and increasing the client base



## THE BUSINESS OUTLOOK

### Increased Client Base

- Innovations in new marketplaces, expanding into our whitespace and understanding what the customer is looking for.
- Our push for obtaining a new and continued customer base is what has driven our growth. We have several account managers and the owners of the company actively seeking new customers to combine with our current customer base.
- Focusing intensively on generating new business, and letting clients/marketing lead the development of projects/ methodologies in some cases.
- Diversification of client base
- Adding more new clients than losing existing ones.
- Finding and nurturing dissatisfied clients of other agencies.
- We acquired more international customers.

### Client-Centricity

- Internal reorganisation to provide clarity and stronger client focus.
- Innovation, client orientation, better presentations with storytelling, and quality service.
- Innovation, agility and client-centricity.
- Relationships that are built on trust & attention to detail.
- Increased level of client servicing and offerings, addition of good salespeople.
- Clients who value my services and have given repeat business.
- Changing business mix, focusing on more profitable lines of work and working with direct clients rather than subcontracting.
- Superior client relationship management and new reporting tools.

Some suppliers also mentioned that revenue growth was influenced by improving knowledge and skills, especially relationship-building skills. Hiring played an important part in growing their capabilities.

### Improved Skills and Knowledge

- Innovation, new products and superb people with the right skills.
- Specific skills for specific markets.
- More internal understanding and engagement.
- Skill development within the team, better business development/relationship building.
- Service levels; relationship management; support for client needs; technical skills; innovation.
- Innovation. Business knowledge
- Client business knowledge, being a partner from question research, trendy emerging tech offering.
- We actively engaged in new business development this year; last year we spent time revamping our systems, our knowledgebase, our documentation, our methods & our network.

Some suppliers also mentioned that revenue growth was influenced by improving knowledge and skills, especially relationship-building skills. Hiring played an important part in growing their capabilities



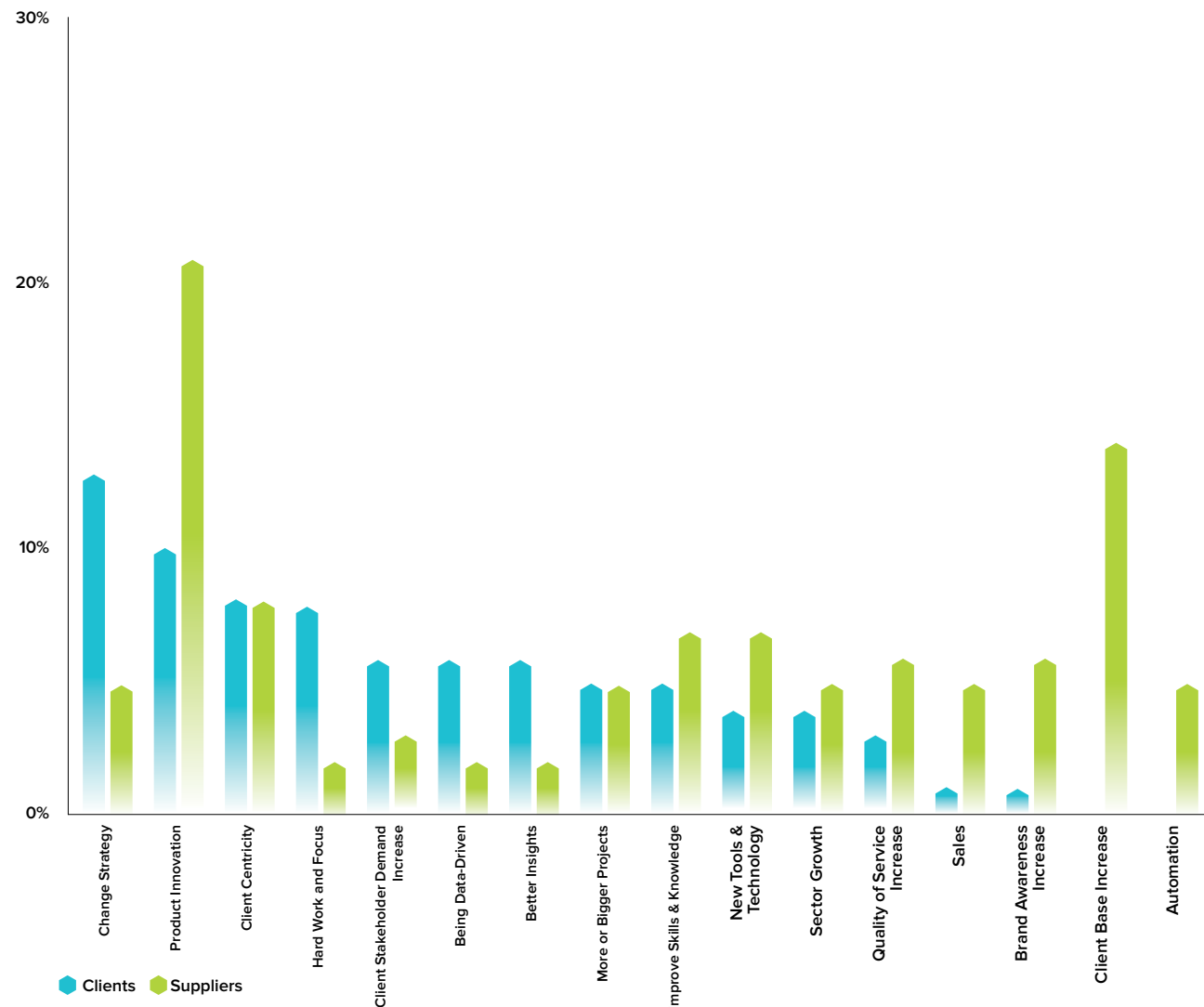
## THE BUSINESS OUTLOOK

Though not designed specifically for this purpose, additional data from the GRIT survey provides more insight into why certain buyers increased spending or revenue. Key themes that emerge from both buyers and suppliers provide clues to the secrets of their successes:

- Future growth strategy is always top of mind in their company's culture.
- Increased spending and revenue is correlated with increased technology spending and increasing the size of their department. It is not clear which drives which, and maybe it doesn't need to be; the associations may be the logical outcomes of a growth-centered culture.
- At least some individuals are not fully subscribed to project work so they can focus on working on the business, not just in the business.
- They share active dashboards and visualization tools with their clients.

Although these buyers have increased spending on technology tools, they do not prioritize innovation above other factors when evaluating a research methodology. Given that they are also more likely to be completely satisfied with the value for the cost they get from their suppliers, they

### WHAT DO YOU THINK DROVE GROWTH?



## THE BUSINESS OUTLOOK

may have a clear vision of where value lies. From that perspective and within the context of comments shared earlier in this section, they may understand innovation to be an enabler of the benefits they get from research, but not a benefit on its own.

Buyers who decreased spending seem to fit the firmographics discussed earlier in terms of industry and research budget amount. Interestingly, they tend to be more involved with client staff meetings, corporate level strategic planning, senior management interaction, and measuring project ROI. From a certain point of view, it seems counter-intuitive that buyers who participate in these ways are spending less on research projects when such behavior would be expected to produce positive outcomes. On the other hand, some of the information discussed earlier supports the following hypotheses:

- Some buyers with these behaviors consider reduced spending to be a positive outcome because they have, for example, reduced waste.
- Some buyers may have been forced to adopt these behaviors because their company faces a crisis.
- For others, these particular activities may cannibalize time from core activities that produce the most value.

Perhaps ironically, while some of these activities are prominent among buyers who spend less, they are also prominent among suppliers who increased revenue. Perhaps suppliers who are key business partners need to engage in these activities so they better understand the business; perhaps members of the research group don't need to because they are already embedded in the culture and have more opportunities to interact with others internally.

These suppliers also focus on exploring new methods, technologies, and business models and are likely to use multiple data sources to address study objectives. With a more integrative point of view, they may be good partners for those who want to choose methodologies based on the potential for delivered value. A supplier with a broader range of tools may be less likely to try to fit research objectives into an inappropriate box.

It is also interesting that these suppliers are more likely to believe that clients are not at all satisfied with their suppliers. Perhaps they are highly critical of other suppliers and thus are able to position themselves as “outsiders.” This hypothesis seems to fit with the comments shared earlier, which seemed to be spiced with “attitude.”

Although users have increased spending on technology tools, they do not prioritize innovation above other factors when evaluating a research methodology



A supplier with a broader range of tools may be less likely to try to fit research objectives into an inappropriate box



## THE BUSINESS OUTLOOK

To summarize the findings from the survey, buyers who increased spending are more likely to have these characteristics compared to buyers who did not:

### COMPANY CHARACTERISTICS

- Service or technology industry
- In business 11–20 years
- 101 to 1,000 employees
- Conduct either fewer than 25 or 51 to 100 research projects annually

### WHAT THEY DO

- Always/frequently gives access to active dashboards and visualization tools to clients
- Less than “frequently,” their organization regularly interacts with senior stakeholders
- Are not considering or do not use:
  - Online communities
  - Eye tracking
  - Applied neuroscience

### STRATEGIES THEY USE

- Increase full-time equivalent positions in department
- Increase spending on technology tools
- Always/frequently focus on future growth strategy
- Do not prioritize innovation highly when choosing methods (rank “innovative approach” last in method prioritization criteria)

### PERSONAL SITUATION

- Spends no time:
  - designing research projects
  - presenting to results to key stakeholders
- Completely satisfied with value for the cost

On the flip side, characteristics that are more prominent among buyers who decreased spending include:

- Serve a consumer market
- Have total annual research project budgets of \$30M or more
- Conduct more than 250 projects annually
- Have been In business 20+ years
- Decreased full-time equivalent positions in department
- Always/frequently:
  - Participate in clients’ staff meetings
  - Involved in strategic planning sessions at the corporate level
  - Regularly interact with senior stakeholders
  - Measure the ROI impact of the projects they conduct
- Less than “frequently” give access to active dashboards and visualization tools to clients

Note: these characteristics appear more frequently among buyers who increased spending; buyers with other characteristics that were not as prominent also increased spending.

## THE BUSINESS OUTLOOK

Suppliers who increased revenue are more likely to have these characteristics compared to suppliers who did not:

### COMPANY CHARACTERISTICS

- 11 to 1,000 employees
- Sample/Panel Provider
- Platform/Software Provider

### STRATEGIES THEY USE

- Always/frequently focus on future growth strategy
- Increase full-time equivalent positions in department
- Increase spending on technology tools including:
  - Sample quality and/or management
  - DIY solutions
  - Data integration including warehousing and meta-analysis type platforms
- Rank scalability highly
- Considers internal leverage a highly important element of a market research study

### WHAT THEY DO

- Do not use:
  - In-person focus groups or CATI
  - Discussions Using Online Communities
- Use mobile surveys
- Use at least one quant method
- Always/frequently
  - Gives access to active dashboards and visualization tools to our clients
  - Involved in strategic planning sessions at the corporate level.
  - Participate in clients' staff meetings.
  - Use multiple data sources instead of a single study to address business issues.
  - Explore new methods, technologies, business models and partners
- Use biometrics or neuromarketing plus "other" methods not mentioned in the GRIT survey

### PERSONAL SITUATION

- Spends little time managing research projects or analyzing/interpreting results
- Regarding buyer satisfaction with providers, more likely to believe:
  - Buyers are not at all satisfied with them
  - Buyers are not highly satisfied with providers' data analysis or recommendations

Note: these characteristics also appear more frequently among buyers who increased spending suggesting consistency with the Benchmark measures reported herein in a proceeding section. However, we should note that buyers with other characteristics that were not as prominent also increased spending.

It may be that this class of suppliers channel the assumption that Buyers are dissatisfied overall into a strategy to keep driving the relationship and deliverables top exceed expectations, and/or to tightly control expectations based on their offerings as distinct from the broader "insights consultancy" type of expectations.

Suppliers whose revenue decreased are not at all homogeneous, but a couple of characteristics pop out:

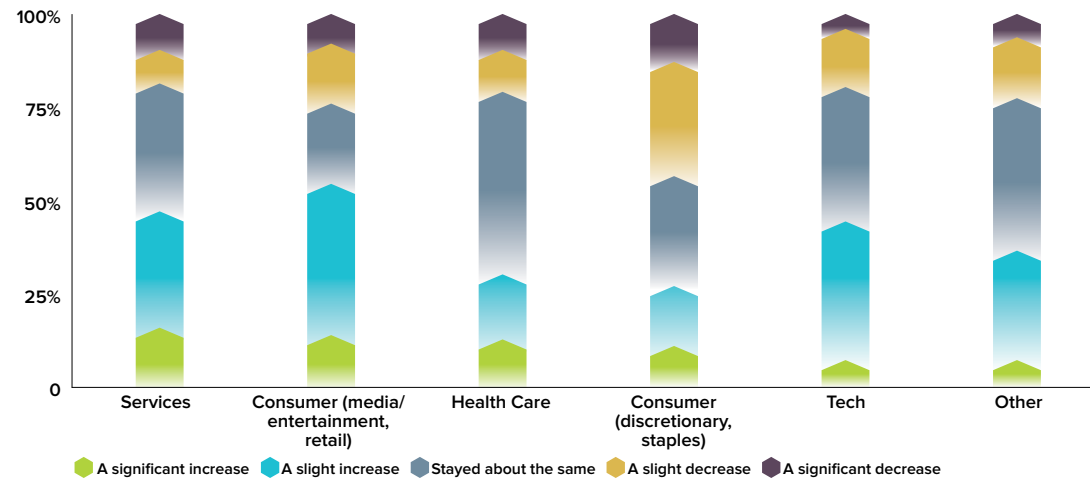
- Have 1 to 4 employees
- Research Freelancer/Consultant



# INDUSTRY & PROFESSIONAL FOCUS

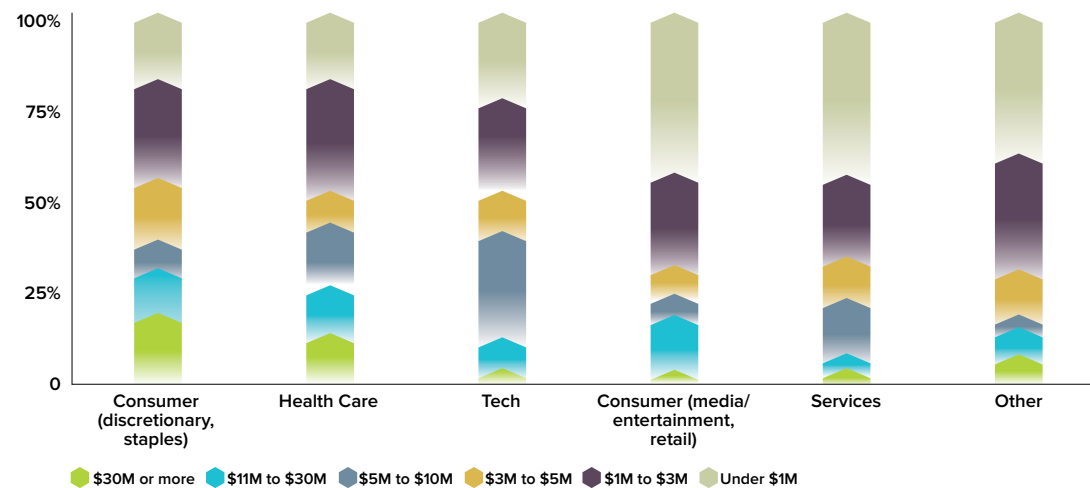
Buyers in services (professional and financial services) and tech (information technology and telecommunications services) were mostly likely to have increased spending (45% of each) while those in consumer (discretionary, staples) had the most decreases (44%). Although both sectors experienced the same proportionate amount of increases, twice as many had significant increases among services than among tech.

RESEARCH SPENDING TREND BY INDUSTRY (BUYER)



Consumer (discretionary, staples) and health care have the highest proportion of budgets of \$10M or more. The smallest budgets are concentrated in consumer (media/entertainment, retail), services, and other sectors.

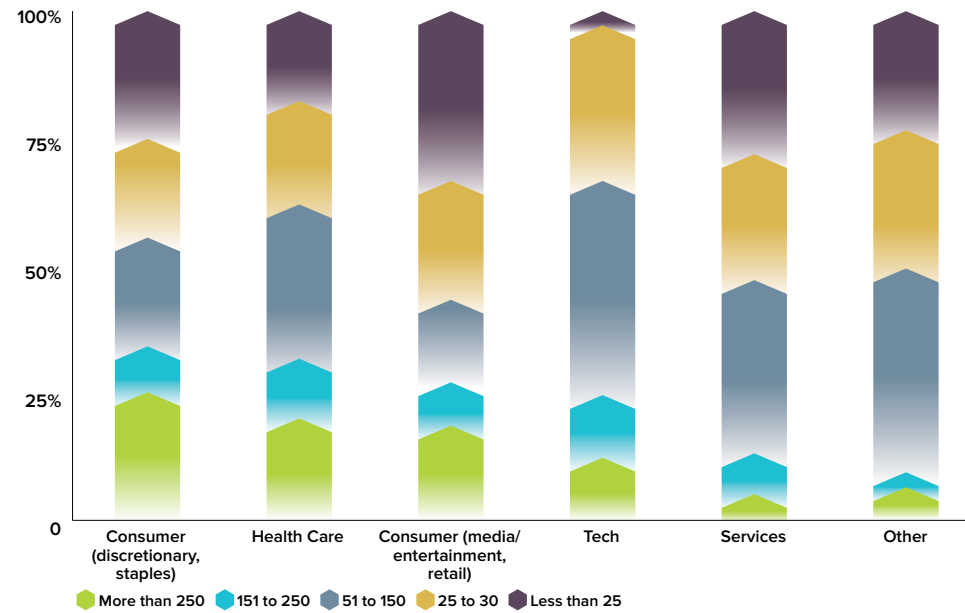
TOTAL ANNUAL RESEARCH BUDGET BY INDUSTRY (BUYER)



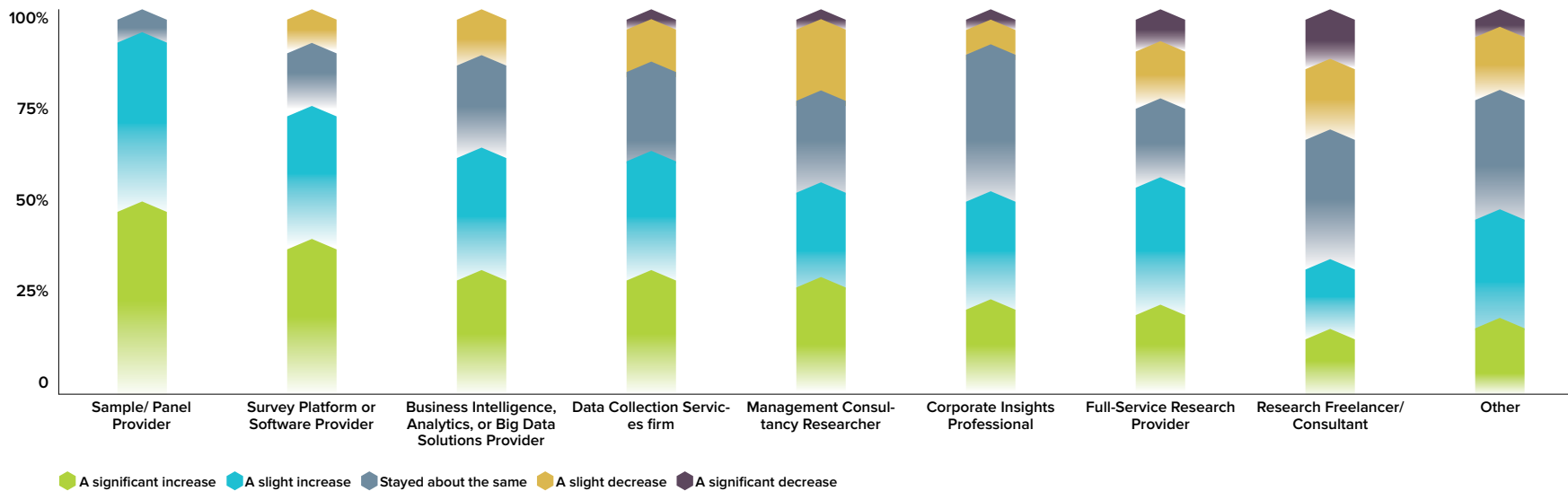
## THE BUSINESS OUTLOOK

Among suppliers, sample/panel providers and platform/software providers have the highest proportions of companies that increased revenue. The highest proportions of decreased revenue are among research freelancers/consultants, full service research/Ad & PR agencies, management consultancies, and “others.”

### ANNUAL NUMBER OF PROJECTS BY INDUSTRY (BUYER)



### REVENUE TREND BY PROFESSIONAL FOCUS (SUPPLIER)




# GLOBAL REGION

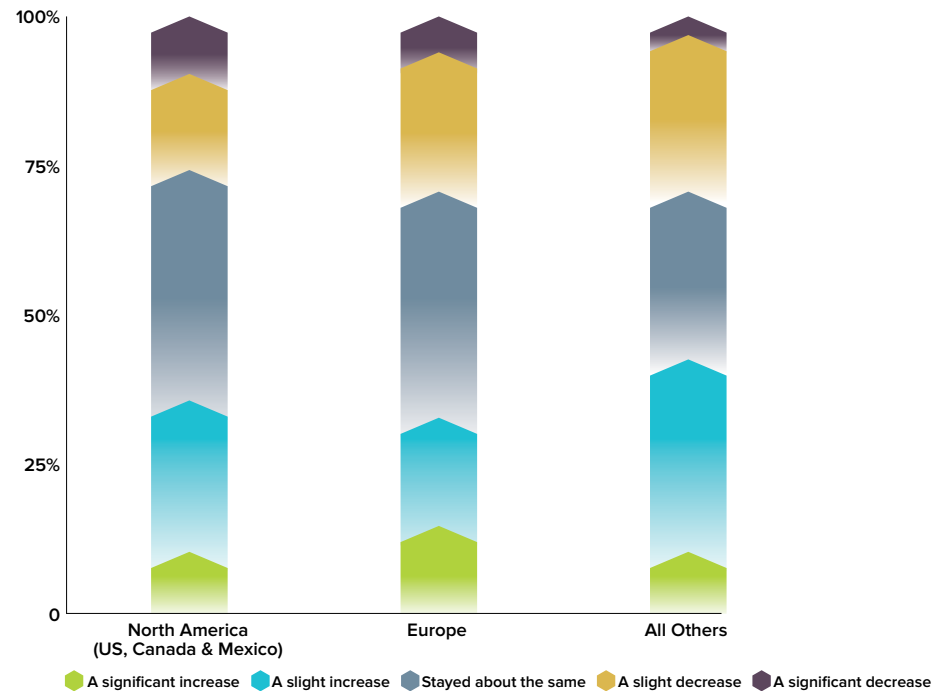
Proportions of spending increases were similar across global regions, with regions outside of North America and Europe slightly higher. Those regions, however, also had slightly more decreases, resulting in the smallest proportion of spending that stayed the same.

The proportion of budgets \$10M or more is around 20% of buyers in each region, although skewed more toward budgets of over \$30M outside of North America. Europe has the highest proportion of budgets under \$3M at 70%, compared to 56% for North America and 58% for all other regions.

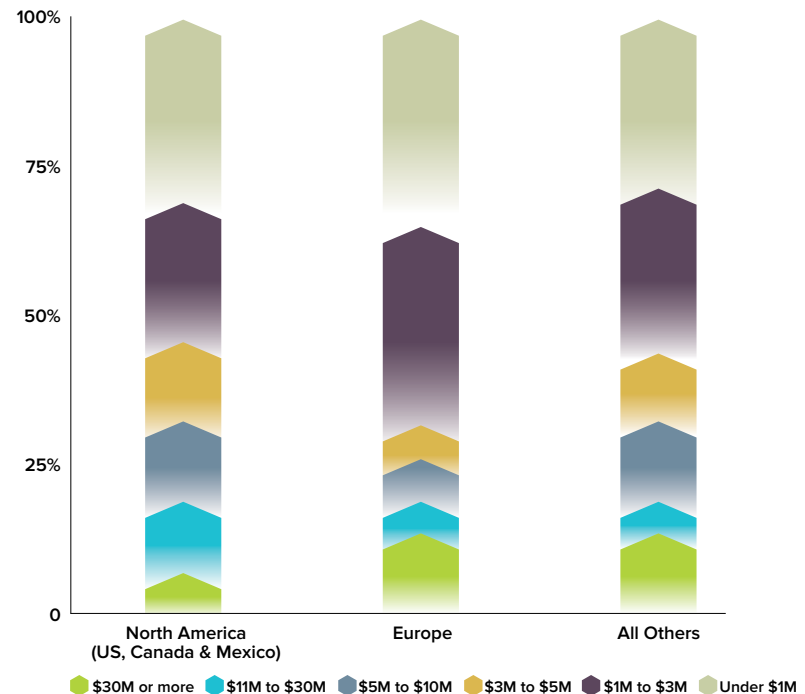
Europe has the highest proportion of budgets under \$3M at 70%, compared to 56% for North America and 58% for all other regions



RESEARCH SPENDING TREND BY GLOBAL REGION (BUYER)



TOTAL ANNUAL RESEARCH BUDGET BY GLOBAL REGION (BUYER)



## THE BUSINESS OUTLOOK

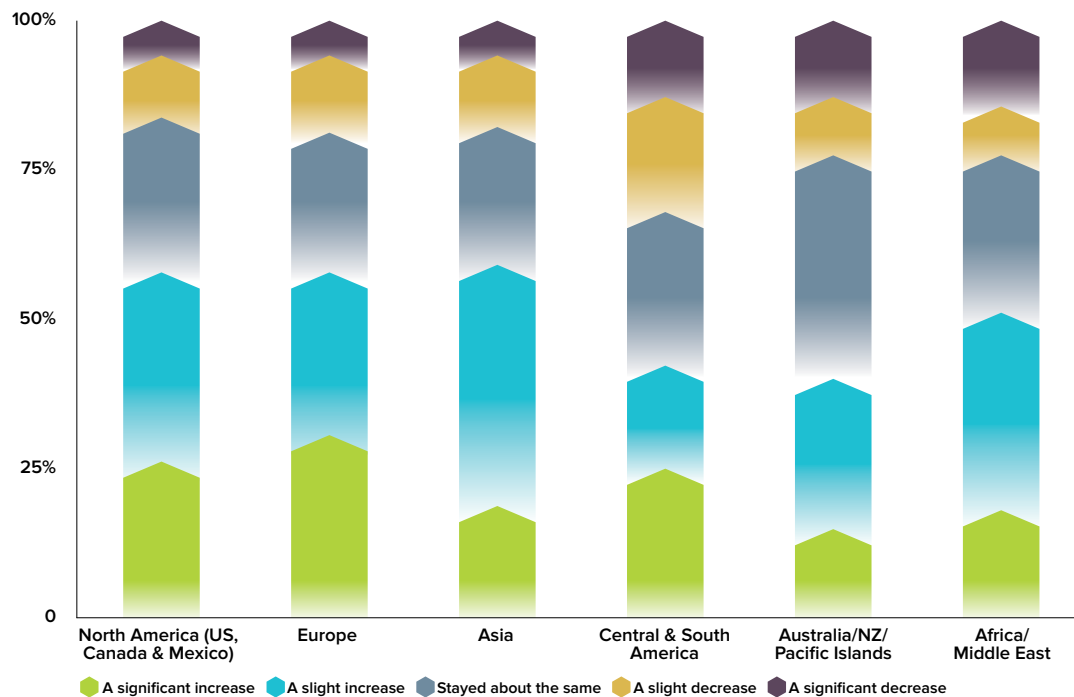
Europe has the lowest proportion of project volume in excess of 150 per year (16%) compared to North America (24%) and other regions (26%). North America has the lowest proportion of project volumes 50 or fewer (45%) compared to Europe (57%) and all other regions (51%)

Regarding supplier revenue, the proportions of spending increases were similar for North America (58%), Asia, (58%), Europe (57%), and Africa/Middle East (51%). Proportions were lower for Central & South America (42%) and Australia/NZ/PI (40%). Revenue decreases are most frequent among Central & South American suppliers (33%)

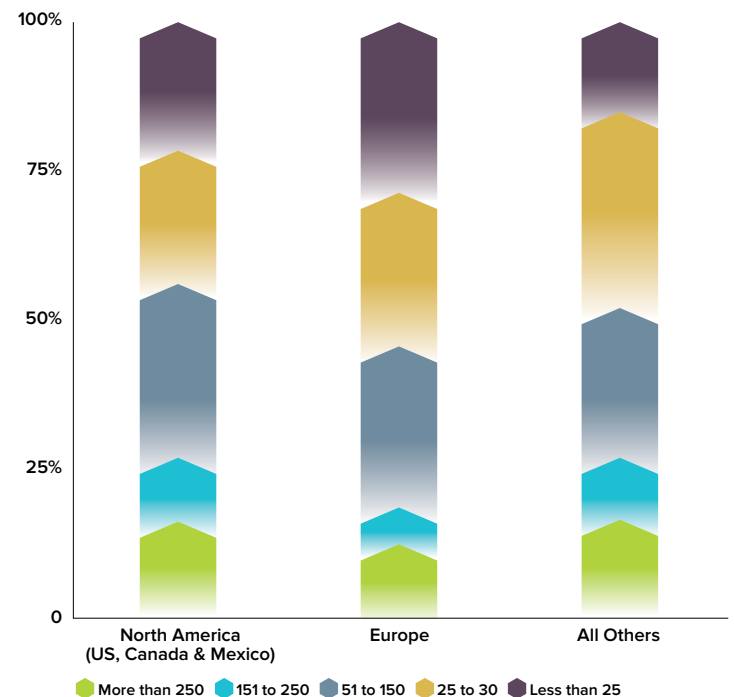
Revenue decreases are most frequent among Central & South American suppliers (33%)



TOTAL ANNUAL RESEARCH BUDGET BY GLOBAL REGION (BUYER)



ANNUAL NUMBER OF PROJECTS BY GLOBAL REGION (BUYER)

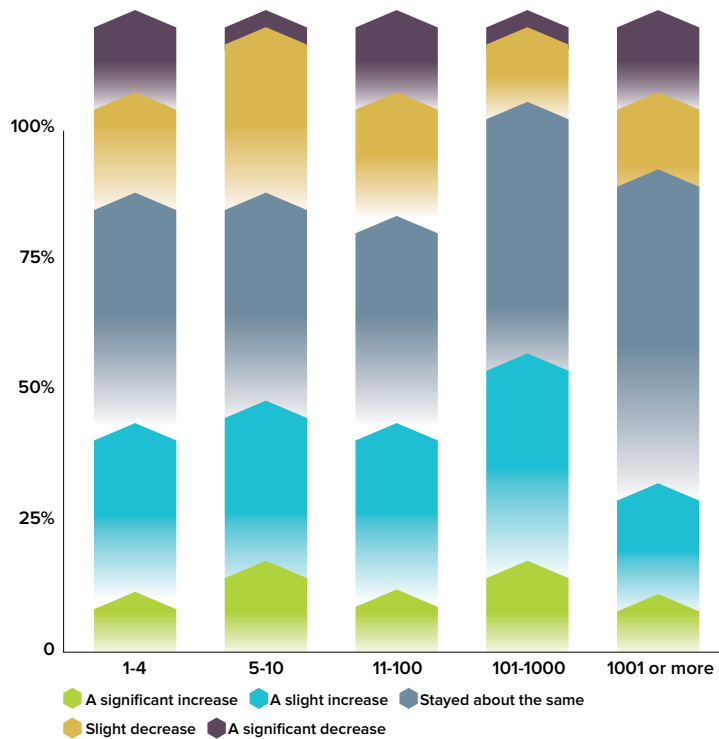


# EMPLOYEE SIZE

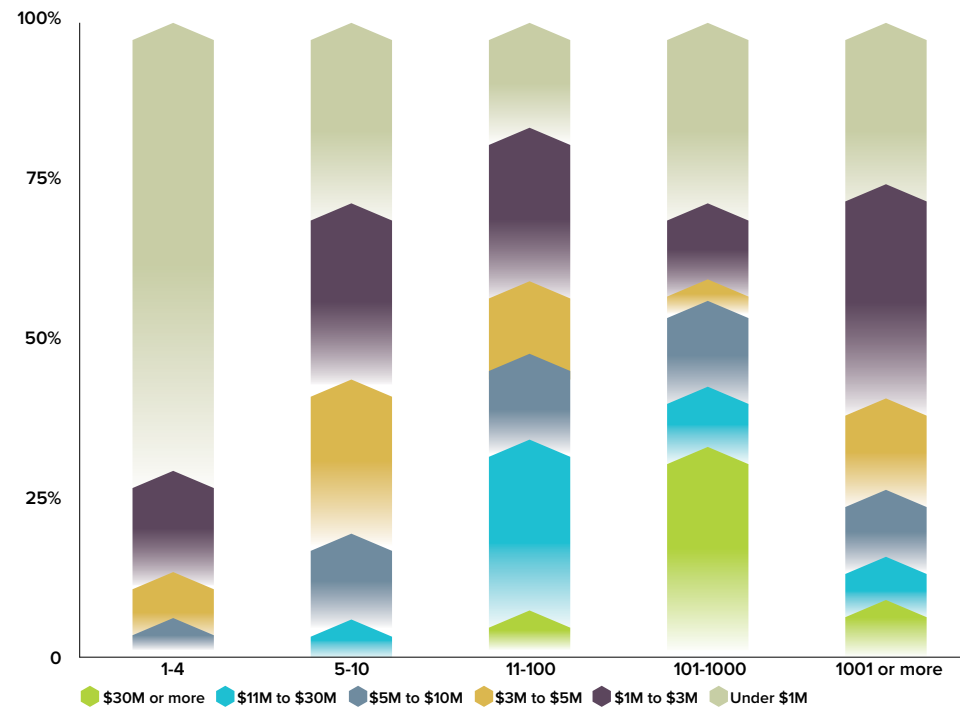
Spending increases were more frequent among buyers with 101 to 1,000 employees (48%), where decreases were also the least frequent (18%). Companies with more than 1,000 employees had the highest proportion of unchanged budgets (49%), and companies with 100 employees or fewer have the most frequent decreases (around 30% of buyers).

The buyers that employ the most people are not the ones with the largest annual budgets for research projects; that distinction belongs to buyers with 101 to 1,000 employees. The proportion of those buyers who have budgets of more than \$30 million is more than three times the proportion of buyers with more than 1,000 employees. Aside from that, annual budget size seems to correlate well with employee size.

RESEARCH SPENDING TREND BY EMPLOYEE SIZE (BUYER)



TOTAL ANNUAL RESEARCH BUDGET BY EMPLOYEE SIZE (BUYER)



## THE BUSINESS OUTLOOK

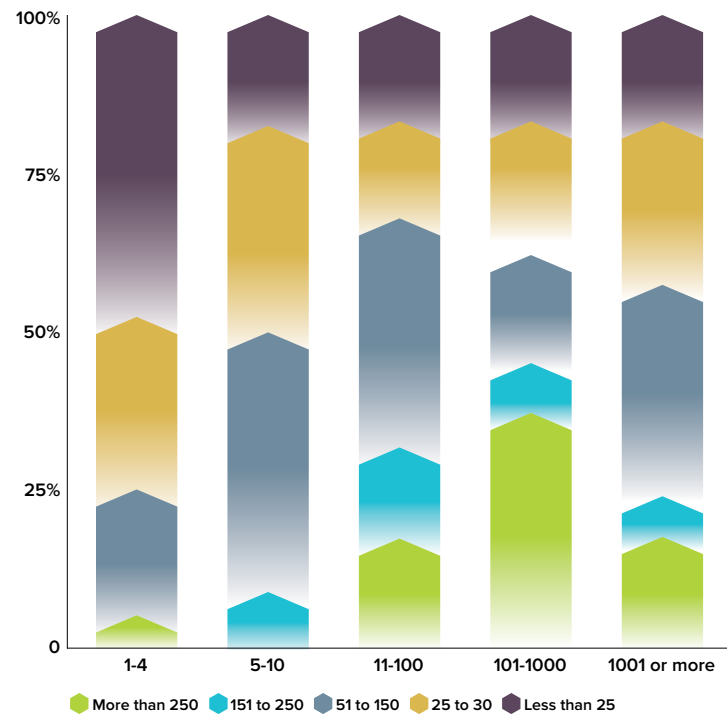
Similar to annual budgets, the proportions of large project volumes are highest among buyers with 101 to 1,000 employees. Below the 1,001 or More Employees category, project volume seems to correlate well with employee size.

Proportion of revenue increases are highest among suppliers with 11 to 1,000 employees (around two-thirds of suppliers) and lowest among those with 10 or fewer employees (around 40%). Revenue decreases occurred for 31% of suppliers with fewer than 5 employees; each other category has 22% or lower.

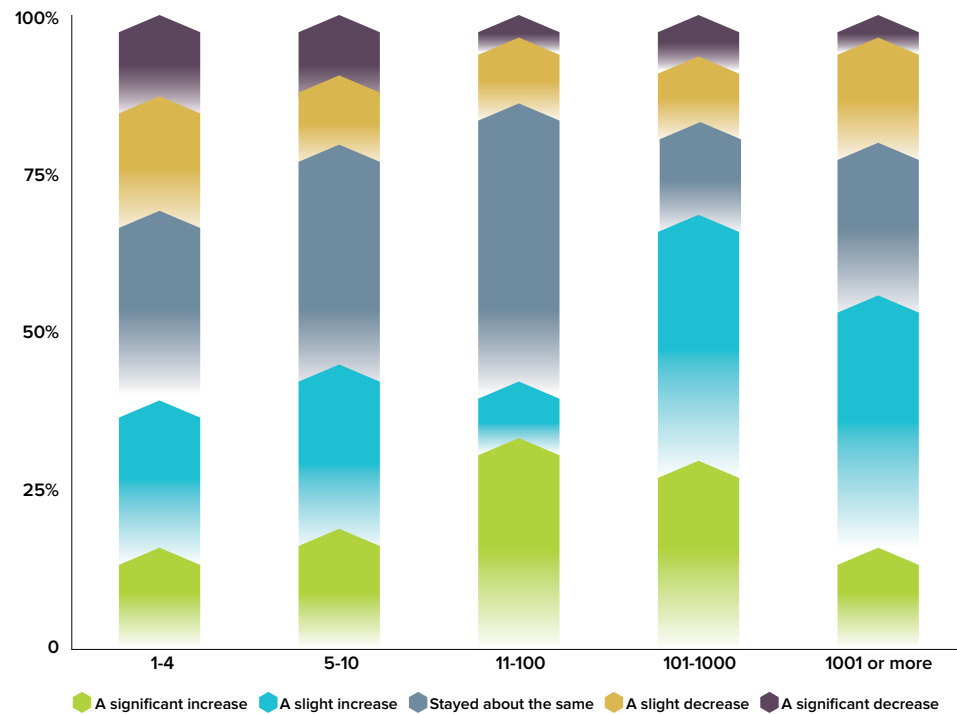
The buyers that employ the most people are not the ones with the largest annual budgets for research projects; that distinction belongs to buyers with 101 to 1,000 employees



ANNUAL NUMBER OF PROJECTS BY EMPLOYEE SIZE (BUYER)



REVENUE TREND BY EMPLOYEE SIZE (SUPPLIER)



## THE BIG PICTURE

Overall, the insights industry is optimistic at the moment, and about its future, and “healthy”, with most suppliers experiencing revenue increases and more buyers increasing spending. At the same time, the industry is aware of dark clouds that can bring hard rain: political turmoil, competitive threats from dissimilar challengers, uncertainty over what position to take on technology, whether to specialize or diversify, and the riskiness of having too many eggs in too few baskets, particularly when influential buyers’ budgets are in flux. More importantly, the gauntlet is still down regarding better, cheaper and faster, and everyone must respond.

Times seem to be hardest on the very largest and the very smallest players. Buyers with research budgets over \$10M have decreased spend, and that ripples throughout the industry. At the other end of the spectrum, freelancers and suppliers with fewer than five employees also have seen revenue decrease; perhaps larger suppliers have gone after their work because competition is so intense in their space or DIY tools have made them less relevant. Or perhaps, like many smaller suppliers, they rely on a single, large client that isn’t producing and have few candidate replacements in the pipeline.

While DIY tools have been cited as a threat to suppliers’ business, automation does not appear to be cannibalizing jobs – at least not yet. Technology and

staffing spending seem to follow revenue/spend trends, and those on the positive side of those trends tend to live and breathe growth strategy; apparently, they appreciate the value that technology-based and human resources bring to the table. Investing in technology while reducing staff seems to be an isolated phenomenon driven by companies with large budgets who are doing poorly. Some others view technology as a way to improve efficiency and allow them to work through an impossible backlog of projects. Such a scenario would improve their department’s standing in the company and likely result in more hires.

Finally, it is important to appreciate diversity in the industry. Buyers who have increased spend seem to appreciate a mix of traditional and new methodologies as long as they deliver the necessary value at an affordable cost. Suppliers who have increased revenue seem to believe that a broader portfolio of methods will make them more successful and don’t rely on a single source of data for their conclusions. The insights industry continues to support a broad portfolio of expertise, and each player must figure out how to maximize their strengths vis a vis “faster/cheaper” and the type of clients in their network. Some buyers may be partial to single sourcing while others may prefer a la carte. For some, the right conclusion will be to add capabilities; for others, it will be to hone their expertise and client development skills.

While DIY tools have been cited as a threat to suppliers’ business, automation does not appear to be cannibalizing jobs – at least not yet



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## FOR THE FUTURE OF MARKET RESEARCH: SCALABILITY IS AT THE HEART OF SUCCESS

### Steve Phillips

CEO, ZappiStore

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**W**e all feel the pressure for quick results. We all know the importance of counterbalancing short-term success with making a difference longer term; of not just winning the battle but winning the war. The industry is awash with automation. Its speed and cost efficiency is helping the insights community win micro battles it could never have won before. But the really exciting opportunities lie in wait and they very much depend on us looking beyond the next project.

The GRIT report tells us that nearly every part of the market research industry has been investing more in technology and automation this past year. This is good to hear and no surprise. It points out that the top considerations in selecting a research approach map to the holy trinity of better, faster, cheaper, and in that order. This is again, very healthy.

Where the trends come unstuck is in the comparative de-prioritisation of scalability and synthesis with other sources or, in the way I would like to address this, standardization. While it's easy to see how automation makes insight faster and cheaper, better through automation will only really come as a direct result of scalability and standardization.

In any business, if you want success and growth, then scalability is paramount. Rather than continually reinvent the wheel, you need to develop standard ways of doing things in order to scale efficiently. This not only facilitates speed, but also allows you to generate learnings and improvements through meta comparisons across projects. It means you can communicate in a common language across your organisation.

CONTINUED ON NEXT PAGE



## GRIT COMMENTARY



Businesses that supply and consume insight are no different of course, hence the importance of normative databases for decades now. But big normative databases are often inflexible, out of date, too generic or black-boxed. They are synonymous with the old world of market research. In the new world, the computational power of tech platforms offer the opportunity of meta analysis and prediction on an unprecedented level. This is the ability to crunch enormous volumes of data collected across projects, brands, categories, non-survey sources (e.g. media, social) and uncover relationships which help answer organisational questions and predict outcomes that would take hundreds of hours or may never be reached by a human. A tech platform will also learn and improve its output the more you feed information to it.

This level of analytic performance genuinely represents 'better' for the industry, but data and method must be standardized and scaled. Platforms such as Zappi's are building solutions and analytical capabilities that allow an insights buyer to realize the value of a standardized dataset. We ensure that the methods our users select encourage or enforce consistency so that as their dataset grows, so does the analytical potential.

The challenge to tech platforms is to demonstrate enough value with early adopting users such that scalability and standardization become must haves. In an industry that is often reactive and tactical, the challenge to buyers is to keep longer term analytical opportunities firmly in mind.



# THE EVOLVING RESEARCHER ROLE & SKILLS

In the classrooms of Advanced Degree programs centered on Market Research around the world, students are presented with and taught to hone a myriad of skills: qualitative research, quantitative research, presentation, sales, analysis, pricing, positioning and more. But how do these skills stack up to what employers are saying they want and need? What should degree students and continuing education seekers be focusing their efforts on in school (as well as in our internships and professional lives) to ensure that what they are bringing to the table is what the market is looking for in an ideal marketing research candidate? As researchers and students of market research, our field is constantly evolving as new technology is developed and methods improve and evolve. Our days in the industry will look different today than they will in five years (or even one year for that matter), so we must constantly keep a pulse on what employers and clients are looking for, and who and what they will find valuable long term.

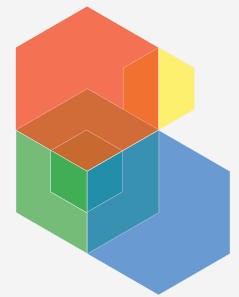
With that in mind, GRIT continues to explore the topic of the skills that are in demand and the changing role of the researcher and in this wave some compelling new insights were presented.



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## IN DEMAND SKILLS

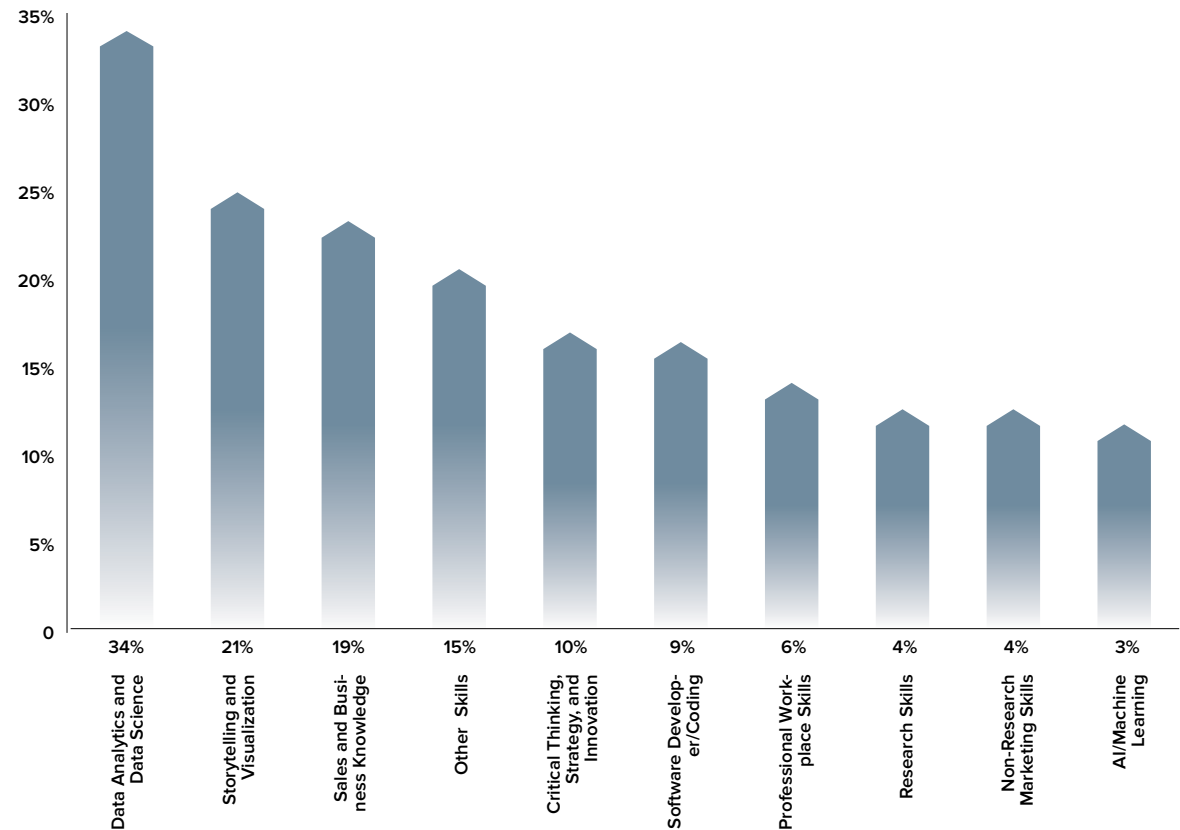
What should researchers make sure is the shining star on their resume in 2019? Answer: Data Analysis or Data Science.

When asked the question “If you could add one individual with a needed skill in your organization, what skill would it be?” nearly 35% of respondents gave an answer related to data analytics, data science, data modeling, big data or other analytic skills. While our report in 2018 boasted design and storytelling as king, it took a slight dip and claimed only 20% of the responses. Clearly, organizations not only need employees who can tell a story but are also proficient in handling data. The importance of other soft marketing skills is waning in favor of comfort and competence in data use and interpretation. Employers want to see market researchers comfortable with not only analysis but with handling large data sets and synthesizing data across many sources.

From one respondent, a comment summed up the essence of our overall findings: “I would love to hire someone with a graphics design {background} who gets research. Infographics, storytelling, leveraging strong visuals, etc. is critical to reporting. Anyone who can blend graphics with research knowledge is an asset.”

This blend of skills is what employers find valuable. It is important when it comes to data, to not only know it but show it. Marketing research students and those seeking professional development should focus on fine-tuning their analytics skills, but ensuring that they don't get so far into the weeds that they cannot relay the message accurately and sell their clients on their approach.

IF YOU COULD ADD ONE INDIVIDUAL WITH A NEEDED SKILL IN YOUR ORGANIZATION, WHAT SKILL WOULD IT BE?



What should researchers make sure is the shining star on their resume in 2019? Answer: Data Analysis or Data Science



# DAY IN THE LIFE OF A RESEARCHER

As the role of researchers change, so does the composition of a typical “day in the life” as it is spent on various research tasks. When asked to describe a typical month’s breakdown of different research tasks, respondents provided the following:

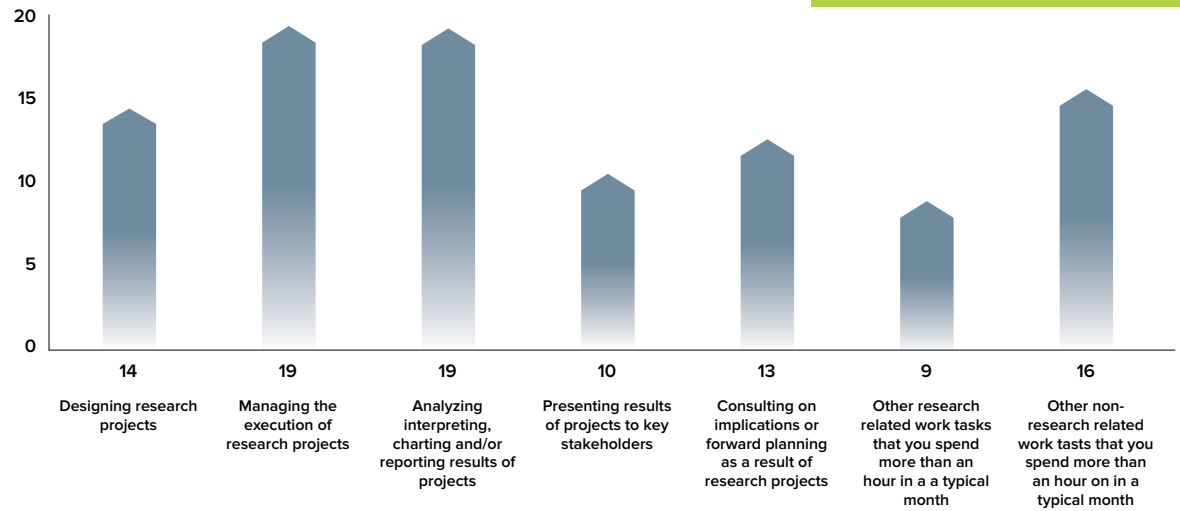
Both managing research projects as well as analyzing and reporting results of these projects occupy the largest portion of time, accounting for nearly 20 hours a month each. The next largest amount of time is spent on non-research related work tasks, followed closely by designing research projects. Presenting the results of projects, consulting on their implications and other research-related work make up the remainder of the work month. However, these hours can vary depending on whether or not you are an insights buyer/client or an insights provider/supplier.

Both managing research projects as well as analyzing and reporting results of these projects occupy the largest portion of time, accounting for nearly 20 hours a month each. The next largest amount of time is spent on non-research related work tasks, followed closely by designing research projects. Presenting the results of projects, consulting on their implications and other research-related work make up the remainder of the work month. However, these hours can vary depending on whether or not you are an insights buyer/client or an insights provider/supplier.

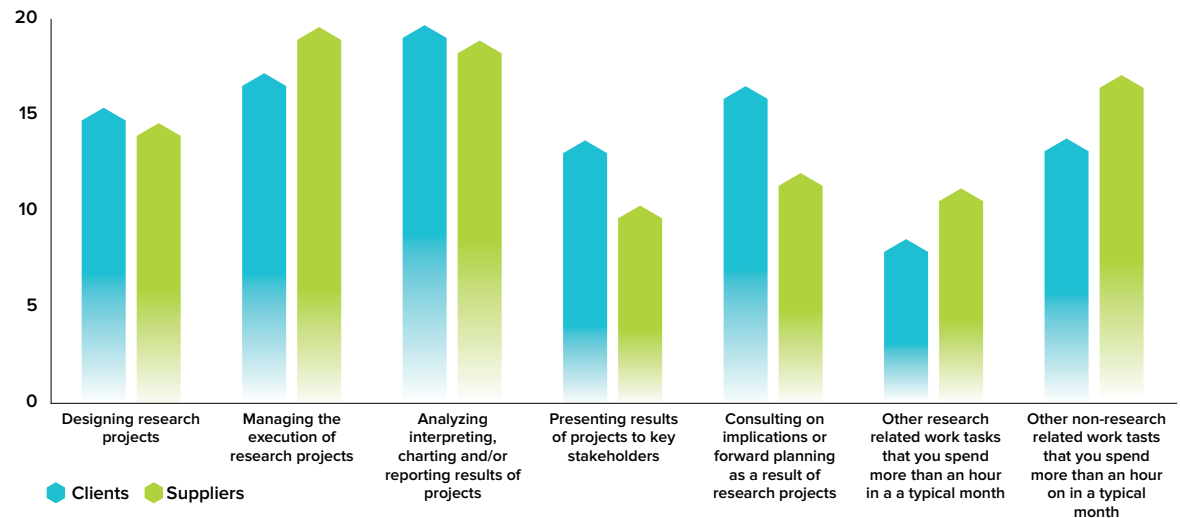
As the role of researchers change, so does the composition of a typical “day in the life” as it is spent on various research tasks



## OVERALL



## TIME SPENT: BUYER VS. SUPPLIER



## WHERE DO YOU SEE YOURSELF IN 5 YEARS?

As we head further into our careers, data analysis will only continue to grow more important, and we will need to stay on top of those skills. However, our professional development should start to focus on some other areas as well in order to stay competitive in the marketplace.

Data analytics remains at the top, but it is followed closely by critical thinking, strategy and innovation. As we chart career paths in the research industry, development must begin to focus on the big picture beyond the data itself. It is important to think critically, as informed by the data, and plan strategically for the future. Respondents also felt that sales and business knowledge and storytelling and visualization are important skills to gain and develop as your career progresses. The researcher of the future will require not only top-notch data science skills but a broader, more strategic focus.

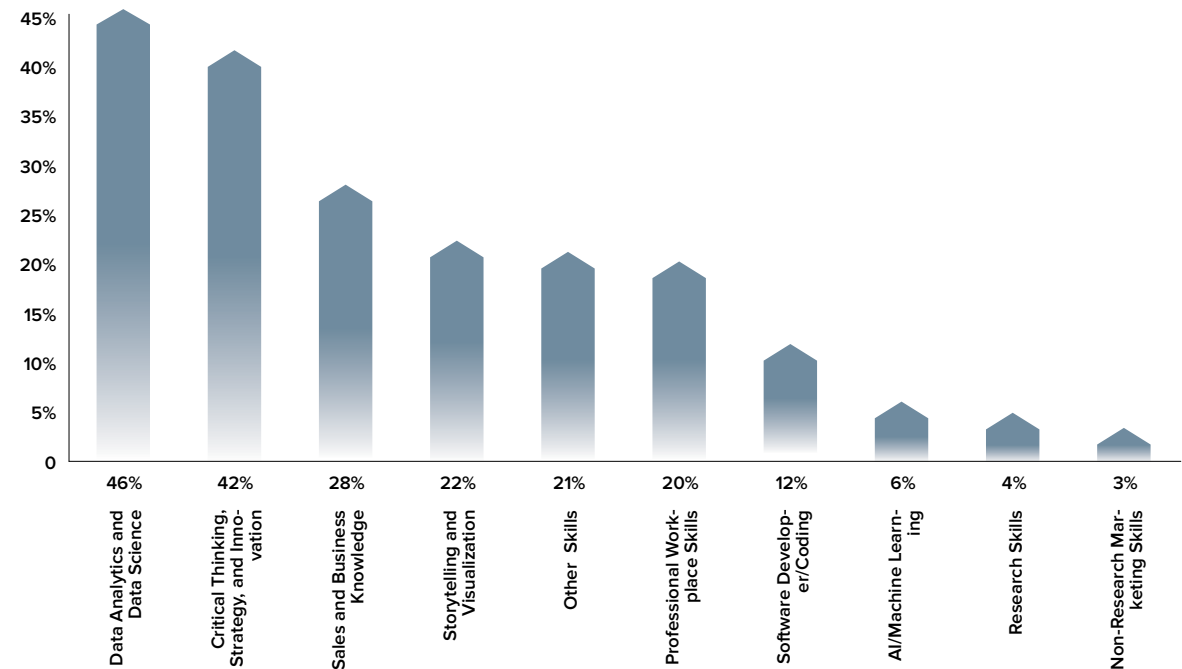
A few quotes from respondents stood out and helped to sum up the general tone of the future of marketing research:

” “Agility, ability to master new skills, curiosity, ability to understand business problems NOT JUST methodologies.”

” “Someone who has the ability to see through the clutter and find the best and simplest research solution, and also the ability to see when a larger solution is required. Someone who has one foot in traditional and in newer methodologies; old and new school working together works.”

” “1. Basic understanding of new technologies in research, including applications/benefits of AI. 2. Ability to influence other parts of the corporation, especially when it comes to taking action on insights.”

WHAT SKILLS DO YOU THINK WILL BE MOST IMPORTANT FOR SUCCESS FOR PEOPLE WORKING IN THE RESEARCH INDUSTRY FIVE YEARS FROM NOW?



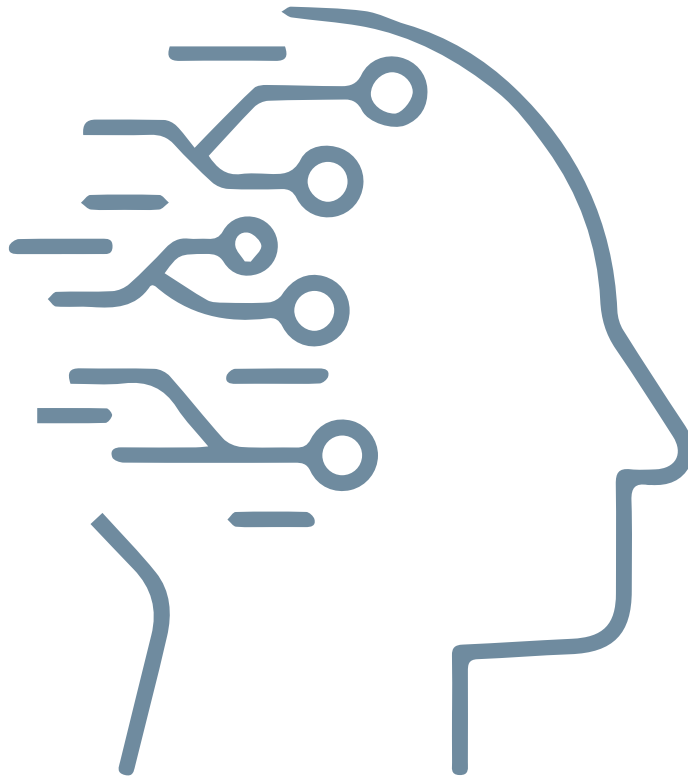
Data analytics remains at the top, but it is followed closely by critical thinking, strategy and innovation



## THE BIG PICTURE

How we think will become just as important, if not more important, than what we do. Market researchers must remain current in technology and methods, but be sure to continue to sharpen their business edge and creative mind. Certainly “niche” expertise will have a role, but the era of process oriented or even core research design, a methodology-centric

focus or singular analysis acumen don't appear to be the path to growth in the future. Instead, the long predicted era of polymaths who are both comfortable with data from any source, and most importantly can deliver business impact with that data, seems to have arrived.







## TO CREATE BETTER EXPERIENCES FOR CUSTOMERS, FIRST ENABLE YOUR AGILE TEAMS TO MAKE BETTER DECISIONS

### Basil Shariff

Customer Success Manager, Alpha

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Linkedin: [www.linkedin.com/in/basilshariff/](http://www.linkedin.com/in/basilshariff/)

As customers, we can easily recognize when an experience is great. But as researchers, product managers, and marketers, what roadmap can we follow to create great experiences? At Alpha, our clients are the world's most innovative organizations and teams, and they're not shy about sharing their craft.

Take Amazon for example. In a 2017 letter to shareholders, CEO Jeff Bezos illustrated the decision-making framework his organization uses to continually deliver value to the market faster:

"Most decisions should probably be made with somewhere around 70% of the information you wish you had. If you wait for 90%, in most cases, you're probably being slow...If you're good at course correcting, being wrong may be less costly than you think, whereas being slow is going to be expensive for sure."

As a rule, Amazon encourages employees to quickly generate 70% of the information needed in order to make a decision, so long as that decision is adjusted afterward with rapid iteration. Clients using our platform rely on similar benchmarks and workflows, creating great experiences by making small bets that offer directional insight into customer preferences.

### **The new reality: fast and steady wins the race**

Consumer preferences change daily, as industry-shaking terms like 'cord cutting' and 'privacy concerns' proliferate headlines. Keeping up has challenged once blue chip giants, reflected in the accelerating pace of turnover in the Fortune 500.

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You need an operating model specifically designed for this new reality. You may have deep expertise doing large-scale research to identify new market opportunities and optimize go-to-market campaigns. But in between are thousands of assumptions about customers that often go untested, leaving your agile product teams well below the information threshold needed to make decisions. Agile teams sometimes take unconventional approaches to get quick feedback when they don't have access to the necessary tools.

It isn't uncommon to find time-crunched product managers visiting nearby Starbucks to test prototypes with random patrons. It's not a rigorous practice by any means, which is why we built Alpha, a turnkey experimentation and on-demand insights platform, to help them close the gap between market research cycles.

### **Complement market research with experimentation**

Agile teams at leading organizations utilize experimentation to introduce data to daily decisions. Whereas market research is perfect for large, strategic activities like brand tracking or price elasticity, experimentation involves more tactical roadmap prioritization and optimization activities within a fast-turnaround agile environment.

For example, an experiment might include testing industry jargon with a handful of user interviews to minimize confusion. Or it might involve split-testing user experiences with the prototyping phase to learn if target users can figure out how to cancel their subscriptions. Neither set of assumptions requires exhaustive time or resources to test, but both could prevent a major headache down the line.

Whether you use Alpha or you stitch together an assortment of DIY tools, researchers should partner with agile teams to ensure experiments are rigorous and unbiased, without compromising speed. Fortunately, we're beginning to see organizations aggressively make the shift. A research leader and client of Alpha was recently tasked by her leadership team with helping her product management colleagues find ways to continuously engage with consumer feedback. She told us:

"It's a new era – product teams are moving quickly and need data to inform high-velocity decision-making. It's important for us to enable them to experiment rapidly throughout the entire process. In a world that's moving quicker than ever before, Alpha helps us always be on the side of the consumer."

To create better experiences for customers, start by mastering the capability to rapidly and iteratively experiment in between market research cycles.



# INDUSTRY BENCHMARKING

Over the past several waves of the GRIT survey, we asked a series of questions to better understand what drives success for insights buyers and the research providers/partners they work with. These findings represent the collective wisdom of those operating in the insights arena. At the highest level, there is substantial agreement between research providers and those whom they support with the areas of agreement reflecting much of the ongoing industry dialog. We asked GRIT respondents to tell us their most important priorities when executing a research project for maximum impact. Using a Max-Diff exercise, we asked respondents to rank order a series of alternatives across 23 project attributes. The results show us a close alignment between the needs and expectations of clients and the mandates for delivery acknowledged by research providers. Topping the list of what is most important are five attributes:

- There is a clear linkage to business objectives (#1 for clients and providers)
- Recommendations that help grow the business are delivered
- A focused story conveys the outcomes
- Executives implement action based on the results
- Agency executing the work understands my business

These top five attributes indicate a convergence between clients and research providers in knowing what is important to the successful delivery of an engagement.

Of further interest, however, are where discrepancies lie between the two groups. Perhaps the most important area of discrepancy is the 'synthesis of results across multiple data sources/types'. Dialog around this issue has reached a crescendo for those charged with bringing insights to business decisions as well as platform providers whose tools enable the capability. This plays out organizationally for many on the client side with the integration trend for customer analytics and market insight functions. It represents a pragmatic application of 'big data' analytics. The merger of understanding actual behaviors and the attitudes driving behavior is a powerful elixir in the search for increasing the ROI of investment in insights. Clearly, this is recognized by all parties.

The results show a close alignment between the needs and expectations of clients and the mandates for delivery acknowledged by research providers



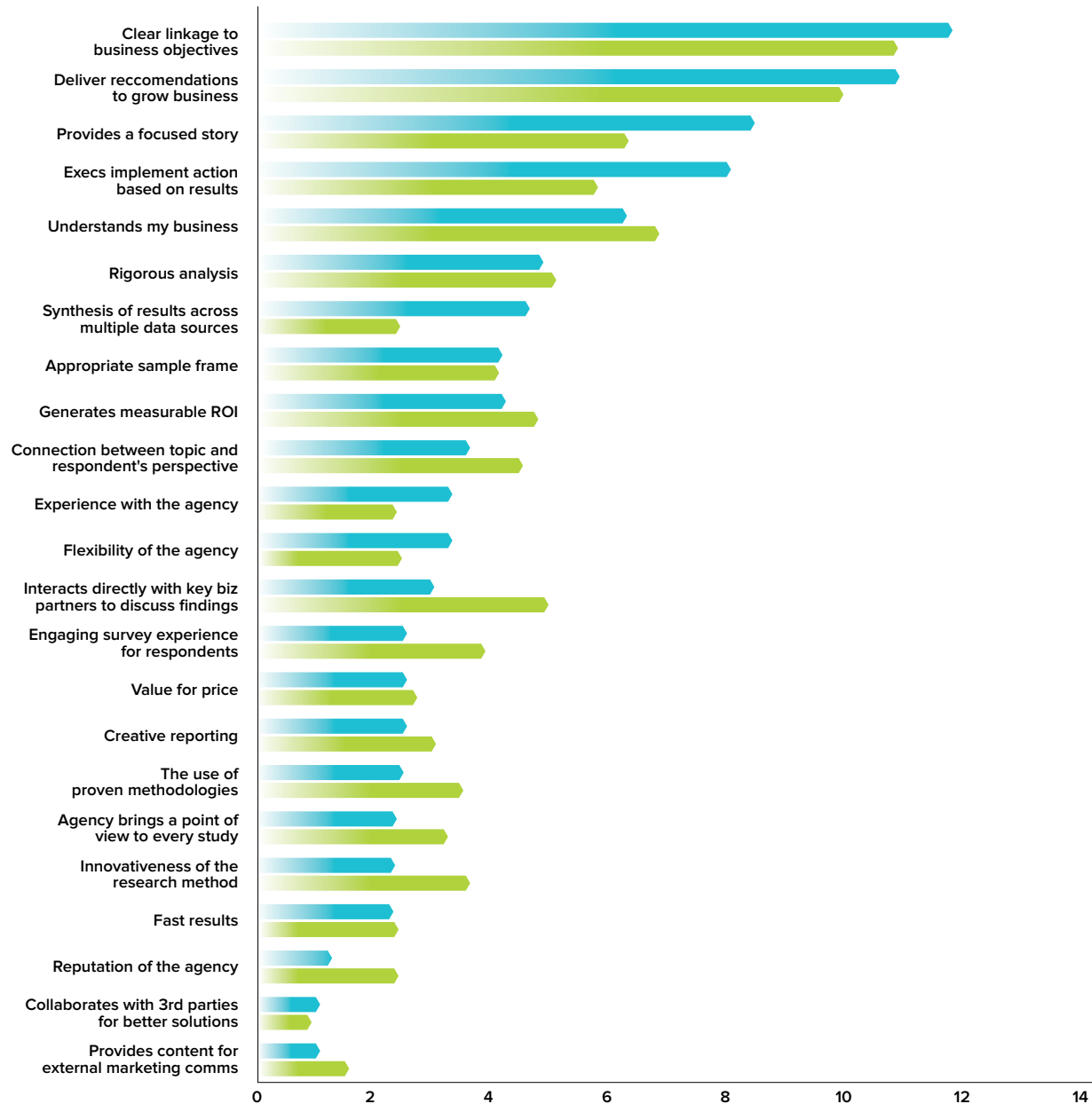
However, speed in the absence of linkage to business objectives or as an enabler to business growth will fall short of business needs



Of note is the importance of ‘generating a measurable ROI’ in the analysis. ROI is inextricably linked to the top five project attributes. Linking to business objectives and delivering recommendations to grow the business enable executives to act based on the results. The importance of this will continue to increase particularly if economic headwinds appear in 2019. As budgets come under attack or as the insights function is relegated to a lower priority in the funding mandate, the ability to demonstrate the value of the investment in insights will be critical. While the measurement of ROI is a discussion on its own, the ability to successfully act based on recommendations provided, particularly when actions lead to a more positive business outcome, is the ultimate demonstration of ROI. Do not be surprised if this moves up the priority order in coming years.

Commentary is also required concerning the positioning of ‘fast results’; toward the bottom of this year’s list. The need for ‘faster and cheaper’ has been a driving force behind the development of platforms that increase efficiency and reduce the labor necessary to implement a research effort. The agile research movement was partially born out of this need. However, this has been a theme for some time now and may well be an ‘assumed’ attribute for any research project making it less differentiating. However, speed in the absence of linkage to business objectives or as an enabler to business growth will fall short of business needs.

RELATIVE IMPORTANCE OF PRIORITIES WHEN EXECUTING A RESEARCH PROJECT



## INDUSTRY BENCHMARKING

Positioned just below 'fast results' is the reputation of the agency. Significant market challenges faced by agencies with a legacy of a strong reputation is a testament to the hard reality that in today's environment, a name doesn't buy you much good will. It's about the delivery of impact whether you are a global conglomerate or a boutique agency with specific expertise. The opportunity to succeed is there for those who can deliver on the top five and additional elements.

Interestingly, a preliminary exploration of attributes from the Max-Diff exercise may be related to *increasing* revenue at a research provider show us the following. When either 'generates a measurable ROI' or 'fast results' are ranked in the top six project attributes for importance then research providers were more likely to report increasing revenue over the past 12 months. Conversely, when either 'reputation of the agency' or 'the use of proven methodologies' are ranked in the top six project attributes then the research provider was more likely to have experienced a *decrease* in revenue during the past 12 months. While these are early findings that will be further explored and deepen as the benchmarking database grows, they are instructive. The lesson learned is that demonstrating ROI impact leads to more work. Resting on your laurels does not.

### SNEAK PEEK – BENCHMARK MODELING WHAT LEADS TO INCREASING REVENUE FOR RESEARCH PROVIDERS?

- Generates measurable ROI
- Fast results

IF THESE PROJECT ATTRIBUTES  
ARE IN THE TOP 6 FOR IMPORTANCE ...

THEN REVENUE IS  
MORE LIKELY TO ...

- Reputation of the agency
- The use of proven methodologies



Respondents were also asked to allocate 10 points across the importance of three elements of the 'ideal' research project:

- **Knowledge leverage** – the study design and execution allow us to get better data and generate richer knowledge
- **Internal leverage** – the study leads to change within the organization. It impacts the hearts, minds and actions of executives and employees beyond the traditional
- **External leverage** – the study leads to increased external visibility and has an impact on our sales and business.

While there are not large differences between clients/buyers and research providers, research providers allocated an average of 4.0 points out of ten to **knowledge leverage** and less to internal leverage and external leverage (3.3 and 2.7 points respectively). Conversely, clients/buyers allocated an average of 4.0 points to **internal leverage** and less to knowledge leverage and external leverage (3.3 points and 2.7 points respectively as well). These differences are not surprising given the role of buyers versus providers. Findings inside and outside of North America are similar.

The lesson learned is that demonstrating ROI impact leads to more work. Resting on your laurels does not



## INDUSTRY BENCHMARKING

So how well do clients/buyers and research providers say they are delivering on the 'ideal' project? The answer is not as well as needed. One could argue that, just like a diet, consistency separates winners from losers when assessing the probability of success. While achievement of the ideal may not be realistic, getting close is certainly a necessary objective to survive in a competitive business environment. Yet in this wave of GRIT, only 9% of clients/buyers say their average project compares to the 'ideal' project while two-in-ten (22%) of research providers say it does. This differential is certainly striking. Even when looking at those responding who selected either 'very well' or 'somewhat well' this gap exists, AND this top two comparison has held for the prior two waves of GRIT. How to interpret this? Clients pay the bills. They live in a world where they are more apt to get direct feedback on the value of the work they do from those who use their insights. Hence, let's give the nod to clients/buyers. Research providers may simply be more optimistic about the projects they produce and may be missing a bit of the reality equation. While many research providers have some variation of a customer satisfaction program in place, the question is "How frequently do you engage in a deep conversation with your client about the extent to which your work has met their business objectives and how future improvements can be made?" Scratching the surface doesn't work well to further excellence in meeting the business objectives of research clients/buyers.

### COMPARISON TO THE IDEAL PROJECT



Additional insight into this issue comes through a series of questions concerning the frequency in which research clients/buyers and research providers engage in specific activities. Those activities with the highest frequency of occurrence across clients/buyers and research providers include:

- Regularly interacting with senior stakeholders
- Ensuring the research is aligned with business objectives
- Focusing on future growth strategy

Yet in this wave of GRIT, only 9% of clients/buyers say their average project compares to the 'ideal' project while two-in-ten (22%) of research providers say it does



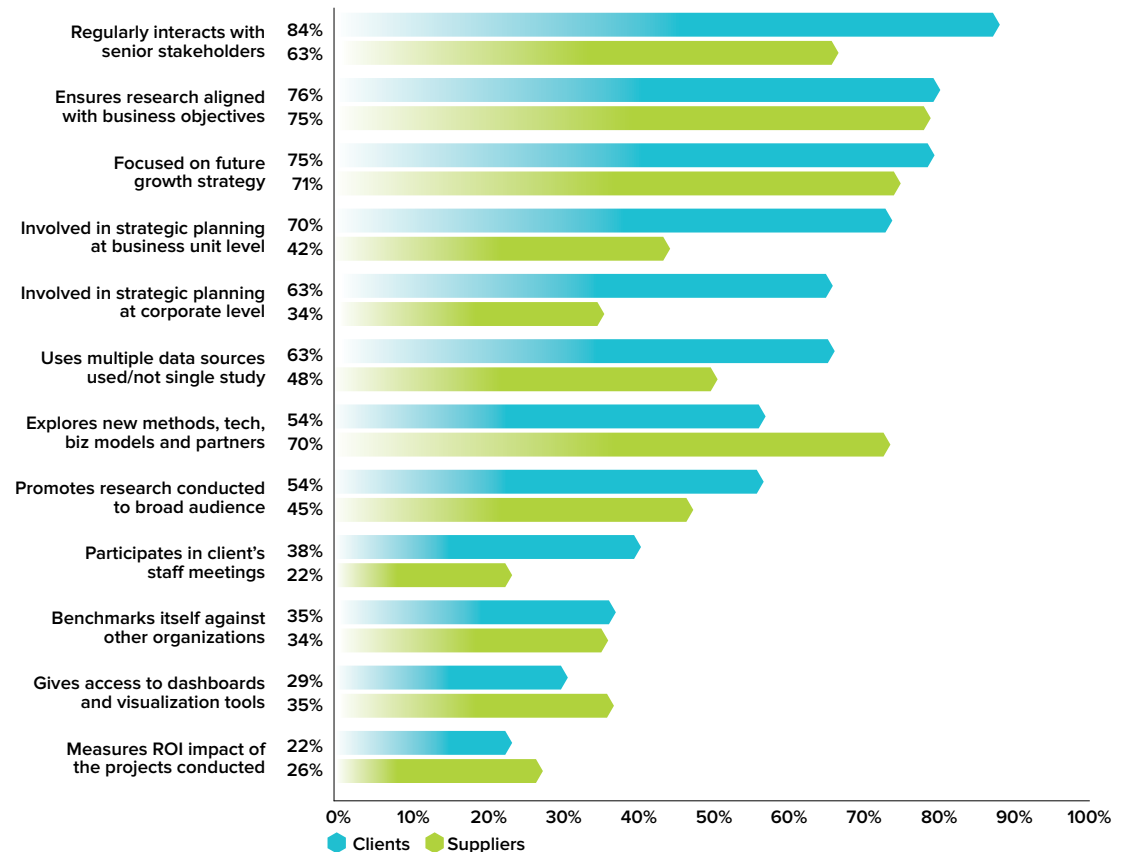
## INDUSTRY BENCHMARKING

These are certainly key activities to ensure happen with regularity, but other activities may warrant further exploration. For example, approximately half of those responding indicated they promote the research conducted to a broad audience. Raising the visibility of the value market insights brings to an organization is clearly a self-serving but a very important endeavor. Yet, half of those responding do not engage in any such activity. This is an opportunity lost. If an insights team, whether on the provider or client side, does not ‘toot its own horn’, no one will do it for them.

Additionally, a remarkably low proportion of clients/buyers and research providers indicate they participate in client’s staff meetings. Only four-in-ten clients/buyers say so and two-in-ten research providers do so. While obstacles to participation undoubtedly exist, the ability to attend such meetings is important for understanding the business context in which a research is occurring. If your insights team only attends 25% of such meetings this year, strive to attend an additional 10% next year. It will have a meaningful impact on the quality of the insight you provide.

Significant differences between research buyers and research providers are largely explained by their role and function. For example, clients/buyers will have greater opportunity to interact with strategic planning activities than will research providers. Similarly, an important function that the provider community fulfills is to explore new methods, technology, business models and partners. This is clearly a ‘value-add’ component to any relationship with a client-side insights

### PERCENT SAYING ORGANIZATION ‘FREQUENTLY’ OR ‘ALWAYS’ ENGAGES IN ACTIVITY



team. They generally neither have the time nor budget to do so. Being a filtering mechanism that recommends which new techniques are worthy and which are not can be a relationship builder.

Interestingly, there has been little meaningful change to responses since GRIT’s 2017 Wave 1 study when this question was first introduced.

Raising the visibility of the value that insights bring to an organization is a very important endeavor





# OPTIMISM IN THE INDUSTRY

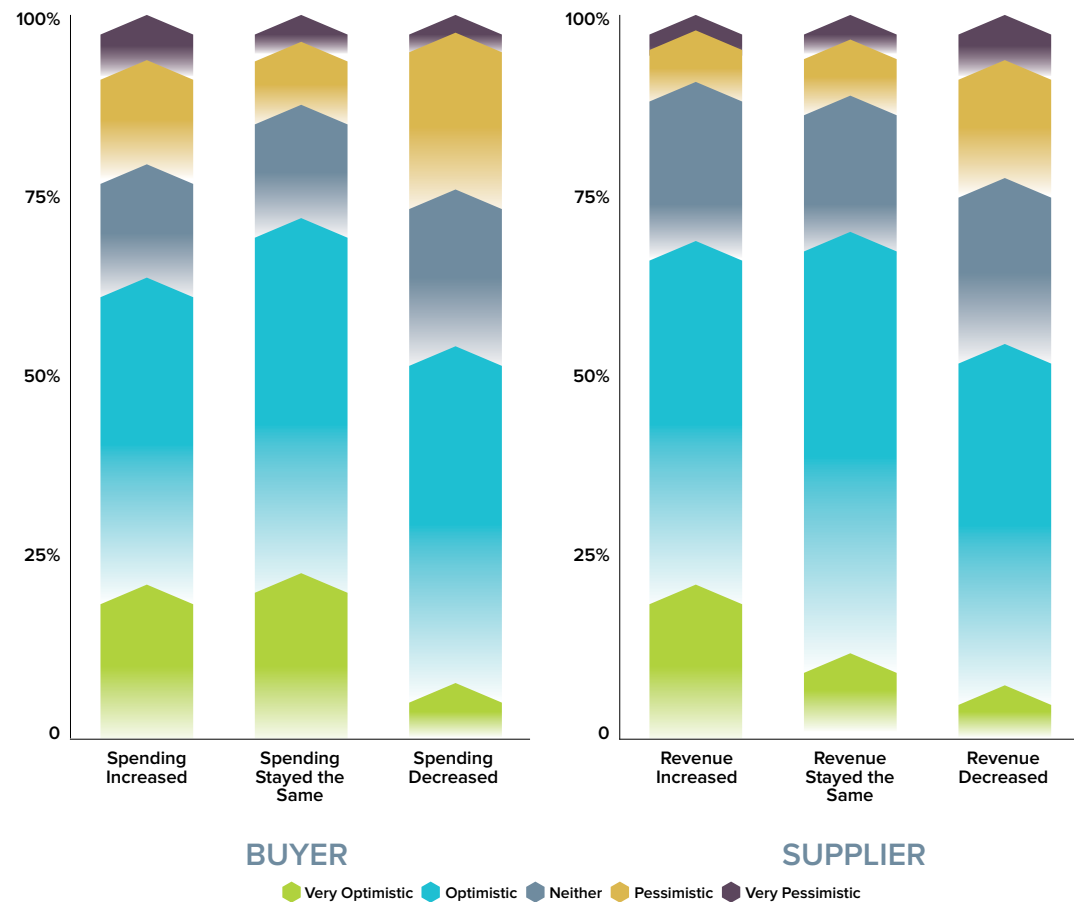
This wave of GRIT included a new series of questions on optimism – optimism about the future of the respondent’s company for research providers, future of the insights role at their company for clients/buyers and the future of the industry – asked of both groups.

Optimism is equally shared. Approximately, seven-in-ten say they are either ‘very optimistic’ or ‘optimistic’ about the future (Research Providers – 71%, Clients/Buyers – 65%). Few, from either group, are pessimistic. That is good news.

We can take a step further and ask, “Is health correlated to happiness?” Again, taking the spending and revenue trends as proxies for “health” and “optimism” as a proxy for “happiness,” we can see that maintaining or increasing revenue/spend is related to greater optimism about the future of the insights industry, while decreases are related to less optimism.

Optimism about the industry is higher for suppliers whose revenue increased (64%) or stayed the same (72%) than for suppliers whose revenue decreased (54%). Similarly, buyers whose spending increased or stayed the same express more optimism (68% each) than those whose spending decreased (54%).

OPTIMISM ABOUT INSIGHTS INDUSTRY BY SPENDING TREND



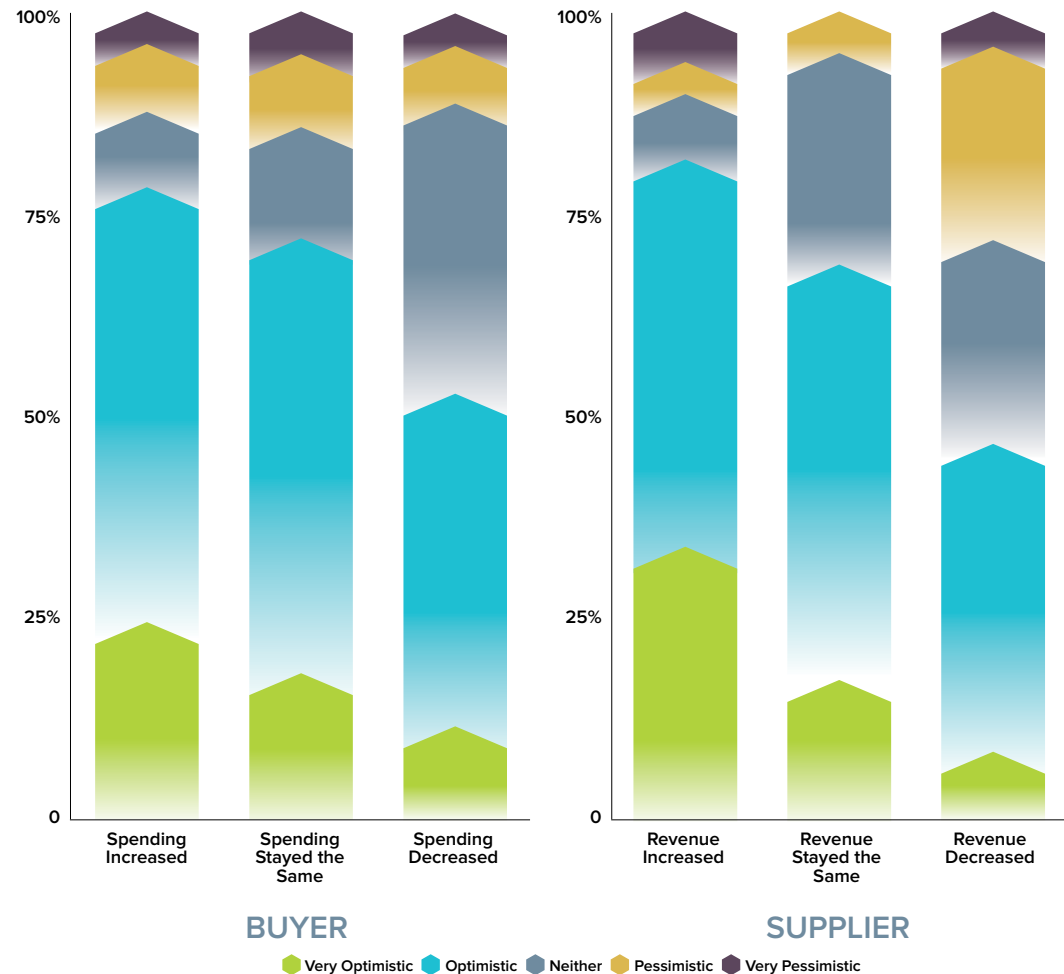
## INDUSTRY BENCHMARKING

A similar relationship holds true when insights workers consider optimism about their own situation (for suppliers, their company; for buyers, the insights function at their company). The relationship between optimism and revenue/spend is more pronounced when the focus is closer to home, so to speak; optimism is higher for:

- Suppliers whose revenue increased (77%) or stayed the same (70%) than for suppliers whose revenue decreased (51%)
- Buyers whose spending increased (72%) or stayed the same (74%) than for buyers whose spending decreased (46%).

The revenue and spending trends are not completely determinative of optimism; after all, 51% of suppliers whose revenue decreased are still optimistic about their company. This suggests that there are other factors to explore, but also demonstrates that these trends are related to higher or lower optimism about insight worker's professional situations and the industry in general. At the moment, health and happiness seem strong.

OPTIMISM ABOUT INSIGHTS ROLE BY SPENDING TREND



Optimism about the insights industry is also equally shared. Approximately two-thirds of each group are 'very optimistic' or 'optimistic'. Where there is optimism, there is opportunity

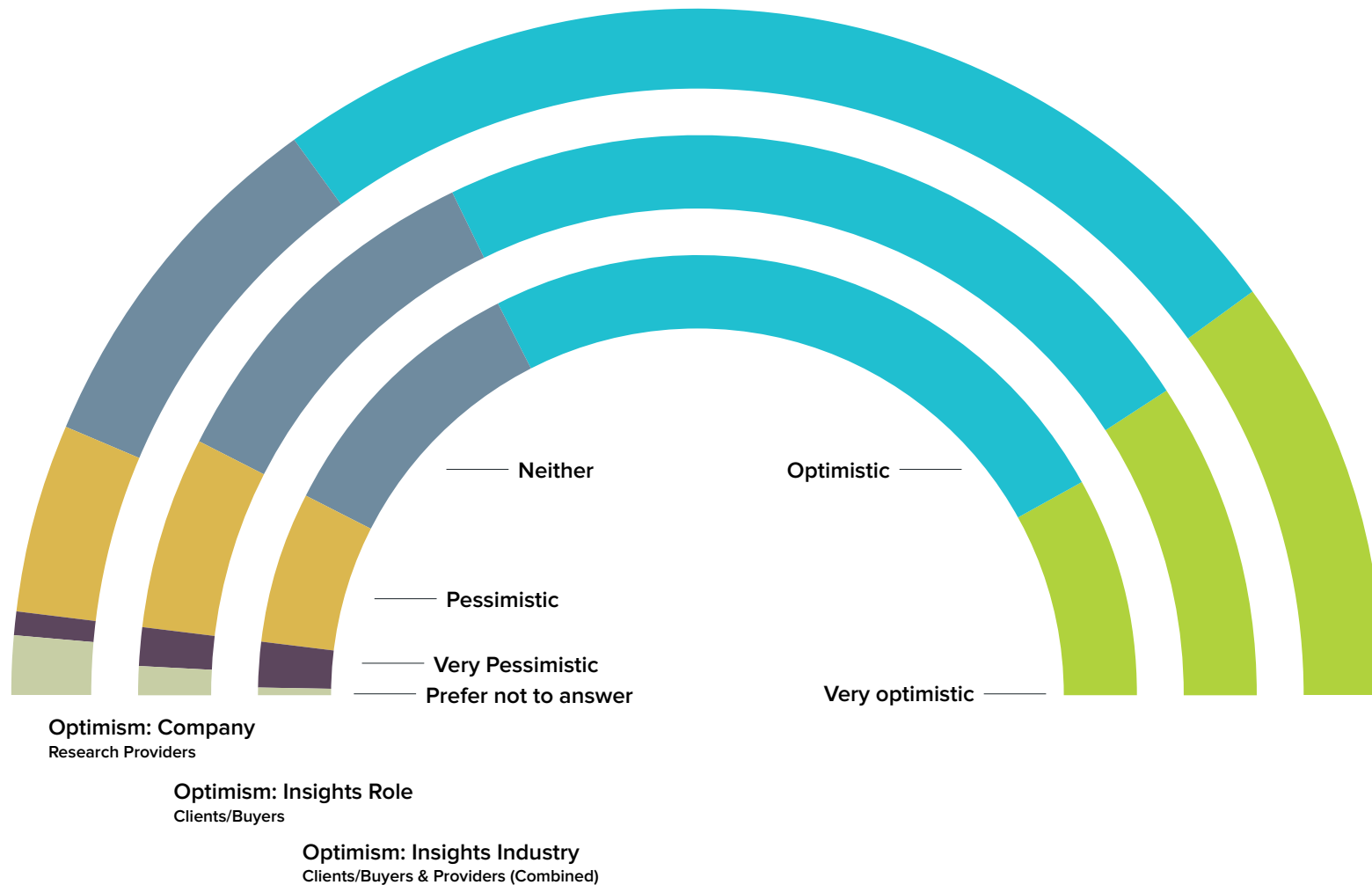


# THE BIG PICTURE

Optimism about the insights industry is also equally shared. Approximately two-thirds of each group are 'very optimistic' or 'optimistic'. Where there is optimism, there is opportunity.

Benchmarking can help us understand what to do, but it remains up to us to make it happen.

## OPTIMISM CHARTS





# TO BECOME INSIGHTS-DRIVEN, WE NEED TO CHANGE THE WAY WE THINK ABOUT RESEARCH

## Mark Hammer

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**S**top me if you've heard this one before: an insights team produces a research report that never goes beyond the line manager who commissioned it. The report contains information that could have changed the way the organization thinks about communicating with customers, developing new products, or launching to new markets— if only the right decision-makers had seen it. By failing to make the research available to stakeholders across the organization, the company misses out on several big opportunities.

This lack of visibility is an unfortunately common problem for many organizations with insights-generating teams. According to this year's GRIT report, almost half (46 percent) of insights buyers or clients infrequently or never promote their research to the broadest appropriate audiences. Only 14 percent of respondents said they always promote their research to a broad audience. And when research isn't getting in front of key decision-makers, it's not going to have a

significant impact on the organization. One study from the Boston Consulting Group found that only about half of core business decisions are made with the influence of customer insights.

To overcome this problem, organizations need to change the way they think about research, who is conducting it, and how it is distributed.

### Creating a Path to Insights

To start shifting the mindset and culture around insights, companies need to democratize research across their entire organization. In other words, business leaders need to give their insights teams a platform to share their research and discover the research of their peers.

CONTINUED ON NEXT PAGE



Employees at all levels and across all lines of business need to have access to this information—and know where to find it through a self-service platform. When conducting research, it can be hard to know who else will benefit from something you've uncovered, so why risk restricting that information to the team that commissioned it?

When research is democratized, insights teams are better-positioned to identify larger trends that allow for improvements to their current products and new products that better meet market needs. For example, Capital One, a Bloomfire customer, recently explained how they use their insights platform to share research about the customer journey across their lines of business. Because this information is readily available across the organization, every line of business can focus their work on a shared view of the customer.

### **Gaining Insights from Unexpected Sources**

When an organization successfully democratizes their data and research, they open up the door for both market research professionals and non-researchers to contribute ideas, engage with the research, and ask questions.

Rather than waiting for a line manager to commission a new research project, team members can use their organization's self-service insights platform to explore existing research. If a team member has a question they want to investigate, they can start by searching for related research that other teams have conducted. From there, they can use the information that others have uncovered to go deeper on their topic of interest. They may find that another team has done the research they need to answer their question, saving their organization from commissioning new research. By bringing in new perspectives and synthesizing existing sources to learn something new, businesses can maximize the investment they've made in research.

The ability to democratize insights—and to draw connections between research sources—is a skill that sets leading insights-generating organizations apart. The democratization of research gives companies the opportunity to gain insights from anywhere across their company, ultimately leading to a better understanding of their customer and a better customer experience.





# FINAL THOUGHTS

For years, people have been saying that our industry is changing. This edition of the GRIT confirms that the change is here, but incomplete. There is a clear bifurcation in what makes up marketing research. The first has to do with data and the second has to do with consulting.

From the data perspective, this is about using tools that can help us gather traditional types of data in more efficient ways, gather new types of data, more effective analysis of data, and new ways to communicate that data to deliver impact. This edition of the GRIT study is encouraging in that more people are using these data tools to deliver greater value. We see this in the high number of studies that clients are conducting give the same budget (or smaller), we see this in the variety of methodologies that are being used, and we see this in the hiring trends and investment priorities of insights organizations.

These tools and capabilities cover a wide variety of applications – from method to business issues to research issues. Most of this can be attributed to technology (though there are some methodology and framework components in here as well). As of today, technology is still a differentiator, but the gap is narrowing rather than expanding. We are quickly coming to a time where the technology will be available to any buyer and any supplier of research. Fortunately, both buyers and suppliers are investing in technology – and not just the big players. The expectations of technology driven research will be table stakes for all projects and all relationships.

The other side of the bifurcation is our ability to be consultative to our clients – be they internal clients or external. Many may have a better definition, but my definition is the ability to provide very actionable recommendations about what the business should do – and not just recommendations based on the results of a single study. This is difficult – and that difficulty is reflected in this edition of GRIT – client satisfaction with the strategic components of research is very low overall satisfaction of just 49% (Top 2 box).



# FINAL THOUGHTS (CONT.)

We also know that this is important to clients. A single point of view from a single study is a lot less compelling than it was – particularly for very strategic studies. Data synthesis, multiple data streams, meta-analysis, and multi-disciplinary recommendations are all components of being able to provide business recommendations, rather than just research results. Though we are seeing some clients and suppliers making these changes (evidenced by some of the investment priorities), this approach is still the exception rather than the rule. Until this changes, the satisfaction with being strategic partners in the business will remain low and the work will be transactional.

The data side of the bifurcation is on a solid path and I have no doubts about our continued innovation and improvement, albeit slower than most would like. The consulting side is in a more difficult place with significant process and intellectual changes needed to make this happen. The needs of internal and external clients will drive this change – whether through changing the organization or changing the suppliers that support the organization.

I know this feels like being “half full and half empty”, and it is. But there are signs that it can be more than “half full” – investment continues and is moving quickly downstream, we actually are doing more with less, and there are a LOT of very bright people in this industry (I know, I was one of the judges for the GRIT Future List). That is a very powerful combination of ingredients. Let's get cooking.

GREGG ARCHIBALD  
Managing Partner,  
Gen2 Advisors





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## Publication

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PureSpectrum

RealityCheck Consulting

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Toluna

Track Opinion Research

Go to [www.GreenBook.org/GRIT](http://www.GreenBook.org/GRIT) to access all GRIT data and charts via OfficeReports and KnowledgeHound, which you can use for your own analysis



# RESEARCH & PRODUCTION



**aytm**

## **AYTM – Ask Your Target Market**

[aytm.com](http://aytm.com)

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.



## **Deckchair Data**

[deckchairdata.com](http://deckchairdata.com)

Deckchair Data uncovers business insight through the combination of data analytics and research. We partner with ambitious companies to provide insight that directly drives growth. We have significant expertise and experience in modern quantitative and qualitative research, advanced analytics, data science and data strategy.



## **Gen2 Advisors**

[www.gen2advisors.com](http://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.

## **KnowledgeHound**

[www.knowledgehound.com](http://www.knowledgehound.com)

KnowledgeHound features the first "search Driven Analytics" platform designed specifically for customer insights so you can instantly find the exact answers you need when it matters most. Turn your customer data into a source of information that can continually adapt to help solve ongoing business challenges. KnowledgeHound's intuitive visualization engine allows anyone to create charts and tables on the fly so your customer data can be used to influence more decisions.

## LIGHTSPEED

### Lightspeed

[www.lightspeedresearch.com](http://www.lightspeedresearch.com)

Quality-seeking researchers, marketers and brands choose Lightspeed as their trusted global partner for digital data collection. Our innovative technology, proven sampling methodologies and operational excellence facilitate a deep understanding of consumer opinions and behavior. With 700 employees working in 14 countries, we maximize online research capabilities. We empower clients by revealing information that is beneficial, providing clarity and research data that illuminates. Headquartered in Warren, New Jersey, Lightspeed is part of Kantar, one of the world's leading data, insight and consultancy companies. For more information, visit [www.lightspeedresearch.com](http://www.lightspeedresearch.com).

## #NewMR

### NewMR

[newmr.org](http://newmr.org)

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



### OfficeReports

[www.officereports.com](http://www.officereports.com)

OfficeReports is a powerful analytical reporting platform fully integrated in Microsoft Office that automates the process from data to final reports and presentations:

- OfficeReports Analytics automates cross-tab and stat-test processes in Excel
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### Dynata

[www.dynata.com](http://www.dynata.com)

As the established expert in digital market research data, Dynata 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.



### Researchscape International

[www.researchscape.com](http://www.researchscape.com)

We provide programming, hosting, and analysis services for survey research projects using your own email house list or third-party panel. Starting at \$1,995 when purchased through our web store.



### Stakeholder Advisory Services

[www.stakeholderadvisory.com](http://www.stakeholderadvisory.com)

Stakeholder Advisory Services partners with its clients to incorporate insights of key stakeholders within two critical areas for business success – ensuring alignment of the organization's strategy and services with market needs and the management of reputational risk. To achieve its mission, 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 insights industry.



### Keen as Mustard

[www.mustardmarketing.com](http://www.mustardmarketing.com)

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.



### Idea Highway

[www.id-highway.com](http://www.id-highway.com)

Idea Highway is a strategic design studio with offices in Bucharest, Romania and Linz, Austria.



### Nelson Whipple Consulting

Whether from new or traditional methods (or both), insights have to be credible and relevant to be valuable. We help corporations and researchers generate game-changing insights and maximize insight value by ensuring business issues (and project resources) align with project design, research and analysis methods, and communication. We offer project design and management as well as advice on current projects, from design to drawing and communicating conclusions.



## Potentiate

[www.potentiate.com](http://www.potentiate.com)

We're an award-winning data intelligence company, bringing to light what your customers, employees and the marketplace see in you and your others. Our priority is working with you to accelerate your business to the next level. Our consultative approach means you can rely on us to be focussed on outcomes. When working with Potentiate, you can expect world-class technology, coupled with smart research design and consultancy. We're dedicated to understanding your business and your challenges and we'll tap into our full suite of services to ensure you get the answers you need.

## MICHIGAN STATE UNIVERSITY

Master of Science in Marketing Research  
Broad College of Business

## Michigan State University MMR

[www.marketing.broad.msu.edu/msmr](http://www.marketing.broad.msu.edu/msmr)

The Broad Master of Science in Marketing Research is a specialized graduate-level degree for people who want to build or accelerate their careers in marketing research. There are two program formats: a one-year, full-time program that starts in January, and a part-time, 21-month hybrid program that is mostly online, with several on-campus sessions.



## Infotools

[www.infotools.com](http://www.infotools.com)

Infotools is an award-winning software and services provider, with particular expertise in processing, analyzing, visualizing and sharing market research data. We have almost three decades of experience working with both in-house corporate insights teams as well as market research agencies. Our powerful cloud-based software platform, Infotools Harmoni, is purpose-built for market research data. From data processing through to analysis, reporting, visualization, dashboards, distribution, and data alerts – Harmoni is a true 'data-to-decision-making' solution. We also offer data experts who can help with things like research design and management, data design and organization, and insights discovery, analysis, visualization and reporting.

# COMMENTARY PROVIDERS



## Cint

[www.cint.com](http://www.cint.com)

“Cint is a software company developing technology to innovate the way insights are gathered. Cint specializes in API and SaaS solutions offering efficient, user-friendly tools to access online consumer panels, as well as panel management software. Cint’s exchange platform is a fully transparent insights marketplace, brings together questions and answers from all around the world. Reach more than 40 million consumers in 80+ countries, all sourced via 1,500+ different panels owned by publishers, local media outlets, market research agencies and non-profits.”



## Civicom

[www.civi.com](http://www.civi.com)

Civicom® is a leading edge global service provider for marketing researchers worldwide. We work closely with insight professionals in developing solutions for transforming ideas into well-executed strategies, deploying effective telephone and web-enabled tools and solutions that hold no project too large, no locale too far, and no respondent too difficult to reach.



a delvinia company

## Methodify

[www.methodify.it](http://www.methodify.it)

Methodify, a Delvinia company, is an automated research platform that’s changing the way businesses access customer opinions. With a full range of industry-proven research methods, Methodify enables marketers and researchers to automate their research process and gain consumer insights within hours. From initial concept testing to researching final products and ad campaigns—it’s the answer to the age-old brand question: How can we make better business decisions? For more, visit [methodify.it](http://methodify.it).



## Discuss.io

[www.discuss.io](http://www.discuss.io)

Discuss.io enables live video conversations with on-demand, global recruitment, and end-to-end service. Unearth and share consumer insights with your team and across your company, quickly and easily. Make better business decisions and drive innovation by engaging with consumers through real-time conversations. Today, Discuss.io is powering consumer closeness through Consumer Connection at many of the world’s leading brands. The company is headquartered in Seattle, WA, USA. Please visit [www.discuss.io](http://www.discuss.io) for more details.

The logo for Fuel Cycle features a stylized orange flame icon to the left of the text "FUEL CYCLE" in a bold, orange, sans-serif font.**FUEL CYCLE**

[www.fuelcycle.com](http://www.fuelcycle.com)

Fuel Cycle is a mobile-first market research and community intelligence 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.

**GutCheck**

[www.gutcheckit.com](http://www.gutcheckit.com)

At GutCheck, we pioneered agile market research to provide our clients with actionable answers and insights, globally, at the speed of their business. Our team of full-service agile research experts—experienced in multiple tried-and-true methodologies, not just agile ones—uses our online qualitative and quantitative platform to help clients make more confident business decisions by connecting them with their target consumers more often and earlier on in development.

**Dynata**

[www.dynata.com](http://www.dynata.com)

Dynata is the world's leading global provider of first-party consumer and professional data based on extensive, proprietary market research panels. Around this core asset of opted-in, managed data, the company has built innovative data services and solutions that bring the voice of the individual to the entire marketing spectrum, from research to marketing to advertising. Dynata serves more than 4,000 market research agencies, media and advertising agencies, consulting and investment firms, and healthcare and corporate customers in the Americas, Europe, and Asia-Pacific.

**ZappiStore**

[www.zappistore.com](http://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.





### **Bloomfire**

[bloomfire.com](http://bloomfire.com)

Bloomfire's Insights Platform helps teams curate and share their research and knowledge with the stakeholders who need it to make business decisions. The platform's AI-powered search and multiple levels of categorization make it easy for users to find exactly what they're looking for: even words spoken in a video. And thanks to the software's mobile-friendly design, all platform users can access the information they need, whenever they need it.



### **Periscope**

[www.periscope-solutions.com](http://www.periscope-solutions.com)

The Periscope® By McKinsey platform offers a suite of Marketing & Sales solutions that accelerate and sustain commercial transformation for businesses to drive revenue growth. It combines prescriptive analytics and cloud based tools with expert support and training. The platform leverages its world-leading IP (largely from McKinsey but also other partners) and best-in-class technology to create actionable insights that drive lasting performance improvement. The portfolio of solutions is comprised of: Insight Solutions, Marketing Solutions, Customer Experience Solutions, Category Solutions, Pricing Solutions, Performance Solutions and Sales Solutions. These are complemented by ongoing client service and custom capability building programs. [www.periscope-solutions.com/](http://www.periscope-solutions.com/)



### **Alpha**

[alphahq.com](http://alphahq.com)

Alpha's on-demand insights platform enables teams at the world's leading organizations to make data-driven decisions about users, products, and markets.



PURESPECTRUM

### **PureSpectrum**

[www.purespectrum.com](http://www.purespectrum.com)

PureSpectrum is an intelligent marketplace for buyers and sellers of online sample. As a team of engineers, client advocates, and online sampling experts, we're on a mission to reinvent how sample is bought and sold. We won't stop until we can deliver any audience, anywhere, with excellent quality, at a great price

# 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.



## **Nelson Whipple – Independent Consultant**

Currently an independent insights and research consultant, Nelson has more than 30 years' supplier-side experience managing market research teams while directing internal Modeling and Analytics groups focused on advancing methodologies and processes. Diverse project work has centered around preference analysis and simulations for Fortune 500 companies and foreign equivalents in B2C and B2B markets such as mobile devices, personal financial services, CPG, industrial equipment, telecom services, and retail. His teams have been recognized for work such as developing advanced preference-based simulators and R-based tools for Hierarchical Bayesian estimation.



## **Melanie Courtright – Dynata**

Melanie serves as Executive Vice President of Global Client Services at Dynata. 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.



## **Jeffrey Henning – Researchscapes International**

Jeffrey Henning, PRC has personally conducted over 1,000 survey research projects. Before founding Researchscape in 2012, Jeffrey co-founded Perseus Development Corporation, which introduced the first web-survey software, and Vovici, which pioneered the enterprise-feedback management category. He also coined the #MRX hashtag on Twitter. Jeffrey is currently volunteering as the president of the Market Research Institute International, a non-profit providing continuing education to the 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.



### **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 of Lightspeed a Kantar business, where he heads an international team called

QuestionArts specialising in the copy writing and design of

surveys and the development of specialist tools and technology for conducting research in the online and mobile arena.



### **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 BrandScan360 and Senior Partner of strategic consultancy Gen2 Advisory Services. 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.



### **Jeffrey Resnick – Stakeholder Advisory Services**

Jeff Resnick is founder of Stakeholder Advisory Services ([www.stakeholderadvisory.com](http://www.stakeholderadvisory.com)). Stakeholder Advisory Services partners with its clients to incorporate insights of key stakeholders within

two critical areas for business success – ensuring alignment of the organization's strategy and services with market needs and the management of reputational risk.

Prior to founding Stakeholder Advisory Services, Jeff held a variety of executive roles at ORC International including President of its U.S. Group. Jeff is a political junkie by nature and initiated and managed the CNN|ORC Poll for more than six years. He had the honor of serving as Board Chair for CASRO (now the Insights Association) in 2012.



### **Larry Friedman, Ph.D. – GreenBook**

Larry Friedman, Ph.D. is former Chief Research Officer, TNS North America. Larry has over nearly 40 years of experience in research and has worked on both the client and research company sides of

market research. Larry consults extensively with senior level client executives on the business implications of their research. He also publishes widely, and speaks before numerous industry forums, including ARE, IIR, AMA and ESOMAR conferences.

He is a winner of a 2009 ARF "Great Mind in Innovation" Award. Larry's market research experience began at General Foods Corporation. Since then he has worked in numerous categories, including FMCG, financial services, pharmaceuticals (OTC and Rx), IT, telecoms, automotive and others. He has considerable experience in a wide variety of research areas, including brand equity research, tracking research, communications research (digital and traditional), social media, customer experience research, strategic/segmentation studies, and new product development. He has extensive experience with integrating these different types of research and distilling larger strategic implications from them.

**Christopher Robson – Deckchair Data**

Chris is a Partner and Co-Founder of Deckchair Data. He is an acknowledged expert in research methodology and data science, and a frequent speaker on advanced methods at industry conferences.

He strongly believes in the importance of solid methodology combined with a laser focus on the business problem.

**Allison Spoelhof – Michigan State University MMR**

Allison Spoelhof is an experienced marketer and researcher with 8 years of experience in the non-profit, higher education, public and private sectors. She is currently the Director of Institutional

Effectiveness at Northwood University and recently graduated with her Master of Science in Marketing Research degree from Michigan State University.

**Elissa Moses – Ipsos**

Elissa is the CEO, Neuro and Behavior Science at IPSOS, She is a recognized Neuromarketing pioneer, with an extensive track record innovating technology applications, leading change and developing

technology driven products and services. Her career spans client side (Gillette, Seagram, Philips), Agency (BBDO, Grey, FCB) and consulting (The BrainWaves Group.) She is also an author and frequent global speaker.



# GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT

2018 Q3–Q4

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