



# GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT





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## CONTACTS:

LEONARD F. MURPHY  
Chief Editor & Principal Consultant  
(770) 985-4904 [lmurphy@greenbook.org](mailto:lmurphy@greenbook.org)

LUKAS POSPICHAL  
Managing Director  
(212) 849-2753 [lpospichal@greenbook.org](mailto:lpospichal@greenbook.org)

CHRIS KOSAR  
Business Development Director  
(646) 840-3427 [ckosar@greenbook.org](mailto:ckosar@greenbook.org)

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GREENBOOK  
New York AMA Communication Services Inc.  
234 5th Avenue,  
New York, NY 10001

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# OUR PARTNERS...





# WELCOME

Welcome to the 20th edition of the **GreenBook Research Industry Trends Report**, using data collected in Q3 & Q4 of 2016.

We continue our efforts to make the GRIT sample globally comprehensive with 1,583 completed interviews and participants from 76 countries. As with previous editions, we consider this GRIT Report to be highly directional and we think it provides a meaningful and reliable snapshot of the market research industry.

While still not as robust in some regions as we would like, in many cases regional analysis is possible with this sample. In keeping with the GRIT spirit of transparency and collaboration, we are making this data available to everyone for further exploration.

GRIT is an experimental platform for us to “walk the talk”, and as always, we sometimes do better with that in some ways than in others. Length of interview and response rates for panelists continue to be a challenge, as does maintaining consistency for tracking questions. We feel the same pain that many clients and suppliers do in trying to migrate to new modes or incorporate emerging best practices in mobile-friendly designs.

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, sample quality and respondent engagement, projected spending and financial outlook, use of non-traditional data sources, trends impacting corporate researchers,

buzz topics such as automation, AI, big data, nonconscious measurement, or attribution analytics; and much more.

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

GRIT continues to be a community effort and our authors, commentary providers, sample partners, advertisers, and most especially research partners make this all possible. Special thanks go out to the organizations who helped with data collection and analysis, including Ascribe, AYTm, Gen2 Advisors, Lightspeed, mTAB, NewMR, OfficeReports, Recollective, Research Now, Researchscape International & Stakeholder Advisory Services.

As always, I think you will find the report informative, provocative, and useful. Enjoy!

LEONARD F. MURPHY  
Executive Editor & Producer, GreenBook  
[lmurphy@greenbook.org](mailto:lmurphy@greenbook.org)  
(770) 985-4904

Go to [www.GreenBook.org/GRIT](http://www.GreenBook.org/GRIT) to read the GRIT Report online and to access all GRIT data and charts



# EXECUTIVE SUMMARY

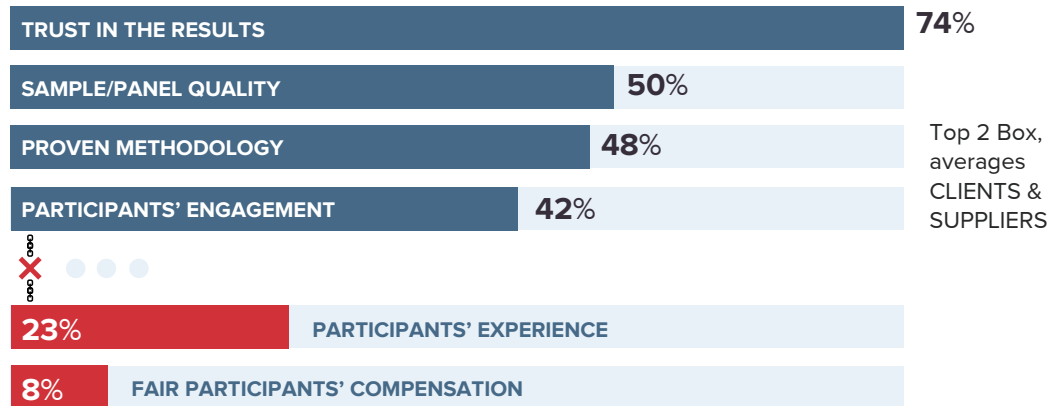


Both Clients and Suppliers rank trust and quality as the drivers of research design decisions, but respondent experience are almost afterthoughts.

It seems that few grasp the relationship between quality and respondent experience.

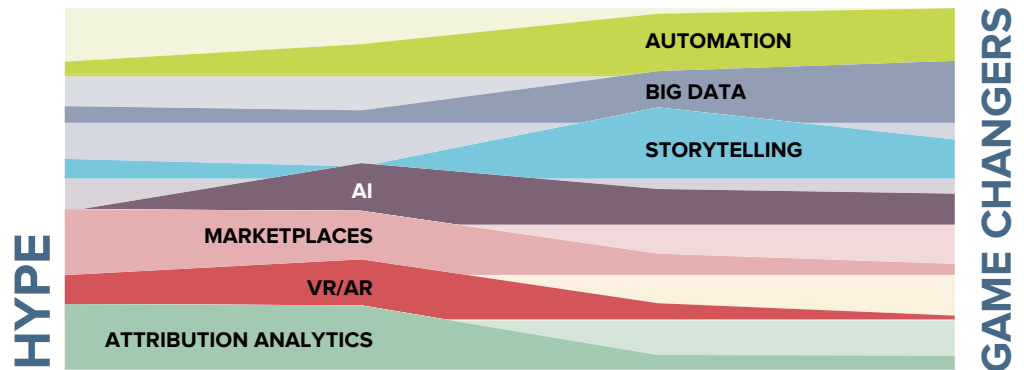


## MOST/LEAST IMPORTANT FACTORS IN STUDY DESIGN



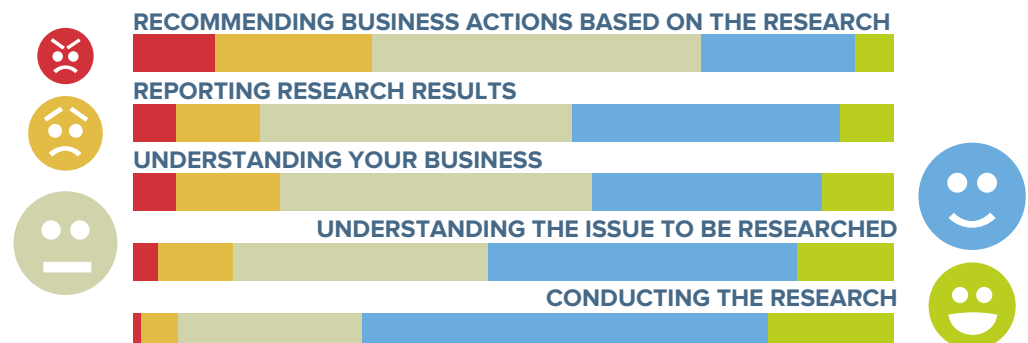
## BUZZ TOPICS: HYPE OR GAME CHANGERS?

Automation & Big Data are clear game changers in MR, with AI and Storytelling not far behind. The industry is taking a "wait and See" attitude about Marketplaces, VR/AR, and Attribution Analytics.



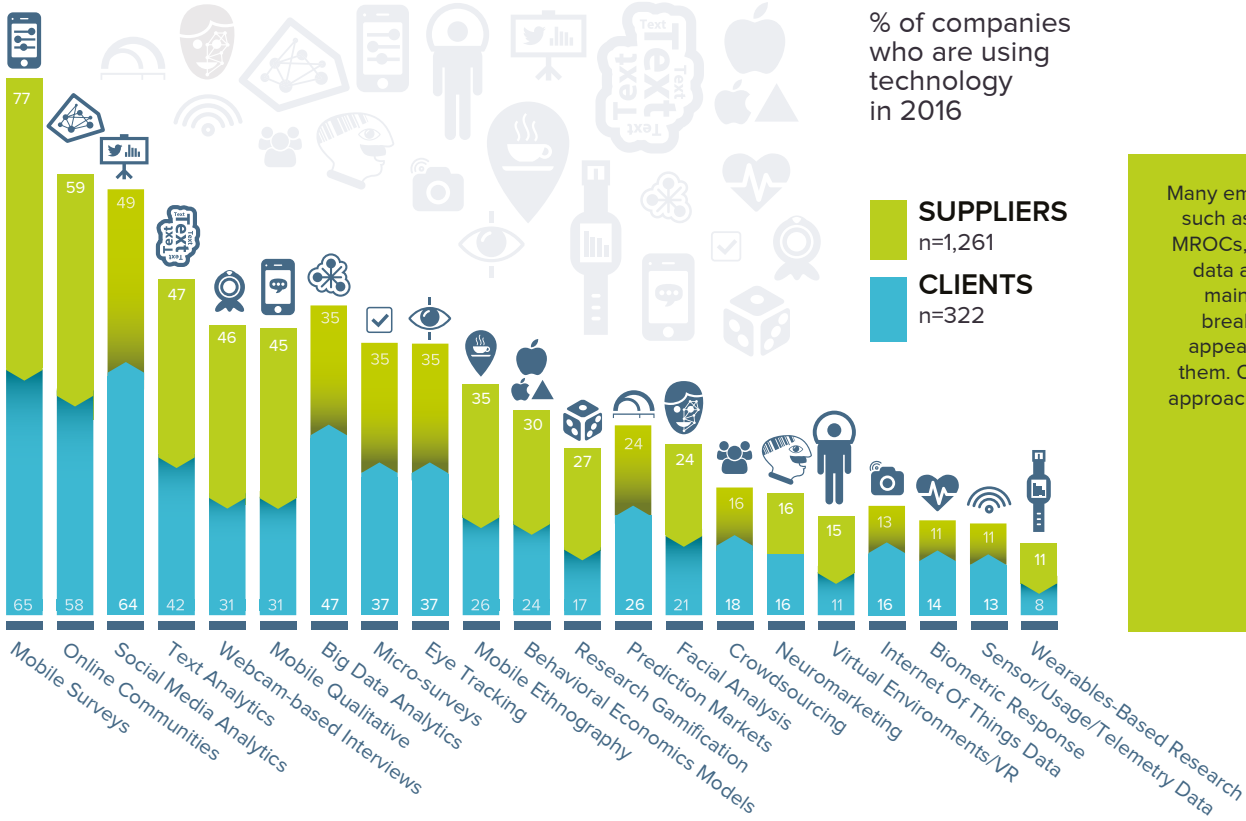
## CLIENT SATISFACTION LEVELS WITH SUPPLIERS

Clients are mostly satisfied with how MR suppliers conduct research, but less so when it comes to consulting skills like understanding their business or business issues and reporting results and recommending actions.



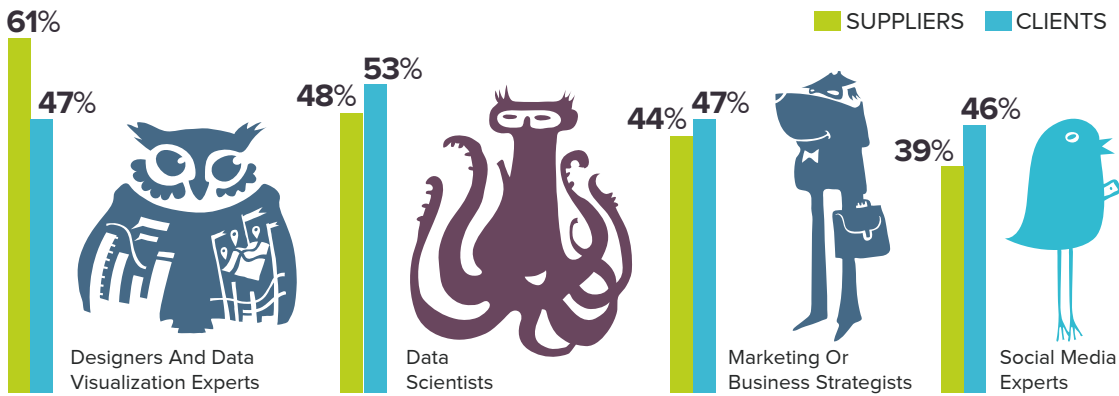
# EMERGING METHODS IN USE BY CLIENTS VS. SUPPLIER

% of companies who are using technology in 2016



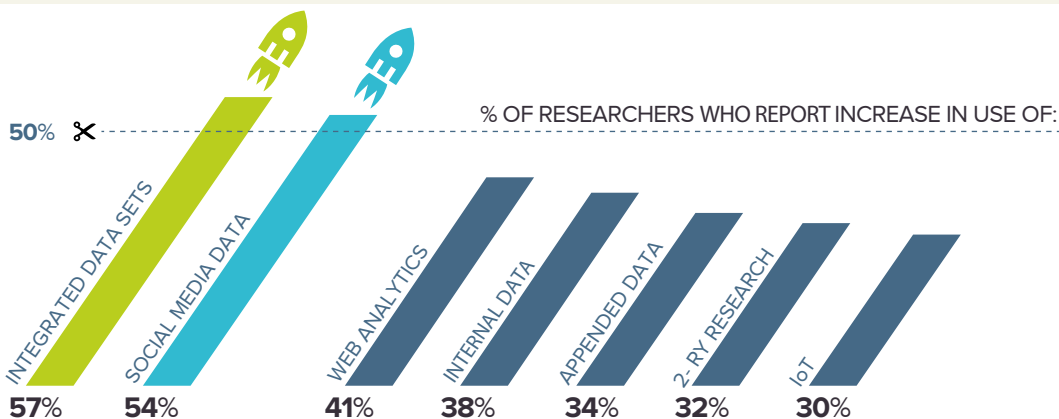
Many emerging techniques such as Mobile Surveys, MROCs, and Unstructured data analysis are now mainstream and no breakout stars have appeared to challenge them. Overall most other approaches remain niches.

# HIRING PROFILES OF THE RESEARCHER OF THE FUTURE



It's great time to be a Designer, Data Scientist, Business Strategist or Social Media Expert; those are most in-demand skills for the year ahead. If your skill set lies more in traditional research it might be time to consider more training in something else.

# PLANNED USAGE OF NON-MR DATA SOURCES



The use of non-primary research data sources by researchers is growing, but it's unclear if Internet of Things (IoT), Web Analytics, and internal Business Intelligence streams will be part of most researcher's tool kit.

# METHODOLOGY AND SAMPLE

For this report, the analysis is based on 1,583 completed interviews



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

For this report, the analysis is based on 1,583 completed interviews, although for some questions, base sizes may be lower due to skip patterns, rotations, routing, and other factors. Unless otherwise noted, all analyses should be assumed to be based on the total sample.

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

## GRIT SAMPLE SIZE TREND

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

## BUYERS VS SUPPLIERS TREND

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

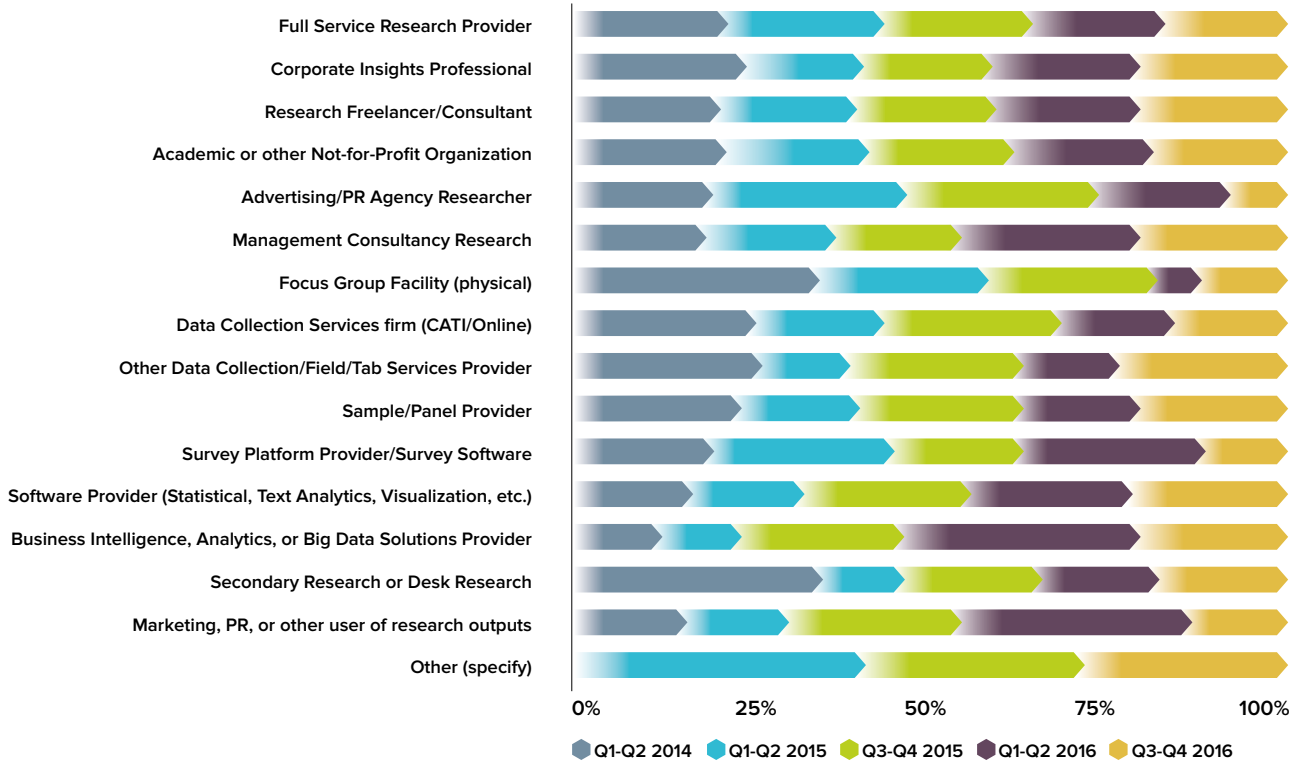
Plurality of respondents describe themselves as working within full-service agencies



The mix of respondents has varied during the 15 years of this study, but within fairly narrow bands. We hold relatively steady at 80% of respondents identifying themselves as being suppliers (n=1,261) and 20% identifying themselves as clients (n=332), which from a percentage perspective is generally consistent with the last several waves of the study.

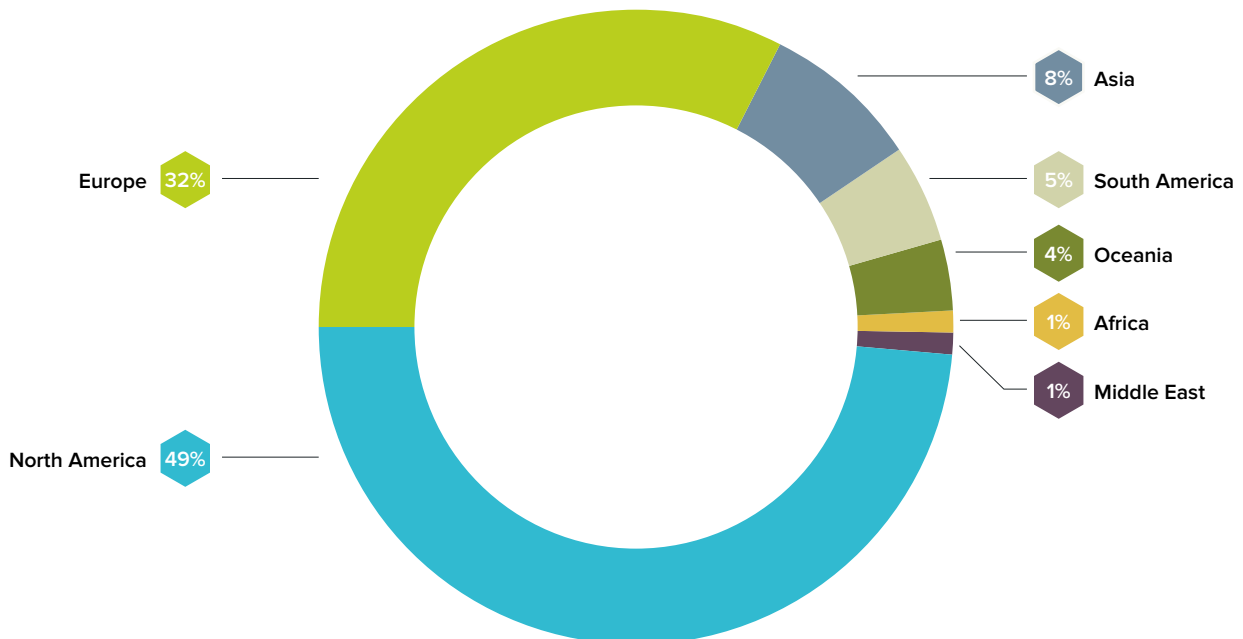
On the supplier side, we have achieved a robust cross-section of the various sectors of the industry, even if a strong plurality of respondents describe themselves as working within full-service agencies. Proportionally, representation from all industry sectors has remained relatively constant across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

### GRIT SAMPLE ORGANIZATIONAL AFFILIATION OVER TIME

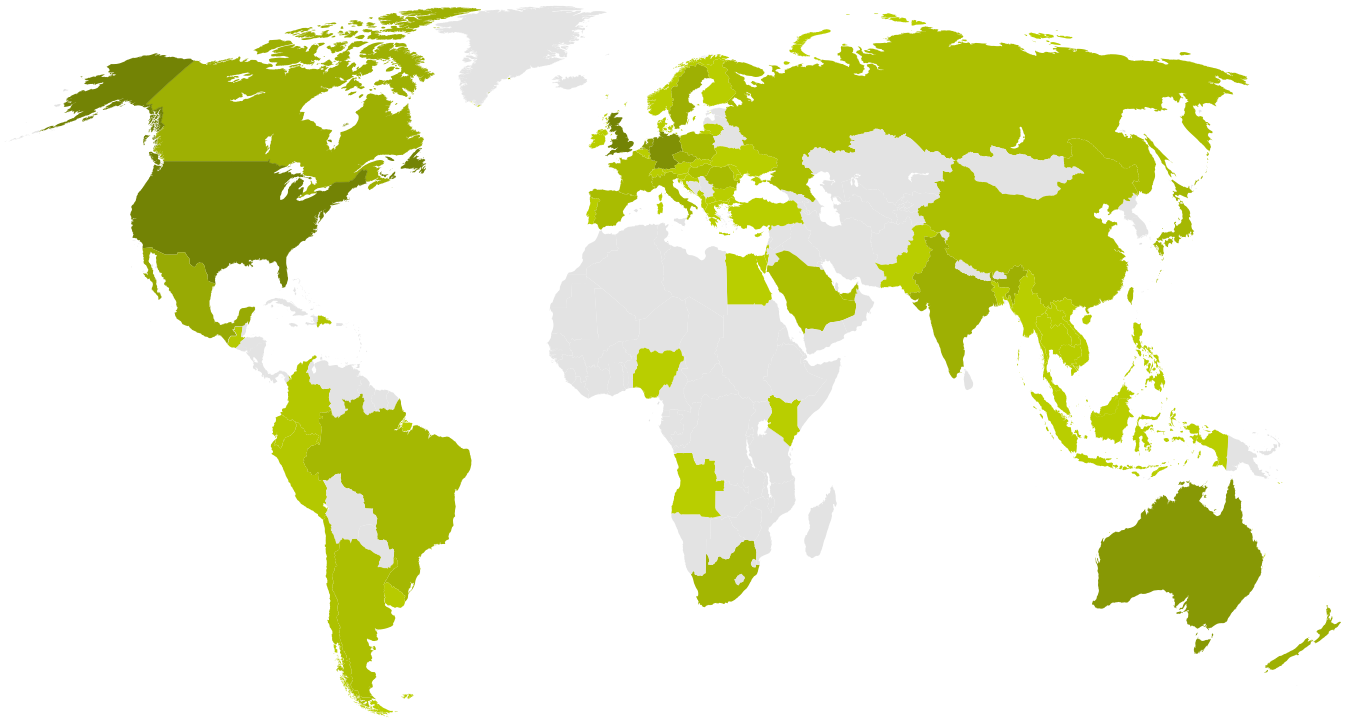


Regional sample sizes remained relatively consistent, with minor variances within each region.

### GRIT PARTICIPATION BY REGION



In total, 76 different countries are represented within the sample, with respondent density shown in the map below.



Almost three quarters of all client-side and almost half of supplier side respondents have worked in the industry for over 20 years.

GRIT respondents generally fall into 2 camps with pluralities being from either small (under 11 people) organizations or larger (over 100 people), with the rest making up the middle. This has remained

broadly consistent over the last several waves as well, with the exception of fluctuations of about 10 points between the two poles between this wave and Q1-Q2 2016.

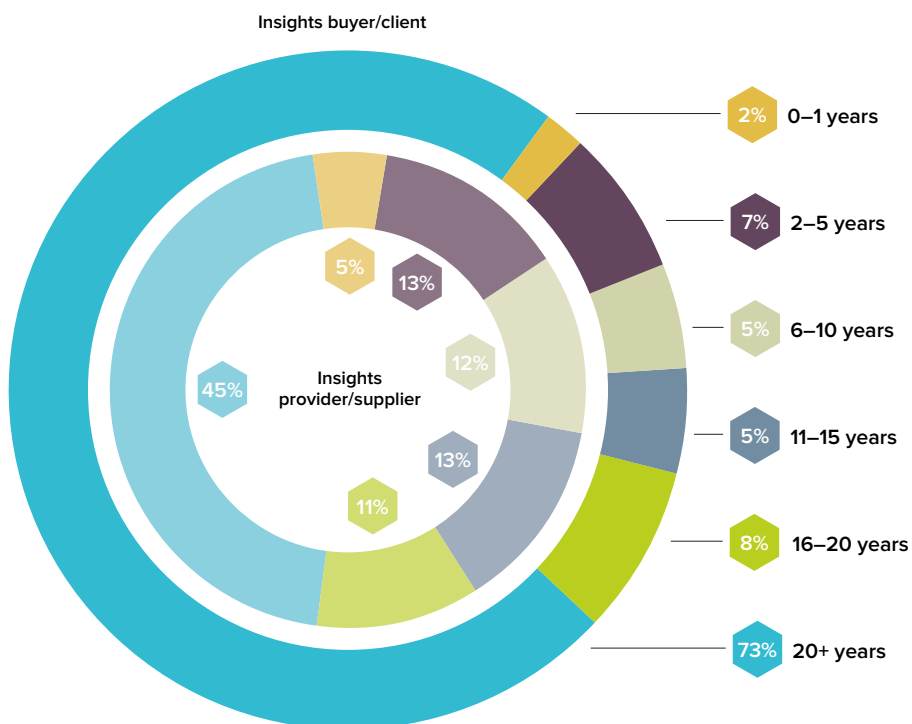
#### GRIT SAMPLE BY SIZE OF ORGANIZATION

Size of Organization	GRIT edition				
	Q1-Q2 2014	Q1-Q2 2015	Q3-Q4 2014	Q1-Q2 2016	Q3-Q4 2016
<11	41%	34%	34%	30%	40%
11 – 20	11%	9%	10%	10%	10%
21 – 50	14%	15%	15%	13%	13%
51 – 100	8%	10%	10%	9%	8%
> 100	26%	33%	31%	38%	30%

In looking at other firmographic questions, the GRIT sample is comprised of largely senior level research professionals. Almost three quarters of all client-side

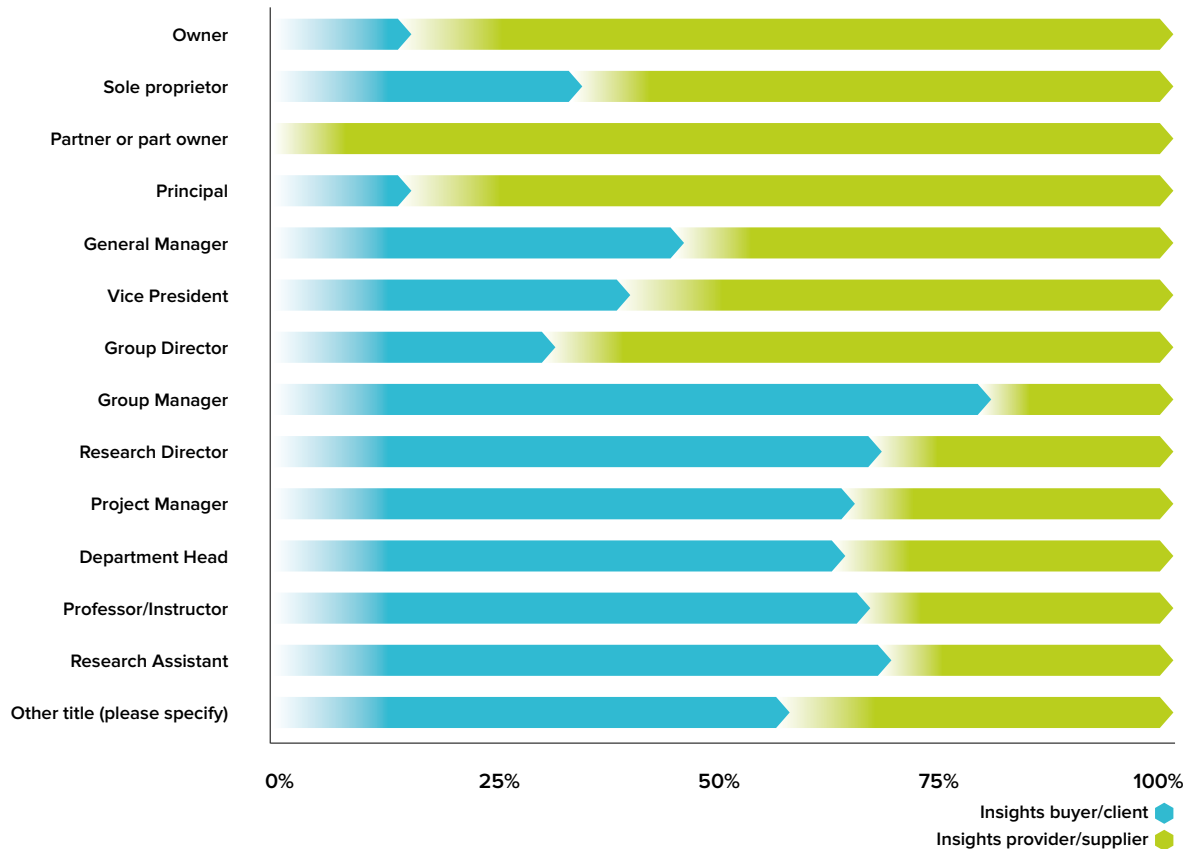
and almost half of supplier side respondents have worked in the industry for over 20 years.

#### GRIT RESPONDENT TENURE



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

GRIT RESPONDENT TITLES BY BUYERS VS SUPPLIERS



The combination of the large sample size globally, the increasingly single source recruiting method (GreenBook email lists), 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* (if such a feat is even possible in our industry!), 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.



## IT'S NOT A GAME-CHANGER IF THE GAME HAS ALREADY CHANGED

### Matt Warta

CEO and Co-Founder, GutCheck

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

**A**lthough it is seen either as a game-changer or interesting trend by almost 70% of clients and 75% of providers in the GRIT report, automation is already considered standard in innovative research methodologies like agile market research, invented about a decade ago. An enabler and proxy for agile market research, automation begets speed and affordability, timeless currencies important to market researchers across industries. Previous research tells us that 78% of marketers and researchers globally plan to adopt agile research methods more within the next year (winter 2015 study). It's no surprise that when you experience a game-changer that essentially bucks the norms of an encumbered industry, new and impressive things happen—and more people use it.

By thinking differently about where the industry is going, you can see opportunities for adding more value for your clients by challenging that which is known. When you've earned lasting, large-scale partnerships with clients, they ask you to do more for that research dollar they're spending with you. In order to rise to that occasion, you can't just automate existing methodologies already out there. Automation is only part of the story; it will be the combination of technologies and methodology that derives the most value for clients.

As an example, let's take concept testing, which hasn't changed much in decades. Concept testing tends to be very standardized, driven off of opaque, historical concepts tested against mass media audiences—a ripe area for automation. However, just making this process more efficient isn't going to put a large dent in the paltry success rates consumer product companies are used to.

What if you were able to start with transparent benchmarks, combining automation with big data that shows you how you compare to the current top competing products instead of comparing to historical databases that are black box and perhaps not relevant anymore? You'd be able to drive your research and development based on how you can be better than your competition.

What if you could also identify who your early adopters of your new product are going to be and focus your advertising and promotion on this critical market? By identifying your top-box concept acceptors, you can leverage modeling and big data to identify look-alikes in the programmatic advertising ecosystem who can be targeted to increase the conversion rate of early usage, which can make or break the success of your product.

Wouldn't your new product launches have a better chance of success with such an approach versus more traditional methods? I think so.

Today, we are seeing step-change value in technologies that allow us to find answers to specific problems more efficiently. You can have the technology that enables automation, which leads to affordability; but if you don't have the specificity around the problem you're trying to solve, these innovations are meaningless. True innovation comes from being able to solve real business problems. When you combine several innovative technologies versus being reliant on any given one, you're able to focus that synergistic combination on solving problems, which can in turn provide something truly game-changing, something that will deliver on what clients are really asking for. You can become a problem solver who knows how to harness all of the enabling technologies available, giving your clients unprecedented understanding.

# ADOPTION OF EMERGING METHODS

In looking at what research approaches/methods are in use or under consideration, it is important to remember that the GRIT sample is not a representative sample of the market research population. The GRIT sample tends to be drawn from those more engaged with the future of

research, so the 'in use' figures will tend to be higher than for the wider MR population. The GRIT report's key usefulness lies in the relativities between the approaches, the trends over time, and the differences between key groups (such as the buyers and sellers of research and insight).

## THE OVERALL PICTURE

Mobile Surveys and Online Communities are mainstream and well ahead of all other 'new' research approaches

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 has gone from consideration to occasionally 'In use'.

The results can be broadly divided into three categories:

1. **Mainstream:** We see it confirmed again that Mobile Surveys (75% 'In Use', 16% 'Under Consideration', making a 'Total Interest' score of 91%) and Online Communities (59% 'In Use', 'Total Interest' 82%) are mainstream and well ahead of all other 'new' research approaches.
2. **Wide adoption:** The second group runs from Social Media Analytics (52% 'In Use', 'Total Interest' 76% – which makes it almost mainstream) down to Behavioral Economics (29% 'In Use', 'Total Interest' 54%). These techniques are in wide adoption, but no single approach from this group can be considered essential. However, having some of them in your toolbox is likely to be necessary for most organizations.
3. **Niche:** The bottom group runs from Research Gamification (25% 'In Use', 'Total Interest' 53%) down to approaches with very low scores, such as Wearables (10% 'In Use', 'Total Interest' 37%). This group tends to be a mixture of the very specialized and those approaches that have not yet broken through in terms of usage.

## STABILITY OVER THE LAST TWO YEARS

Mobile Surveys and Micro-Surveys are two approaches that show the largest increase, +11% and +10% respectively

Table 2 shows the 'In Use' data for the last five waves, dating back to August 2014, a period of just over two years. The data shows that there are

changes, but few of them are large. Given the nature of the data, sampling variation etc., we suggest that you ignore anything smaller than plus or minus 5%.

TABLE 1 – EMERGING METHODS IN USE/UNDER CONSIDERATION

	Rank	Labels	In Use	Under Consideration	Total Interest
<b>Mainstream</b>	1	Mobile Surveys	75%	16%	91%
	2	Online Communities	59%	23%	82%
<b>Wide Adoption</b>	3	Social Media Analytics	52%	24%	76%
	4	Text Analytics	46%	30%	76%
	5	Webcam-Based Interviews	43%	22%	65%
	6	Mobile Qualitative	42%	26%	68%
	7	Big Data Analytics	38%	31%	69%
	8	Micro-surveys	35%	25%	60%
	9	Eye Tracking	35%	21%	56%
	10	Mobile Ethnography	33%	27%	60%
	11	Behavioral Economics Models	29%	25%	54%
<b>Niche</b>	12	Research Gamification	25%	29%	53%
	13	Prediction Markets	24%	23%	47%
	14	Facial analysis	24%	21%	45%
	15	Crowdsourcing	16%	21%	37%
	16	Neuromarketing	16%	19%	35%
	17	Virtual Environments/Virtual Reality	14%	24%	38%
	18	Internet of Things	14%	26%	39%
	19	Biometric Response	12%	19%	31%
	20	Sensor/Usage/Telemetry Data	11%	19%	31%
	21	Wearables Based Research	10%	27%	37%

Base = 1580

TABLE 2 – EMERGING METHODS IN USE WAVE-TO-WAVE CHANGE

	Q1-Q2 2014	Q1-Q2 2015	Q3-Q4 2015	Q1-Q2 2016	Q3-Q4 2016	Change
Mobile Surveys	64%	67%	68%	74%	75%	11%
Online Communities	56%	59%	50%	61%	59%	3%
Social Media Analytics	46%	44%	43%	48%	52%	5%
Text Analytics	40%	38%	38%	45%	46%	6%
Webcam-Based Interviews	34%	38%	33%	42%	43%	9%
Mobile Qualitative	37%	43%	34%	44%	42%	5%
Big Data Analytics	32%	32%	34%	39%	38%	6%
Micro-surveys	25%	30%	25%	35%	35%	10%
Eye Tracking	34%	28%	28%	36%	35%	2%
Mobile Ethnography	30%	35%	31%	34%	33%	3%
Behavioral Economics Models	25%	27%	21%	31%	29%	3%
Research Gamification	23%	21%	20%	27%	25%	1%
Prediction Markets	19%	21%	17%	22%	24%	5%
Facial analysis	18%	17%	18%	22%	24%	6%
Crowdsourcing	17%	19%	12%	20%	16%	-1%
Neuromarketing	13%	14%	15%	17%	16%	3%
Virtual Environments/VR	17%	15%	10%	14%	14%	-3%
Internet of Things	12%	11%	9%	14%	14%	1%
Biometric Response	13%	10%	10%	11%	12%	-2%
Sensor/Usage/Telemetry Data	—	—	7%	11%	11%	5%
Wearables Based Research	7%	7%	8%	12%	10%	3%

Suggestions for emerging techniques not mentioned in the current selection included Automated Research, Geolocation, and Artificial Intelligence, and Implicit Research



Surveys and Micro-Surveys are two approaches that show the largest increase, +11% and +10% respectively – both of which are part of a broader trend toward agile research – something that we’ve seen reflected in many blog posts and conference presentations over the last two years.

Many people will be disappointed and/or surprised to see that the scores for Social Media Analytics and Virtual Reality have not risen substantially over the last five waves. Techniques such as VR and biometrics seem to be trapped in the bottom part of the table. We suspect this is due to the current scalability limits (and hence cost implications)

of these approaches, and like with other approaches in the recent past more growth will occur when scale is achieved through cost reductions.

We also checked the open-ended suggestions for emerging techniques not mentioned in the current selection, and this process generated four propositions: Three of these techniques were Automated Research, Geolocation, and Artificial Intelligence. The fourth suggestion was Implicit Research, something which could be seen as a sub-category of Neuro, but seems to be emerging in its own right. In future GRIT editions, we will monitor those emerging methods more closely.

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## BUYERS AND SUPPLIERS

Considerably more suppliers than buyers are using several of the more technical methodologies



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 was 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 interested 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.

TABLE 3 – EMERGING METHODS IN USE BUYERS VS. SUPPLIERS

	Buyer%	Seller%	Seller- Buyer
Mobile Surveys	65%	77%	12%
Online Communities	58%	59%	1%
Social Media Analytics	64%	49%	-15%
Text Analytics	42%	47%	5%
Webcam-Based Interviews	31%	46%	15%
Mobile Qualitative	31%	45%	14%
Big Data Analytics	47%	35%	-11%
Micro-surveys	37%	35%	-3%
Eye Tracking	37%	35%	-2%
Mobile Ethnography	26%	35%	9%
Behavioral Economics Models	24%	30%	6%
Research Gamification	17%	27%	10%
Prediction Markets	26%	24%	-3%
Facial analysis	21%	24%	4%
Crowdsourcing	18%	16%	-3%
Neuromarketing	16%	16%	0%
Virtual Environments/VR	11%	15%	4%
Internet of Things	16%	13%	-4%
Biometric Response	14%	11%	-3%
Sensor/Usage/Telemetry Data	13%	11%	-3%
Wearables Based Research	8%	11%	2%

The pattern of techniques and approaches in use is similar between Buyers and Sellers (not surprisingly) with an r-squared value of 82%. However, there are some interesting differences:

Considerably more suppliers than buyers are using several of the more technical methodologies, for example: Webcam Interviews (46% Sellers, 31% Buyers), Mobile Qual (45% Sellers, 31% Buyers), Mobile Surveys (77% Sellers, 65% Buyers), Research Gamification (27% Sellers, 17% Buyers), and Mobile Ethnography (35% Sellers, 26% Buyers).

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 64%, Suppliers 49%) and Big Data Analytics (Buyers 47%, Suppliers 35%). This finding is consistent with earlier waves of GRIT and we believe it indicates that many clients are buying these two services from non-MR suppliers.

Consistent with previous findings, many clients are buying Big Data Analytics and Social Media Analytics from non-MR suppliers



# DIFFERENCES BY REGION

There are some interesting differences by Region, and if you have a chance to dive into the data you will find some interesting differences by country too. However, the main message is that the advanced market research world is essentially a similar place – comparing North America to the other three groupings gives an r-squared of 85% or higher for each region.

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

The top methods most in use, Mobile Surveys and Online Communities, are the same in each region but after that there are variations. In terms of the number of approaches being used, the averages are higher in Europe and North America (33% and 31%) and lower in APAC and Other (28% for both).

TABLE 4 – EMERGING METHODS IN USE BY REGION

	North America	Europe	APAC	Other
Mobile Surveys	76%	75%	74%	67%
Online Communities	56%	62%	60%	58%
Social Media Analytics	53%	52%	44%	55%
Text Analytics	46%	41%	47%	47%
Webcam-based Interviews	48%	41%	34%	31%
Mobile Qualitative	43%	44%	34%	34%
Big Data Analytics	43%	33%	30%	34%
Micro-surveys	33%	41%	32%	45%
Eye Tracking	32%	44%	32%	28%
Mobile Ethnography	33%	35%	28%	21%
Behavioral Economics Models	26%	35%	31%	20%
Research Gamification	24%	32%	15%	16%
Prediction Markets	23%	26%	25%	24%
Facial Analysis	22%	27%	20%	19%
Crowdsourcing	17%	18%	16%	13%
Neuromarketing	15%	18%	10%	18%
Virtual Environments/ Virtual Reality	16%	14%	7%	8%
Internet Of Things Data	13%	11%	15%	19%
Biometric Response	12%	11%	9%	12%
Sensor/Usage/Telemetry Data	11%	13%	11%	9%
Wearables Based Research	10%	10%	10%	14%
Base	761	430	149	98

78% of respondents are suppliers (n=1,673) and 22% are clients (n=471)



## THE BIG PICTURE?

The two main messages are A) over the last couple of 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 similarity).

The stability message is of particular interest to those championing the exciting approaches that have yet to take off, for example Biometrics, Wearables, Virtual Reality, 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 Surveys and Online Communities, some of the techniques in the middle group, and perhaps one of the emergent techniques in the bottom group.

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



The main worry for market research providers is the suggestion from the data that many research buyers are turning to non-market research sources for their Text Analytics and Social Media Analytics.



## THE NORTH STAR IN DATA INNOVATION:

### USING MEASUREMENT SCIENCE TO LINK TRADITIONAL AND EMERGING RESEARCH METHODS

#### Pat Pellegrini, PhD

President and Chief Research Officer, Simmons Research

Email: [info@simmonsresearch.com](mailto:info@simmonsresearch.com) | Twitter: [@patpellegrini](https://twitter.com/patpellegrini) | Website: [www.simmonsresearch.com](http://www.simmonsresearch.com)

LinkedIn: <https://ca.linkedin.com/in/patpellegrini>

The last year has been a year of transition for us at Simmons as we've adjusted to life as a stand-alone company (after our sale from Experian). Over the last 12 months, we've spent a lot of time working with our clients to dig into their current challenges, and one of the biggest is navigating the ever-expanding world of data. This year's GRIT survey reveals that, in the year ahead, 57% of buyers and 56% of providers plan to increase their use of integrated data sets (multiple data sources combined with primary research). Not only is the use of integrated datasets growing, but also the challenge to develop best practice methodologies to merge these datasets efficiently, accurately, and at at-scale. While the fusing of disparate data sources can seem challenging, it offers unique opportunities to us as researchers. It's our responsibility to ensure that, among all this data, we can uncover the real insights versus the noise resulting from the data source itself.

How do we control this noise and ensure we're getting to the insights we need? The answer is in measurement science – the juxtaposition of measurement methodology and measurement technology – by applying best practices in measurement methodology to fast-moving, often imperfect data captured passively. A measurement science approach relies on getting a baseline measurement of consumers using superior sampling, weighting, and questionnaire design that includes core demographic and psychographic measures. No doubt, this kind of effort is resource-intensive, but it lays the foundation to calibrate virtually any other large scale dataset and ensure it aligns with a common set of variables that are deemed to be representative of a consumer population. At Simmons, we maintain a current,

trendable, and high-quality dataset called the National Consumer Survey, and it is our North Star. It's our benchmark of US adults' demographics, psychographics, and key behaviors, and it informs every other survey we field, every model we develop, and every client interaction. It allows us to be nimble when clients want to get to a single version of the truth across disparate datasets, and it ensures that we are protecting our most valuable natural resource – respondents. By linking datasets using what we already know to be high-quality baseline data, we reduce the need to go back and ask respondents questions to which we already have the answers, and we give ourselves and our clients more latitude to enhance their data strategically, rather than starting from scratch.

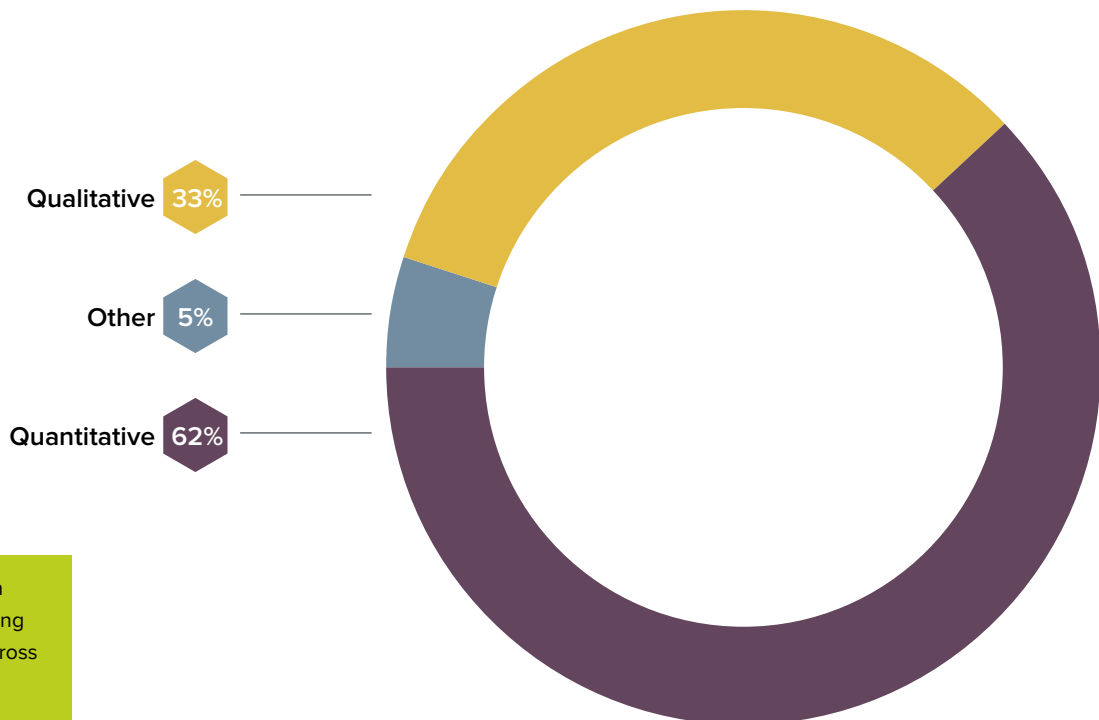
Historical GRIT data, and our everyday client conversations, confirm that large-scale data remains a cornerstone of market research. As our industry works to keep pace with an expanding and diverse universe of available data, we are obligated to ensure that data innovations reflect our industry's high standards of quality and methodological rigor. For that, our industry needs its North Stars.

# USAGE OF TRADITIONAL METHODOLOGIES

Last year we learned that 79% of researchers used qualitative research in 2015, and 90% used quantitative research – in fact, 68% of researchers used both qual and quant. With the age of pure qual or quant research ending, we wanted to better

understand the mix between the two: quantitative research predominates, comprising 62% of research work across projects, while qual research makes up 33% of research work.

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

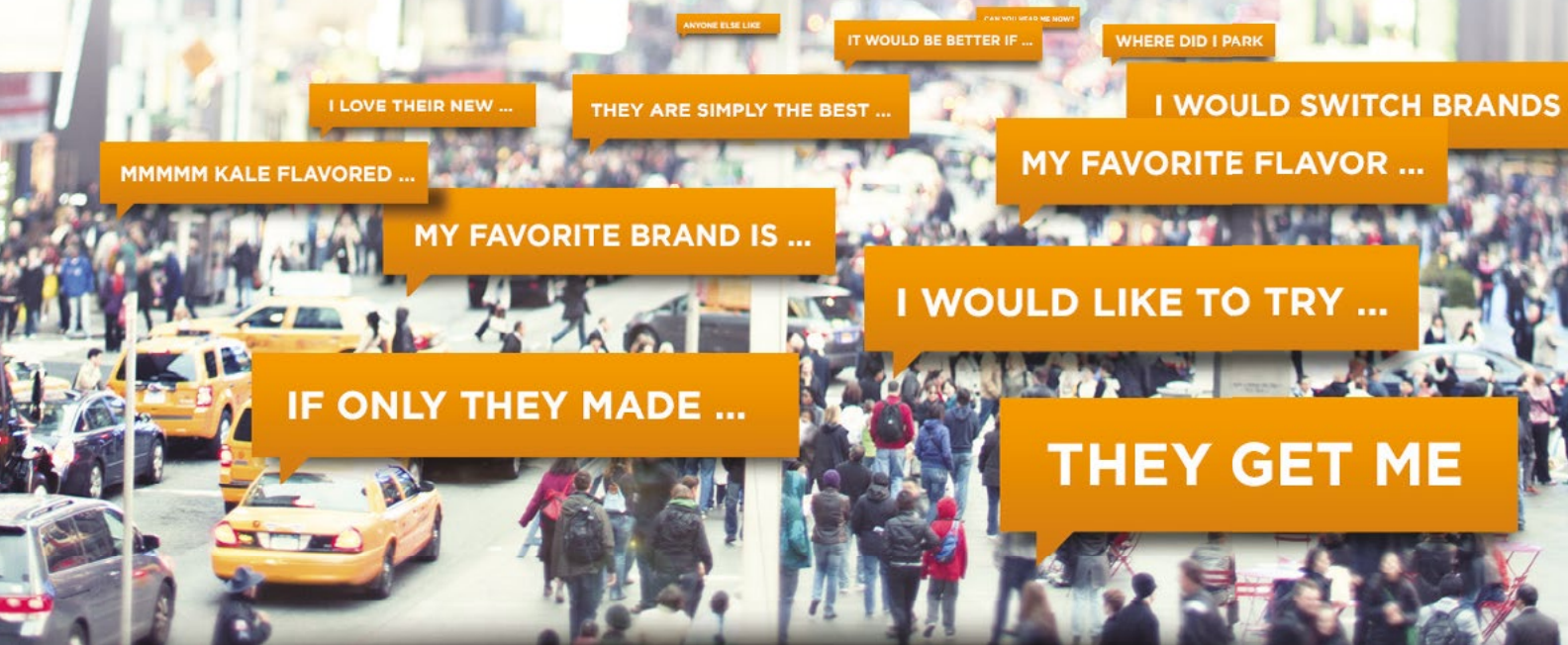


Quantitative research predominates, comprising 62% of research work across projects



Sample Size: 1583

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# QUANTITATIVE RESEARCH

Those who used quantitative research were asked to rank the data collection methods they have used the most in 2016.

ranked F2F (face-to-face) interviews #1, placing it third for #1 votes, most researchers ranked it far lower, pushing its overall rank down to #5.

Mobile surveys came in second overall, with 40% ranking it #2 in usage



How big of a sway do online surveys have over quantitative research today? Over two thirds of researchers (69%) ranked online surveys #1, compared to just 9% who ranked CATI (Computer-Assisted Telephone Interviewing) #1. While 8%

In contrast, mobile surveys were ranked #1 by the fourth-most researchers (5%) but came in second overall, with 40% ranking it #2 in usage. The least used techniques were mail, biometrics, and people meters.

**Q:** Which of these quantitative data collection methods have you used most this year?  
Please select your top 5, rank ordering them by frequency of use.

	Overall Rank	#1	#2	#3	#4	#5	#6-#10	Unranked
Online Surveys	1	69%	15%	7%	5%	3%	1%	1%
Mobile Surveys	2	5%	40%	13%	9%	7%	19%	7%
CATI	3	9%	17%	24%	18%	10%	8%	14%
CAPI	4	4%	9%	16%	21%	16%	18%	16%
Face-to-Face	5	8%	9%	11%	10%	7%	41%	13%
IVR	6	<1%	<1%	2%	7%	18%	53%	19%
Mail	7	1%	3%	5%	5%	9%	60%	17%
Biometrics/Neuromarketing	8	1%	1%	4%	3%	3%	70%	19%
Other quant techniques	9	2%	2%	8%	7%	7%	60%	14%
Automated Measures/People Meters	10	1%	1%	3%	3%	2%	70%	19%

Sample Size: 1,406

# QUALITATIVE RESEARCH

While the top two methods of quant research are conducted online through automated data collection systems, the top two methods of qual research are still conducted in-person, person-to-person.

Focus groups are the most used technique of nearly half (46%) of those researchers who have performed qualitative research in 2016. The second-most used technique is in-person IDIs (In-Depth Interviews), ranked #1 by 14% of researchers. While telephone IDIs are ranked #1 by the third largest group (11%),

this is a niche technique with lower rankings overall, pushing it down to #5 overall, after online focus groups without webcams (#3), and online focus groups with webcams (#4).

The three least used qual methods are online IDIs with webcams, telephone focus groups, and online IDIs with chat.

Focus groups are the most used technique of nearly half of those researchers who have performed qualitative research in 2016



Which of these qualitative data collection methods have you used most this year?  
Please select your top 5, rank ordering them by frequency of use.

	Overall Rank	#1	#2	#3	#4	#5	#6-#10	Unranked
In Person Focus Groups	1	46%	16%	14%	7%	3%	4%	11%
In Person IDIs	2	14%	31%	11%	7%	10%	14%	12%
Online Focus Groups without webcams	3	9%	13%	13%	15%	13%	22%	15%
Online Focus Groups with webcams	4	3%	7%	12%	15%	17%	29%	17%
Telephone IDIs	5	11%	11%	15%	7%	5%	36%	14%
Other qual methods	6	5%	5%	8%	9%	11%	48%	13%
Online IDIs with webcams	7	3%	5%	7%	9%	7%	52%	17%
Telephone Focus Groups	8	1%	2%	2%	9%	10%	57%	20%
Chat (text-based) Online IDIs	9	1%	3%	6%	7%	7%	59%	18%

Sample Size: 1,384

Researchers were asked to rate emerging qualitative techniques in a separate exercise. Of these techniques, discussions using online communities were the most used (21% ranking it #1), with 15%

ranking mobile qual #1, and 13% ranking both bulletin-board studies and in-store observations #1.

Least used were blog monitoring and automated interviewing via AI systems.

**Q:** Which of these qualitative data collection methods have you used most this year?  
Please select your top 5, rank ordering them by frequency of use.

	Overall Rank	#1	#2	#3	#4	#5	#6-#10	Unranked
Discussions Using Online Communities	1	21%	16%	13%	12%	7%	4%	27%
Mobile (diaries, image collection, etc.)	2	15%	18%	13%	8%	4%	15%	27%
Bulletin Board Studies	3	13%	12%	14%	11%	11%	8%	30%
In-Store/Shopping Observations	4	13%	12%	10%	8%	11%	17%	29%
Monitoring Blogs	5	6%	7%	8%	12%	15%	21%	31%
Other qual methods	6	10%	4%	7%	7%	9%	36%	26%
Automated Interviewing via AI systems	7	5%	7%	7%	11%	9%	27%	35%

Sample Size: 1,384

## THE BOTTOM LINE

The growth of communities has not noticeably cannibalized other qual approaches



The Researcher's tool box is becoming more and more diverse, but the dichotomy of quant (surveys) and qual (groups) still drives researchers to use variations of these basic tools. While it's clear that online (and now mobile) has supplanted virtually all other quant approaches by a wide margin, the same disruption has yet to occur at significant levels in qual. Even the mainstream growth of communities has not noticeably cannibalized other qual approaches, but rather has simply grown side-by-side with traditional focus groups.

Until such time when qual can achieve the same level of scale, cost and speed efficiencies and/or faces a fundamental shift in respondent behavior such as the massive adoption of mobile, it's unlikely that we will see a decline in traditional qual research. That said, advances in AI and automation already manifesting with some emerging suppliers may indeed grow to ubiquity and could force a sea change in qual research in the near future.



# SAMPLE QUALITY: DID YOU KNOW?

## Melanie Courtright

Executive Vice President, Global Client Services, Research Now

Website: [www.researchnow.com](http://www.researchnow.com)

**I**n the last twelve months, we as an industry have talked a lot about mobile and its impact on survey data and participation. We've also discussed #mrx innovation and changes in the macro landscape with integrated data, passive and behavioral measurement, privacy changes, and automation. We've even discussed how the traditional agency-buyer relationships and value propositions are being challenged.

During that time, there have been some quiet, but important, changes taking place in the sampling and sample quality space that you may not be aware of, or fully appreciate. So how about a quick "Did You Know" exercise?

1. **Did you know** that there are only a couple of true double opt in panels left that are investing in building a predictable set of known people who are deeply profiled and validated? Many firms today are taking a "traffic generation" approach to sampling, and prescreening heavily to support survey work. They are also going to small ponds and fishing heavily from them. This makes a difference in the incidence rates you see, and in the inherent bias present beginning at even the first question in your study.
2. **Did you know** that every company now uses yield management technology, or routers, to direct people to surveys, and that each of these routers is different? Parallel versus serial routers and priority-based versus random are two things you should be asking your partners about. Some excellent research exists that covers how to use a router without introducing bias, and the most important aspect is randomization of assignment and constant testing, along with ensuring sufficient depth of participants included and breadth of research topics to complete.
3. **Did you know** that there are many ways to sample a study, and if you don't tell your partner which you prefer, they will generally pick the most efficient one? You can balance on invitations, balance on survey starts, and balance on survey completes. The last two are the most effective, and the choice depends on your study objectives. Once you decide on that, you also need to decide on how much, or how little, targeting to permit.

4. **Did you know** that targeting and prescreening are NOT the same, but they both change the incidence you will see in your survey? Targeting is based on questions or behaviors from a previous interaction, and pre-screening is based on real time questions. Targeting has less bias than prescreening, because there it is less likely to affect their current cognitive thought process.

Just one more, lest you experience a piece from me that doesn't continue to sound the mobile alarm.

5. **Did you know** that we haven't actually made much progress on mobile design elements as an industry? Research Now has been assessing surveys across ten mobile factors and coding them into four groups, which have not changed much after YEARS of discussions, all while the participants have long since evolved. As an industry, we get a failing grade on addressing this issue.

	2014	2015	2016
Mobile Incompatible	30%	32%	29%
Mobile Possible	27%	23%	23%
Mobile Friendly	30%	30%	33%
Mobile Optimized	13%	15%	15%

Our jobs are busy and our industry is changing. That can make it hard to keep up with everything going on around us. But in market research, everything matters. Every change yields ripples that affect the data. And since quality is best measured by how well the final data tells us the truth we need to make decisions, we need to know it all. Make sure you partner with a company that has great research as its guiding principle, and gives you the information you need to make good decisions about research.

# STUDY DESIGN VS. SAMPLE QUALITY

New to this GRIT edition was a question designed to help us better understand what elements come into play when designing and implementing research.

What we learned tells a very interesting, if not alarming, story.

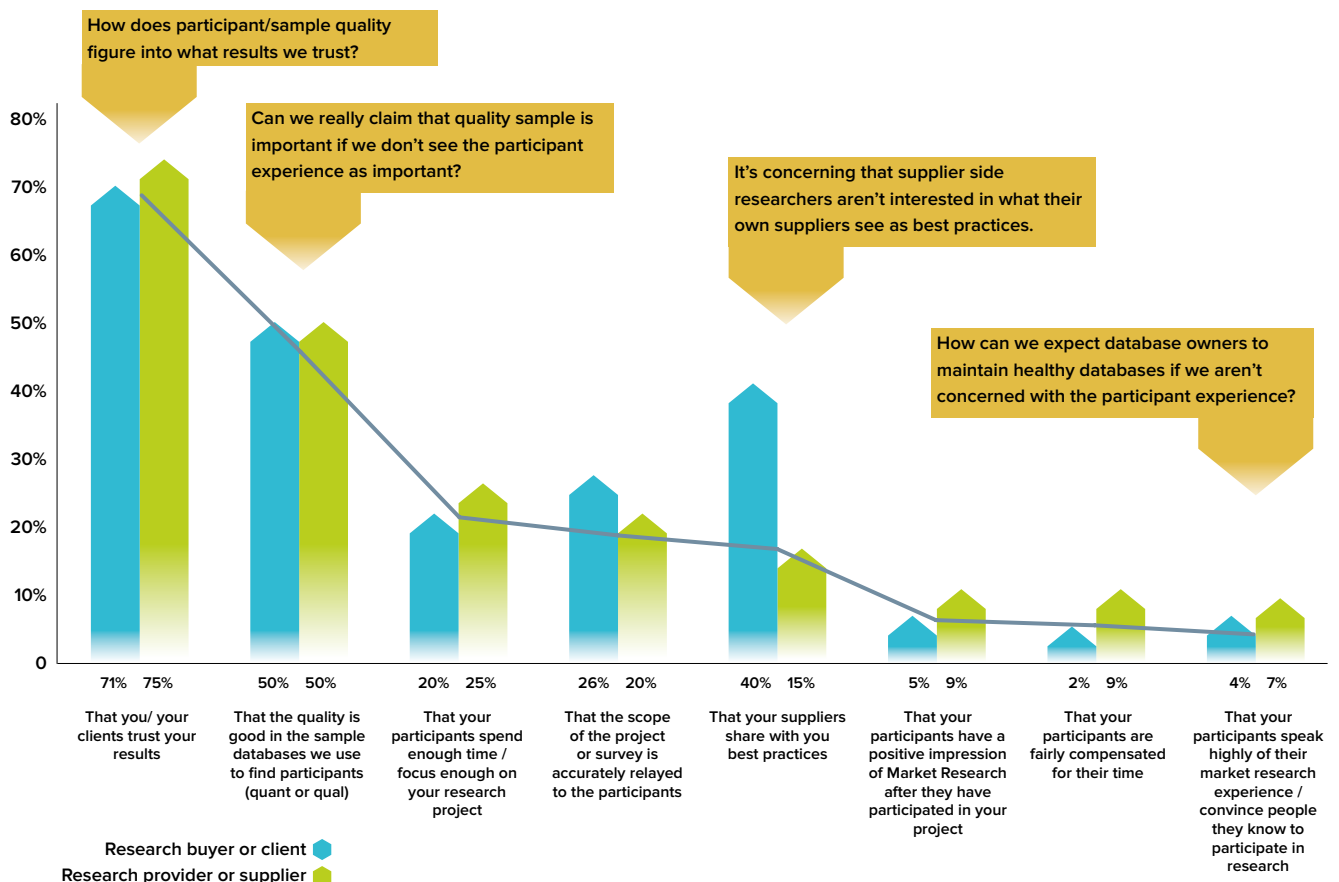
## WHAT RESEARCHERS WANT

The most important to researchers is that they can trust the results derived from their research

Not surprisingly, the most important to both client and supplier-side researchers is that they can trust the results derived from their research. Second to that in importance is that the quality of recruitment databases/panels where the participants are sourced

is good; but there seems to be a disconnect between what is perceived to drive the quality of a sample source and how participant experience affects the results of research.

IMPORTANCE WHEN DESIGNING RESEARCH, TOP 2 BOX BY CLIENT VS. SUPPLIER



# RESEARCH PARTICIPANTS AND THEIR EXPERIENCE

It seems the relationship between researchers and research participants has become very one-sided – what we expect from participants is not aligned with what we feel our obligations are to them.

According to the ranking exercise we conducted, to most GRIT respondents it's not important that participants are fairly compensated for their time, that they speak highly of their experience or have a positive impression of market research. To a lesser degree, it's not important that the scope of

the project has been accurately portrayed to the participant or that the participants spend enough time on the project.

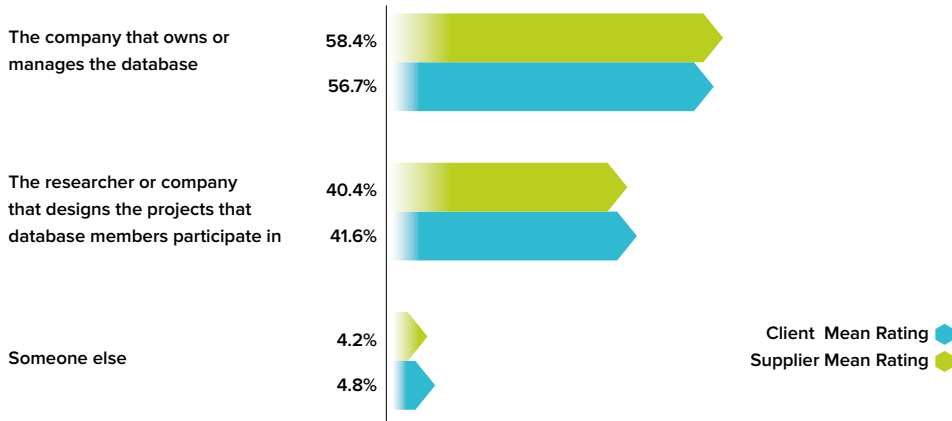
If we view participants as a critical piece in successful research projects, shouldn't we be more concerned with their experience?

We hold database owners responsible for the quality of the databases:

To most GRIT respondents it's not important that participants are fairly compensated for their time or have a positive impression of market research



## WHO IS RESPONSIBLE FOR SAMPLE QUALITY?



We asked GRIT participants to assign responsibility for sample quality to the source owners, the users, or someone else. The mean response, shown above shows a consistent view from both Clients and Suppliers that the majority of responsibility falls on the owner of the sample, while a strong plurality also believe that users have some responsibility.

This presents some interesting questions that have been hinted at in previous waves of GRIT as well; if panel companies carry the brunt of responsibility for sample quality, then they should be allowed to set LOI limits, ensure studies are mobile-first, work to deliver greater incentives to respondents and otherwise take charge of ensuring respondents are

having a great experience and delivering high value data back. However, the reality is almost opposite, and in the exercise related to rating the importance of various attributes for project design, we see starkly yet again that researchers seem to want to have their cake and to eat it to.

Let's assume that we agree with the notion that when it comes to research participants, being fairly compensated for their time, having a satisfactory experience and having a positive impression of market research are all important drivers of quality participation. This would then beg the question: How are panel owners expected to build and maintain quality sample if the conditions that drive the quality aren't valued?

How are panel owners expected to build and maintain quality sample if the conditions that drive the quality aren't valued?

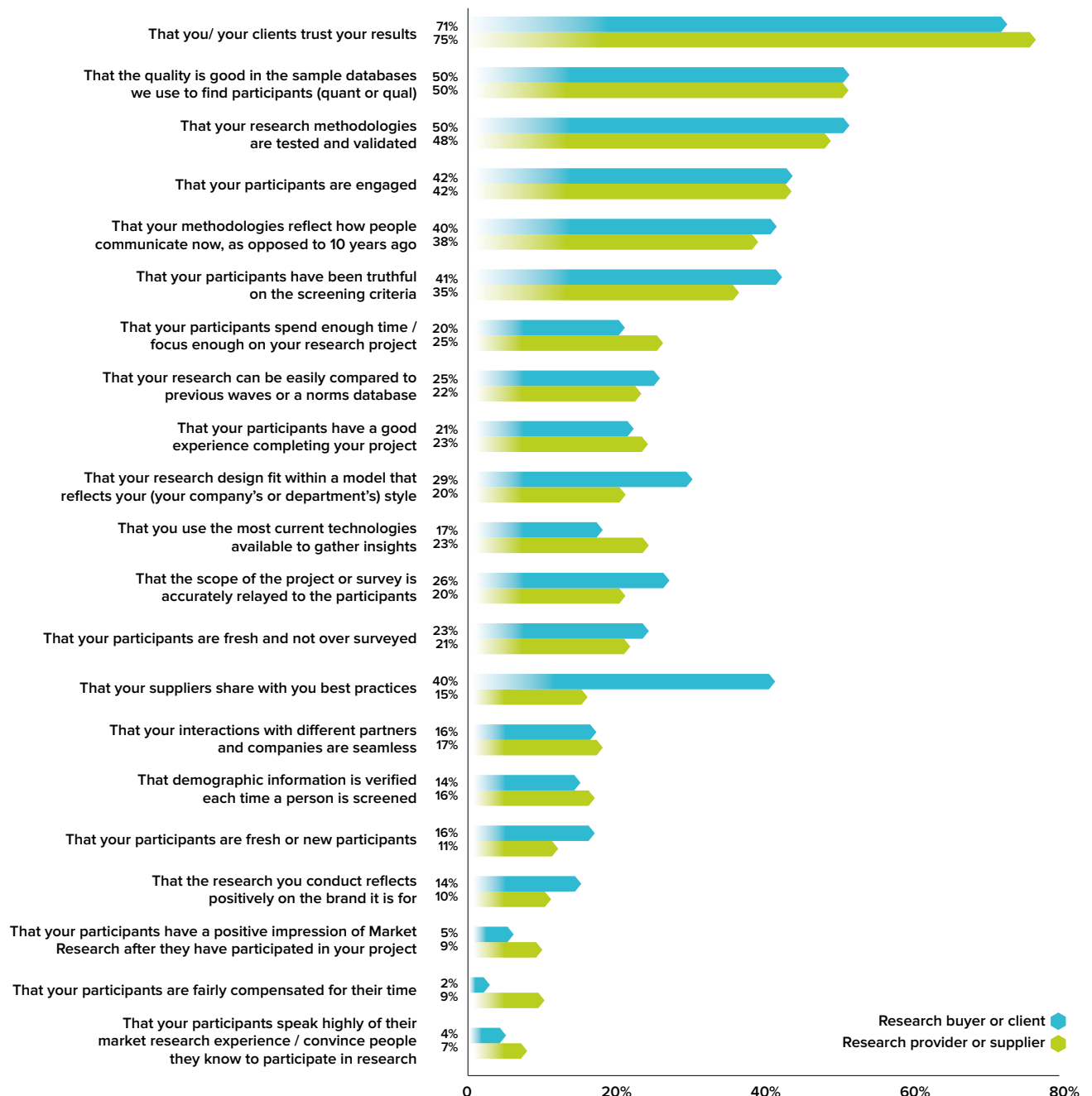


# THERE IS A PROBLEM

Client side researchers are much more likely to want their suppliers to share best practices with them than supplier side researchers are. Is it safe to infer that client side researchers are hiring agencies

for their expertise, but many supplier companies consider themselves the experts so they aren't looking for advice from the companies they hire (i.e. panel providers, software, field agencies)?

IMPORTANCE WHEN DESIGNING RESEARCH, TOP 2 BOX BY CLIENT VS. SUPPLIER



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The GRIT data suggest that sample owners are often not being approached or understood as experts in their own field. Perhaps that is because panel companies aren't insisting upon a "code of conduct" around usage of their panels or doing enough to educate the rest of our industry on why this matters and what we collectively can do about it. With companies still mainly relying on primary research and most of it being run through some form of a panel, we need to think more about the fact that we would consider research results more trustworthy if we knew the people providing us with feedback were adequately cared for.

More than ever, the average consumer has the ability to share their opinions in ways that are convenient and natural to them, mostly through social media. They don't need to take our surveys in order to do it. In fact, we need them more than they need us since research conducted through recruiting or panels is still the primary means of gathering insights.

The technology and tools our industry has developed over the past few years allows us to get closer to consumers in many interesting ways. We should capitalize on that and bring the participant experience to the forefront.

Our industry has a wealth of knowledge from companies that develop the technology, manage the projects, find and recruit our participants, etc. We should welcome their input when developing best practices that involve their services and give them a platform to share what they know. The alternative is that we turn our greatest and most necessary resource into something unusable and make our own future less bright in the process.



We would consider research results more trustworthy if we knew the people providing us with feedback were adequately cared for.



## EVERY BRAND NEEDS TO FIND ITS STORY

### Rebecca West

Global Vice President, Marketing Research Services, Civicom® Marketing Research Services

Email: [rebecca.west@civi.com](mailto:rebecca.west@civi.com) | Twitter: @CivicomMRS | Website: [www.CivicomMRS.com](http://www.CivicomMRS.com)

LinkedIn: <https://www.linkedin.com/in/rebecca-west-11b4999>

**W**e live in the age of the personalized consumer. Buyers don't want statistics. They want to understand why something should be important to them. Creative and engaging content increases brand awareness and popularity. Enter the proven concept of brand storytelling as a way to find the buyers that identify with your brand.

There are some great brands that have built their base around storytelling. Some are launched through the vision of the founder, such as Toms Shoes, Uber, GoPro, or Starbucks. With a chief evangelist promoting the message behind the brand, success is built from the people drawn to it. These brands start with the message. But not all brands were able to start that way, and many find themselves struggling to find their identity or their voice in an age when consumers are flocking to brands with a story they can relate to.

Qualitative research is perhaps the most effective way to help a brand struggling to find a message to come to understand what their story should be. This type of brand most likely already knows its facts and figures. Its need now is to know the inside-the-brain thoughts of why its consumers are engaging with the brand. As a former CEO of Nestlé once said, "Don't give me the 'who,' 'what,' 'where,' 'when,' 'how much,' and 'how often.' Those things are easy. Tell me 'why.'"

To engage in the qualitative research 'why' to create a brand story, it is necessary to gather a significant base of respondents and build a meaningful discussion guide to probe into their point of view. Often a brand will already be national and will therefore need a significant cross section of consumers from every state in order to gather enough commonality of thought to enable building a strong brand narrative that can immerse believers and also draw new brand followers

while also resonating well throughout our diverse country. Such a significant number of research interviews are best accomplished using professionally facilitated audio and web technology to make the interview process efficient and cost effective, and to free the researcher from the burden of project organization in order to concentrate exclusively on the research.

Building a really good storyline for a product starts with the researcher having each respondent first create their own story for the brand, engaging them in an in-depth qualitative exercise to create a story related to the product, with characters, a setting, a problem, a climactic moment and a resolution. The outcome of these interviews will be a very large number of individual personal stories about the brand that will need to be distilled down into what will become the single brand story. Text analytics tools that enable the identification and tracking of keywords and coded excerpts will help the researcher to then distill the messages into a recommended storyline that will have enough cohesion as well as a compelling tale and that can represent all the brand exemplifies.

The conclusion is that telling a good brand story does more than increase engagement and interest. It can mean the difference between brand success and failure. There is the old saying 'Every picture tells a story.' To succeed today, every brand needs to tell a story that the consumer can visualize and identify with. The process often starts with finding out the qualitative 'way' behind how brand buyers think.

# THE RESEARCHER OF THE FUTURE & TRAINING

## THE MOST IN-DEMAND ROLES

A key issue for companies and individuals relates to what skills should I be hiring and what skills should I be developing? We sought to answer this, and the clear answer is that designers and data visualizers are in and, not surprisingly, fieldwork is out.

The survey asked people “*What changes do you expect to see in the mix of people working in your organization in the future?*” The participants were shown a list of 10 skills and asked to say, for each of

these, whether they expected be hiring more, fewer, the same, or whether they employed no such people.

The full data set (available online) shows all of the responses, but to make the message in the data clear we have produced a net change figure. The net change figure is produced by subtracting the percentage saying Fewer from those saying More. The resultant data, sorted in terms of Total, is shown in the table below.

Designers and data visualizers are in and fieldwork is out

### HIRING PLANS IN THE FUTURE

Hiring Plans in the Future	Total	Buyer	Provider	NA	Europe	Other
Designers and Data Visualization Experts	58%	47%	61%	56%	58%	66%
Data Scientists	49%	53%	48%	48%	53%	47%
Marketing or Business Strategists	45%	47%	44%	43%	44%	50%
Social Media Experts	41%	46%	39%	39%	40%	46%
Bilingual (or multilingual) Employees	38%	32%	39%	36%	34%	47%
Experts in the Technologies of Data Collection	23%	20%	23%	19%	26%	27%
Neuroscientists	14%	9%	15%	14%	16%	11%
Sociologists or Anthropologists	11%	9%	11%	12%	7%	13%
Process (e.g., supply chain) Strategists	8%	9%	8%	8%	8%	8%
Moderators or Field Interviewers	-4%	-7%	-3%	1%	-16%	2%
Base	1,434	288	1,146	758	429	247



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The clear winner, especially amongst providers of research, is Designers and Visualization Experts. This skillset is closely followed by Data Scientists, Marketing/Business Strategists and Social Media Experts.

Only one of the ten skill sets mentioned has a negative outlook, Moderators or Field Interviewers – particularly in Europe. But it is worth noting that the picture for Process Strategists, Sociologists/ Anthropologists, and Neuroscientists is much less positive than the top five on our list.

We also asked an open-ended follow-up question “If you had to identify one new or emerging skill

necessary for the researcher of the future what would it be?” The top five responses were:

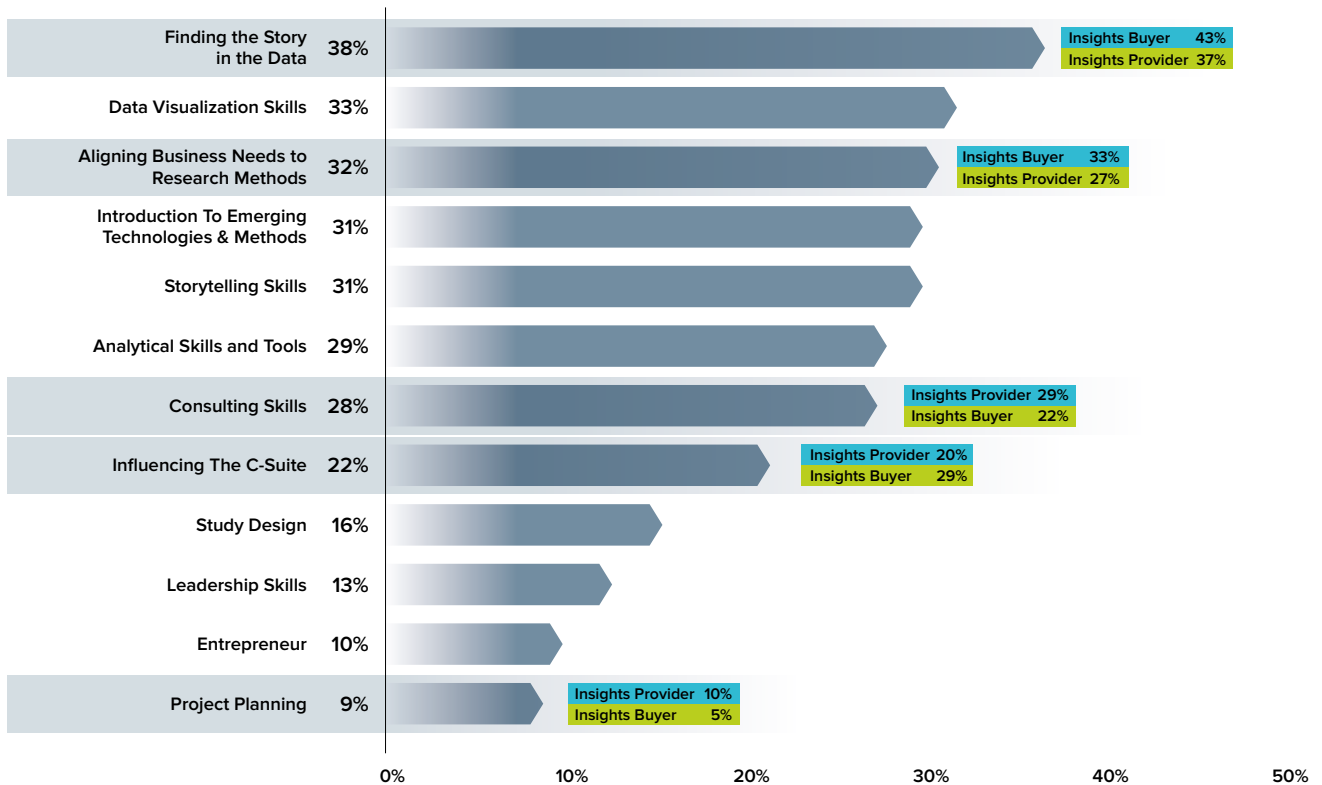
- Turning data into insights / insights into action
- Storytelling
- Automation / data integration
- Data visualization
- Text analytics / Big Data

Some of the skills identified by this exercise are very specialized, such as data science, but others are areas that most insight professionals should be seeking to enhance, such as storytelling, finding the story in the data, and better use of visualization.

Alignment with these hiring trends can be seen in our next section, related to training programs, needs and resources.

## MOST IMPORTANT TRAINING NEEDS

### MOST IMPORTANT LEADERSHIP & RESEARCH FOCUSED TRAINING PROGRAMS



In line with the topics we explored around hiring profiles and training resources, we thought it worthwhile to include a section from the last wave of GRIT related specifically to discrete training topics.

In the Q3/Q4 2015 round of GRIT we wanted to understand training resources for the research industry and found that to a large degree, usage of formal training programs were a definitive need within the industry across both sides of the table. As a follow-up, we wanted to understand what specific areas GRIT respondents felt were needed for training.

The consistency in training needs identified by insights buyers and providers is remarkable. Training areas identified as the most important reflect requirements for success in today's demanding environment. Where differences in opinion do exist, they aren't substantial.

The training program cited as most important is 'finding the story in the data'. 'Data by the pound' has long been rejected and unlocking the essence of the information is now a mandate. Closely aligned with this are two additional training needs identified by approximately one-third of those responding – 'data visualization skills' and 'aligning business needs to research methods'. Stronger data visualization skills will accelerate the development of reporting formats that make it easier for the end-user to grasp the key insights extracted from market-based information. Ensuring business needs are aligned with research methods will help maximize the impact of the insights extracted on business decisions.

Two additional training skills identified that warrant more attention are the further development of consulting skills and more effective influencing of the C-Suite. Both are necessary skills if the industry wishes to have a seat at the table. While many in our industry are already well-practiced in these skills, developing these abilities clearly needs to occur more

broadly if the industry wishes to become integral to decisions made by executives. There are no silver bullets to achieve this but a focused effort to design and deliver required training will increase the competency of our industry in these critical areas.

In addition to the a-priori identification of training needs, insights buyers and providers were given the opportunity to identify additional areas of training seen as important. A few noteworthy suggestions emerged:

- Bringing data and topics to life for presentations
- Defending scope creep in projects
- More effective engagement of respondents
- Integrating data from multiple sources
- Measuring the ROI of research
- Social media analysis
- General business training
- All things mobile
- Working in an agile research environment
- Marketing/selling skills

What is most interesting here, perhaps due to the experienced profile of GRIT respondents, is the de-emphasis on "foundational skills" such as study design, analytical approaches, sampling theory, etc. Perhaps the assumption is that anyone who works in the field will acquire those skills by default through a combination of training and education, but for GRIT respondents at least the stated training needs are much more focused on advanced skills generally not acquired via on-the-job training.

This list can serve as a de facto curriculum for training initiatives implemented internally by organizations, through our trade bodies, continuing education programs, or private consultants. Based on the growth of platforms such as Coursera in the wider field of training and education we hope to see more formalized and flexible offerings to address these gaps in the industry.

'Data by the pound' has long been rejected and unlocking the essence of the information is now a mandate



The stated training needs are focused on advanced skills generally not acquired via on-the-job training



# TRAINING RESOURCES



“What if we train people and they leave?”  
– Head of Finance



“What if we don’t train them and they stay?”  
Head of Insight –

The previous wave of GRIT looked at a variety of training issues, and the current wave takes another step forward by looking at the different ways organizations support training.

The table below shows the responses to the question “What training resources does your organization pay for or provide?”

Training	Total	Buyer	Provider	NA	Europe	Other
Internal training programs we develop and deliver on site	59%	45%	62%	56%	62%	62%
Internal training programs we develop and deliver in an e-learning environment	38%	36%	39%	39%	39%	36%
Employees can be reimbursed for obtaining approved training regardless of delivery channel	35%	39%	34%	40%	26%	33%
3rd party training courses we license to be delivered on site	28%	30%	28%	25%	32%	31%
3rd party training programs we license to be delivered in an e-learning environment	28%	30%	28%	29%	28%	27%
Other	20%	21%	20%	17%	26%	22%
We do not offer any resources for additional training	17%	19%	16%	18%	15%	15%
<i>Base</i>	1,412	286	1,126	750	415	247

19% of clients and 16% of suppliers do not provide any training support



From an industry point of view, the most worrying finding is that 19% of clients and 16% of suppliers do not provide any training support. Against that, the organizations that do provide training, on average, selected just over two of the categories – which highlights the difference between companies committed to competence building and those that are less forward looking.

Buyers are a little less likely to develop training and provide it on site – with the highest scores

being for companies outside of North America. North America was the place most likely to say they reimburse training.

There is a widespread belief that the key new skills that the insight world needs, such as data visualization, storytelling, and data science, are going to be in short supply. This means that more companies will need to find ways of developing their own talent – and finding ways of keep that talent engaged and motivated.

# Navigate Your Research With Confidence

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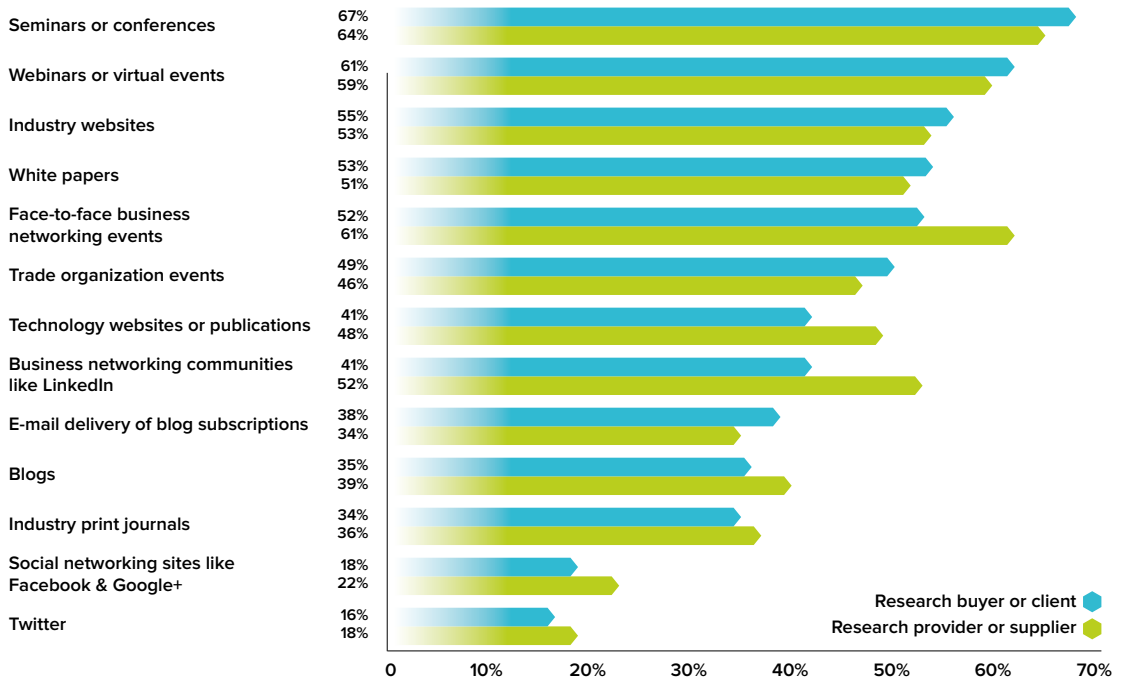
Learn more at our new website  
[www.FUELCYCLE.com](http://www.FUELCYCLE.com) or by visiting  
our GRIT Commentary on page 39.

# SOURCES OF INFORMATION

Since GreenBook is a media and marketing platform for the research industry, we like to check annually on what information channels the industry finds valuable. The results have been largely stable for a

number of years now: both clients and suppliers value conferences or seminars more than anything else, followed closely by webinars as the top 2 channels.

## IMPORTANCE OF INFORMATION CHANNELS - TOP 2 BOX



Both clients and suppliers value conferences or seminars more than anything else, followed closely by webinars

Other channels with majority importance ratings are more passive channels such as websites and white papers followed by networking events (which suppliers unsurprisingly appreciated by an almost 10-point margin more than clients).

It seems that despite the ubiquity of social media in our lives, its value to researchers is marginal. GRIT participants rank Twitter and other social networking sites as lowest on the totem pole (although suppliers rated them slightly higher than clients). This begs the question for all of us who use social media daily; are we mostly just talking to ourselves?

In the middle of the pack are blogs, LinkedIn, and various other types of publications and events all being rated in a fairly narrow band of 34% to 49% of importance.

Could the above chart be a guide for budget allocation for suppliers looking to market their businesses? Perhaps in a future wave of GRIT we can try to measure the actual impact of each of these channels, but until then it's a safe bet that we'll be seeing many of you at events or on webinars!



## ALTERNATIVE DATA COLLECTION METHODOLOGIES

### Rick Kelly

VP Client Services, FUEL CYCLE by Passenger

Email: [rkelly@passengerinc.com](mailto:rkelly@passengerinc.com) | Twitter: [@\\_rickkelly](https://twitter.com/_rickkelly) | Website: [www.fuelcycle.com](http://www.fuelcycle.com)

LinkedIn: <https://www.linkedin.com/in/rhkelly>

The low-hanging innovation fruit in market research has been picked. In the past three years, both mobile surveys and online communities have reached mainstream usage, but GRIT data highlights that adoption of alternative techniques, such as big data analytics and behavioral economics, has stalled. This is unfortunate, but not irreversible.

Joe Henrich, an acclaimed psychologist and economist, recently stated “When people learn [different] languages they may actually come to think about the world differently.” So it is with insights. When we use multiple insights frameworks - the language of our profession - we gain perspectives not given by one methodology alone. At FUEL CYCLE, we believe deeply in the power of traditional surveys, but we are convinced that surveys should be augmented with other methodologies. This is why we have integrated tools for surveys, discussion boards, chat, videos and photos in our community platform – to provide both depth and richness through diverse methodologies.

Adoption of new technologies is essential to researchers in the coming age of automation and artificial intelligence. Advances in artificial intelligence mean that structured, repeatable tasks could be subsumed by AI within a year or two. Researchers slow to evolve with the progression of computing may find themselves less valuable than today. Adoption of techniques not yet to the point of automation - such as virtual reality or prediction markets - is important for researchers to provide value beyond “surveys and charts.”

Given that adopting multiple methodologies is innately valuable, questions remain: Why has adoption of alternative sources stalled? And what can be done to spur adoption? After examining 2016 GRIT data, the answer seems apparent – research buyers need more information from research suppliers.

Providing reliable insights is very important to research buyers. In the GRIT survey, respondents were asked to rank elements of a research project from most to least important. 70% of respondents said “That you/your clients trust your results” was one of the two most important elements of a research project and 51% of respondents said “That your research methodologies are tested and validated” were among the most important. In the case of new methodologies, buyers need to be confident the results are accurate, a challenge overcome through education.

Providers of alternative methodologies should provide greater education to buyers of market research. 41% of market research buyers said that “That your suppliers supply you with best practices” was among the most important components of research whereas only 15% of market research suppliers agreed. This discrepancy tells us that buyers expect to be educated by their vendors, but education is not prioritized by suppliers. Providing best practices and information could likely increase the adoption of alternative methodologies.

Our FUEL CYCLE team are great proponents of alternative methodologies. The proliferation of new technologies enables us to do more and create greater value than ever before - provided those technologies are implemented. Adoption of new techniques is challenging, but can likely be accelerated through useful education given by research providers.

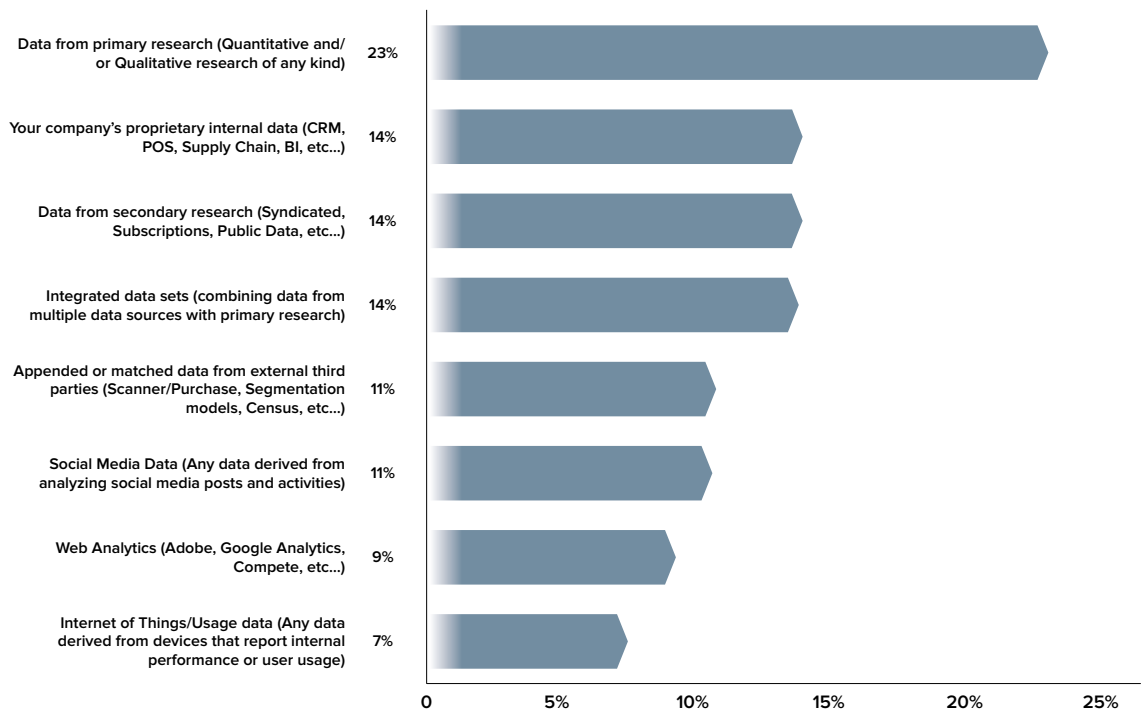
# USE OF ALTERNATIVE DATA SOURCES

This year, we added two questions to better understand how companies are using different types of data, and what they envision changing in 2017 as a result of the data economy. New forms of data are emerging, as are questions about the actual use and efficacy of non-traditional data.

The first question asked participants to rank data sources based on their current use, and not surprisingly, the chart below shows that data from primary research was most used, followed

by internal proprietary data, and then a virtual tie for third between secondary data and integrated data. The least used data comes from the Internet of Things (IoT), perhaps because this data is much newer and the industry is still working on how best to collect, store, code and interpret it, and prove its utility. When looking at usage for buyers versus suppliers, the preference for primary research is more pronounced for suppliers, while corporate buyers ranked internal data higher, as well as integrated data.

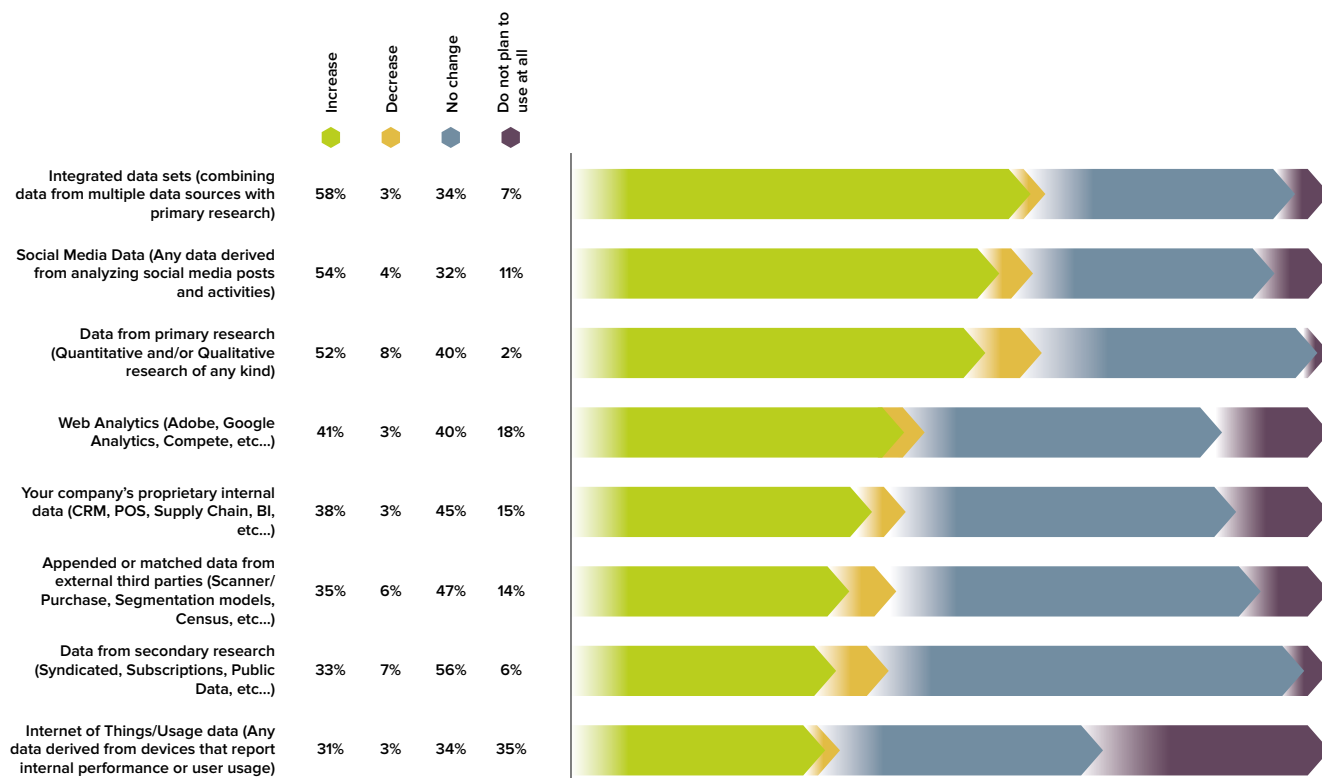
New forms of data are emerging, as are questions about the actual use and efficacy of non-traditional data



We then asked participants to indicate planned usage levels of these same data sources in 2017. Here, the use of integrated data is expected to grow the most, followed by social media data and primary data, as shown the chart below. Expected decreases in use were relatively small across all forms of data, but the highest percent of decrease was for primary data (7%). Data from IoT had the highest “do not plan

to use at all” scores by far, followed by web analytics, internal data, and external data from appends. The primary difference between buyers and suppliers was in the expected use of social media data, with corporate buyers expecting higher use of it along with internal and integrated data, while providers were expecting higher use of primary, secondary and appended external data.

### USAGE OF DATA SOURCES IN 2017



The use of integrated data is expected to grow the most, followed by social media data

Clients plan to use more data resources that are not related to primary research



These results indicate a slight separation between buyers and suppliers, which may affect investment in skills and technology. Corporate buyers are more interested in integrated data, perhaps combining primary, internal and social media data based on the usage and ranking scores. Suppliers are focusing on primary, secondary and appended data. The technology, skill, and privacy investments needed to tie this data to internal customer data is an opportunity for the industry. These results also indicate a need to better understand and structure data from Big Data or the Internet of Things, helping buyers understand its potential.

The consistency we see across the various topics addressed in this wave of GRIT paints an interesting picture, and one that many market researchers may find alarming.

In the section related to usage of emerging methods we clearly see a significant difference between client and supplier in the usage of Big Data and Social Media, with our belief being that the difference is because clients do not consider market research suppliers as potential partners for these types of needs.

In the topics about hiring and training we saw a large demand (and a current gap) in data science professionals who are accustomed to utilizing more than primary research data sets.

As we explored sample quality, the priorities defined had more to do with data quality than the human elements of respondent experience.

And finally, in this section we see that clients are currently using (and plan to use more of in 2017) data resources that are not related to primary research.

The pattern seems clear that research has yet to “break through” as players when it comes to more than “surveys and focus groups” and risks being further marginalized out of business necessity as client organizations move rapidly to address their internal information needs with a myriad set of tools and resources. It’s very possible that “the ship has sailed” in terms of other types of companies such as BI, Analytics, Strategy Consultancies, etc., already becoming the preferred partners to help capitalize on these new data resources.

What is certain is that primary research still very much has a role to play in decision making, and that we have many opportunities to expand the value we bring.



It’s very possible that “the ship has sailed” in terms of other types of companies such as BI, Analytics, Strategy Consultancies, etc., already becoming the preferred partners to help capitalize on these new data resources.



## BIG DATA IN A POST-DIGITAL AGE

### Wale Omiyale

Senior Vice President, Market Research, Confirmit

Email: [wale.omiyale@confirmit.com](mailto:wale.omiyale@confirmit.com) | Twitter: [@confirmit](https://twitter.com/confirmit) | Website: [www.confirmit.com](http://www.confirmit.com)

**T**he information age...the digital age...Whatever you call it, the fact is that we expect technology to be able to do just about anything these days. Whether that is a major breakthrough in medicine, or a magical new app release that makes our lives a bit easier. Or in the MR world, delivering untold insights without a single survey being deployed.

The importance of the digital age is that it has sped up the research process tremendously, the introduction of automated tasks has brought a level of simplicity that did not previously exist. This is vital as we aim to meet buyer-side demands for faster insight, but at the same time challenging as we try to understand the unstructured elements of the data that we collect and store.

The responses from the GRIT report support this view, and it's great to see that businesses on both the client and provider side acknowledge that Big Data is, well, a big deal. The global average shows that 44% of buyer-side respondents consider Big Data to be a game changer, while 37% feel it's an interesting trend.

There's a world of difference between "game changer" and "interesting trend", of course, but it's heartening to see that our industry is seeing the opportunity. As an industry that, dare I say it, has occasionally been reluctant to embrace changes of this magnitude, there's massive scope for businesses who take a lead to drive real change.

What struck me as a sign of progress was that globally, 46% of respondents have some form of Big Data analytics in use already. No doubt the level of analytics evolve dramatically, but it's good to see that people are not bandying around words like "game changer" while failing to actually make use of the approach!

What's going to drive the progress of Big Data is Market Researchers prepared to commit to its future. Inevitably, a lot of that will be the up-and-coming researchers who are less entrenched in established methodologies and more prepared to take risks. So, it was interesting to note responses to the question "*If you had to identify one new or emerging skill necessary for the researcher of the future, what would it be?*". In Europe, 12% of respondents chose text analytics/big data while the US it was only 5%. The figure for other regions was 14%. This shows a fairly significant split, and may suggest that the US will be playing catch up from a skills perspective when it comes to generating real insight from big data.

Moving forward into whatever age we find ourselves in, the challenges of volume, storage, variety and complexity of Big Data will continue as the process of amassing data gets simpler and more affordable.

How we address these challenges will define us as an industry and dictate our place as value adding players in the new age. Evolving new methodologies to exploit the opportunities available, building new categorization models that allow us to rationalize the unstructured aspects of the data we collect, and developing smart storage systems that allow us to easily access the crucial elements of data in ever increasing fast and efficient ways will begin to define our role in the new post digital age.

# BUZZ TOPICS: HYPE OR GAMECHANGERS?

Over a third of both clients and suppliers said automation is a game changer

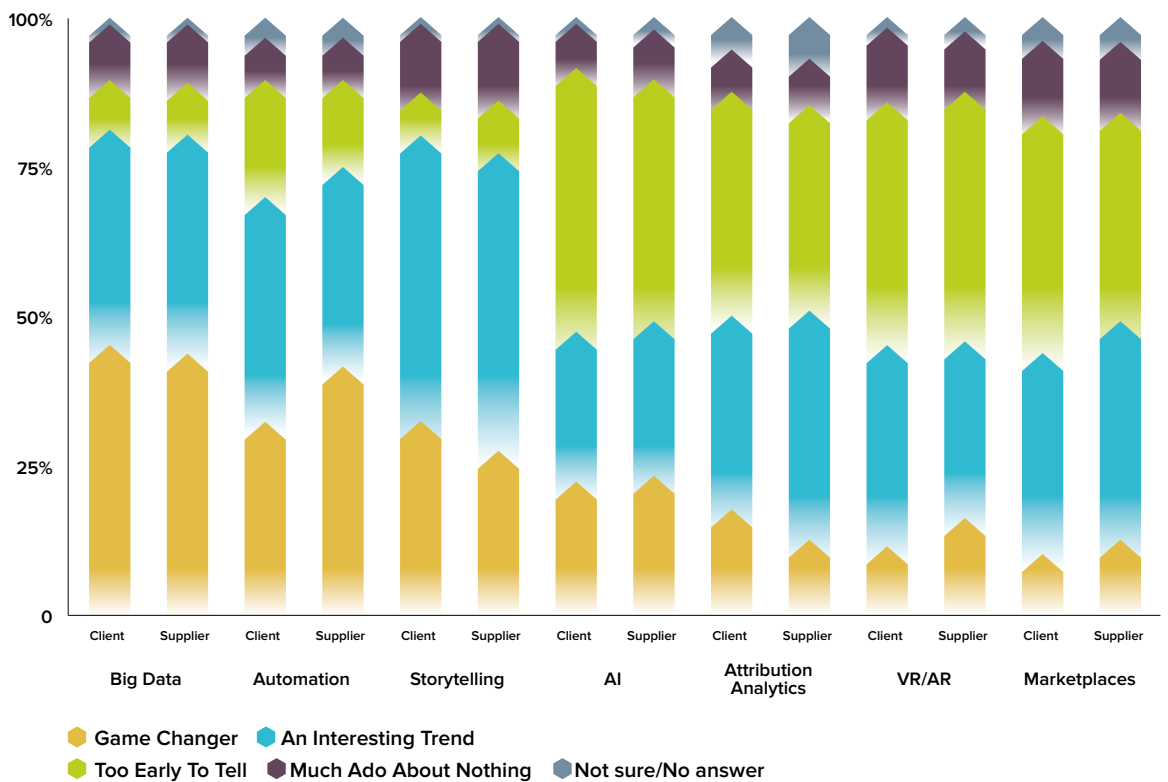


Another new area we explored in this wave is the assessment of GRIT respondents on buzz topics. We asked participants to rate 7 topics that seemed to be ubiquitous in the research industry in 2016 and to let us know whether they thought they were game changers, an interesting trend, too early to tell,

much ado about nothing or not sure. The topics were automation, AI, marketplaces, big data, storytelling, VR/AR and attribution analytics.

What did our respondents think?

HYPE OR GAME CHANGER BY CLIENT VS. SUPPLIER





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GRIT respondents are divided over the hottest topic of the year – AI



Over a third of both clients and suppliers said automation is a game changer with well over another third saying it was a trend that bore watching. Those folks have obviously been paying attention, since much of the conference stage time and blog real estate in 2016 has been dominated by various and sundry approaches to automate large chunks of the research process. Based on the emergence of literally dozens of new suppliers (some who are experiencing great success) in the automation space, we'd agree that it's likely a game changer.

Big Data drew an even greater number of adherents almost equally between clients and suppliers at roughly 40% considering it a game changer, followed by the perennially popular storytelling. GRIT respondents are divided equally over the hottest topic of the year – AI – on whether it will in fact change the game or if it's just an abstract trend to follow for now.

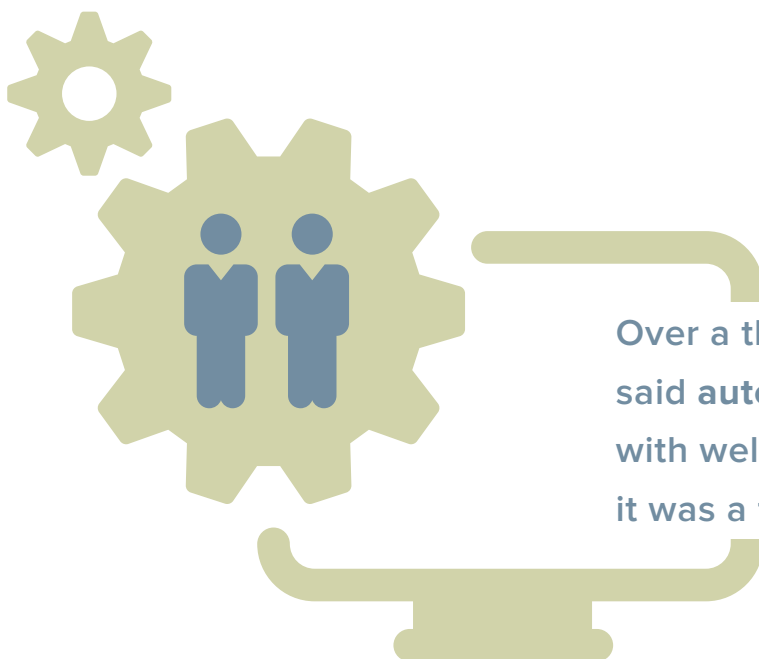
GRIT respondents were definitely taking a wait-and-see attitude toward marketplaces, VR/AR and attribution analytics, with relatively few thinking they were game changers... yet.

So what does this really tell us?

It seems that just a few short years ago, topics like mobile research, social media analytics, communities, etc., were the hype terms everywhere. Today those are mainstream approaches that are continuing to redefine many aspects of the research industry. If history is any indication, some of these hype(d) terms will continue to linger on the fringes due to unclear ROI or issues around impact, scale, speed and cost. However, a few may become the next "online", meaning a shift so revolutionary that the entire industry must pivot in order to stay relevant.

We would also be remiss if we didn't point out, again, the internal consistency of the responses to these questions and other areas of exploration in this GRIT edition. What aspects of the research process can automation, AI, big data etc. impact? Data collection/gathering, synthesis, analysis and reporting. Regardless of data source. Who is needed to help make that happen? Data scientists. Where does that leave human researchers? As consultants and storytellers. The connections are clear.

We'll continue to monitor these and other topics to see which ones are moving from hype to game changer.



Over a third of both clients and suppliers said automation is a game changer with well over another third saying it was a trend that bore watching.



## THE AGE OF AUTOMATION

### Stephen Phillips

CEO, ZappiStore

Email: [steve@zappistore.com](mailto:steve@zappistore.com) | Twitter: @zappistore | Website: [www.zappistore.com](http://www.zappistore.com)

Linkedin: <https://uk.linkedin.com/in/stephen-phillips-2121ab>

**W**e all know that market research remains the best source of insight to inspire customer-centric business decisions, but too often we find that businesses have made significant decisions without us! The problem is that doing it right and with rigor often translates into a five figure budget and a timeframe of 4-6 weeks. Processes are too manual and add little to no value to the end output other than getting the project done.

The businesses we serve and their marketing teams are now in a position where they are forced to move fast to capture consumer interest and ensure competitive advantage. It was Jack Welch who said: *'If the rate of change outside is higher than the rate of change inside, the end is near.'* The rate of change at client side is high and they are becoming more agile. The supply side of the industry must keep up.

Fortunately others agree and it is great to see over two thirds of respondents (69% Client / 75% Vendor) in the latest GRIT report view automation as a positive trend or game changer for the market research industry.

Socrates said more than 2000 years ago: the secret of change is to focus all your energy on building the new, not on fighting the old. We believe that the secret is not in trying to fix the manual processes behind market research but build new ones, automated ones.

But as an industry we must ensure that we keep hold of all the great thinking we have developed over the year. There are wonderful models that help explain human behavior and normative scores that help us decide how strong an idea is. The biggest danger we face is that in a rush to speed and lower cost, we loose all of this hard earned expertise.

We believe that automation can help, not just with sampling, survey configuration, data analysis and reporting, but also with bringing this great human expertise into the digital age – human expertise at machine speed.

This enables clients to commission great research in a matter of hours and at a much lower cost. This will help our industry retain our position as the go to place for consumer insight.

For client-side researchers the initial attraction is obvious; cost and time savings. But the benefits don't stop there, automation of analytics can allow you to do more analysis so much quicker than before – comparing across projects and even insight programs. It empowers clients to re-energize the insight function and let their companies rediscover the true value of research by testing early and often.

Imagine testing each aspect of an ideas development iteratively, from the conceptualization and evaluation of the idea to pack testing or ad testing. Imagine your product designers having an idea in the morning, testing that idea with consumers over lunch and then using the consumer insights gained to improve the product in the afternoon. Such an approach can mitigate a lot of risk and lead to more successful product launches, or campaigns.

A McKinsey study of 28 CPG companies<sup>1</sup> highlighted that businesses with the best product development track record kept in closest contact with customers throughout the development process. Automation allows all companies to take on this consumer closeness.

From a research provider side, the advantages are clear: streamline process, re-focus on adding value and scaling methodologies globally. Researchers are liberated to focus on genuinely adding value, using their expertise to help clients take action!

Over the past couple of years, I have come to witness the strength of this model: a client wants a project, the report comes back in a couple of hours, and the same day, the agency consultant is discussing the insights with the clients and exploring next steps.

I believe 2017 is the year where as an industry we will fully embrace automation and we will find out together what value it can unlock beyond cost & time. Together we can empower research and researchers to take their seat at the top table of decision making!

1. <http://www.mckinsey.com/business-functions/operations/our-insights/the-path-to-successful-new-products>



# THE FINANCIAL OUTLOOK

## SELLERS ARE MORE OPTIMISTIC THAN BUYERS

Just under half of insights buyers expect to spend more in 2017 than 2016. In contrast, three quarters of suppliers expect 2017 sales to increase versus 2016



One of the most interesting things we've followed at GreenBook is the extent to which both innovation and the economy are influencing client budgets and

supplier sales. That is why we asked respondents to predict 2017 budgets (clients) or sales (suppliers) relative to 2016. The results were eye-opening, to say the least.

Spending in 2017 vs 2016	Buyers	Sellers	Revenue in 2017 vs 2016
Increase	45%	75%	Increase
No change	36%	14%	No change
Decrease	19%	5%	Decrease

Just under half of insights buyers expect to spend more in 2017 than 2016. In contrast, three quarters of suppliers expect 2017 sales to increase versus 2016. Logically, this can mean one of two things. One is that suppliers are successfully finding new clients. Remember that while our study is inclusive of both new and traditional MR firms, these data represent respondents and aren't weighted by company revenue or spend. The alternative is that sellers are operating under overly optimistic assumptions.

If we dig deeper into the reasons for lower budget or sales expectations for 2017, we find some dominant reasons.

# BUYERS WITH DECLINING BUDGETS SPEAK ABOUT BUSINESS CONCERNS, BELT-TIGHTENING

Almost 2 in every 3 buyers mention some budgetary cut related to business conditions. Another 11% indicate that research isn't perceived as valuable in the company. That said, one must wonder whether the budgetary declines don't also reflect this same lack of value to some extent. 10% indicate money is being shifted to new techniques, like analytics and big data (a theme that runs through much of this edition of GRIT).

With those suppliers who are predicting lower sales, about 50% mention client budgets and business conditions while 20% indicate they expect sales declines due to automation and lower-cost

approaches (in which DIY is mentioned). Another 17% say they face stronger competition against new methods.

60% of the buyers who are facing budget declines say they will be sharpening the pencil on costs, restructure and streamline their research, and generally try to work smarter. More encouragingly, about 40% will also work on improving the value of their research, including experimenting with new techniques. We see the current driving forces in the industry reflected in this dichotomy: cheaper/faster/good enough (automation) vs. impact (strategic consulting).

60% of the buyers who are facing budget declines say they will be sharpening the pencil on costs, restructure and streamline their research, and generally try to work smarter



Summarize why you believe there will be a decline?	Buyer	Supplier
Budget/budget cuts/downsizing	62%	27%
Cheaper/lower cost techniques	5%	5%
Competitive pricing	3%	3%
Economy	3%	8%
Price increase	3%	3%
Other price/economy/budget mentions	5%	0%
Using data analytics/big data	9%	3%
Using online/instead of CATI	3%	5%
Other methodologies mentions	0%	5%
Business priorities	3%	3%

Summarize why you believe there will be a decline?	Buyer	Supplier
Market research perceived as not valuable	11%	0%
Market trend	5%	5%
No demand/business	9%	15%
No outsourcing/using in house/DIY	5%	13%
Other demand/need mentions	3%	8%
Competitive market	3%	10%
Mergers/consolidations	5%	8%
Other mentions	0%	10%
Don't know	3%	8%

Those who believe sales will decline will aim to up their game. About 55% say they want to add value to what they do and/or introduce new products/

services. 20% said they would sharpen the pencil on costs. Slightly fewer (17%) said they would look for strategic partners or acquisitions.

What if anything will you do to address this?	Buyer	Supplier
Review finances/use more cost-efficient solutions	20.69%	10.34%
Upsell/increase cost	0.00%	3.45%
Acquire new investors/contacts/business	0.00%	17.24%
Add/increase value of work/be more efficient (data, research)	17.24%	10.34%
Expand services/give more insight	17.24%	20.69%
Innovation/offering new products/services/alternatives to traditional methods	6.90%	24.14%
More in house	17.24%	3.45%
Restructure/streamline research/work smarter	20.69%	10.34%
Stay calm/wait for industry correction	6.90%	3.45%
Other growth areas/influences mentions	3.45%	6.90%
Other mentions	3.45%	6.90%
Don't know	0.00%	3.45%
None/Nothing/NA	6.90%	3.45%

A note of caution is in order here.

Historically there has been disparity between clients and suppliers in their outlook for the year ahead. However, considering the themes of new data, new competitors, new approaches, and overall disruption that is running throughout this wave of GRIT, one must wonder if this year is different. The financial performance of the Big 5 full service agencies has been spotty at best. According to

ESOMAR, it's the technology-based suppliers and a broadening of the definition of research itself that are driving whatever growth is happening in the research space. This would all seem to validate the overall trend of over-optimism on the part of some suppliers and more conservative expectations on the part of clients.

In any event, while the year ahead will be challenging for many, our hope is that the industry as a whole continues to thrive.

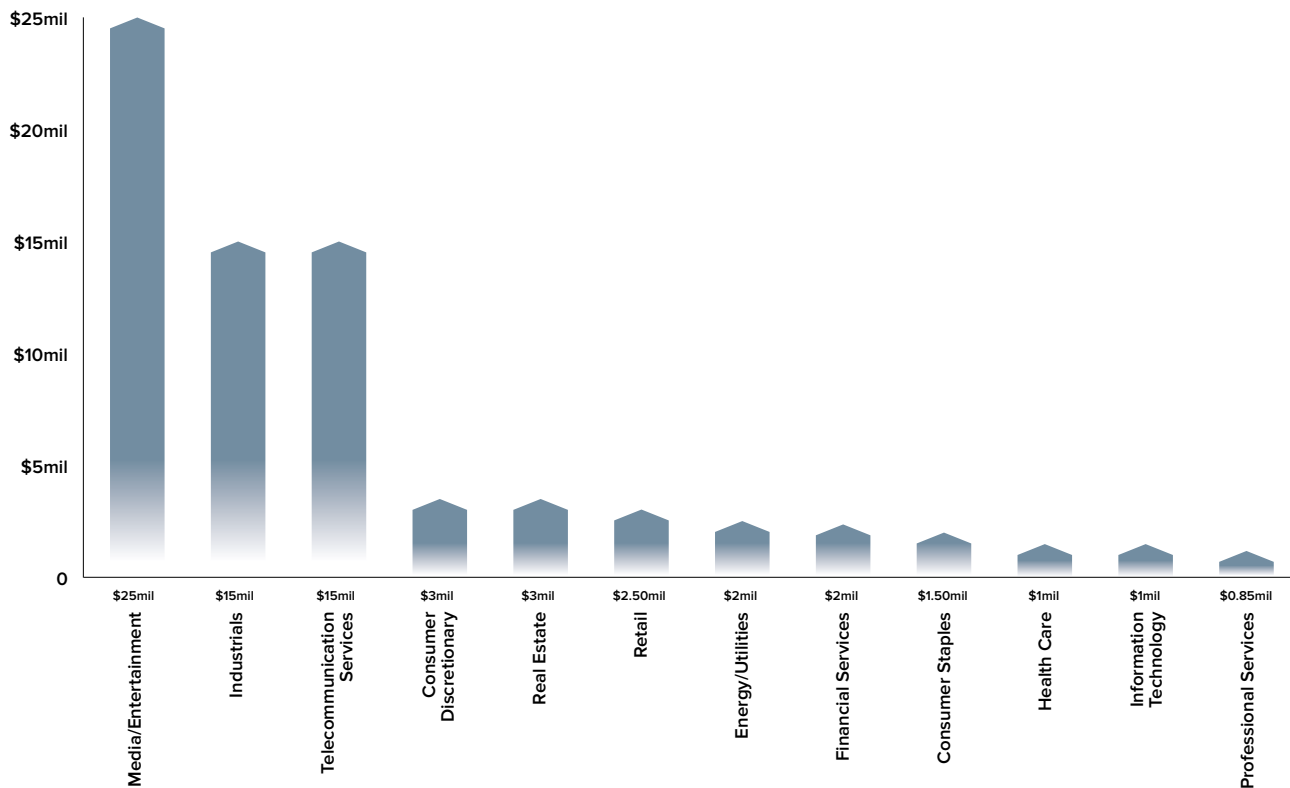
# ANNUAL CLIENT BUDGETS AND PROJECTS

For the first time, we decided to dive deeper budgeting on the client side. We included three new questions in this GRIT edition:

1. We asked self-identified Client/Buyers about the industry their business is a part of.
2. We then asked for their average annual research budget.
3. Finally, we asked for the average number of research projects they initiate in a year.

First, a note of caution. Primarily due to confidentiality concerns, most client participants were unable to divulge their annual budgets. We received 114 response to the question, given as a verbatim. That means that although the data has some validity in aggregate, we have opted to look at it by sector, meaning very small bases.

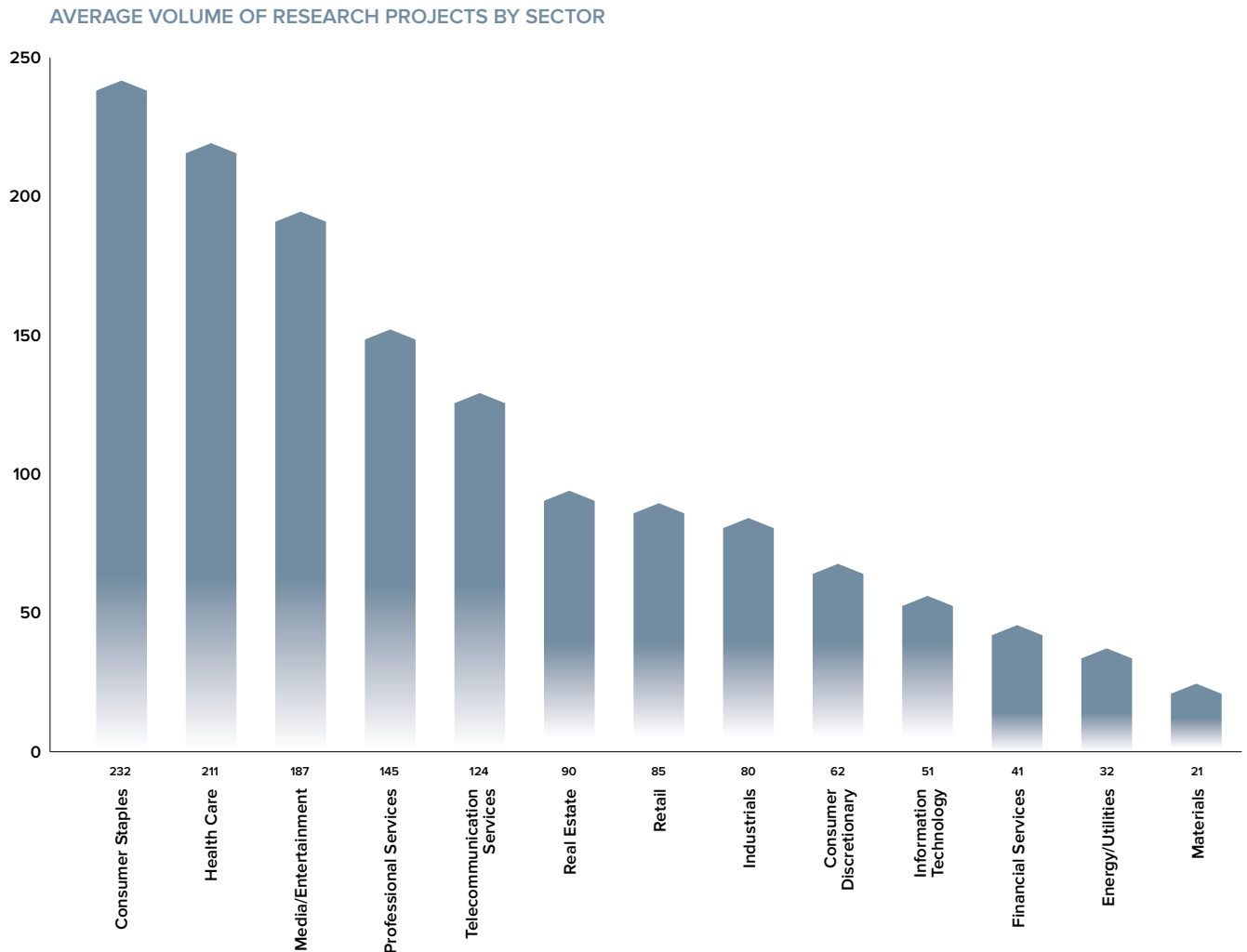
MEDIAN ANNUAL RESEARCH BUDGET BY CATEGORY



As a result of the small base sizes and because of the mix of small and large companies answering the question, reporting averages or means wouldn't be very revealing. We have opted to report the median, which we believe is both more realistic and more meaningful. The graphic below indicates the median by sector.

Clients were more open to sharing the number of projects they conduct annually, with 317 respondents reporting that they collectively conduct 39,490 projects annually.

In the chart below we report the average number of annual projects by sector:



GRIT is used as a strategic planning document by many, and we are frequently asked if we can develop benchmark data for comparison by both clients and suppliers. Although we believe there is not a robust enough sample in these questions to establish legitimate benchmarks, the results can be used as a preliminary gauge for internal comparisons.

The results can also be useful for target/prospect calibration by suppliers. For instance, Consumer Staples (CPG) conduct more projects on average than any other category, meaning there is likely a plentiful torrent of disparate projects to bid on. In future GRIT editions, we will continue to explore these and other related questions in such a way as to give all client participants confidence in answering, as well as more data that will be useful to various stakeholders.



# WHERE'S WALDO AND THE UNCERTAIN ADOPTION OF MARKET RESEARCH INNOVATIONS

## John McGarr

President | Founding Partner, Fresh Squeezed Ideas

Email: [john@freshsqueezedideas.com](mailto:john@freshsqueezedideas.com) | Twitter: [@jmccgarr](https://twitter.com/jmccgarr) | Website: [www.freshsqueezedideas.com](http://www.freshsqueezedideas.com)

Linkedin: <https://ca.linkedin.com/in/johnmccgarr>

Upon being asked to comment on the challenges of client-side insight professionals, a quote from one of my recent clients immediately sprang to mind. He, who will remain anonymous, said about his organization, “*We would rather fail conventionally than take a risk on something unconventional.*” This articulates what I believe Aaron Reid would call the Prevention Focus; the emotional emphasis on security and safety, where sometimes they don’t play to win, they play to *not lose*. Which at first glance may suggest that the client-side is slow to embrace new methods.

However, we clearly see from this latest edition of the GRIT survey that there is indeed fertile ground for innovation in market research (MR). 70% of client-side professionals see their revenue increasing next year, and over 80% predict their MR budgets will at least hold flat or increase. While we must acknowledge that humans are prone to overestimating in this situation, we should take some comfort that we have at least a stable market for MR investment. Importantly, we should also recognize the “soil” in which these advances will grow is a complex ecosystem of innovators and integrators that are necessary to shepherd innovations through the adoption curve. If we look to the mathematics behind probabilities within complex systems ( $P=2^{N(N-1)/2}$ )\*\* identifying which innovation will go mainstream in such a complex system is exceedingly difficult. It is a little bit like playing **Where’s Waldo**; we get overwhelmed by the sheer number of service providers and thousands of potential buyers, all working more than there are daylight hours, and a plethora of “prevention” triggers to navigate.

We may take for granted the hard work, investment, and IPO that drove the awareness and fan base of BrainJuicer, one of the industry’s innovation darlings. It strikes me as remarkable that only a quarter of corporate researchers report Predictive Markets (one of BrainJuicer’s bread and butter methods) as being in use, while 50% are either unsure or considering. The innovators among us may be asking “What is taking so long?” when it feels to the iix community that we have been talking about MR innovations for many years.

The GRIT data suggest to me that there is a reasonable level of satisfaction with the status quo, and that getting more value out of existing data and making it actionable is seen as more critical to client-side professionals than trialing new methods. MR providers need to keep in mind that no client owes the industry a trial of new methods for the sake of being innovative. Service providers need to do their part to validate and prove their methods to warrant the effort for the client, knowing that a client-side researcher must invest time, money and reputation equity to try something new; let alone that the innovation must deliver truly better value.

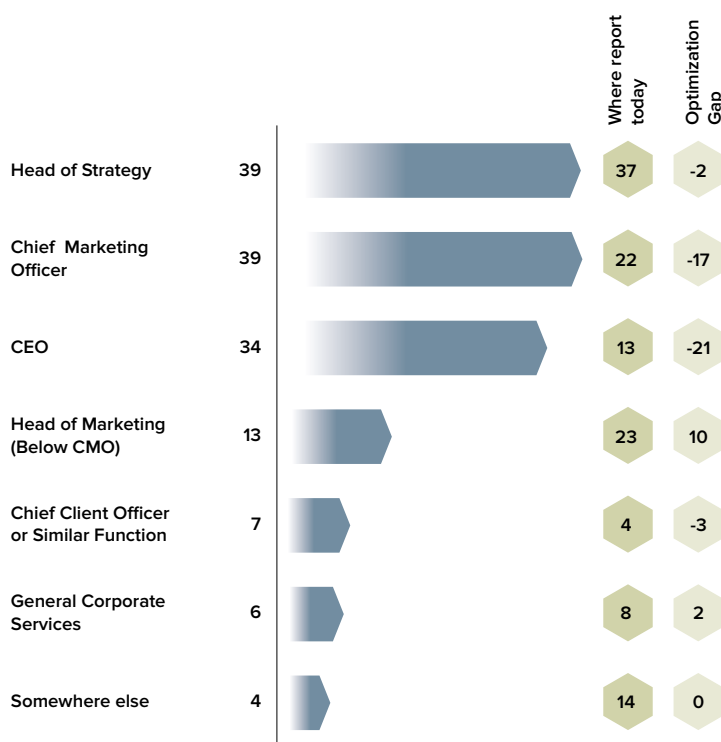
Within each organization, be it client-side or the service provider side, there are a precious few who have the curiosity and courage to develop or introduce new methods and innovations to their organizations. In the ecosystem of this industry, there are two types of organizations; the innovators and the integrators. Both need each other. Not every provider organization has the knowledge or will to reinvent how insights are found; and only a few have the nerves for this type of work. These organizations tend to focus all of their efforts on developing the method or the technology but lack the distribution channels to make the method mainstream. Enter the integrators; organizations with existing client relationships that have been built on a history of trust and service excellence. Those that are open to integrating new methods with old methods are in a unique position to bring new value to their client organizations in a safe and reliable way. I suggest that the integrator is the golden nugget in this ecosystem where trust is the precious currency – and boutiques with a high degree of hands on client service are amongst the best, most nimble, and have the required skills for offsetting the prevention focus that inhibits innovation adoption.

The practical challenge for the corporate researcher is deciding when and with whom to innovate. Where’s Waldo? He is where the right business issue meets with the right internal stakeholder, going to the right partner with the right method that fits the right budget.

# ISSUES FOR CORPORATE RESEARCHERS

## REPORTING STRUCTURE FOR HIGHEST IMPACT OF INSIGHTS FUNCTION

(Percent Insight Buyers/Clients Identifying)



In this edition of the GRIT report, insights buyers/clients spoke about issues relevant to the evolution of their organizations and the ability to impact the businesses decisions of the firms for which they work. More than 300 clients shared their thoughts with us concerning issues ranging from organizational structure to a focus on strategic versus tactical business issues and the development of educational programs for staff. There is little difference in response by region of the world or size of organization – insights buyers spoke with a single voice on these topics.

One of the most significant topics is the organizational structure in which the corporate insights function operates. A good number of respondents indicate they report to more than one point within the organization although the most frequent response is that insights organizations reported to the CMO (37%) or another senior individual within marketing below the CMO level (23%). Another two in ten (22%) indicate they currently report to the head of strategy. When asked to indicate where insights should report for maximum impact on the organization, the response is clear – either the CMO, CEO or head of strategy. The ‘optimization gap’ – that is the gap between where insights organizations should report to have maximum impact versus where they currently report, argues stronger ties than exist today need to be built with the head of strategy and the CEO.

For maximum impact on the organization, insights should report to the CMO, CEO or head of strategy



# ABOUT SIS INTERNATIONAL RESEARCH

SIS International Research has been conducting primary and secondary research for over 30 years in various sectors and industries, including but not limited to B2B, B2C, Automotive, Education, Healthcare, Industrial, Travel and Tourism, Food and Beverage, Market Entry and Opportunity, Market Assessment, etc.

SIS International Research is prepared to provide you with strategic and market research with an experienced global team, found locally around the world. All teams are comprised of local and international researchers and project managers, allowing for in-house native languages such as English, Spanish, German, Italian, French, Dutch, Russian, Chinese, Korean, and Japanese.

With quality, diligence, and high standards of attention to detail, SIS International Research is able to provide qualitative and quantitative research in local or multi-country markets. SIS International Research employs numerous methodologies such as:

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- » Mobile Surveys
- » CATI / PAPI / CAPI
- » Intercepts
- » Mystery Shopping

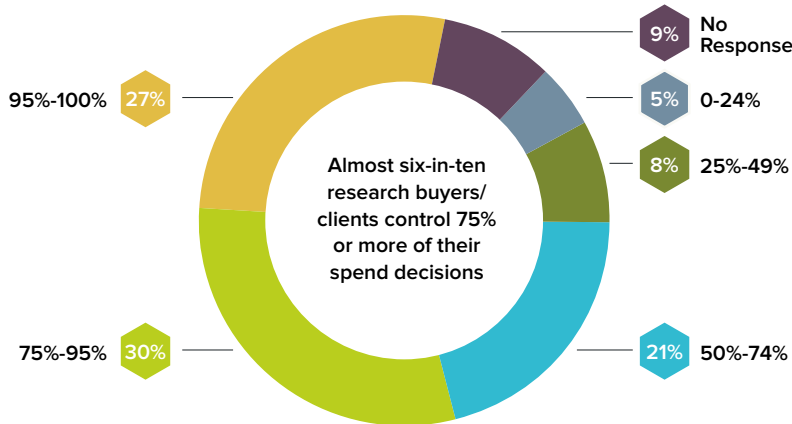
Centrally headquartered in the Flatiron District of New York City, SIS International Research owns a state-of-the-art focus group and in-depth interview facility offering video streaming and translation equipment. SIS International Research maintains a robust database for the United States from coast to coast as well as internationally, facilitating the excellent recruitment of respondents.

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# BUDGET AUTHORITY

**CONTROL OVER RESEARCH SPEND DECISIONS**  
(Percent Insight Buyers/Clients Identifying)

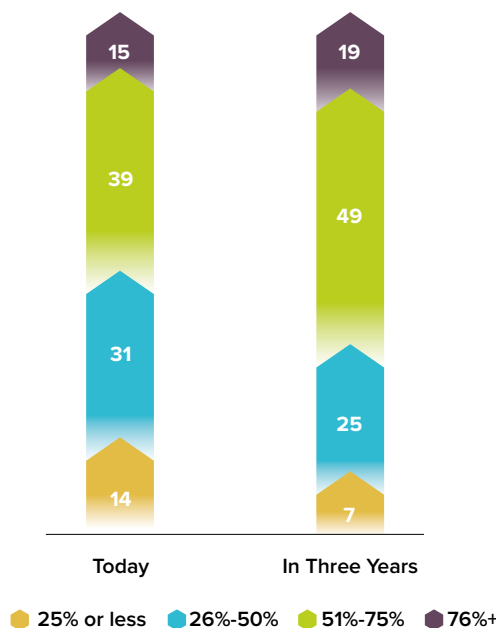


While there may be a gap in the desired reporting structure, there does not appear to be one concerning the authority to spend funds on insights programs.

Just more than one-fourth of insights buyers (27%) indicate they essentially have full authority over their department's expenditures. Almost six-in-ten (57%) control at least three-fourths of their spend decisions. The ability to determine where and how research funds are spent is an essential ingredient for success. It appears that, for the most part, those responding to GRIT indicate the majority of control lies within their domain. Only one-in-ten (13%) say they control less than half of their insight program spend decisions.

# TACTICAL VS. STRATEGIC ROLE

**PROPORTION OF WORK STRATEGIC IN FOCUS**  
(Among Research Buyers/Clients)



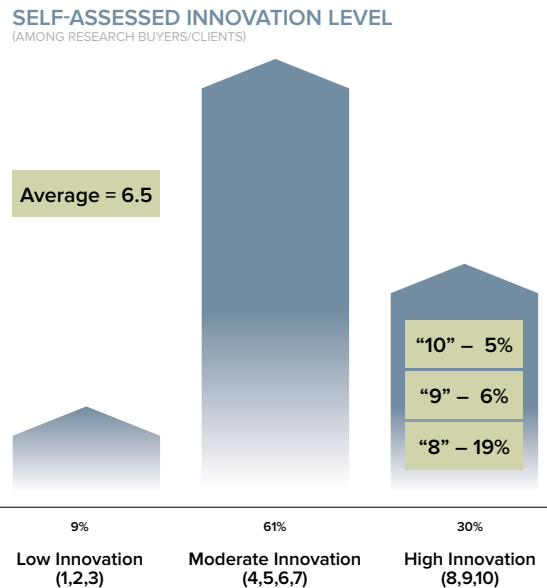
Another aspect of business impact is driven by whether the majority of insights work is strategic or tactical in focus. Tactical research provides a huge contribution to the short-term success of the company (product refinement, advertising execution, customer service monitoring etc.) and its contribution should not be diminished. Tactical research is important and will continue to be in the future.

However, many speak about the desire for their organizations to become more focused on longer-term issues impacting the business. Insights buyers see a movement, more evolutionary than revolutionary, toward conducting more strategic research. When asked the proportion of their research that is strategically focused today, the answer is just under half. Looking forward, however, insights buyers see 56% of their research being strategically focused. While not a monumental shift, it does echo a desire to be more strategic in focus.

Looking forward, insights buyers see 56% of their research being strategically focused

# ORGANIZATIONAL INNOVATION

Fewer than one-third of insights buyers give their organizations top marks for innovation. The majority claim a moderate level of innovation. A few brave souls are even willing to admit their organizations aren't innovative at all. Innovation, however, is an essential element of growth and while some might say the levels of innovation expressed are acceptable, others will indicate that if insights organizations truly want a 'seat at the table' innovation must be a core element of their function. This is one area where future performance must improve, despite how difficult innovation can be.



Fewer than one-third of insights buyers give their organizations top marks for innovation



# INSOURCING VS. OUTSOURCING

Connected with the conversation surrounding innovation, is often the question of whether more research will be conducted in-house as tools, technology, software platforms and other elements of infrastructure become less expensive and more accessible.

At least among those responding, there does not appear to be an increase in the momentum to fully execute research programs in-house. Today, insights buyers say that 43% of the research their group conducts is fully executed in-house. Looking forward three years, this proportion only marginally increases. A somewhat higher proportion of research is conducted fully in-house in North America than in other parts of the world. This seems to indicate that the current relationship between insights suppliers and buyers will remain robust in the years to come, however, it equally underlines the health of DIY models.

**PROPORTION OF RESEARCH CONDUCTED FULLY IN-HOUSE**  
(Average Among Insight Buyers/Clients)

## TODAY



North America	47%
Outside North America	39%

## IN THREE YEARS



North America	51%
Outside North America	43%

A higher proportion of research is conducted fully in-house in North America than in other parts of the world





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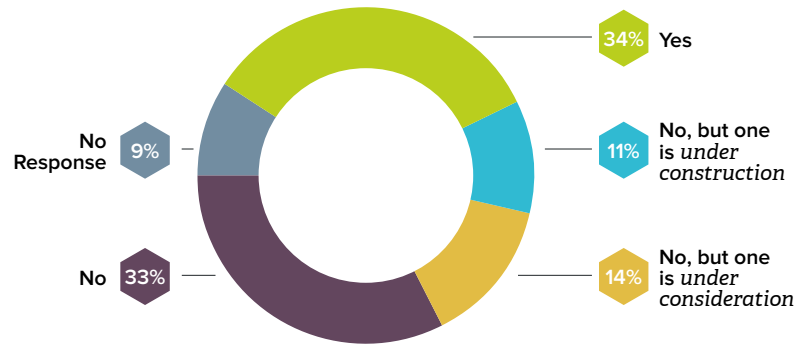
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# KNOWLEDGE MANAGEMENT

We explored two additional elements related to the function of an insight buyer's organization. The first relates to the existence of a searchable knowledge management system that provides access to insights at the enterprise level. This enables a company to extract insights it has already explored. More than one-third of organizations say such a system is currently operational. Another one-fourth say a knowledge management system is currently under construction or under consideration. Knowledge management is a hot topic across many industries and it is an area where our industry needs to successfully establish itself.

**CURRENT STATE OF SEARCHABLE KNOWLEDGE MANAGEMENT SYSTEMS**  
(Among Research Buyers/Clients)



# EDUCATION & TRAINING

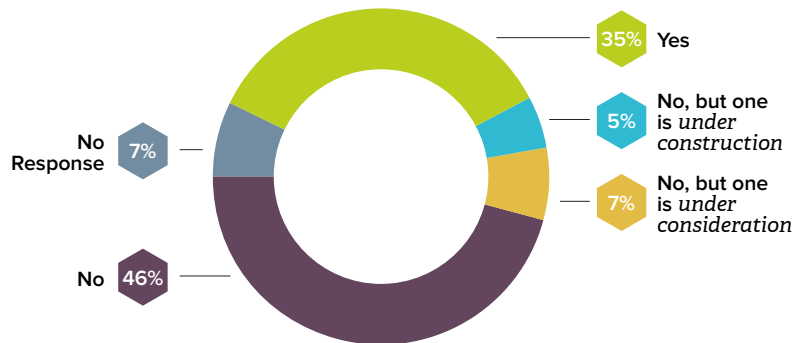
The second element explored relates to the education of the insights team staff about the business they serve.

There is little doubt that if the objective is to impact the business decisions made, the insights team members need to have an intimate knowledge of the business they are supporting, how it functions and how it makes money. Without this foundation of understanding, insight is difficult. Yet, almost half of those responding (46%) say no such program exists within their organization. This is an area worth further exploration by leaders of insights teams.

The following examples of existing efforts illustrate how some organizations are delivering this training:

- Brand-immersion learning sessions and shopping experiences
- Structured initiatives with product management and marketing
- Working closely with sales and product development
- Fully integrating insights team members with business units
- Exposure to strategic plans and category trend analysis
- Attendance at global sales meetings

**EXISTENCE OF PROGRAMS TO EDUCATE TEAM ABOUT BUSINESSES THEY SUPPORT**  
(Among Research Buyers/Clients)



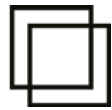
- Secondments
- Internal online training and workshops
- Forums to understand how the business 'gets done'

There are many ways to achieve the business understanding required for generating actionable insights. No matter which method or combination of methods are ultimately implemented, the potential ROI is high.

Insights team members need to have an intimate knowledge of the business they are supporting







## NOT JUST BUZZWORDS: HOW PLATFORMS, MARKETPLACES, PROGRAMMATIC, AND AUTOMATION ARE TRANSFORMING MARKET RESEARCH

### Patrick B. Comer

Founder/CEO, Lucid, LLC

Email: [pcomer@luc.id](mailto:pcomer@luc.id) | Twitter: [@comerpatrick](https://twitter.com/comerpatrick) | Website: [www.luc.id](http://www.luc.id)

Linkedin: <https://www.linkedin.com/in/patrick-comer-80845>

Everywhere you look, platforms are growing in the market research/insights industry. Whether you are talking about research platforms, such as ZappiStore or Wizer, service management platforms, like CoolTool, companies providing insights via platforms, such as Price Intelligently or GutCheck, or sample marketplaces, such as Lucid's Fulcrum or Cint Access, technology is transforming the way we handle every aspect of our roles.

With these technological advancements come key buzzwords that are driving innovation and change in our industry: automation, marketplaces, APIs, and programmatic. All of these drivers are interconnected and build off of each other to deliver sweeping changes to the industry landscape.

#### A Buzzword Glossary

**Automation:** The use of technology to automatically perform a task.

Everything that can be automated with data collection, survey programming, sampling, data processing, visualization, and insights generation has or will be automated. *Everything*. Automation is already having a huge impact on the operational capabilities of market research companies. Those that have invested in technology and process, are seeing higher quality data collection, lower costs, and faster turnaround times. With automation, the role of the researcher is moving away from detail oriented project management to storytelling and client success.

**Marketplaces:** A place where buyers and sellers convene (in this case, virtually).

Sample marketplaces are probably the best known and most disruptive aspects of the survey business. Historically, most sample was purchased and delivered via direct relationships with a handful of global panel companies underpinned by a network of loyalty and niche sample companies. With the advent of marketplaces, buyers and sellers can engage on bidding, pricing and delivering sample automatically.

**Programmatic:** The use of software and tools to manage the research process in lieu of more traditional manual methods.

For instance, programmatic sampling means using a platform to bid, field, and manage sample. Essentially, letting the machines handle that work. The non-programmatic model requires RFPs, human price negotiations, and calling panel companies for more sample.

**Application programming interface (API):** A set of rules that allows two distinct applications to communicate in a common language that they both understand.

Essentially, APIs are the connective tissue between platforms and marketplaces that support automation and programmatic sampling. For example, the Supply APIs at Lucid allow a platform (Fulcrum) to communicate with supplier platforms (ProdegeMR) to target surveys to specific demographics.

#### What do they really mean?

The expected consequence of these buzzwords is research that is faster. By removing all the manual steps, the turnaround time from questions to answers to insights is drastically shrinking. Additionally, the costs are getting lower not just because of fewer labor hours—programmatic tends to remove many of the service layers or brokers that support the manual processes. All that cost goes straight to the bottom line. Quality also improves with reduction of human error. There are fewer opportunities for the manual game of telephone to confuse research needs from the brand, down through the value chain, and back again.

But what are the unintended consequences? New companies that are not traditional market research providers are entering the market at a remarkable speed, such as ZappiStore, that require programmatic in order to drive their value proposition. Additionally, companies that aren't investing in platforms and developers are going to be left behind. The industry is bifurcating between those that invest in technology, and those that don't, and the winners are visionaries who use platforms to drive the market forward.

# CLIENT SATISFACTION WITH RESEARCH PROVIDERS

**Q:** Overall how satisfied are you with your research providers?

A5: Completely satisfied	10	3%
A4: Very satisfied	136	42%
A3: Moderately satisfied	147	46%
A2: Slightly satisfied	22	7%
A1: Not at all satisfied	7	2%

Sample size: 322

Expanding upon our focus on issues important to corporate researchers, we undertook a series of exercises related to client satisfaction with their research providers.

Only 45% of corporate researchers are very or completely satisfied with their research providers. Though this compares favorably to panel providers: last year's GRIT study found that only 40% of corporate researchers and supplier researchers were very or completely satisfied with their panel providers.

Only 45% of corporate researchers are very or completely satisfied with their research providers



**Q:** Overall how satisfied do you think corporate researchers are with their research providers?

A5: Completely satisfied	6	<1%
A4: Very satisfied	324	26%
A3: Moderately satisfied	761	60%
A2: Slightly satisfied	154	12%
A1: Not at all satisfied	16	1%

Sample size: 1,261

Research providers themselves were more pessimistic about how they were regarded: Only 26% of research providers believe that corporate researchers are very or completely satisfied.

Researchers being researchers, some criticized this scale as being too harsh: Why not make the top label "very satisfied"? The answer is that we kept the "completely satisfied" label because of research evidence that shows how totally satisfied customers are much more likely to re-purchase a brand's products over the next 18 months than its satisfied customers. Striving for complete client satisfaction should therefore be a goal for the research industry. In fact, one information provider has already 21% of its users "completely satisfied": Google bests research and panel providers on top-two-box satisfaction - 45% for research providers, 40% for panel providers, and 77% for Google search.

Only 26% of research providers believe that corporate researchers are very or completely satisfied



**Q:** Overall how satisfied are you with Google's Internet search engine?

A5: Completely satisfied	21%	3%
A4: Very satisfied	56%	42%
A3: Moderately satisfied	14%	46%
A2: Slightly satisfied	9%	7%
A1: Not at all satisfied	1%	2%

Sample size: 135 (from a separate Researchscape survey of U.S. adults)



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# SATISFACTION WITH STRATEGIC ASPECTS

A majority of corporate researchers are very or completely satisfied with how research providers conduct the research (70%) and understand the issue to be researched (53%). Four out of ten are satisfied with the reporting of research results and understanding of the business. Satisfaction is lowest

with the recommendations research suppliers provide for business actions based on the research, at 25%.

**Q:** How satisfied are you with each of the following strategic aspects of working with your research providers?

	Conducting the research	Understanding the issue to be researched	Reporting research results	Understanding your business	Recommending business actions based on the research
Top 2 box	70%	53%	42%	40%	25%
Completely satisfied	16%	12%	7%	9%	5%
Very satisfied	54%	41%	35%	31%	20%
Moderately satisfied	24%	34%	41%	41%	43%
Slightly satisfied	5%	10%	11%	14%	21%
Not at all satisfied	1%	3%	6%	6%	11%

Sample size: 321

Satisfaction is lowest with the recommendations research suppliers provide for business actions based on the research



# SATISFACTION WITH TACTICAL ASPECTS

Besides these strategic issues, corporate researchers also evaluated providers on a range of tactical aspects related to delivering research. The majority of corporate researchers are satisfied with all but two aspects: data visualization (only 23% are very or completely satisfied) and cost (32%).

Satisfaction is highest with survey programming (70% very or completely satisfied) and focus group moderation (60%). Interviewing skills, discussion-guide design, timeliness, data analysis, and questionnaire design only have top-two-box satisfaction levels between 51% and 59%.

**Q:** How satisfied are you with the following tactical aspects of working with your research suppliers?

	Survey programming	Focus group moderation	Interviewing skills	Discussion guide design	Timeliness	Data analysis	Questionnaire design	Cost	Data visualization
Top 2 box	70%	60%	59%	56%	54%	52%	51%	32%	23%
Completely satisfied	20%	19%	11%	11%	14%	8%	12%	5%	4%
Very satisfied	50%	40%	48%	45%	40%	45%	39%	27%	19%
Moderately satisfied	21%	28%	33%	34%	30%	33%	35%	49%	42%
Slightly satisfied	7%	8%	5%	7%	13%	10%	11%	14%	25%
Not at all satisfied	2%	4%	3%	4%	3%	5%	3%	5%	11%

Sample size: 321

Satisfaction is highest with survey programming and focus group moderation



# KEY DRIVERS OF OVERALL SATISFACTION

Key drivers of overall satisfaction with research providers	Correlation	Shared variance
Conducting the research	0.548	30%
Understanding the issue to be researched	0.508	26%
Recommending business actions based on the research	0.506	26%
Understanding your business	0.483	23%
Reporting research results	0.471	22%
Questionnaire design	0.457	21%
Data analysis	0.450	20%
Survey programming	0.391	15%
Interviewing skills	0.383	15%
Discussion guide design	0.373	14%
Focus group moderation	0.358	13%
Data visualization	0.346	12%
Timeliness	0.336	11%
Cost	0.308	9%

Sample size: 321

Key strengths are 'understanding the issue to be researched' and 'conducting the research'.

Weaknesses include 'recommendations', 'understanding the business', and 'reporting results'



Which attributes of satisfaction have the highest correlation to overall satisfaction? The process of conducting the research is the primary driver, with a 0.548 correlation, explaining 30% of the shared variance between the two measures. Next in importance is understanding of the issue to be researched, with a 0.508 correlation, and recommending business actions based on the research, with a 0.506 correlation (each with 26% of the shared variance). The top-five aspects were all strategic aspects, with understanding of the business and reporting research results rounding out the top five.

Of the tactical issues, the most important was questionnaire design, explaining 21% of the shared variance, and data analysis, explaining 20% of the variance.

While the cost of the research will always inform purchase decisions, it had the least role in overall satisfaction of the 14 aspects measured: cost had the lowest derived importance, with a correlation to overall satisfaction of 0.308 (9% variance), just below timeliness (11% variance).

A quadrant analysis of satisfaction vs. importance, splitting each axis by its median value, provides a useful way to group attributes (median values are included in the lower quadrant for that dimension). Key strengths, which are high in derived importance and high in top-two box satisfaction, are 'understanding the issue to be researched' and 'conducting the research'. Weaknesses – which drive overall satisfaction but score in the lower half of attributes for satisfaction – include the other three strategic aspects ('recommendations', 'understanding the business', and 'reporting results') and the two most important tactical aspects (questionnaire design and data analysis).

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Following day-to-day activities of the Hispanic community.

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Moderator conducts phone interviews to get better insights on the right target market in Africa.

#### WEBCAM INTERVIEWS in the U.K.

Moderator conducts webcam interviews with Moms and kids.

#### SIMULTANEOUS TRANSLATION in Western Europe

Research on global advertising in five countries via webcam interviews.

#### RETAIL ANALYSIS in Asia

Working with mobile phones as the main means for sending data. Respondents receive and send text messages with ease using their own mobile devices.

#### FOCUS GROUPS in the Middle East

Overcoming cultural barriers to involve female respondents from the Middle East. Moderators get the women online and on the phone for a focus group.

#### PRODUCT TESTING in Australia

Male respondents from Australia go online for a bulletin board focus group where they post videos of themselves testing the product and sharing their thoughts with the group.

#### ONLINE COMMUNITY in China

Teens from China join an online community to evaluate online courses.

# QUADRANT ANALYSIS – CORPORATE RESEARCHERS

How satisfied are you with each of the following aspects of working with your suppliers?



Of those items that are deemed less important, survey programming, interviewing skills, discussion guide design, focus group moderation, and timeliness – are all viewed as assets with higher satisfaction. The two vulnerabilities (lower in importance, lower in satisfaction) are data visualization and cost.

To what extent are research providers themselves in tune with what drives the satisfaction of corporate researchers? Providers correctly recognize that conducting the research is a key strength, but are too hard on themselves when it comes to understanding the issue to be researched, seeing it as a weakness when their clients see it as a key strength.

Conversely, research providers consider questionnaire design and data analysis to be key strengths, though corporate researchers regard these as weaknesses.

The only other disconnect is that researchers expect satisfaction with timeliness to be a vulnerability when it is in fact an asset.

# QUADRANT ANALYSIS – RESEARCH PROVIDERS

How satisfied do you think clients are with each of the following aspects of working with suppliers?



Color indicates how corporate researchers perceive this aspect.

The strategic imperative for research providers is to develop better understanding of their clients' businesses, improve research reporting, and focus more on the quality of business recommendations.





# CONCLUSIONS & FINAL THOUGHTS

Several years ago, GRIT reported that our industry was on the verge of significant change – and we now see that many aspects of this change are now commonplace – mobile surveys, communities, and utilization of unstructured data through text/social media analytics. And now it appears that the next significant change is upon us.

This next change is not just about the tools and processes of providing insights, it is about integrating disparate sources of knowledge for gaining a more complete understanding of people and issues. We can see both the cause and the implications laid out in the findings from this edition of the GRIT survey.

The causes:

- The corporate researcher is, at best, moderately satisfied with research suppliers.
- Automation is making the research process simpler and, in some cases, is nearly eliminating the need for project management – allowing people to focus on more complex thinking.

GREGG ARCHIBALD  
Managing Partner  
Gen2 Advisors

Implications:

- Almost 60% of GRIT respondents are expecting to use multiple data sources to address their marketing and business questions. This is the first and the most important indicator of this important shift in how we do our work.
- Big Data, Automation and AI are all seen as game-changers. The combination of these three is the recipe for changing the way we respond to business questions and marketing issues.
- The hiring profile is quite different than just a few years ago. While someone who understands the business has been and continues to be a very important person in the hiring mix, experts in data visualization and science are most in demand, both by suppliers and clients. This is direct result of the increased complexity in the amount and types of data researchers have to work with.

Over the next few years, we are going to see a continued focus on improving tools and methodologies – but that will only be a small part of the story. The more important part of the story are going to be the insights coming from a much broader perspective of who we are, what we do, and why we do what we do. It will be demanding – and fun.

# How We Help Brands Make Human Connections

## When a Brand Feels Human

Consumers don't connect to brands, humans do. Before we can make big, human connections with people as brands we have to talk with the human part of them when doing qualitative research. By actually talking and listening to "consumers" as "real people," we get them to open up, share deeper insights and reveal bigger opportunities. More than just research, **RealityCheck's** proprietary methods are part science, part artful conversation. Our techniques break down the comfortable barriers that separate marketers and consumers and lead brand teams on a journey in which they feel as well as think.

Talking to the "human" in marketing research is simply good for business.



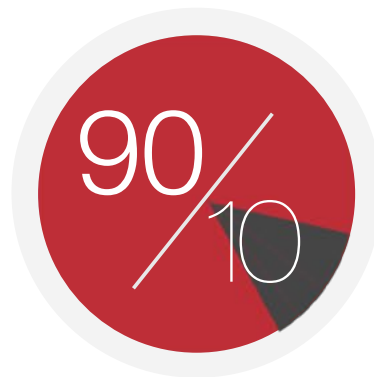
## Life Mindset

We set up qual as a conversation — not a way to “test” people. By starting a conversation about what’s important in people’s lives we learn what they believe in, the tensions they have in their lives and their human motivations.



## Empathic Listening

We listen empathically — meaning we feel them not just hear them. Our team of psychologists teach you how to listen in a way that gets you much closer to a true understanding who you are targeting and how your brand can truly enhance their lives.



## Analysis

We provide deeper, more strategically actionable analysis. We call this 90/10. We spend 90% of the analysis on the 10% that will make a difference (and that you don't know or haven't thought about already) so you have a clear strategic path forward.

# ACKNOWLEDGMENTS

**Concept Originator, GRIT**

**Executive Editor:**

Leonard Murphy – GreenBook

**Authors:**

Gregg Archibald – Gen2 Advisors

Melanie Courtright – Research

Now

JD Deitch - Independent

Jeffrey Henning – Researchscape  
International

Kerry Hecht Labsuirs – Recollective  
(Ramius Corporation)

Leonard Murphy – GreenBook

Ray Poynter – NewMR

Jon Puleston – Lightspeed

Jeffrey Resnick – Stakeholder  
Advisory Services

**Project Coordinator**

Samantha Skurdahl – GreenBook

**Design Partner**

Keen as Mustard

**Sample Partners:**

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Go to [www.GreenBook.org/GRIT](http://www.GreenBook.org/GRIT) to read the GRIT Report online or to access all GRIT data and charts via Office Reports, which you can use for your own analysis

# RESEARCH & PRODUCTION



## AMAI

[www.amai.org](http://www.amai.org)

AMAI is the only professional association in Latin America focused on applying industry intelligence to business and social issues. Founded in 1992, AMAI originally emerged as the institutional center of Mexican market research, opinion and communication communities; it now encompasses the entire industry, as well as data processing for decision-making.



## ARIA

[www.ariaalliance.org](http://www.ariaalliance.org)

Americas Research Industry Alliance (ARIA) is an alliance of pan-American research associations established to support and improve the business and integrity of the market, opinion and social research industry.



## Ascribe

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

Ascribe's leading suite of survey, data mining, visualization, sentiment and text analytics software quickly collects data via a massive sample powered by Google, and then transforms closed- and open-ended customer comments into precise, actionable insights. Our intuitive technologies collect, code, analyze and visualize a wide variety of unstructured data, including survey, social media and speech-to-text feedback. Ascribe connects seamlessly with your existing platform, enabling the fastest time to high quality insights from customer comments

compared to other providers. For nearly two decades, we have served the world's top research firms, driving continuous, disruptive innovation via multiple proprietary technologies and outsourced coding, translation and transcription services. We process hundreds of millions of verbatim comments annually for elite corporate and research brands across 57 countries, enabling them to efficiently and effectively make informed decisions that lead to relevant product development, exceptional customer journeys, improved operations, revenue growth and increased profits.



## AYTM – Ask Your Target Market

[www.aytm.com](http://www.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 CASRO-approved 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.



### 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.



### Happy Thinking People

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

Happy Thinking People is one of the world's leading brand research and consulting companies. With offices in Berlin, Munich, Paris, Zürich and Mumbai employing over 100 people, we have over 25 years of experience in people understanding across the globe



### Lightspeed GMI

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

"Quality-seeking researchers, marketers and brands choose Lightspeed GMI 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. From award-winning survey engagement to fieldwork management, we add value at every stage of the research process.

"



### MROC Japan –Community Solutions Company

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

MROC Japan is the online marketing insights company specialized exclusively in community research in Japan. By providing 'Supporter Online Meeting (SOM)' by MROC 360, the hybrid methods both quantitative and qualitative from listening, observing, & co-creating to nonconscious/emotional analytics, the company tries to help the clients put the voice of the customer at the heart of their marketing strategy.



### mTAB LLC

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

mTAB® LLC serves the global needs of many Fortune 500 companies. Our web based tools remove the cost and complexity of processing and querying large data sets, making survey data more accessible and useful through data mining and dashboard solutions.



### NewMR

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

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



SURVEY ANALYTICS FOR MICROSOFT OFFICE®

### 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
- OfficeReports Link populates data from Excel into Infographics in PowerPoint



### PROVOKERS

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

Provokers is a brand positioning & consumer understanding challenger. We nurture ideas, thoughts and processes to provoke a difference that really makes the difference.



### RECOLLECTIVE (Ramius Corporation)

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

Recollective is a community platform for qualitative and quantitative research. Supporting activity-based, social and mobile research methodologies, Recollective is offered in thirteen languages and used by hundreds of marketing research agencies worldwide. Recollective is developed by Ramius Corporation.



### Remesh

[remesh.ai](http://remesh.ai)

We use AI to make communicating with large groups of people efficient for research. Our products consist of a real-time moderated focus-group conversation with a scalable set of participants while our machine learning and NLP tools automate the heavy lifting of qualitative data analysis.



### Research Now

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

Research Now is the global leader in digital data collection, powering analytics and market research insights. The company enables data-driven decision making for its 3,000 market research, consulting, media, and corporate clients through its permission-based access to over 8 million deeply-profiled business and consumer panel members using online, mobile, social media and behavioral data collection technology platforms.



### 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.

# SAMPLE PARTNERS



## ACEI

[www.acei.co](http://www.acei.co)

Our association was created with the objective of associating the companies within the sector, seeking to improve and maintain the quality of market research in Colombia, determining common quality standards and promoting a serious and reliable work, guided by ethics and following our country's legislation.



## AIM

[www.aimchile.cl](http://www.aimchile.cl)

Chile Marketing Research Trade Association. The most relevant MR providers are part of AIM.



## AIP

[www.aip-global.com/EN](http://www.aip-global.com/EN)

AIP continues to be the leading online fieldwork agency in Asia. AIP recruits and manages proprietary panels in 12 countries across Asia. Our research only panels are actively managed to the highest global standards. When running research using panels from AIP, our clients have the peace of mind with knowing who recruited and managed your respondents. Combined with our dedicated multi-national/lingual consultants who are specialized in global projects AIP ensures your survey is asking the right questions, to the right people, in the right language.



ASIA  
PACIFIC  
RESEARCH  
COMMITTEE

## Asia Pacific Research Committee (APRC)

[www.aprc-research.com](http://www.aprc-research.com)

The main purpose of the Asia Pacific Research Committee is to further promote the development of Asia-focused marketing research technologies and insights through creating additional opportunities for cross-border exchanges amongst marketing research associations and communities within the Asia Pacific region.



## Australian Market & Social Research Society (AMSRs)

[www.amsr.com.au](http://www.amsr.com.au)

"The Australian Market & Social Research Society Limited (AMSRs) is a not-for-profit professional membership body of over 2,000 market and social research professionals who are dedicated to increasing the standard and understanding of market and social research in Australia. The Society assists members to develop their careers by heightening professional standards and ethics in the fields of market and social research.



## AVAI

The Venezuelan Association for Market Research Agencies represents the interests of its affiliated marketing research Firms and strengthens global core values and best practices of the industry in Venezuela through its international presence and local events and standards.



## BAQMAR

[www.baqmar.eu](http://www.baqmar.eu)

BAQMaR is the research association that aims to make research COOL again through its forward thinking online content and events.



## BVA

[www.bva.fr/en/home](http://www.bva.fr/en/home)

BVA provides expert advice thanks to sharp knowledge of the sector and methodological innovations. As a pioneer in many areas (behavioral, non verbal, digital,...), BVA offers quantitative and qualitative solutions in all business sectors that can untangle consumer's mind and lead to actionable and strategic recommendations.



## CASRO

[www.casro.org](http://www.casro.org)

Founded in 1975, CASRO represents 330+ research organizations in the U.S. and abroad, all of which annually reaffirm their adherence to the internationally respected CASRO Code of Standards. CASRO member benefits include a strong government and public affairs program, expert legal guidance, an industry-specific insurance program, benchmarking surveys and superb staff training and networking opportunities via webinars and conferences held throughout the year.



## CEIM

[www.ceim-argentina.org.ar/index.php](http://www.ceim-argentina.org.ar/index.php)

CEIM (Cámara de Empresas de Investigación Social y de Mercado) brings together the leading companies in the Consumer and Opinion Research industry. Its main objective is to establish mechanisms ensuring the responsible operation of this business sector in Argentina. It promotes flawless quality as key differentiator of their company members performance within their specialty, and advises, defends and represents their members, acting in the quest of their recognition within the community.



## ESTIME

[www.estimate-neurobiomarketing.com](http://www.estimate-neurobiomarketing.com)

We have 24 years of traditional expertise in LatAm with 10 years pioneering consumer neuroscience developments in Europe and the Americas to research US Hispanic & LatAm Markets with full capabilities of EEG, GSR, ET and HRV equipment tied to proprietary neuropsychology modeling, all teamed with a dedicated group cognitive neuropsychologists and industry-specific experts. This primes our Firm to provide our Clients with deeper and broader understanding of their markets and customers, while maximizing their ROI across all marketing efforts.



### **FeedBACK**

[www.fb.com.co](http://www.fb.com.co)

We are an agency with 17 years of experience in Market Research. Our mission is to apply consumer knowledge to concrete marketing decisions. We focus on four areas: Semiotics, Neuromarketing, Qualitative and Quantitative.



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INNOVATIVE MARKTFORSCHUNG

### **GIM Gesellschaft für Innovative Marktforschung**

[www.g-i-m.com](http://www.g-i-m.com)

GIM, Gesellschaft für Innovative Marktforschung, started life in 1987 as a small specialist company and has since grown into one of Germany's leading market research institutes. We offer qualitative and quantitative market research and can thus provide the appropriate research solution for your needs and area of investigation. In every phase of each project, we optimize our methods on an on-going basis. We always employ the most suitable solution, be it ethnography, focus groups, in-depth interviewing, conjoint, multivariate procedures, tracking-studies, car clinics or research at the POS.



### **LYNX Research**

[www.lynxresearch.biz](http://www.lynxresearch.biz)

Choosing a marketing research partner is hardly simple. Almost every firm promises tested methods and an efficient team to help you achieve your objectives. The BIG problem with this is that they often miss the personal care and attention that will turn a solid project into something that is the envy of your clients and colleagues. And this individual commitment is the distinction between the research craftsmen at Lynx and everyone else.

### **MICHIGAN STATE UNIVERSITY**

Master of Science in Marketing Research  
Broad College of Business

### **Michigan State University**

[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.



### **MRIA-ARIM**

[www.mria-arim.ca](http://www.mria-arim.ca)

The Market Research and Intelligence Association represents all sectors of the market intelligence and survey research industry in Canada and is its single authoritative voice.



### **MRS**

[www.mrs.org.uk](http://www.mrs.org.uk)

With members in more than 60 countries, MRS is the world's largest research association serving all those with professional equity in provision or use of market, social and opinion research, and in business intelligence, market analysis, customer insight and consultancy.



### **New York American Marketing Association**

[www.nyama.org](http://www.nyama.org)

NYAMA is an organization of marketing professionals from a broad range of industries who seek the knowledge to become more effective marketers. We focus on giving marketers easier access to recognized thought leaders, best practices, trends and resources.



### Next Gen Market Research (NGMR)

[www.linkedin.com/groups/31804/profile](http://www.linkedin.com/groups/31804/profile)

The market has changed, the customers have changed, why should consumer insights be the same? NGMR is an invitation-only group for analytics-professionals who want more than traditional market research.



### OdinText Inc.

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

The leader in text analytics for marketing research.



### Qualitative Research Consultants Association

[www.qrca.org](http://www.qrca.org)

QRCA is a global association of the world's most innovative, collaborative and passionate market research professionals dedicated to maximizing the power of qualitative.



### SAIMO

[www.saimo.org.ar](http://www.saimo.org.ar)

SAIMO is the institution founded in 1996 that brings together all professionals in marketing and opinion research in Argentina.



### Sands Research

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

Sands Research Inc. is a pioneer in applying cognitive neuroscience technology for unique insight into television and print advertisements, retail environments, product packaging and product design. Combined with pre- and post- questionnaires, we provide a comprehensive, objective analysis of the consumer's response to advertising, packaging, displays and sensory inputs (food, beverage and cosmetic product testing).



### The Research Club

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

At the heart of The Research Club is our desire to connect people within the Market Research Industry. There's nothing we like better than bringing people together for their mutual benefit. We've been connecting people since 2007 and believe that our relaxed style of networking events is key to building strong relations. We now host over 30 events each year for our growing membership of 13000+ and collaborate with the many of the industry's leading conference organisations across the globe.



In touch with people

### Toluna

[corporate.toluna.com](http://corporate.toluna.com)

Toluna is a leading provider of real-time digital consumer insights and empowers companies to brainstorm ideas, uncover new business opportunities and answer their questions in real time. Toluna is transforming the way marketing decisions are made by bringing consumers and brands together via the world's largest social voting community of 10 million members across 59 countries. This real-time access to consumers is coupled with its state-of-the-art, market research survey and analytics platform.



### University of Georgia | MRII

[www.georgiacenter.uga.edu/mrii](http://www.georgiacenter.uga.edu/mrii)

University of Georgia & MRII are proud education partners of GreenBook. The Principles of Market Research is an online certificate course administered by the University of Georgia and is designed to teach the Market Research Core Body of Knowledge MRCBOK®. Over 8,000 research practitioners have enrolled in the program from 104 countries. New Online Course: Principles of Mobile Market Research. This online course explores emerging mobile technologies and how they can be applied in market research. GreenBook is a proud supporter of the Principles programs, presented by the UGA and MRII.



### University of Texas

[www.uta.edu/msmr](http://www.uta.edu/msmr)

The MSMR Alumni Association (MAA) is a nonprofit association for graduates of the Masters of Science in Marketing Research (MSMR) program from the University of Texas at Arlington.

MSMR is a practical, hands-on program designed to prepare students for careers in marketing research. Students learn how to meld logic with creativity, quantitative data with qualitative insights, and intelligence with intuition to solve marketing problems and create business opportunities.

## VISIONCRITICAL®

### Vision Critical

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

Vision Critical is a cloud-based customer intelligence platform that helps companies build engaged, secure communities of customers they can use continuously, across the enterprise, for ongoing, real-time feedback and insight.



A.C. NIELSEN CENTER for  
MARKETING RESEARCH

### A.C. Nielsen Center for Marketing Research at The Wisconsin School of Business

[go.wisc.edu/wsb-marketing-research](http://go.wisc.edu/wsb-marketing-research)

The A.C. Nielsen Center at the University of Wisconsin-Madison was established in 1990 and is built on the legacy and funding of the Arthur C. Nielsen Jr. family, pioneers in the field of marketing research. It was created to train students in the specialized ideas, issues, and techniques of marketing research, as well as to help discover and disseminate new marketing research knowledge.



### Women In Research

[www.womeninresearch.org](http://www.womeninresearch.org)

Women in Research (WiRe) is a global non-profit that arms women in the marketing research industry with the tools to develop professionally, build connections and stay inspired. WiRe's mission is to advance the contributions and voice of women in research, both for themselves and the greater good of the market research industry.

# COMMENTARY PROVIDERS



## **Civicom® Marketing Research Services**

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

Civicom® is a global leader in serving the marketing research community in almost every country worldwide, with a strong industry presence in facilitating telephone/web-enabled IDIs/focus groups, online research communities, and mobile qualitative research including audio/video diaries, ethnography and usability testing.



**Confirmit.**

## **Confirmit**

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

Confirmit helps businesses operationalize feedback to drive change throughout their organizations using the world's most secure, reliable and scalable solutions for Market Research programs. Confirmit's solutions enable companies to run feedback and research programs that increase revenue, reduce costs and promote culture change.



## **Fresh Squeezed Ideas**

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

Fresh Squeezed Ideas is an evidence-based brand and marketing consultancy that engineers breakout brand strategies for today's global markets across a diverse range of industries and categories, including consumer packaged goods, pharmaceutical, healthcare, retail, food & beverage, financial services, insurance, and automotive.



## **FUEL CYCLE by Passenger**

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

FUEL CYCLE's SaaS-based online community platform gives enterprises a 360-degree view of their customers - not as data points, but as people, buyers or prospects. With the voice of the customer at their fingertips, our clients are empowered to make decisions that increase both revenue and long-term customer loyalty.



## **GutCheck**

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

GutCheck provides global, online agile market research solutions that enable you to quickly address business questions whenever they come up, at any stage in the development process. The flexibility of our quantitative and qualitative platform allows us to instantly reach and engage with your target audience. Our full-service team designs and executes the study and analysis to give you the insights you need to make informed, confident, consumer-driven business decisions.



### **Lucid, LLC**

[luc.id](http://luc.id)

Lucid is the world's largest audience platform for sourcing and understanding "human answers" – real, deterministic data about human behavior at scale. Lucid has the largest and most powerful programmatic survey exchange, enabling partners to ask and answer over 10.5 billion questions worldwide. With a pool of 80M+ unique respondents, Lucid allows for data-driven decision making – about everything from marketing to product development – in real-time.



### **Research Now**

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

Research Now is the global leader in digital data collection, powering analytics and market research insights. The company enables data-driven decision making for its 3,000 market research, consulting, media, and corporate clients through its permission-based access to over 8 million deeply-profiled business and consumer panel members using online, mobile, social media and behavioral data collection technology platforms.



### **Simmons Research**

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

Simmons is a leading cross-channel consumer research company, measuring consumer preferences, attitudes, and media behaviors by overlaying survey and passively measured data. For more than 60 years, Simmons has helped leading brands, agencies, and media companies effectively engage with consumers using rich demographic, psychographic, attitudinal, intent, and behavioral data across devices.



### **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.

# ADVERTISERS



## **Aha! Online Qualitative Research Technology**

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

The Aha! Online Qual Platform enables marketing research companies to easily create engaging online consumer studies with amazing response rates. Social and mobile-friendly activities include storytelling, collage building and community tools such as pinboards, wishing walls and bulletin boards.



## **B2B International**

[www.b2binternational.com](http://www.b2binternational.com)

B2B International is the largest b2b-focused market research firm with offices across North America, Europe and Asia-Pacific. We have conducted 3,000+ b2b research studies spanning a wide range of sectors. Our client portfolio includes 600 of the world's largest 1,500 companies.



## **Civicom® Marketing Research Services**

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

Civicom® is a global leader in serving the marketing research community in almost every country worldwide, with a strong industry presence in facilitating telephone/web-enabled IDIs/focus groups, online research communities, and mobile qualitative research including audio/video diaries, ethnography and usability testing.

## **C+R**

RESEARCH

### **C + R Research**

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

At C+R Research, a full-service marketing insights agency, we've been helping brands grow for over 50 years by delivering great research, deep perspective and committed client service. We're known for designing innovative custom methodologies for answering complex marketing questions, high-quality analytical insights and delivering senior-level attention throughout every phase of our clients' projects. We embrace a "whatever-it-takes" philosophy on every client engagement and flexibly adapt to our clients' needs, however challenging they may become. We offer an array of effective, customizable techniques for traditional and online qualitative, quantitative, mobile and community-based research both in the U.S. and globally. We also offer focused areas of knowledge and consultative expertise in youth and family, Latino and multicultural consumers and shopper insights. Our goal is to equip our clients with the insights they need to confidently develop successful brand strategies and grow their businesses.



## **Confirmit.**

### **Confirmit**

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

Confirmit helps businesses operationalize feedback to drive change throughout their organizations using the world's most secure, reliable and scalable solutions for Market Research programs. Confirmit's solutions enable companies to run feedback and research programs that increase revenue, reduce costs and promote culture change.

## **FocusVision™**

### **FocusVision**

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

FocusVision is the global leader in market research technology. Our insights suite provides an online survey platform, research facility video streaming, webcam focus groups, ethnography streaming, panel management and mobile device usability studies. More info: [www.focusvision.com](http://www.focusvision.com).



### **FUEL CYCLE by Passenger**

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

FUEL CYCLE's SaaS-based online community platform gives enterprises a 360-degree view of their customers - not as data points, but as people, buyers or prospects. With the voice of the customer at their fingertips, our clients are empowered to make decisions that increase both revenue and long-term customer loyalty.



### **L&E Research**

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

L&E knows that finding the right people to talk to is the key to a successful market research project, and we are passionate about connecting our clients with the best respondents for their research. Since 1984, L&E Research has successfully recruited consumers, healthcare professionals, and business professionals - for virtually every type of market research project. Discover our qualitative research facilities and recruiting services in Charlotte, Cincinnati, Columbus, Minneapolis, Raleigh, St. Louis, Tampa, and Baltimore.

## **M3 GLOBAL RESEARCH**

### **M3 Global Research**

[www.m3globalresearch.com](http://www.m3globalresearch.com)

M3 Global Research maintains ISO 26362 and 27001 certifications with the highest quality data collection and project management capabilities that cover the spectrum of quantitative and qualitative techniques utilized today.



### **RealityCheck Consulting**

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

RealityCheck is a global partnership of experienced qualitative consumer researchers, creative facilitators, and strategic conceptual analysts. From moderation and recruitment, to field management and analysis, we provide insightful clarity and transformative strategic direction for brands.



### **SIS International**

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

SIS International Research is a leading full-service market research and market intelligence firm. SIS conducts fieldwork, data collection, recruiting, strategic market intelligence, low-incidence research and global growth marketing consulting solutions in local markets and around the world. The company's coverage is global, including nationwide US, Europe, Latin America, Asia, Canada, Africa and the Middle East.



### **Toluna**

[corporate.toluna.com](http://corporate.toluna.com)

Toluna is a leading provider of real-time digital consumer insights and empowers companies to brainstorm ideas, uncover new business opportunities and answer their questions in real time. Toluna is transforming the way marketing decisions are made by bringing consumers and brands together via the world's largest social voting community of 10 million members across 59 countries. This real-time access to consumers is coupled with its state-of-the-art, market research survey and analytics platform.



GRIT<sup>top</sup>50  
INNOVATIVE FIRM



Friday 1:17 PM

Hey AYTM!

I planned to ski with family over the weekend but my study has to be done by Tuesday... (N=2500)

Read 1:18 PM

We're on it. Have fun!

Today: 10:35 AM

Presentation went great. They now call me the Research Hero :)

# LOOKING FOR RESEARCH BUYERS?

We've helped hundreds of research companies build and strengthen their brands, develop stronger client relationships, and grow their businesses. We can help you, too.

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