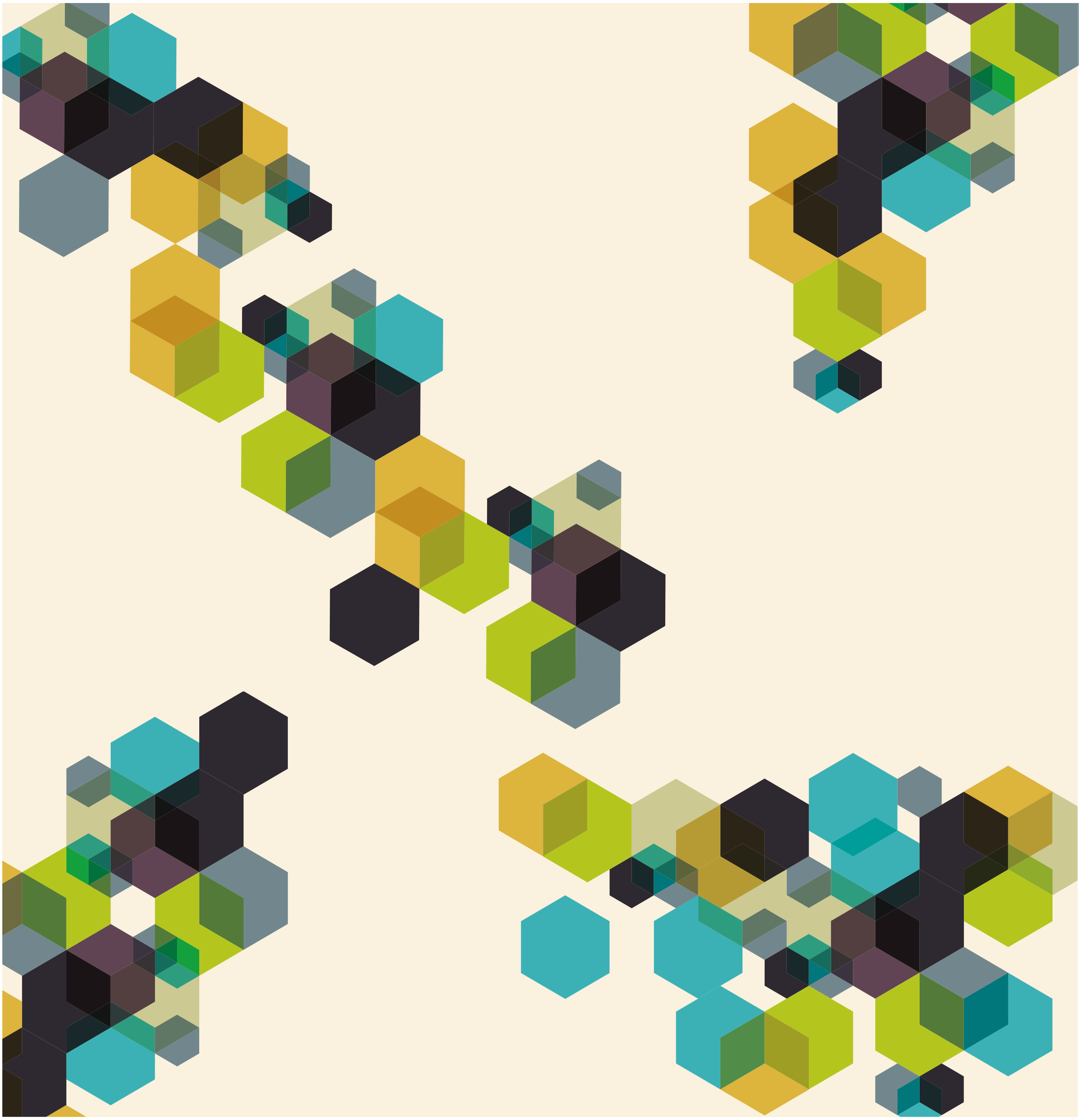
# GRIT REPORT

## GREENBOOK RESEARCH INDUSTRY TRENDS REPORT



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2016 Q1–Q2

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## COMMENTARY



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# OUR PARTNERS...

# WELCOME

Welcome to the 19th edition of the **GreenBook Research Industry Trends Report**, using data collected in Q1 & Q2 of 2016.

This GRIT relies on the most comprehensive sample yet with 2144 completed interviews and participants from 70 countries, increasing the representativeness of the study and the overall reliability of the data as a meaningful snapshot of the 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 our history of transparency and collaboration, we are making this data available to everyone for further exploration via tools such as Dapresy and OfficeReports.

Much was new in this wave; we switched to a new data collection platform partner, began opting in to build a GRIT panel, and of course explored new question areas related to topics such as automation, training needs, and the future of sampling.

However, we also focused on those topics our readers depend on only GRIT to provide: a view on adoption of newer technologies/methods, opportunities & threats in the industry, financial forecasting and of course the always popular GRIT 50 Most Innovative Suppliers & Clients, the only brand tracker in our industry.

The result of all this? A report that goes deeper, provides better guidance, and helps to truly chart the course of the industry as an invaluable strategic planning tool. During a time of accelerating change, we hope GRIT can be a touchstone for you and your team to understand what is happening, what it means, and what you should do to adapt.

GRIT has always been a coalition of the willing and our authors, advertisers, commentary providers, sample partners and most especially our research partners make this all possible. A special thanks goes out to all the organizations who help with the heavy lifting of data collection and analysis including Ascribe, AYTM, Dapresy, Gen2 Advisors, Lightspeed GMI, Lucid, mTAB, NewMR, OfficeReports, Researchscape International & Stakeholder Advisory Services.

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


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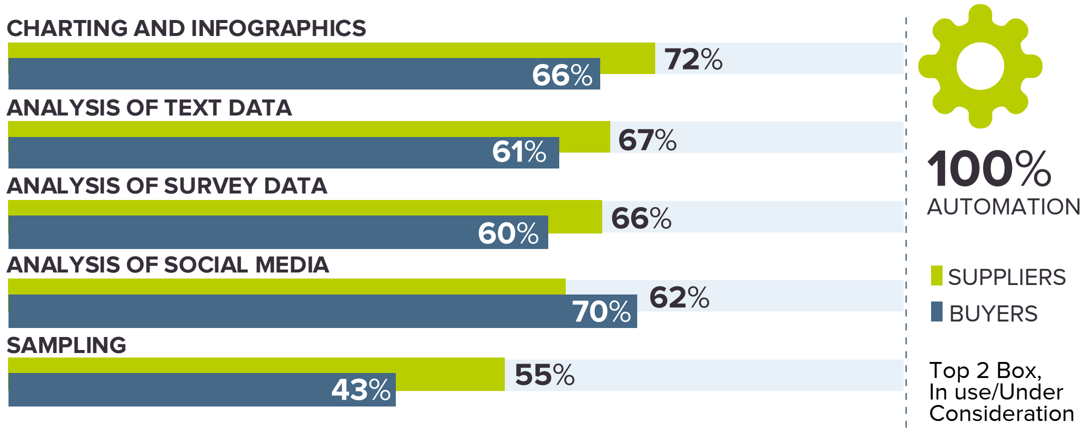
# EXECUTIVE SUMMARY

## ADOPTION OF AUTOMATION

Automation is already transforming much of the industry, and it's in wide use at almost identical levels among clients and suppliers.

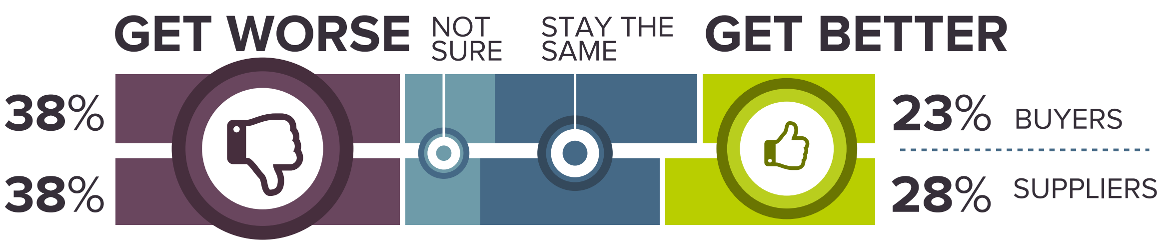
Analytics and reporting are currently being automated by many, but what can be automated will ultimately be automated as well, and many other aspects of research are being disrupted now.




## THE FUTURE OF SAMPLE

Differences exist in subsets, but more clients and suppliers agree that sample quality is getting worse, and there is little alignment on what to do about it. This is a perennial topic; when will the industry do something to address it?

Over the next three years the overall quality of sample will...



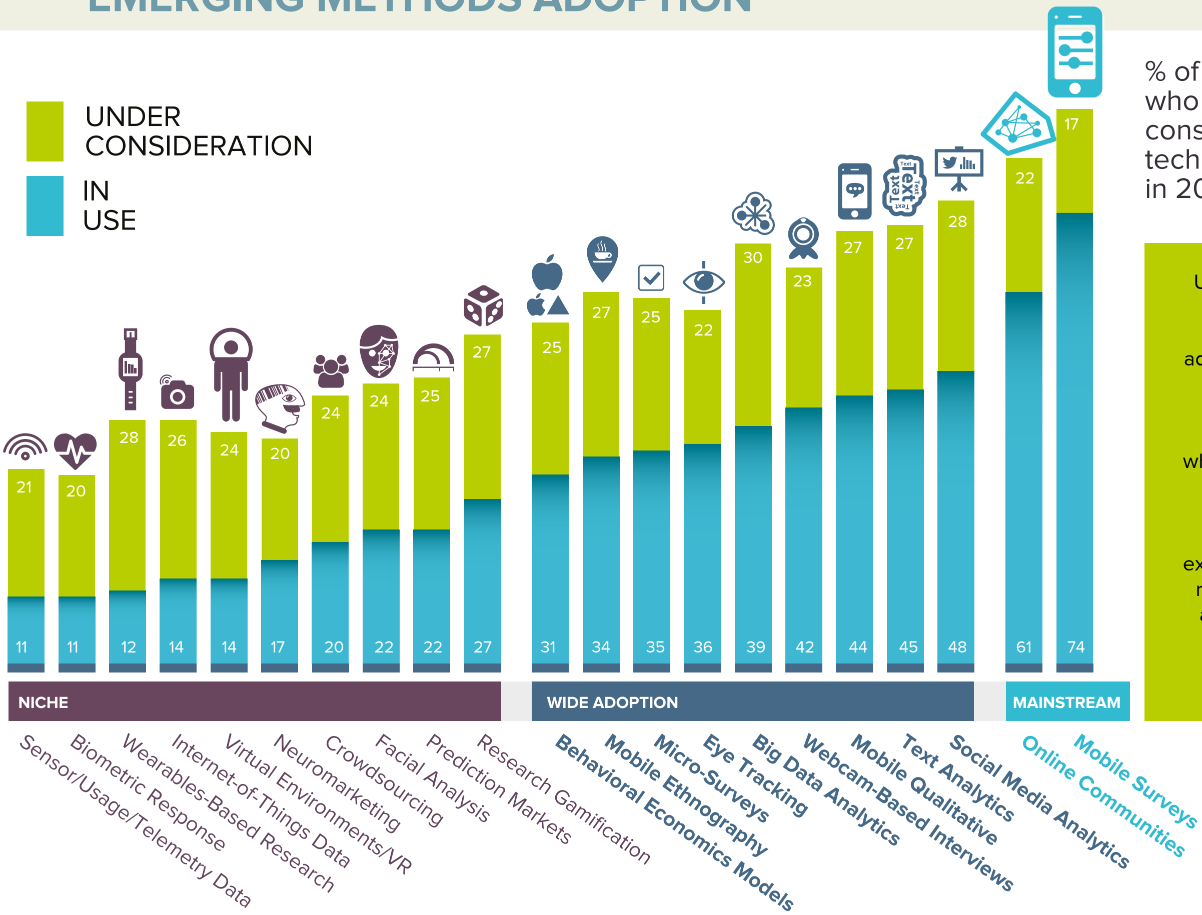

## GRIT 50 MOST INNOVATIVE CLIENTS

P&G is still the one to beat, but many other companies from a variety of industries are building reputations in the industry as embracing (and driving) innovation in insights.

1. P&G
2. Unilever ▲1
3. Google ▲1
4. Coca-Cola ▼2
5. Apple ▲1
6. PepsiCo ▲4
7. amazon ▲24
8. facebook ▲11

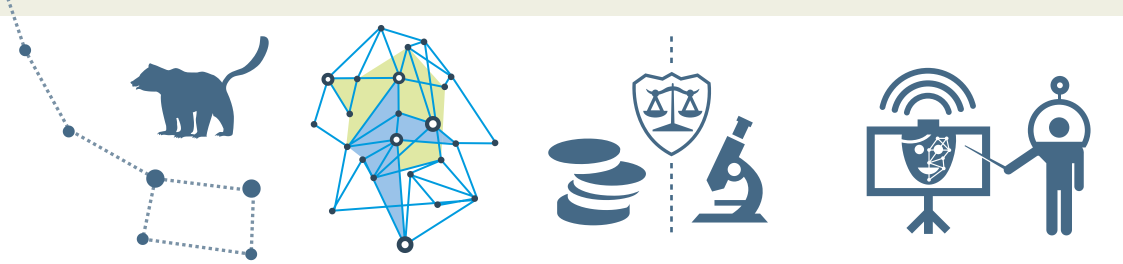
...

## EMERGING METHODS ADOPTION




Use of mobile and online communities is now mainstream, but wide adoption is happening with everything from social media analytics to behavioral economics, while many other emerging methods remain in the niche category. The standard toolkit has expanded significantly, and more non-standard tools are becoming available.

## MOST IN-DEMAND TRAINING TOPICS



**38%** Finding the story in the data

**33%** Data visualization skills

**33%** Aligning business needs to research methods

**32%** Introduction to emerging technologies & methods

Researchers often bemoan the lack of fundamental training; what's in demand are skills that can help us be more consultative, engaging, and aligned to broader business objectives.

## GRIT 50 MOST INNOVATIVE SUPPLIERS

1. brainjuicer
2. Ipsos
3. InSites Consulting – taking research forward (1)
4. nielsen (5)
5. GfK (1)
6. TNS (1)
7. VISIONCRITICAL (4)
8. lrw

...

BrainJuicer continues to dominate as the company that is topmost of mind when it comes to innovative suppliers, but with eleven debuts on this list and twenty-two others moving up in the ranks, it's clear that many other companies are embracing innovation as well.

# METHODOLOGY AND SAMPLE

For this report, the analysis is based on 2,144 completed interviews

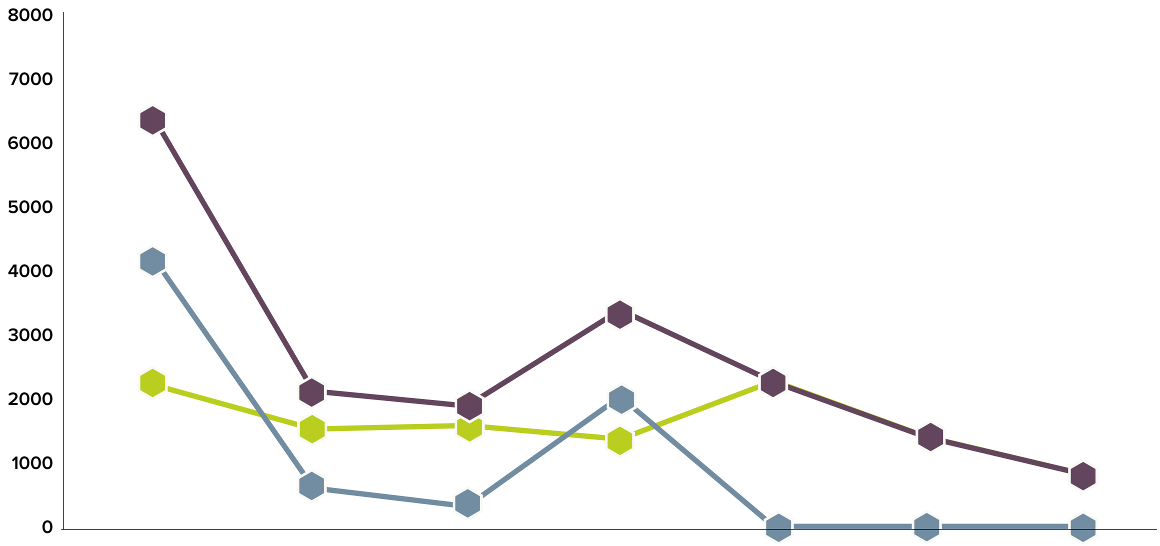
GRIT respondents are recruited by email and social media channels by GreenBook and GRIT partners. These lists are comprised of both research providers and clients. The sample size for this latest wave is significantly greater than previous waves, especially in certain regions such as Asia Pacific, so 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 2,144 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.

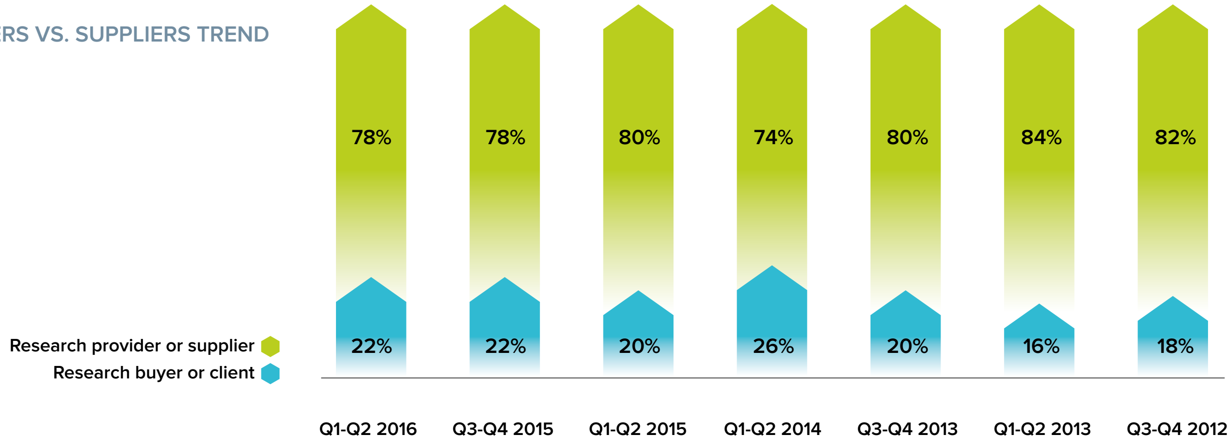
Here is a comparison of sample size over the last several waves:

GRIT SAMPLE TREND




| | Q1-Q2 2016 | Q3-Q4 2015 | Q1-Q2 2015 | Q1-Q2 2014 | Q3-Q4 2013 | Q1-Q2 2013 | Q3-Q4 2012 |
|---|---|---|---|---|---|---|---|
| NET | 6130 | 2087 | 1858 | 3338 | 2229 | 1375 | 818 |
| Incomplete | 3986 | 590 | 307 | 1996 | 0 | 0 | 0 |
| Complete | 2144 | 1497 | 1551 | 1342 | 2229 | 1375 | 818 |

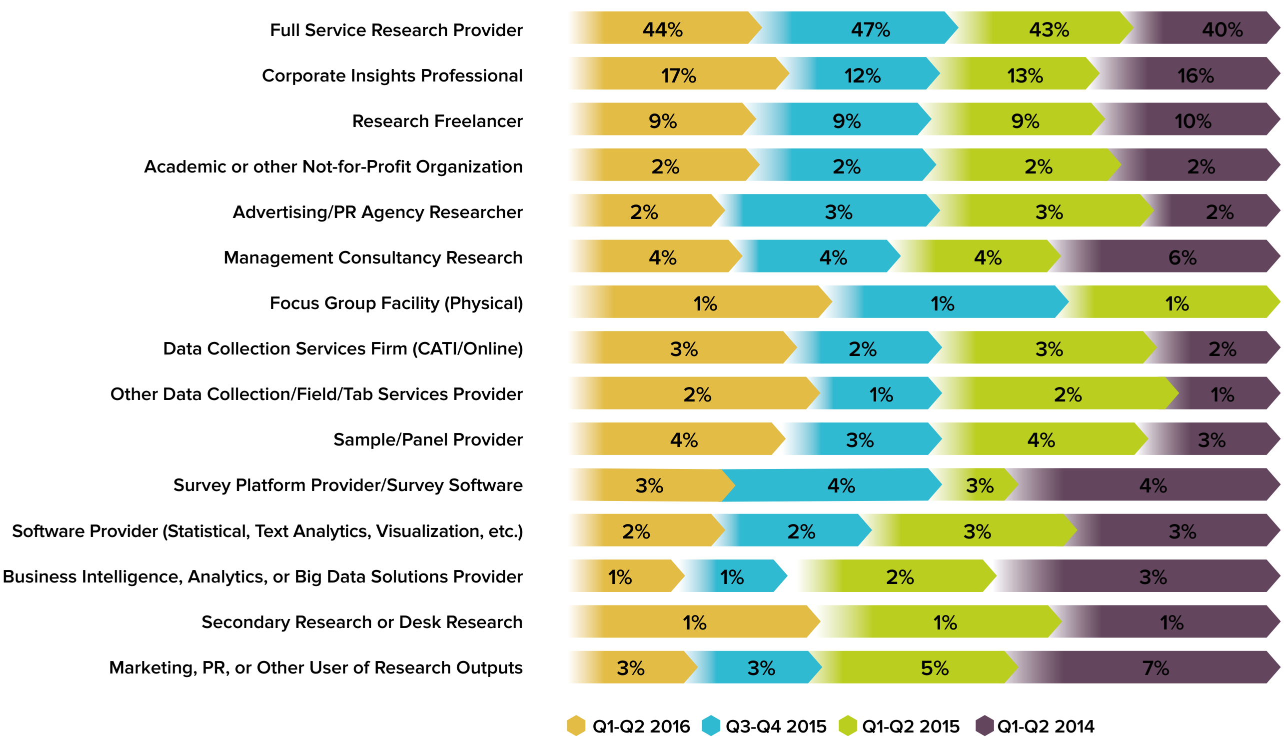
## BUYERS VS. SUPPLIERS TREND




The mix of respondents has varied during the 14 years of this study, but within fairly narrow bands. We hold relatively steady at 78% of respondents identifying themselves as being suppliers (n=1,673) and 22% identifying themselves as clients (n=471), which from a percentage perspective is generally consistent with the last several waves of the study. On the supplier side, 40% of all respondents identify themselves as working within a full-service market research agency.

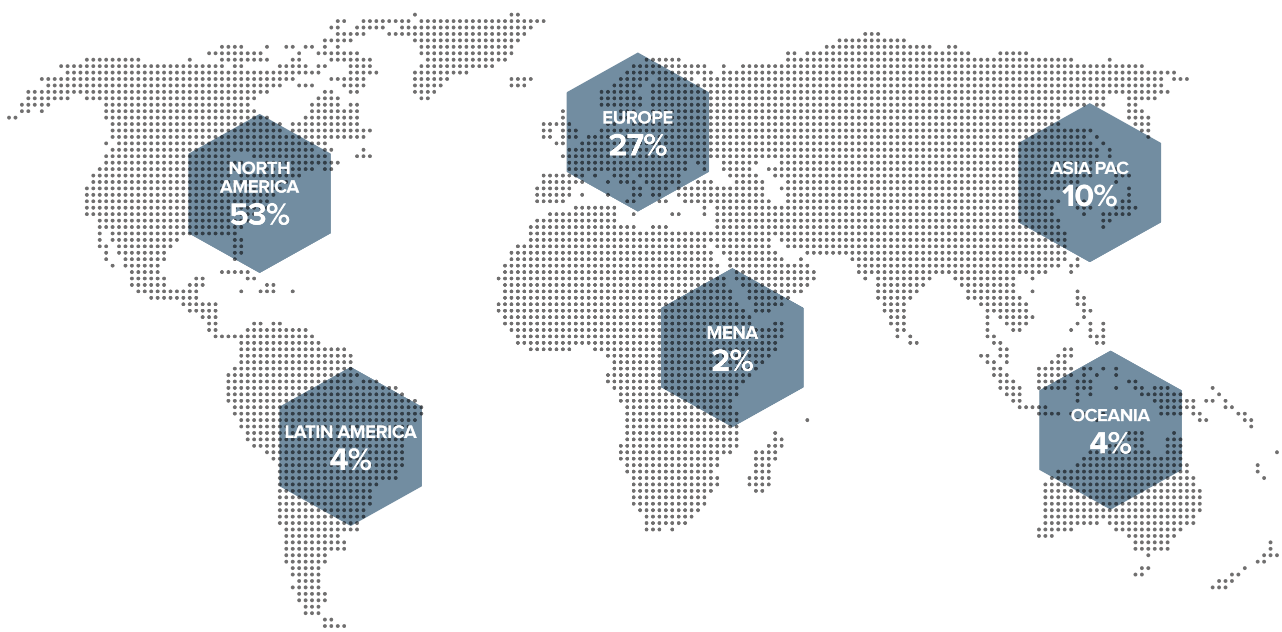
> 78% of respondents are suppliers (n=1,673) and 22% are clients (n=471)

## GRIT SAMPLE ORGANIZATIONAL AFFILIATION OVER TIME



In spite of increased international participation, the percentage of respondents from North America increased to 53%. There were some minor fluctuations in other geographies (within a few percentage points) with the next largest segment being Europe at 27% (holding steady from the last wave), Asia Pac at 10% (up from the previous wave), Latin America at 4% and Oceania (mostly comprised of Australia) at 4% (slightly down from the previous wave) and MENA at 2% (slightly up from the previous wave).

GRIT PARTICIPATION BY REGION




In total, 70 different countries are represented within the sample, and here is a selection of the largest contributors.

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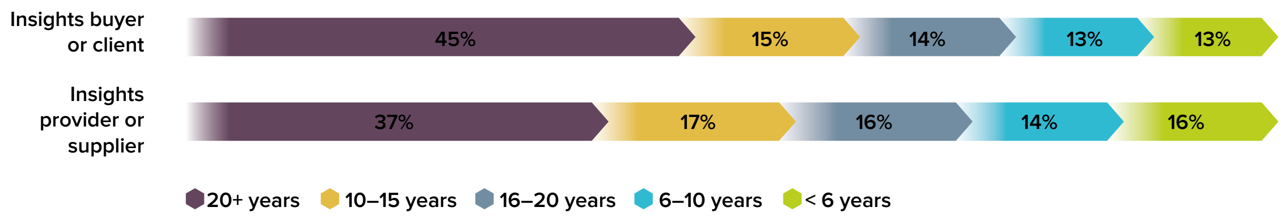
## HOW MANY YEARS HAS YOUR COMPANY BEEN IN BUSINESS?

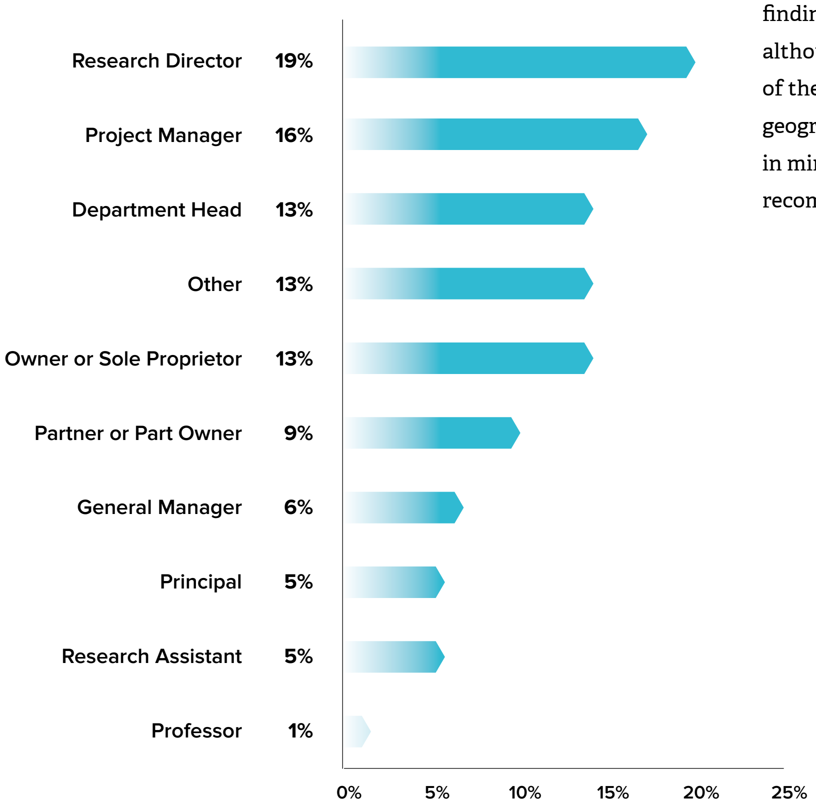



GRIT sample is comprised of largely senior level research professionals

In looking at other firmographic questions, the GRIT sample is comprised of largely senior level research professionals, with over half of all client-side and supplier-side respondents having been in the industry over 11 years, and pluralities over 20 years.

The selection of titles given for participants to choose from reflects the senior level of our respondents with almost 50% being in senior-level roles within their organization:

## GRIT PARTICIPANT TENURE




We believe that the combination of the larger sample size globally, the increasingly single source recruiting method (GreenBook email lists), the diverse professional affiliation and the deeply experienced nature of our participants makes this edition of the GRIT report especially impactful and worthy of careful reading by the industry as a whole.

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.

# THE CHANGING ADVERTISING LANDSCAPE:

## WHERE BIG DATA IS STEPPING UP AND MARKETING RESEARCH IS FALLING SHORT

**Matt Warta**
CEO and Co-Founder, GutCheck
Twitter: @mwartam | Website: www.gutcheckit.com

Big data has been embraced by the advertising industry over the last several years. With the ability to target consumers with media in more specific ways, the necessity and efficacy of big-data driven advertising has led to billions of spend in this area. So if big data has become bigger, better, and more efficient, why hasn't the marketing research industry—big data's other half—followed? The answer may lie in how the media industry has evolved while marketing research methodologies have not.

Prior to the Internet, the media world was dominated by the big three networks—ABC, CBS, and NBC—together representing over 60% of TV viewing. The other dominant advertising formats were newspaper and radio. Back then, media buying was simple; targeting was done at a high level, given media were not specific. A broad consumer audience would be exposed to the media, and according to John Wannamaker, a proponent of advertising and pioneer in marketing, 50% of the advertising at this time worked, but no one knew which 50%.

Today, the big three's share has fallen to roughly 20% of TV viewing; digital and mobile have gained over $130B in advertising spend—at the expense of newspaper and radio. Why? The ROI is more demonstrable and the new digital formats enable specific consumer targeting through demographics and behavioral data that live in the adtech ecosystem. Further, digital inventory against specific audiences can be bought in real time through programmatic platforms.

This shift and impact can be seen on both the client and supplier side:

- P&G moved 35% of their ad spend into digital channels and saw three to five times the effectiveness compared to traditional media.
- TubeMogul, a leading programmatic ad platform that didn't exist 10 years ago, will deliver almost $600mm in media spend this year and is growing at a rate not seen at scale in marketing research.

So, why is this important to marketing research? I believe the marketers who are investing their $600B in an increasingly targeted way will force the marketing research industry to leverage methodologies and sampling techniques—consistent with the marketer's modern approaches.

The challenge for marketing research is that many methodologies leveraged in primary marketing research were developed in an age when network TV dominated and mass markets ruled; these methodologies and their resulting data sets were built for general population audiences. This begs the question: Do these methods need to be modernized for a more targeted world?

There is data in the GRIT report in line with this thesis:

- Big data—the heart of adtech—is top of mind. It's listed as one of the top five techniques, with 81% of clients/buyers either using it or considering using it.
- Respondents saw the analysis of behavioral data—rather than survey data—as being the most significant disruptor of how they engage with consumers.

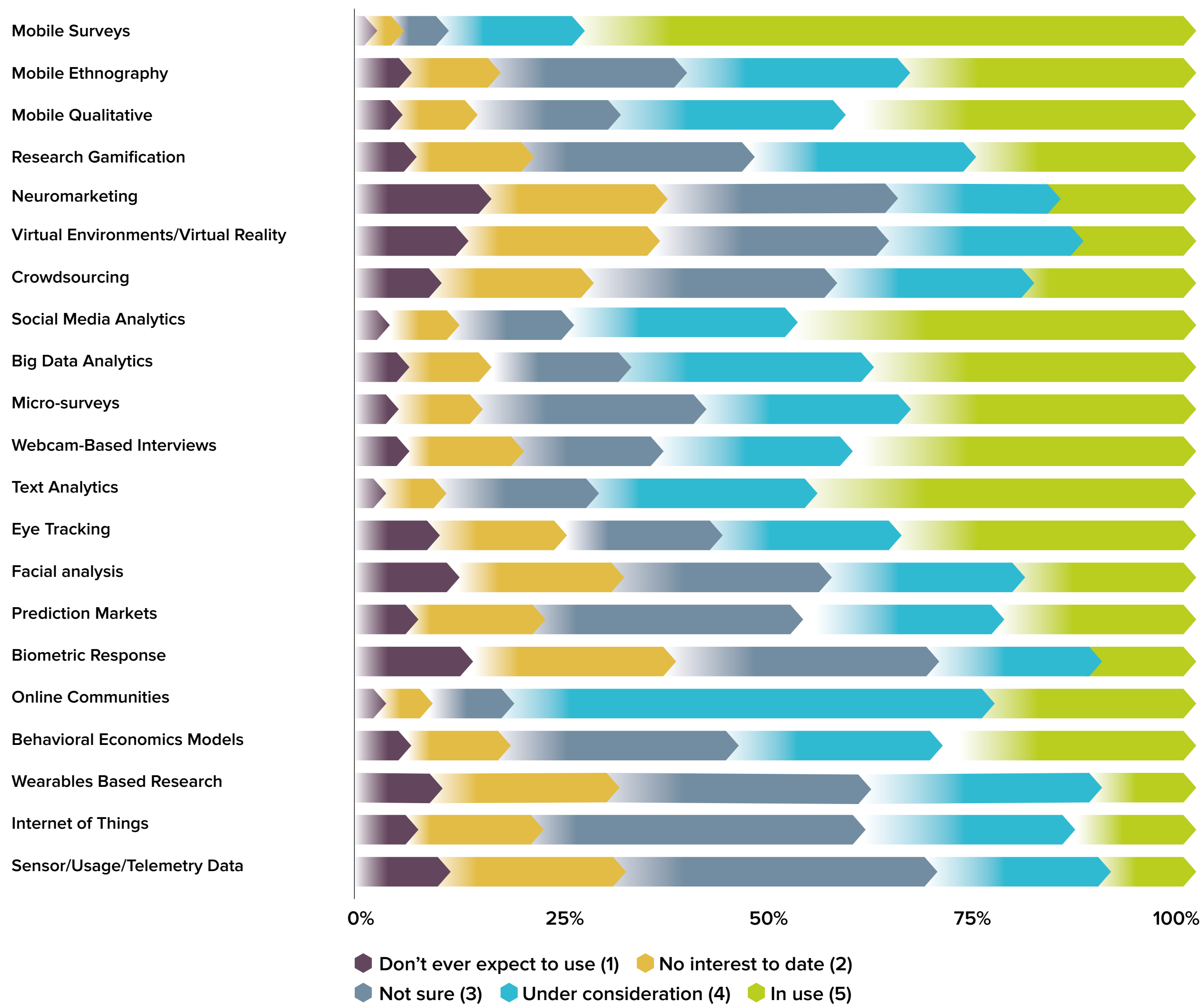
It's hard to imagine a future of marketing research that's not in line with the increasingly big-data driven advertising industry. It's time for new research methodologies that can meet the demands and sophistication of the advertising industry in order to leverage big data and create a truly holistic view of the consumer.

# 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 differences between key groups (such as the buyers and sellers of research and insight).

To cut to the chase, here is how GRIT respondents reported their adoption levels of emerging methods in this wave:

EMERGING METHODS ADOPTION



# THE OVERALL PICTURE

There is a deeper story here though. The table below shows the 21 approaches included in the GRIT study ranked in terms of how many people said they were already using these techniques or considering using them. Remember, using a technique does not necessarily means using it heavily, it simply means it has gone from consideration to 'In use'.

EMERGING METHODS TOTAL INTEREST

| | In Use | Under Consideration | Total Interest | |
|---|---|---|---|---|
| Mobile Surveys | 74% | 17% | 91% | Mainstream |
| Online Communities | 61% | 22% | 83% | |
| Social Media Analytics | 48% | 28% | 76% | Wide Adoption |
| Text Analytics | 45% | 27% | 72% | |
| Mobile Qualitative | 44% | 27% | 71% | |
| Webcam-Based Interviews | 42% | 23% | 64% | |
| Big Data Analytics | 39% | 30% | 68% | |
| Eye Tracking | 36% | 22% | 57% | |
| Micro-surveys | 35% | 25% | 60% | |
| Mobile Ethnography | 34% | 27% | 61% | |
| Behavioral Economics Models | 31% | 25% | 56% | |
| Research Gamification | 27% | 27% | 55% | Niche |
| Prediction Markets | 22% | 25% | 48% | |
| Facial analysis | 22% | 24% | 45% | |
| Crowdsourcing | 20% | 24% | 44% | |
| Neuromarketing | 17% | 20% | 38% | |
| Virtual Environments/VR | 14% | 24% | 38% | |
| Internet of Things | 14% | 26% | 40% | |
| Wearables Based Research | 12% | 28% | 40% | |
| Biometric Response | 11% | 20% | 31% | |
| Sensor/Usage/Telemetry Data | 11% | 21% | 32% | |

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

The results can be broadly divided into three categories:

1. **Mainstream:** Mobile Surveys (71% 'In Use', 17% 'Under Consideration', making a 'Total Interest' score of 91%) and Online Communities (61% 'In Use', 'Total Interest' 83%) are mainstream and well ahead of all other 'new' research approaches.
2. **Wide adoption:** The second group runs from Behavioral Economics (31% 'In Use', 'Total Interest' 56%) up to Social Media Analytics (48% 'In Use', 'Total Interest' 76%). While no single approach from this group can be considered essential, having some of them in your toolbox is likely to be necessary for most organizations.
3. **Third tier:** The bottom group runs from Research Gamification, which is just below the second group (27% 'In Use', 'Total Interest' 55%) through to approaches with very low scores, such as Sensor/Usage/Telemetry Data (11% 'In Use', 'Total Interest' 32%). This group tends to be a mixture of the very specialized and those approaches that have not yet broken through in terms of usage.

Some will be surprised to see the adoption scores for Social Media Analytics, Virtual Reality, and Biometric Response so flat over the last four GRIT editions

# STABILITY OVER THE LAST TWO YEARS

Table below shows the 'In Use' data for the last four waves, dating back to August 2014, a period of just under 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 ignoring anything smaller than plus or minus 5%.

EMERGING METHODS IN USE WAVE-TO-WAVE CHANGE

| | Q1-Q2 2014 | Q1-Q2 2015 | Q3-Q4 2015 | Q1-Q2 2016 | Movement |
|---|---|---|---|---|---|
| Mobile Surveys | 64% | 67% | 68% | 74% | 10% |
| Online Communities | 56% | 59% | 50% | 61% | 6% |
| Social Media Analytics | 46% | 44% | 43% | 48% | 2% |
| Text Analytics | 40% | 38% | 38% | 45% | 5% |
| Mobile Qualitative | 37% | 43% | 34% | 44% | 7% |
| Webcam-Based Interviews | 34% | 38% | 33% | 42% | 7% |
| Big Data Analytics | 32% | 32% | 34% | 39% | 7% |
| Eye Tracking | 34% | 28% | 28% | 36% | 2% |
| Micro-surveys | 25% | 30% | 25% | 35% | 10% |
| Mobile Ethnography | 30% | 35% | 31% | 34% | 5% |
| Behavioral Economics Models | 25% | 27% | 21% | 31% | 6% |
| Research Gamification | 23% | 21% | 20% | 27% | 4% |
| Prediction Markets | 19% | 21% | 17% | 22% | 3% |
| Facial analysis | 18% | 17% | 18% | 22% | 4% |
| Crowdsourcing | 17% | 19% | 12% | 20% | 3% |
| Neuromarketing | 13% | 14% | 15% | 17% | 5% |
| Virtual Environments/VR | 17% | 15% | 10% | 14% | -3% |
| Internet of Things | 12% | 11% | 9% | 14% | 1% |
| Wearables Based Research | 7% | 7% | 8% | 12% | 5% |
| Biometric Response | 13% | 10% | 10% | 11% | -3% |
| Sensor/Usage/Telemetry Data | -- | -- | 7% | 11% | 4% |

The two approaches that show the largest growth in adoption (+10%) are Mobile Surveys and Micro-Surveys, underscoring the trend towards agile research.

Many people will be disappointed and/or surprised to see the adoption scores for Social Media Analytics, Virtual Reality, and Biometric Response so flat over the last four GRIT editions.

# BUYERS AND SUPPLIERS

There are a couple of good reasons why suppliers might say they are using more research techniques than research buyers/users:

1. Suppliers typically work on many different projects and may use a different range of techniques with different clients. Of course, the 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 or what proportion of the surveys are completed via mobile device. A research buyer will often know this too, but not always.

The table to the right shows the 'In Use' data for Buyers and Suppliers of market research, and the right-hand column contrasts the results.

The pattern of techniques and approaches in use is similar between Buyers and Sellers (not surprisingly) with an r-squared value of 80%. However, there are some interesting differences.

In several of the more technical areas the percentage of suppliers using them is considerably higher than the buyers, for example: Mobile Qual (48% Sellers, 29% Buyers), Mobile Ethnography (37% Sellers, 24% Buyers), Webcam Interviews (44% Sellers, 32% Buyers), Research Gamification (30% Sellers, 18% Buyers), and Mobile Surveys (77% Sellers, 66% Buyers).

However, the more interesting cases are those where the buyers are more likely to be using an approach then the suppliers. The two key ones being: Big Data Analytics (Buyers 55%, Suppliers 35%) and Social Media Analytics (Buyers 60%, Suppliers 45%). This finding is consistent with earlier waves of GRIT and we believe it indicates that for these two services many clients are buying from non-MR suppliers.

EMERGING METHODS IN USE BUYER VS. SUPPLIER

| | Buyer% | Seller% | Seller -Buyer |
|---|---|---|---|
| Mobile Surveys | 66% | 77% | 11% |
| Online Communities | 59% | 62% | 3% |
| Social Media Analytics | 60% | 45% | -15% |
| Text Analytics | 40% | 46% | 6% |
| Mobile Qualitative | 29% | 48% | 19% |
| Webcam-Based Interviews | 32% | 44% | 12% |
| Big Data Analytics | 52% | 35% | -16% |
| Eye Tracking | 34% | 36% | 3% |
| Micro-surveys | 31% | 37% | 6% |
| Mobile Ethnography | 24% | 37% | 13% |
| Behavioral Economics Models | 28% | 32% | 4% |
| Research Gamification | 18% | 30% | 11% |
| Prediction Markets | 24% | 22% | -1% |
| Facial analysis | 17% | 23% | 6% |
| Crowdsourcing | 15% | 21% | 5% |
| Neuromarketing | 14% | 19% | 5% |
| Virtual Environments/VR | 8% | 16% | 8% |
| Internet of Things | 14% | 14% | 0% |
| Wearables Based Research | 10% | 13% | 3% |
| Biometric Response | 9% | 11% | 2% |
| Sensor/Usage/Telemetry Data | 10% | 11% | 1% |

Many clients are buying Big Data Analytics and Social Media Analytics from non-MR suppliers

# DIFFERENCES BY REGION

The average number of approaches being used is highest in Europe

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

EMERGING METHODS IN USE BY REGION

| | North America | Europe | APAC | Other |
|---|---|---|---|---|
| Mobile Surveys | 75% | 79% | 65% | 65% |
| Online Communities | 58% | 70% | 58% | 47% |
| Social Media Analytics | 49% | 51% | 38% | 41% |
| Text Analytics | 48% | 41% | 45% | 41% |
| Mobile Qualitative | 42% | 52% | 38% | 27% |
| Webcam-Based Interviews | 46% | 39% | 31% | 34% |
| Big Data Analytics | 42% | 37% | 29% | 38% |
| Eye Tracking | 31% | 43% | 41% | 29% |
| Micro-surveys | 33% | 43% | 27% | 31% |
| Mobile Ethnography | 32% | 43% | 27% | 23% |
| Behavioral Economics Models | 29% | 40% | 20% | 21% |
| Research Gamification | 21% | 42% | 19% | 18% |
| Prediction Markets | 20% | 27% | 23% | 19% |
| Facial analysis | 20% | 26% | 17% | 19% |
| Crowdsourcing | 19% | 26% | 12% | 10% |
| Neuromarketing | 16% | 20% | 17% | 16% |
| Virtual Environments/VR | 17% | 13% | 7% | 9% |
| Internet of Things | 15% | 12% | 12% | 15% |
| Wearables Based Research | 11% | 14% | 13% | 6% |
| Biometric Response | 9% | 14% | 10% | 7% |
| Sensor/Usage/Telemetry Data | 9% | 13% | 11% | 9% |
| Average | 31% | 36% | 27% | 25% |
| Base | 1,118 | 657 | 264 | 105 |

The top two approaches, Mobile Surveys and Online Communities are the same in each region, but after that there are a range of variations. In terms of the number of approaches being used, the average is highest in Europe, where across the 21 approaches the average 'In Use' was 36%, slightly ahead of the 31% for North America, and further from the 27% in APAC and 25% in the Other Regions.

The biggest differences across the regions were:

- Research Gamification, Europe 42% and the other regions close to 20%.
- Mobile Qual, which was higher in Europe (52%) and North America (42%) and lower in APAC (38%) and Other Regions (27%).
- Online Communities reached 70% in Europe, and was 47% in Other Regions, with both APAC and North America reporting 58% usage.
- Behavioral Economics was 40% in Europe, 29% in North America, and about 20% in the other two areas.

North America was the top region for: Text Analytics, Webcam-based Interviews, Big Data, and Virtual Reality.

# How We Help Brands Make Human Connections

## 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.

## When a Brand Feels Human

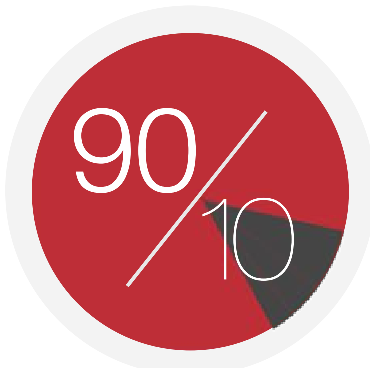
Consumers don't connect to brands, humans do. Before we can make big, human connections with people as brands we have to talk with the human part of them when doing qualitative research. By actually talking and listening to "consumers" as "real people," we get them to open up, share deeper insights and reveal bigger opportunities. More than just research, **Reality**Check'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.

**Reality**Check
A Global Insights Boutique

## 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.

# THE BIG PICTURE

The two main messages are A) over the last couple of years, trends in adoption have been relatively stable, and B) that the adoption of new research methods across the advanced research world is quite consistent overall (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.

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

# UNDERSTANDING THE PATH TO PURCHASE IN THE AGE OF IOT

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In our increasingly tech-driven world, the lines between human communication and everyday objects are blurring at a herculean rate. This blending has its own label, "The Internet of Things," also known as IoT. But what is it exactly? And why should marketers and marketing researchers care?

IoT isn't a new idea; it's been around for at least 25 years. Like all great ideas, the time had to be right. Advances in radio frequency identification (RFID), the miniaturization of data collection devices, and cellular communications have made IoT cost effective and scalable. With the wide-ranging availability of broadband internet access, "being connected" is also getting less expensive. Wi-Fi hotspots are nearly everywhere and our Smartphones dutifully connect on demand. The development of newer, faster, better technologies – apps, sensors, and new "wearable tech" is exploding. We are always "on," always discoverable, and ostensibly joined at the hip with the rest of the world.

With all this technological coziness, it was only a matter of time before our connectedness with each other morphed into connectedness with things. According to research Toluna recently conducted with consumers, 51% want to use IoT devices of some sort with security devices (home alarm, etc.), home appliances (smart refrigerator), and healthcare apps that communicate with the consumer and each other topping the list.

Marketing researchers aren't exempt from this desire; 40% indicated they are using or considering using IoT in the Q1/2 2016 GRIT Report, which is a significant increase from the Q3/4 2015 GRIT Report. What market researchers are seeming to understand is that while data is important, insight is of the utmost importance when understanding the 'why' behind the 'what.'

Further, the concept of IoT brings about its own host of marketing challenges. For example, if a refrigerator can sense the milk carton is almost empty and orders more from the store, how can marketers influence the brand purchasing decision? The assumption made by the refrigerator is that the milk brand bought last is the milk brand to buy again. Direct consumer input is reduced – or not a factor at all. If this logic expands to other products, consumer purchasing can be forever changed. Suddenly getting through store shelf clutter isn't the problem for brands – it's getting the consumer to go to the store in the first place.

A 2014 Pew Research report explored the ramifications and opportunities that IoT will offer and hypothesized its impact on our lives ten years out. At the root of the issue is the ability of IoT to influence consumer behavior. According to the Pew report, IoT will likely utilize incentives to encourage behavior change, whether that change is to purchase a good, have healthier habits, or use public services more effectively. Supporting this belief is Laurel Papworth, a social media educator, who stated, "Every part of our life will be quantifiable, and eternal, and we will answer to the community for our decisions. For example, skipping the gym will have your gym shoes auto tweet (equivalent) to the peer-to-peer health insurance network that will decide to degrade your premiums. There is already a machine that can read brain activity, including desire, in front of advertising by near/proximity. I have no doubt that will be placed into the Big Data databases when evaluating hand gestures, body language, and pace for presenting social objects for discussion/purchase/voting."

So what about the data that all these devices are generating? Is it useful? What are the ramifications for marketers in parsing this information? As IoT use grows, these are the questions we must consider. It is our belief that traditional survey data will not become obsolete, as some have suggested. Instead, a new way of interpreting Big Data that marries the wide variety of information sources will be the natural outgrowth. Additionally, we believe marketers will have a greater influence on consumer behavior once the avalanche of IoT information, which can be drilled down to a specific household, is mined for patterns, buying variances (as in lapsed buyers), and brand preferences.

IoT will open the door to dynamic, robust data that will further expose consumer preferences and proclivities and underscore the disruptive nature of 24/7 connectivity.

# THE TOP 50 MOST INNOVATIVE SUPPLIERS IN MARKET RESEARCH

Beginning in 2010, we decided to start tracking which supplier firms were perceived as most innovative within the global market research industry. This has evolved into the GRIT Top 50 Most Innovative list, which at its core is a brand tracker using the attribute of "innovation" as the key metric. Now, each year we measure how market research suppliers are leveraging this brand element through a simple question series:

1. Using an unaided awareness verbatim question, we ask respondents to list the research companies they consider to be most innovative.
2. We then ask them to rank those firms from most to least innovative.
3. Finally, we ask another verbatim as to why they consider their number one ranked firm to be most innovative.

For this wave, using the aggregate of total mentions, we developed a list of 634 unique companies from 5,638 total responses. From that list, we have narrowed it down to the Top 50 for additional analysis.

Only brands that received 15 or more mentions made it on to the list, which is a higher threshold than in the past. This is a reflection of the vast number of companies mentioned and the competitiveness now in play for companies vying to be identified with the "innovative" brand attribute.

We've set out to glean insight on the drivers of perception in regards to what makes a firm innovative. From this, our ultimate goal is to better understand how MR firms are capitalizing on the idea of "innovation" to grow their businesses. We believe that this list, developed by our peers within the industry, is a true measure of how successful these companies are at using "innovation" to help drive brand awareness.

Due to issues around consolidation and multiple brands within a single entity (Kantar for instance with Millward Brown, TNS, Added Value, etc.) we are presenting the Top 50 in two ways: *without* brand rollups, which is based solely on the number of times a company was mentioned with no consideration given to parent company ownership or affiliation, and *with* brand rollups, where we have consolidated all appropriate business entities under the parent brand. As you'll see this doesn't change things significantly, but there is a reshuffling of the higher ranked companies, most notably for Kantar-owned companies.

For our purposes, we consider the "without rollups" list to be the definitive GRIT Top 50 and all mentions of the list will be in reference to the list that omits rollups.

We are ignoring "ties" (companies with the same number of mentions) for the sake of simplicity; it is not a factor in the Top 10 at all.

Here are the rankings in both forms, as well as changes from the last wave:

We believe that this list, developed by our peers within the industry, is a true measure of how successful these companies are at using "innovation" to help drive brand awareness

## GLOBAL TOP 50 WITHOUT ROLLUPS

| Change | 2015 | 2016 | Company | Mentions |
|---|---|---|---|---|
| 0 | 1 | **1** | BrainJuicer | 420 |
| 0 | 2 | **2** | Ipsos | 286 |
| 1 | 4 | **3** | InSites Consulting | 201 |
| 5 | 9 | **4** | Nielsen | 193 |
| 1 | 6 | **5** | GfK | 178 |
| -1 | 5 | **6** | TNS | 174 |
| -4 | 3 | **7** | Vision Critical | 162 |
| 0 | 8 | **8** | LRW | 135 |
| 1 | 10 | **9** | Millward Brown | 133 |
| -3 | 7 | **10** | Google | 103 |
| 14 | 25 | **11** | ZappiStore | 98 |
| 2 | 14 | **12** | Qualtrics | 88 |
| 31 | 44 | **13** | SSI | 85 |
| 4 | 18 | **14** | GutCheck | 73 |
| -3 | 12 | **15** | Research Now | 73 |
| 12 | 28 | **16** | Kantar | 67 |
| 0 | 17 | **17** | Toluna | 50 |
| -3 | 15 | **18** | Hotspex | 47 |
| -6 | 13 | **19** | RIWI | 40 |
| -9 | 11 | **20** | 20\|20 Research | 38 |
| 16 | 37 | **21** | Focus Vision | 37 |
| Debut | 0 | **22** | Intage | 37 |
| 3 | 26 | **23** | Lightspeed GMI | 36 |
| Debut | 0 | **24** | Macromill | 34 |
| Debut | 0 | **25** | MaritzCX | 34 |

| Change | 2015 | 2016 | Company | Mentions |
|---|---|---|---|---|
| -3 | 23 | **26** | SurveyMonkey | 31 |
| 0 | 27 | **27** | Communispace/C Space | 30 |
| 26 | 54 | **28** | Flamingo | 27 |
| -5 | 24 | **29** | iModerate | 26 |
| 3 | 33 | **30** | Added Value | 26 |
| Debut | 0 | **31** | Cint | 25 |
| 8 | 40 | **32** | Happy Thinking People | 25 |
| Debut | 0 | **33** | Sentient Decision Sciences | 25 |
| -12 | 22 | **34** | YouGov | 25 |
| Debut | 0 | **35** | Infoscout | 24 |
| Debut | 0 | **36** | OdinText | 24 |
| 11 | 48 | **37** | IBM | 22 |
| -6 | 32 | **38** | Instant.ly | 21 |
| 12 | 51 | **39** | Facebook | 20 |
| -19 | 21 | **40** | Hall & Partners | 20 |
| 16 | 57 | **41** | Incite | 19 |
| Debut | 0 | **42** | TRC | 19 |
| Debut | 0 | **43** | AYTM | 17 |
| -8 | 36 | **44** | Discuss.io | 17 |
| Debut | 0 | **45** | Forrester | 17 |
| -17 | 29 | **46** | Join The Dots | 16 |
| 6 | 53 | **47** | Lucid | 16 |
| -7 | 41 | **48** | MetrixLab | 16 |
| 11 | 60 | **49** | Forbes Consulting Group | 15 |
| Debut | 0 | **50** | Voxpopme | 15 |

For the 5th year running, BrainJuicer has been voted as the most innovative agency

Methodologies/Techniques and Technology/Tools are the key drivers of why companies are considered innovative

SSI (with Instant.ly rolled-in) jumped 28 places from last year to 9th this year

For the 5th year running, BrainJuicer has been voted as the most innovative agency, and with a very large lead over every other agency. Indeed, not much change at the top of the leader board is the key message. All ten of this year's top ten were also in the top ten last year. However, there are interesting moves within that elite group. InSites Consulting has moved from 4th to 3rd, Nielsen has jumped 5 places to 4th, Vision Critical has dropped 4 places to 7th and Google has dropped 3 places to 10th.

Outside of the top ten, there are some much bigger moves and 11 new entries, including two headquartered in Japan which is largely (but perhaps not solely) an artifact of the larger Japanese sample. Key ones to mention are:

- ZappiStore + 14 to 11th
- SSI +31 to 13th
- FocusVision +16 to 21st
- Intage debuting at 22nd
- Macromill debuting at 24th
- MaritzCX debuting at 25th

In terms of why these companies are innovative (beyond the use of words like 'new' and 'innovative') the two key drivers were 'Methodologies/ Techniques' and 'Technology/Tools'. [Many thanks to Ascribe for helping with the coding of the open-ended responses.]

This finding refutes the notion that real innovation is about people, storytelling, and co-creation, etc. In order to score well on innovation, having good, new and innovative technology is a key part of the picture. Terms like 'people', 'data collection', 'leadership', 'virtual' and 'quality' were only used occasionally – with the two key phrases occurring more than ten times as often.

We also looked at what happens when companies that are part of a larger group are rolled-up into a single entity, for example all of the Kantar brands gathered in a single number.

The combined weight of TNS, Millward Brown, Added Value, etc. pushes Kantar into first place, with BrainJuicer slipping to 2nd (which is a reversal of the position last year). It also opens the door to movement up into the Top 50 at the bottom of the list, with 7 firms coming on that did not make it in the definitive list, five of which are debuts. In this scenario the minimum cutoff is 13 mentions.

There are several big movers in this version of the table including:

- SSI (with Instant.ly rolled-in) jumped 28 places from last year to 9th this year
- ZappiStore jumped 13 places to 11th this year
- Macromill (including MetrixLab) jumped 11 places to 15th this year.

Several companies that were on the list last year dropped off this year: BVA, Mesh Planning, InCrowd, Qualvu, Affectiva, Cello Group, Schlesinger Associates, Infotools, MMR, BuzzBack, C&R Research, Antedote, comScore, and Confirmit. We can only surmise that these organizations are not marketing as effectively to the research industry and are losing the battle for top of mind association with innovation within the category.

## GLOBAL RESULTS WITH ROLL-UPS

| Change | 2015 | 2016 | Company | Mentions |
|---|---|---|---|---|
| 1 | 2 | **1** | Kantar (Including TNS, Millward Brown, Added Value, Kantar Ns, Lightspeed GMI) | 436 |
| -1 | 1 | **2** | BrainJuicer | 420 |
| 0 | 3 | **3** | Ipsos | 286 |
| 1 | 5 | **4** | Nielsen (including Affinova) | 207 |
| 1 | 6 | **5** | Insites Consulting | 201 |
| 1 | 7 | **6** | GfK | 178 |
| -3 | 4 | **7** | Vision Critical | 162 |
| 1 | 9 | **8** | LRW | 135 |
| 28 | 37 | **9** | SSI (Including Instantly) | 106 |
| -2 | 8 | **10** | Google | 103 |
| 13 | 24 | **11** | ZappiStore | 98 |
| 2 | 14 | **12** | Qualtrics | 88 |
| -3 | 10 | **13** | Research Now (Including Peanut Labs) | 86 |
| 5 | 19 | **14** | GutCheck | 73 |
| 11 | 26 | **15** | Macromill (Including MetrixLab) | 50 |
| -1 | 15 | **16** | Omnicom (Including C Space and Hall & Partners) | 50 |
| 1 | 18 | **17** | Toluna | 50 |
| -2 | 16 | **18** | Hotspex | 47 |
| -6 | 13 | **19** | RIWI | 40 |
| -8 | 12 | **20** | 20\|20 Research | 38 |
| -10 | 11 | **21** | Focus Vision | 37 |
| Debut | 0 | **22** | Intage | 37 |
| Debut | 0 | **23** | MaritzCX | 34 |
| 24 | 48 | **24** | Incite | 33 |
| -3 | 22 | **25** | SurveyMonkey | 31 |
| 21 | 47 | **26** | Flamingo | 27 |
| -4 | 23 | **27** | iModerate | 26 |
| Debut | 0 | **28** | Cint | 25 |
| 5 | 34 | **29** | Happy Thinking People | 25 |
| Debut | 0 | **30** | Sentient Decision Sciences | 25 |
| -10 | 21 | **31** | YouGov | 25 |
| Debut | 0 | **32** | Infoscout | 24 |
| 7 | 40 | **33** | OdinText | 24 |
| 7 | 41 | **34** | IBM | 22 |
| 9 | 44 | **35** | Facebook | 20 |
| Debut | 0 | **36** | TRC | 19 |
| Debut | 0 | **37** | AYTM | 17 |
| -8 | 30 | **38** | Discuss.io | 17 |
| Debut | 0 | **39** | Forrester | 17 |
| -15 | 25 | **40** | Join The Dots | 16 |
| 5 | 46 | **41** | Lucid | 16 |
| 9 | 51 | **42** | Forbes Consulting Group | 15 |
| Debut | 0 | **43** | Voxpopme | 15 |
| -8 | 36 | **44** | Gongos Research | 14 |
| Debut | 0 | **45** | Martec Group | 14 |
| Debut | 0 | **46** | Medallia | 14 |
| Debut | 0 | **47** | Burke | 13 |
| -16 | 32 | **48** | Dub | 13 |
| Debut | 0 | **49** | KRC Research | 13 |
| Debut | 0 | **50** | Mfour | 13 |

# DIFFERENCES BY REGION

The data from different regions tell an interesting story of why the strong are strong and where the next top names might be coming from. The table to the right divides the world into North America, Europe, APAC, and Other (including Latin America, Africa, and the Middle-East).

To be in this table an organization had to finish in the top ten in at least one of the regions, or in the top ten overall.

The strength of the BrainJuicer brand in terms of innovation is unparalleled, it is number 1 or 2 in every region. Ipsos is the closest rival, with a 1st, two 3rds, and a 6th. The only other organization to be in the top 10 in each region is Nielsen.

Brands that show a striking asymmetry in their scores are:

- InSites Consulting who are number 1 in Europe, but 21st in North America
- LRW who are 2nd in North America, but in the 30s and 40s elsewhere
- Intage and Macromill who are 4th and 5th respectively in APAC, but a long way behind in the other regions.

Europe is the most localized in its perception of which companies are innovative inasmuch as the highest score a non-European company gets is Nielsen at 8th. Indeed, only six of Europe's top 20 scores come from companies outside of Europe.

INNOVATIVE SUPPLIERS BY REGION

| Organisation | Total | NA | Europe | APAC | Other |
|---|---|---|---|---|---|
| BrainJuicer | 1 | 1 | 2 | 1 | 2 |
| Ipsos | 2 | 3 | 3 | 6 | 1 |
| InSites Consulting | 3 | 21 | 1 | 11 | 8 |
| Nielsen | 4 | 4 | 8 | 3 | 6 |
| GfK | 5 | 6 | 5 | 12 | 4 |
| TNS | 6 | 12 | 4 | 7 | 3 |
| Vision Critical | 7 | 5 | 13 | 2 | 9 |
| LRW | 8 | 2 | 32 | 44 | 32 |
| Millward Brown | 9 | 11 | 7 | 8 | 5 |
| Google | 10 | 14 | 9 | 10 | 7 |
| ZappiStore | 11 | 13 | 6 | 16 | 18 |
| Qualtrics | 12 | 7 | 19 | 24 | 12 |
| GutCheck | 14 | 8 | 20 | 19 | 20 |
| Research Now | 15 | 9 | 21 | 18 | 19 |
| Kantar Ns | 16 | 24 | 11 | 9 | 11 |
| Toluna | 17 | 27 | 15 | 13 | 10 |
| Intage | 22 | 47 | 50 | 4 | 35 |
| Macromill | 24 | 48 | 45 | 5 | 36 |
| *Base* | *2,144* | *1,118* | *657* | *264* | *105* |

Europe is the most localized in its perception of which companies are innovative

# DIFFERENCES BY SUPPLIERS VS. BUYERS

INNOVATIVE SUPPLIERS BUYERS VS. SUPPLIER

| Company | Overall | Buyer | Supplier |
|---|---|---|---|
| BrainJuicer | 1 | 1 | 1 |
| Ipsos | 2 | 2 | 2 |
| Insites Consulting | 3 | 4 | 3 |
| Nielsen | 4 | 3 | 4 |
| GfK | 5 | 6 | 5 |
| Vision Critical | 7 | 7 | 6 |
| TNS | 6 | 5 | 7 |
| LRW | 8 | 10 | 8 |
| Millward Brown | 9 | 8 | 9 |
| Google | 10 | 11 | 10 |
| *Base* | *2,144* | *471* | *1,673* |

While the total sample contains about four times as many suppliers as buyers, reflecting the split in the wider industry, it is interesting to see whether buyers and suppliers have differing views on which companies are innovative. The following table shows the rankings for the total sample, buyers, and the suppliers:

Due to the overall sample composition, there are no differences between the top ten innovative companies for suppliers and the total sample. The rankings for the buyers show a few small differences (in comparison to suppliers), but no major discrepancies. The missing player in the table is Qualtrics, who were ranked 9th by the buyers, but who were 12th overall and 13th among the suppliers.

Between buyers and suppliers, the rankings show only a few small differences

Looking further down the table there was a tendency for suppliers to the suppliers, for example the panel and software companies, to score lower among the buyers than among the suppliers – which is not surprising as the buyers will often have less exposure to the work of these companies.

*Note: There were some concerns this year that some companies had overstepped the mark in trying to get researchers to select them in the study. When such queries were received, GreenBook immediately communicated with any agencies mentioned, all of whom were happy to tone down their enthusiasm. We have looked at the results very closely and we are confident that none of the issues raised have materially impacted the rankings.*

Between buyers and suppliers, the rankings show only a few small differences

# THE TOP 50 MOST INNOVATIVE CLIENT COMPANIES

For the second time in this survey, GRIT has also focused on innovative client-side companies. We asked respondents to tell us which client-side organizations are innovative in their approach to market research and the reason for that evaluation. Since market research is driven by client demand, we felt that focusing only on the supply-side of the business was giving us an incomplete picture of the drivers of change. By extending our investigation to the demand-side, we were able to fill in some gaps.

We followed the exact same question structure as for the Top 50 supplier rankings. The result was 4,980 total responses which were coded down to 448 unique companies. The threshold for making the list was at least 9 mentions. As with the Top 50 suppliers, we are ignoring "ties" (companies with the same number of mentions) for simplicity's sake.

Here is the 2016 GRIT Top 50 Most Innovative Client Companies, with comparisons to last year:

P&G and Unilever are considered the most innovative client organizations

P&G and Unilever are considered the most innovative client organizations, reflecting their reputation for being at the forefront of marketing and, therefore, at the forefront of marketing research. The other Top 5 companies are Google, Coca-Cola and Apple.

Thirteen companies debuted on the list this year. Technology led the day with 4 new entrants; Telstra, Uber, Twitter, and Vodafone. Pharmaceuticals made a mark on the list by debuting three new companies; Merck, GSK, and Pfizer. The rest of the debut companies include: Delta Airlines, Tesla, Sony, Sky, BBC, and McDonald's.

With thirteen new additions to the list, thirteen companies are gone from the list. Because of ties last year, the number is somewhat higher than that. Some of the notable companies missing from this year's list are: Anheuser-Bush, Warner Bros Entertainment, American Express, 3M, AstraZeneca, Discovery, AT&T, Bank of America, Colgate Palmolive, Kellogg's, and Capital One.

## MOST INNOVATIVE CLIENTS

| Change | 2016 Rank | 2015 Rank | Company | Mentions |
|---|---|---|---|---|
| 0 | **1** | 1 | Procter & Gamble | 234 |
| 1 | **2** | 3 | Unilever | 230 |
| 1 | **3** | 4 | Google | 186 |
| -2 | **4** | 2 | Coca Cola | 161 |
| 1 | **5** | 6 | Apple | 77 |
| 4 | **6** | 10 | Pepsico | 74 |
| 24 | **7** | 31 | Amazon | 54 |
| 11 | **8** | 19 | Facebook | 50 |
| 2 | **9** | 11 | Nestle | 44 |
| -5 | **10** | 5 | General Mills | 42 |
| -4 | **11** | 7 | Microsoft | 40 |
| 6 | **12** | 18 | Heineken | 30 |
| 2 | **13** | 15 | Samsung | 29 |
| 29 | **14** | 43 | Nike | 25 |
| -2 | **15** | 13 | Lowe's | 24 |
| 8 | **16** | 24 | Disney | 23 |
| 31 | **17** | 48 | IKEA | 21 |
| -1 | **18** | 17 | Intel | 21 |
| -7 | **19** | 12 | Kimberly Clark | 21 |
| -11 | **20** | 9 | Johnson & Johnson | 20 |
| 4 | **21** | 25 | Netflix | 19 |
| -8 | **22** | 14 | Red Bull | 18 |
| 11 | **23** | 34 | Toyota | 17 |
| 28 | **24** | 52 | Clorox | 16 |
| -5 | **25** | 20 | Danone | 16 |

| Change | 2016 Rank | 2015 Rank | Company | Mentions |
|---|---|---|---|---|
| 9 | **26** | 35 | L'Oréal | 16 |
| 15 | **27** | 42 | Diageo | 15 |
| 23 | **28** | 51 | Hershey Corporation | 14 |
| Debut | **29** | 0 | Telstra | 14 |
| 25 | **30** | 55 | BMW | 13 |
| -8 | **31** | 23 | Campbell Soup Company | 13 |
| Debut | **32** | 0 | Merck | 13 |
| Debut | **33** | 0 | Sky | 13 |
| 6 | **34** | 40 | Kao Corporation | 12 |
| 9 | **35** | 44 | Philips | 12 |
| Debut | **36** | 0 | Sony | 12 |
| Debut | **37** | 0 | Tesla | 12 |
| Debut | **38** | 0 | Twitter | 12 |
| Debut | **39** | 0 | Uber | 12 |
| Debut | **40** | 0 | GSK | 11 |
| -14 | **41** | 27 | Kraft | 11 |
| -9 | **42** | 33 | Mars | 11 |
| -5 | **43** | 38 | Target | 11 |
| 3 | **44** | 47 | IBM | 10 |
| Debut | **45** | 0 | McDonald's | 10 |
| Debut | **46** | 0 | Vodafone | 10 |
| Debut | **47** | 0 | BBC | 9 |
| Debut | **48** | 0 | Delta Air Lines | 9 |
| -19 | **49** | 30 | ESPN | 9 |
| Debut | **50** | 0 | Pfizer | 9 |

Openness to risk is an important prerequisite for innovation, and not all companies or industries are open

## What Makes a Company Innovative?

Companies are considered innovative for reasons that are quite varied – and can range from the staff to the budget to storytelling. In the end though, similar to our findings in the supplier analysis, it is because they use new and different methodologies and techniques or use new technology and tools to create insights. With only anecdotal evidence from our survey, it seems that an openness to risk is an important prerequisite for innovation, and not all companies or industries in general are open.

Let's look at two pairs of companies that ranked in the Top 5:

**P&G / Unilever:** While they are both recognized leaders for their staff and in using new methodologies and techniques, P&G is noted for its focus on the consumer and consumer needs, large budgets allowing for exploration, and focus on Big Data. In contrast, Unilever is noted for its focus on behaviors, the digital world, and real time insights. Both derive their strengths from being innovative and both are quite different.

**Google / Apple:** Google has several strengths in being innovative particularly in the amount of data, understanding of behaviors, and the technology used to evaluate that data. No real surprises there. Apple, in contrast, is applauded for how well it uses the data it does have and the real time nature of those applications.

## Which Industries Are Innovative? And Not?

After categorizing all client companies into industry classifications, we did a quick industry analysis. Such classification can be a bit more challenging than one might think at first glance, e.g., is Netflix a tech company or an entertainment company? Overall though, we think these segments are instructive and useful.

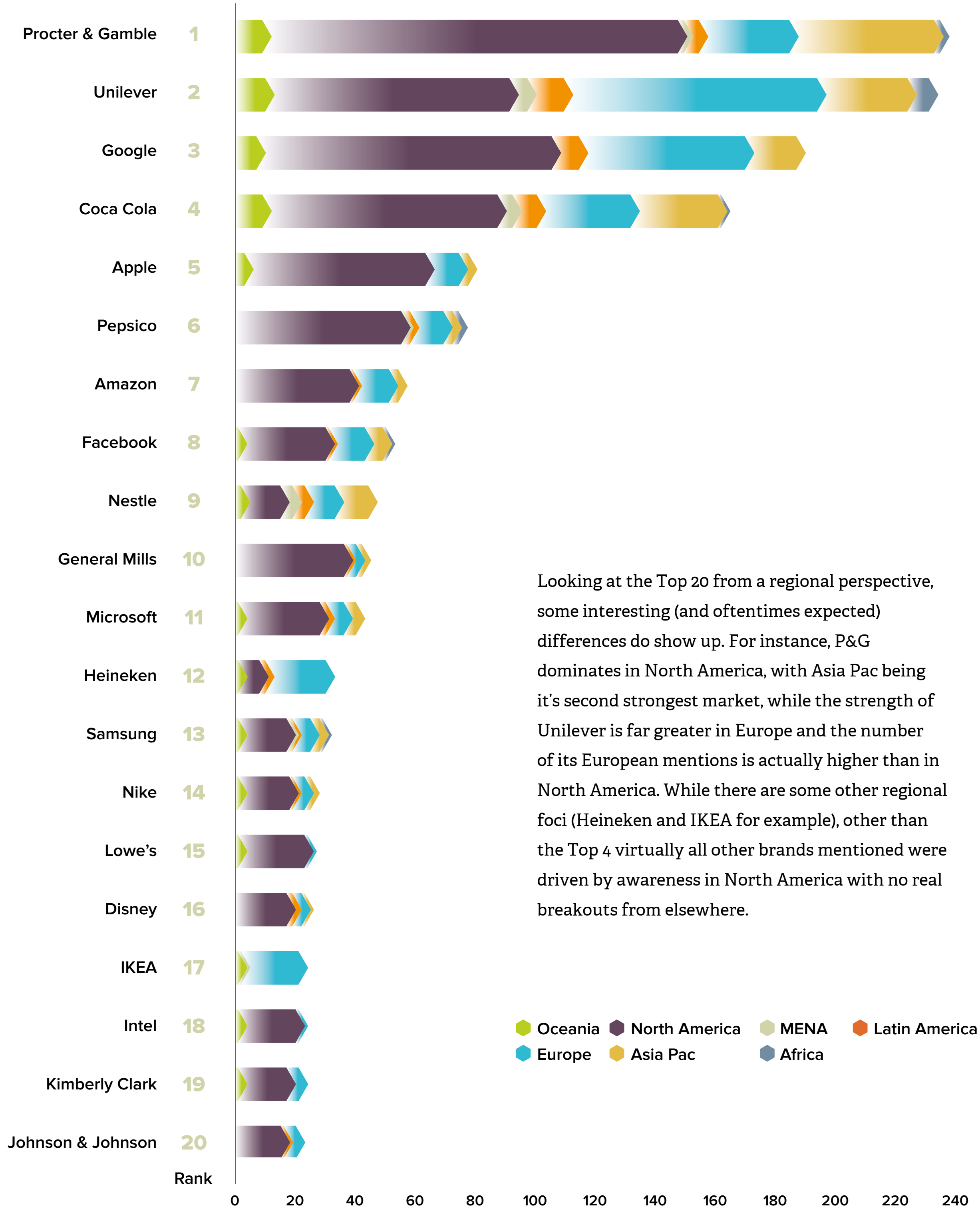
The Food & Beverage industry takes home the top prize for most companies listed in the Top 50 with 11 companies, excluding the two Alcoholic Beverage companies. This is quickly followed by the Technology industry with 10 companies. CPG and Entertainment are the next largest represented industries, with 7 and 5 companies, respectively.

More industries are represented this year than last. Of the major sectors in marketing research, only Consumer Durables and Financial Services are missing – and we know there is some great work done in both. As the mental definition of marketing research expands to consistently include predictive analytics – Financial Services will likely emerge as a major sector for insights innovation.

11 companies from the Food & Beverage industry ranked among the Top 50

# DIFFERENCES BY REGION

GRIT 50 CLIENTS BY REGION




Looking at the Top 20 from a regional perspective, some interesting (and oftentimes expected) differences do show up. For instance, P&G dominates in North America, with Asia Pac being it's second strongest market, while the strength of Unilever is far greater in Europe and the number of its European mentions is actually higher than in North America. While there are some other regional foci (Heineken and IKEA for example), other than the Top 4 virtually all other brands mentioned were driven by awareness in North America with no real breakouts from elsewhere.

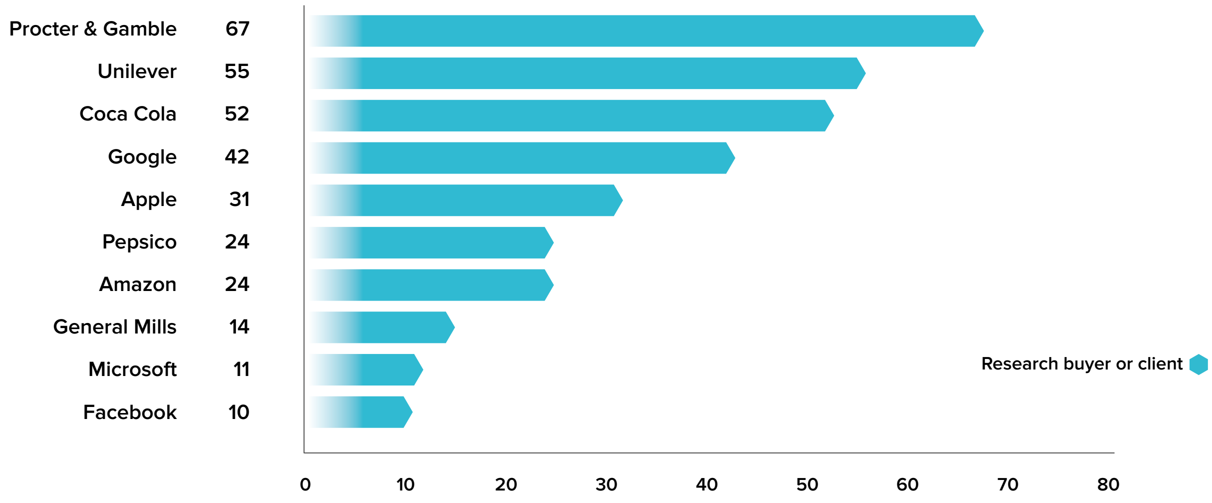
# DIFFERENCES BY SUPPLIERS VS. BUYERS

Suppliers and clients see the most innovative clients similarly

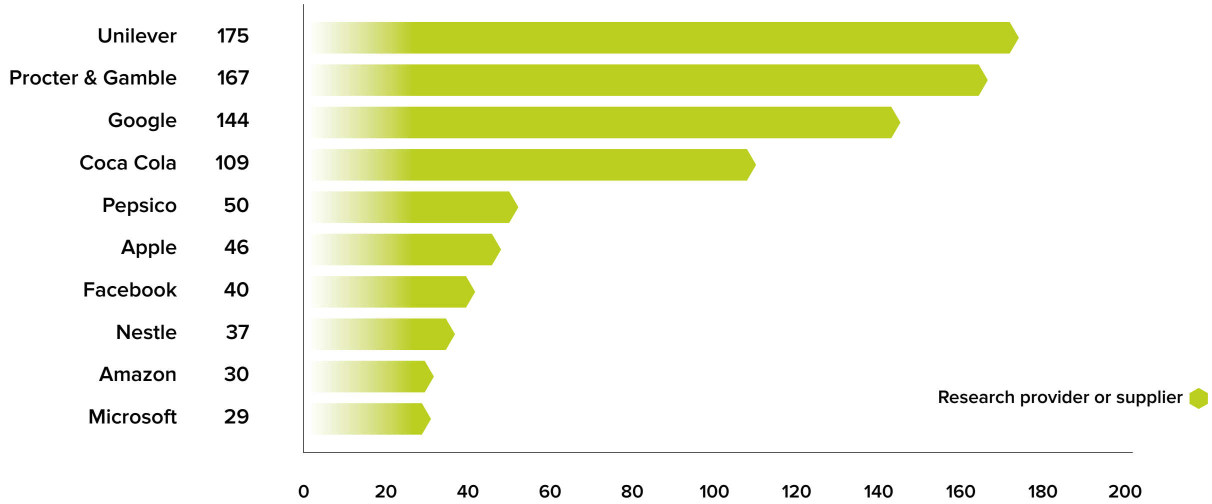
A quick analysis suggest that suppliers and clients see the most innovative clients similarly. Nine of the Top 10 are the same, and in a very similar order, when the list is split. Microsoft gains a couple of spots and Nestle falls just out of the Top 10 when client evaluations are solely considered. P&G and Unilever still maintain their primacy of position, although they do swap their order within the two groups.

Other than shuffling of order only one significant change exists between the two sets: clients include General Mills while suppliers rate them lower and Nestle takes their place.

## GRIT 50 CLIENTS TOP 10 CLIENT RANKING




## GRIT 50 CLIENTS TOP 10 SUPPLIER RANKING





# EMOTIONAL MOTIVATIONS AND THE LONG-TERM ADOPTION OF INNOVATIVE INSIGHTS

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In behavioral science, we have a motivational theory that distinguishes a "promotion" focus from a "prevention" focus. A promotion focus places greater weight on achievement and advancement while a prevention focus places greater weight on safety and security. Importantly, both of these motivational profiles reside in all of us.

Can you recall a time when you were motivated by the emotions you anticipated from achieving a personal advancement goal (e.g. excitement, pride)? It may also be easy for you to recall the emotions you felt when you successfully averted a professional disaster (e.g. relief!). The strength of these emotions are the foundation of our motivations and are key determinants of our behavior.

In our practice at Sentient, we apply these principles to more accurately predict consumer behavior. But it struck me, as I was asked to comment on the list of the Top 50 most innovative clients, that these same principles are key to understanding why some insights professionals are more successful at getting innovation adopted within their organizations.

It might surprise you to hear that it's not all about achievement and advancement!

First, it is important to note that real opportunity for innovation tends to attract minds motivated to make a change. Being focused on achievement and advancement is what we call "table stakes" to effect real change in the world.

Client side insights professionals can get an innovative project approved based on the pure "promotion appeal" of it. I'm sure you've heard it yourself: "it's really cool!", "they're going to give us heat maps of the brain that show us how consumers really feel!", "it promises to give us new insights that we've never had before!".

These statements are full of wonder and excitement, and are largely accurate (if the science is valid). They are table stakes for getting innovative techniques considered and trialed.

However, once we have a seat at the table, being sensitive to safety and security concerns becomes increasingly important. Unless insights professionals effectively appeal to the prevention focused motivations of the "buyers", innovative techniques are not adopted for long-term use. That means the onus is on both clients and suppliers to provide evidence of real business impact from the application of innovative methods, otherwise insight innovation just becomes the latest "shiny new object".

Supplier side innovators can do this by publishing evidence of the scientific validity of their methods, and market validation of how those methods more accurately predict behavior and provide deeper insight into the "whys" behind behavior. Case studies showing more accurate prediction of real consumer behavior (e.g. sales, social contagion of an ad) are very effective in their appeal to prevention motivations by evoking feelings of confidence and the emotion of "relief".

Client side innovators can do this by understanding the motivations of their internal "buyers" and co-creating the story with their supplier partners to address the underlying concerns of the executive suite. Putting results into a business outcome frame is critical. But understanding how executives will implicitly gain confidence in your approach and thereby your recommendations, requires insight into their potential concerns and a strategy on how to alleviate that anxiety.

From Sentient's experience with the Top 50 innovative clients over the past decade, we would argue that these companies have:

- created a promotion focused culture fertile for innovation,
- attracted a great proportion of the most innovative minds, and
- operated with an implicit understanding of the prevention motivations of the ultimate decision makers.

This moment in our industry inspires the promotion side of me. I get excited by all of the innovation that is advancing our knowledge of consumer behavior. But my prevention side is activated by this moment as well. To create long-term impact, we must address the safety and security concerns of our ultimate buyers by standing on the shoulders of sound science and demonstrating the business impact of our innovations.

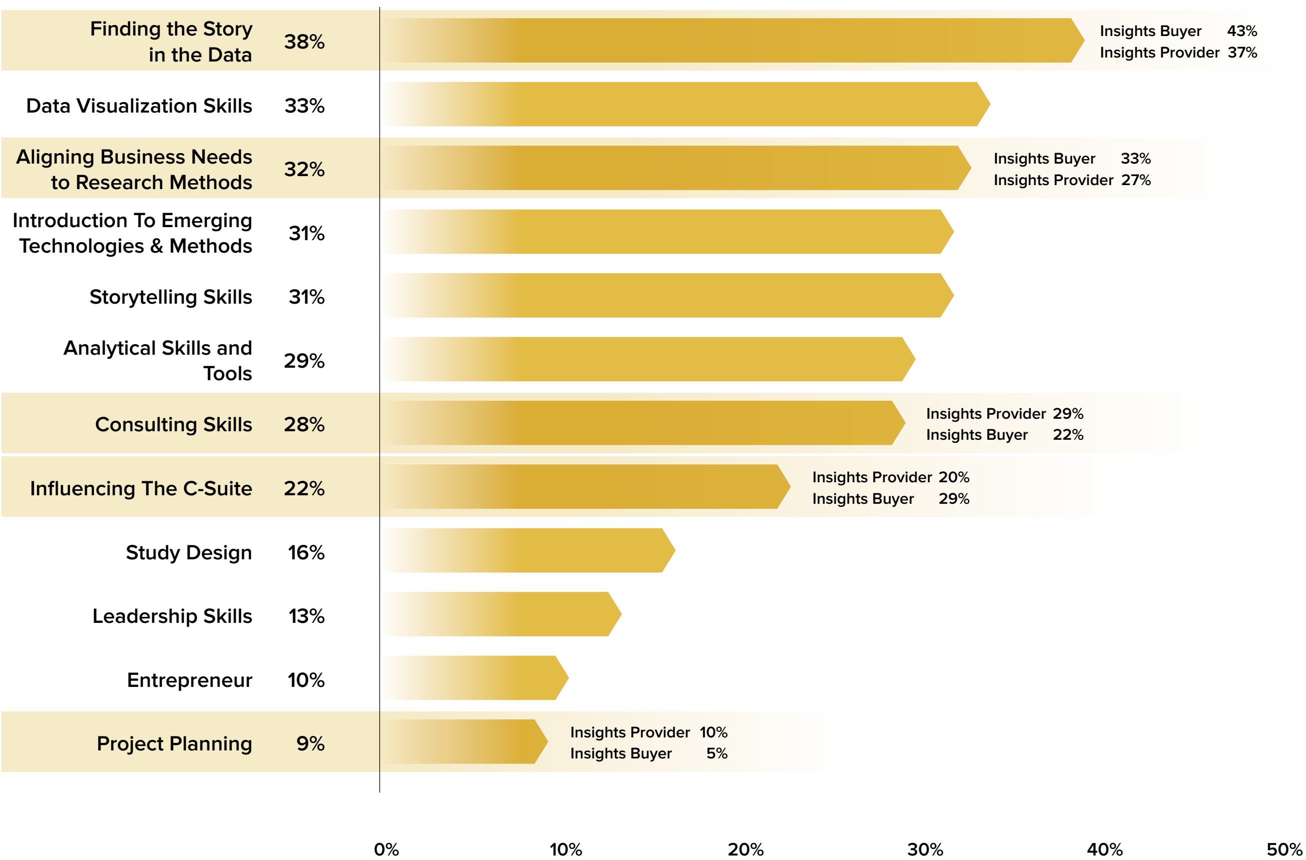
# MOST IMPORTANT TRAINING NEEDS

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

In the previous round of GRIT, we wanted to better understand use of existing training resources by the research industry and found that, to a large degree, formal training programs were a definitive need on 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.

## MOST IN DEMAND TRAINING TOPICS



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 against 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.

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

# WHAT WE NEED TO UNDERSTAND HUMANS IS AN EXPERIENTIAL INSIGHT ECO-SYSTEM, NOT JUST TECHNOLOGY

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Considering the adoption of tools and technologies reported in the GRIT study, one may rightfully conclude that analytics are as important as social media, big data and text analytics to reach high penetration among end clients (over 40% in use). But while social media, mobile and other technologies make us data rich, we are still insights poor!

The latter is exactly what end-clients want to develop as skills. This year's GRIT results suggest there is a high need for training around "making sense of data" and drawing the attention of executives by means of stories and visualizations. But, therefore, we need to add small and soft data, or consumer context. Luckily, when considering the GRIT adoption numbers again, we see several methods high up on the adoption curve which allow adding consumer context. Communities, mobile ethnography, and mobile "in the moment" surveys can generate extraordinary insights into people's everyday life experiences. These can provide the rich ingredients needed to build stories and create change in executives' thinking.

### Adding Context

In a global community for Dorel Juvenile's premium stroller brand, Quinny, we sent people on mobile missions to **generate** context and illustrate their behavior around "mobility". By means of these real-life experiences, we discovered that for urban parents their "skills" for moving around the city were more important than their "looks", which was key for repositioning the brand.

In quantitatively **validating** product concepts for JDE, consumers tested coffee concepts while they were in a specific occasion. Consumers had to prove they were, for example, in the supermarket, having breakfast or on a break by uploading a picture through their mobile. By doing so they unlocked a short survey and evaluated a concept. Consumers who evaluated the product concepts while in a specific moment judged the concepts differently in terms of relevance, usefulness and credibility – which was very helpful for the positioning of the product. Based on a post-product-launch follow up study, we found that the predictive validity of the buying intention of consumers who evaluated the concept while in a specific occasion was much higher than the control groups.

But data remains a means to an end. The end being: **activating** employees with human insights such that an entire organization centers around the very people who buy their brands. The worst enemy of the best study is that it is ad hoc. Hence, there is a need to focus on the delivery and marketing of insights. We have recently implemented insight activation studios at different companies. A "studio" is a corporate social network which both diffuses insights and helps executives collaborate and co-create around human insights.

At Dannon we reached 1/3 of executives with consumer insights, whom we would otherwise never have reached. For these executives, it was eye-opening to experience consumer observations in a very illustrative way and search solutions for it themselves (rather than reading long boring research reports), and it helped reach consumer closeness.

### An eco-system

In an ideal world, organizations should build a dynamic experiential insight eco-system in which these components interplay and being inspired by consumers is a habit. It would increase the return on insights and truly bring a company "close to humans", rather than focused on internal processes, technology, cutting costs or short term shareholder "growth".

# ADOPTION OF AUTOMATION APPROACHES

While a third of respondents already use automated sampling, many were concerned about the impact of this automation on data quality

Perhaps no topic has been as "buzzy" in the MR space (and many others) in recent months as automation. The past few years have seen the emergence of many companies launching various versions of automation platforms to address many different aspects of the research process. With that in mind, we devoted a new section in this wave of GRIT to understanding of current and future adoption of automation within the research industry.

What did we find? Automation is already gaining significant traction. Automation platforms are most used today for analyzing survey data (by 42% of respondents), text (by 35%), and social media (35%), as well as for charting and infographics (41%).

# CURRENT ADOPTION & CONSIDERATION OF AUTOMATION PLATFORMS

Automation is least used for business process tasks including project design (19%), matching suppliers and buyers (11%), and matching talent to projects (8%). Automated analysis of biometric data is low – 10% – primarily because usage of such data at all is still low.

Perhaps one side note of warning is warranted here; "the Uber of..." service model is emerging very quickly in other categories, including in adjacent industries to MR with largely professional services-based processes. This may perhaps be flying under the radar for GRIT participants, but is likely an area that we may see accelerate quickly as new offerings enter the marketplace. It's reasonable to expect that "DIY 2.0" will be in the realm of access to human capital through technology platforms. As a result, automation related to matching talent and buyers and sellers may grow significantly as these approaches begin to penetrate to MR.

While a third of respondents already use automated sampling, many were concerned about the impact of this automation on data quality.

*"Automation oversimplifies the fieldwork process; the defaults are not necessarily the right way to do things for all jobs."*

*"It's terrible now and the push for increased automation puts the power in hands who don't know true sampling. Focus on quality and transparency. The sampling industry has a bad reputation."*

*"It's the general trend: more players, more automation, less care taken."*

*"Too much automation..."*

Despite these concerns, usage of automated sample fulfillment via API integration with research platforms or as standalone solution for research projects is a major trend driving the growth of many companies. We'll tackle more of this issue in the next section on sampling.

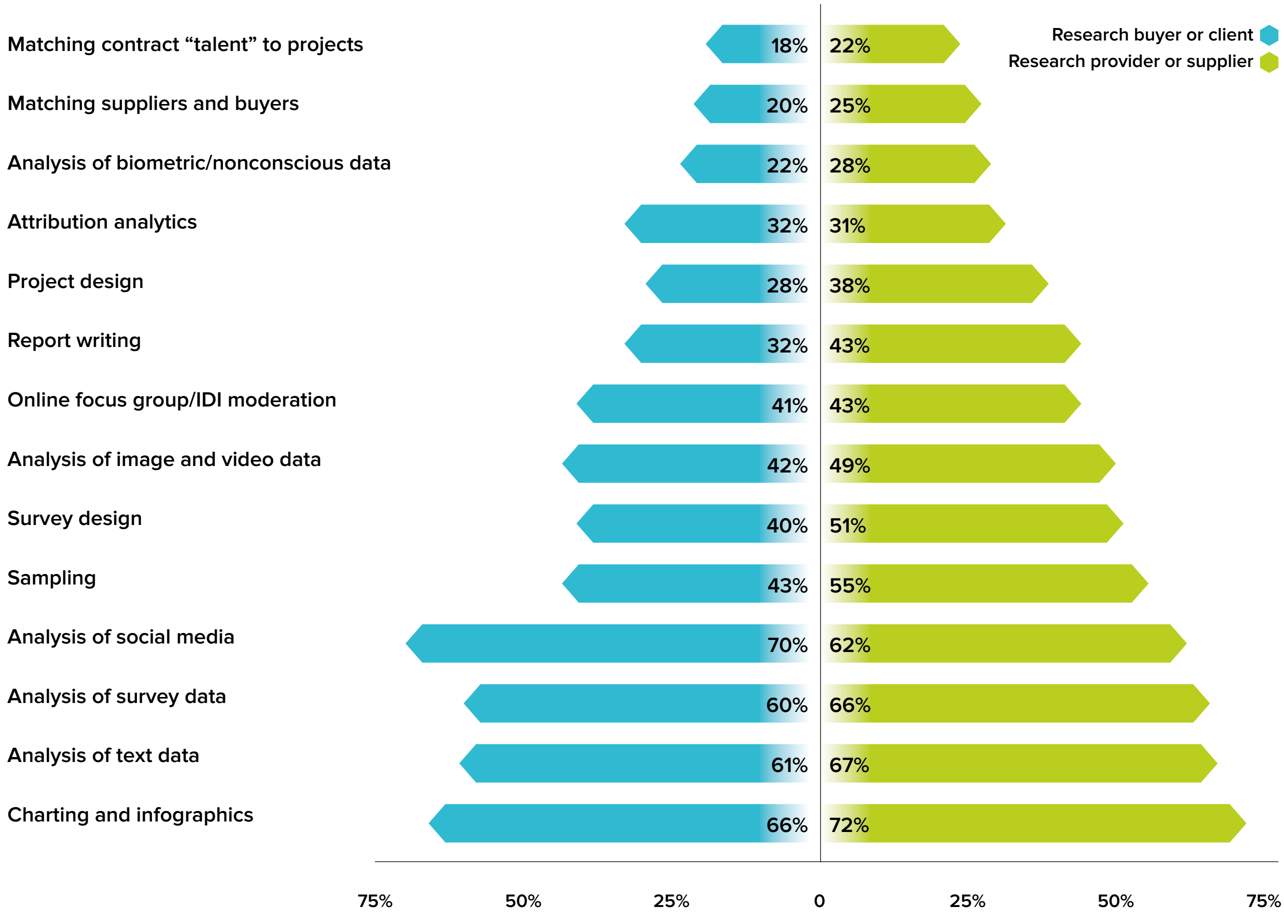
ADOPTION OF AUTOMATION APPROACHES

| | Don't ever expect to use | No interest to date | Not sure | Under consideration | In use |
|---|---|---|---|---|---|
| Charting and infographics | 3% | 8% | 18% | 30% | 41% |
| Analysis of social media | 4% | 12% | 21% | 29% | 35% |
| Analysis of text data | 4% | 10% | 20% | 30% | 35% |
| Sampling | 5% | 12% | 30% | 20% | 33% |
| Analysis of survey data | 6% | 12% | 18% | 23% | 42% |
| Analysis of image and video data | 7% | 17% | 29% | 27% | 20% |
| Attribution analytics | 8% | 16% | 45% | 18% | 13% |
| Survey design | 12% | 18% | 22% | 19% | 29% |
| Online focus group/ IDI moderation | 13% | 19% | 26% | 19% | 24% |
| Matching suppliers and buyers | 14% | 22% | 39% | 13% | 11% |
| Matching contract "talent" to projects | 14% | 24% | 40% | 13% | 8% |
| Analysis of biometric/ nonconscious data | 15% | 24% | 34% | 17% | 10% |
| Project design | 15% | 22% | 27% | 17% | 19% |
| Report writing | 15% | 21% | 23% | 19% | 22% |

# CLIENT VS. SUPPLIER ADOPTION

When we combine "In Use" and "Under Consideration" and compare by Client and Supplier, a surprisingly high level of alignment emerges with both groups roughly marching in lockstep in their current focus on incorporating automation approaches into their business.

TOP 2 BOX AUTOMATION IN USE/UNDER CONSIDERATION

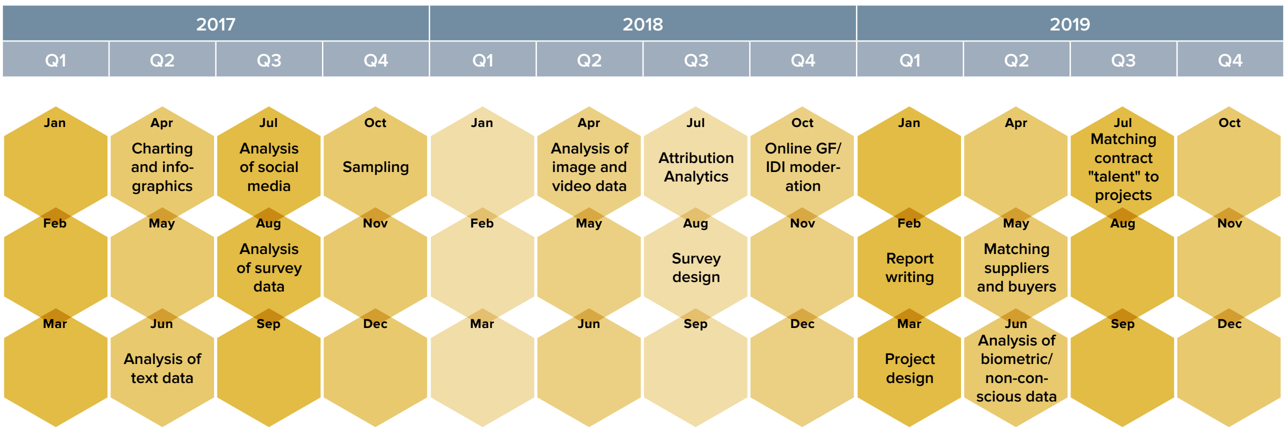



Obviously, automation is an area of significant interest across the insights value chain, which will likely yield some opportunities, and some potential tensions, as the trend progresses.

# FORECAST FOR MAJORITY ADOPTION OF AUTOMATION PLATFORMS

Plugging the full question data into our unautomated human analyst produced this forecast for when the majority of researchers will be using automation platforms for each of the following:

### AUTOMATION ADOPTION FORECAST




In 2017, we expect to see charting, basic analysis, and sampling all handled by automation platforms for the majority of researchers. In 2018, automated analysis of image and video data will win over the majority, followed by attribution analytics and survey design, with automated moderators becoming the norm by October. In 2019, more of the project-oriented tasks will be automated for the majority of researchers, including report writing, project design, matching suppliers and buyers, and matching talent to projects.

This forecast was prepared by assigning a year to each answer and averaging the results:

| | |
|---|---|
| In use | 2016 |
| Under consideration | 2017 |
| Not sure | 2018 |
| No interest to date | 2021 |
| Don't ever expect to use | 2026 |

In 2017, we expect to see charting, basic analysis, and sampling all handled by automation platforms for the majority of researchers

Researchers have a love/hate relationship with automation. On the one hand, many researchers rated firms as innovative specifically because of their use of automation. And many spoke of how they hope to use automation in the future:

*"End-to-end automation including automated reporting."*

*"Having intelligent machines (AI) learning how to harmonize and process data faster, better, quicker."*

*"Photo and video automatic coding."*

*"Machine learning."*

But on the other hand, some researchers worried about the impact on their careers and their employers. Regarding their careers:

*"I think too much is made of automation and not enough of good old-fashioned thinking--whether in design or analysis and reporting. The greatest value of the researcher is in applying their thinking skills to business problems and decisions."*

*"Going beyond research skills, market researchers should seriously start evolving towards data science and intelligence experts. As more traditional functions will be replaced by automation, more on-the-job focus will fall on creative interpretation and storytelling based on diverse information sources."*

Fearing for their employers, some predicted automation would reduce revenues:

*"Due to automation the prices for simple research and reporting will drop. However, this gap has to be filled with consulting."*

*"I think the industry as a whole is reaching a plateau, and continuous problems with panels will prompt a re-thinking of current approaches. I believe we are due to hit the re-set button soon, after which things will pick up again, but with a more focused mindset, better cross-platform transfer-ability, and a lot more process automation."*

Others, in contrast, saw automation as the way forward.

*"Projects will become smarter and more efficient. Clients expect more for less. Automation will help with this."*

Automation won't be uninvented, and – eagerly or not – more and more researchers are adopting it out of necessity.

# NEED TO GET YOUR RESEARCH ROLLING? NO NEED TO REINVENT THE WHEEL!

**Will Robinson**
Vice President of Corporate and Product Development, Research Now
Website: www.researchnow.com

The most recent GRIT survey lists automation as an "emerging trend" that can improve the research experience.

So this begs the question, if automation is "new", then what have researchers been doing all this time? Or the better question might be, "what have researchers been re-doing?"

### Create, Refine, Repeat

Unfortunately, we've been approaching every research project as its own unique creation. Instead of starting with robust, well-designed questionnaires from previous studies, we'll re-design and re-write whole surveys. Instead of reviewing and improving upon previously defined sampling parameters, we'll re-create new audiences with highly custom screeners. And that means we'll process the resulting data again and again with no sound way to meaningfully compare results between studies.

The great news is that automation allows researchers to improve the quality of their research while spending less time on the process – which means they can spend more time generating quality insights for their constituents.

### Putting the Power of Automation to Work

Where can automation be most helpful? Here are a few applications:

- **Survey Design:** Developing a high quality, respondent-friendly questionnaire allows researchers to have greater confidence in the integrity of the research. Combining this up-front thoughtfulness with a templated survey approach (where 95% of the survey stays the same for each study) permits researchers to quickly re-field similar studies and use the resulting data for normative analysis, which isn't possible when running "snowflake surveys" (i.e. each one is different). Academic researchers have done this for a long time, using scales that have been calibrated for reliability and validity over multiple studies.
- **Sampling:** Researchers can lean on their sample providers to help craft representative targeting parameters that can be re-purposed for future studies. By defining a repeatable audience type, many sample providers can leverage proprietary routing technology to reduce field times and increase response rates. Researchers can also use certain online sample providers to recruit people to participate in online qualitative sessions in real-time, which eliminates the need for reminder notices and reduces the risk of no-shows that are commonly associated with traditional qualitative methods.
- **Data Visualization:** Many tools exist today to help researchers quickly generate charts, infographics, and other visuals to make sense of raw survey or transcript data. Their ease of use eliminates wasted time on low value-add data processing to uncover potential insights. These tools are a great way to produce high-quality visualization and easily distribute results to research consumers, like brand managers and marketers.

### Another Tool in Our Research Belt

Of course, automation can't be used for all types of research projects, but it is quite effective for routine, recurring research where benchmarking is important (like concept, brand, and creative/message testing). When used properly, many automation platforms offer a very cost-effective way to execute fast and focused projects to get a quick read on an issue.

The results of the GRIT survey suggest many researchers are either currently using automation tools or considering them for future use. And that's a great thing for market research.

# THE FUTURE OF SAMPLING

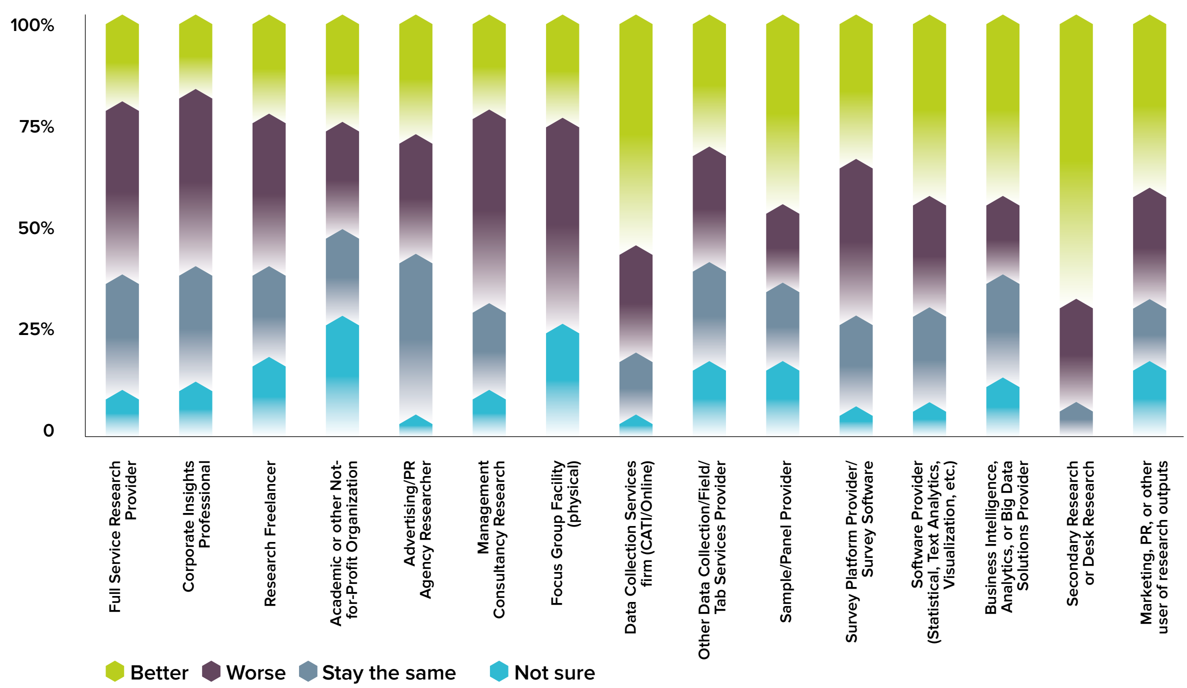
This wave of the GRIT survey asked insights practitioners, both buyers and suppliers alike, two sets of questions:

## WILL SAMPLE QUALITY GET BETTER, STAY THE SAME, OR GET WORSE OVER THE NEXT THREE YEARS?

Is sample getting better or worse? Well, it depends on who you ask. If you are in a full service firm, focus facility or a corporate researcher, you are far more likely (42% and 43% of respondents) to say “worse”.

If you work for a data collection provider or sample provider, then it’s the opposite with 56% and 46% saying “better”.

SAMPLE QUALITY BY AFFILIATION

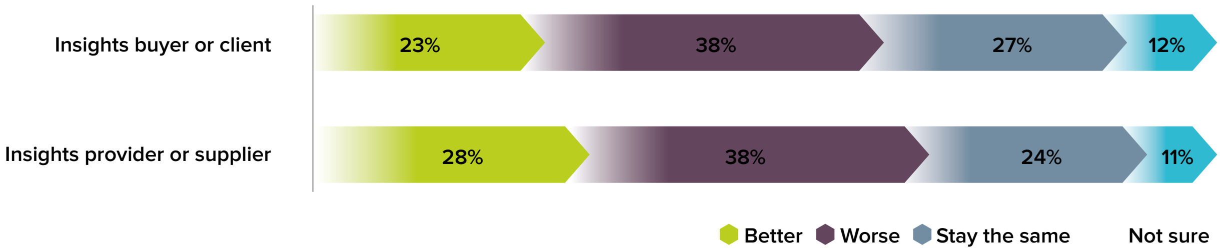


Why do sample sellers think sample is improving while buyers think the opposite? That is the crux of why we are exploring this concept.

Oddly though, when we go back to aggregate numbers and just look at the buyer vs. supplier split, these differences are drowned out and the two segments are largely in line, although even in that scenario over one third of participants still think sample quality is getting worse, not better.

Why do sample sellers think sample is improving while buyers think the opposite?

SAMPLE QUALITY BY BUYERS VS. SUPPLIER




## Why the Differences?

Believers in sample getting better point to improved technology, reach, fraud detection, and sourcing capabilities. Time and time again, technology and automation are given as the reason sample or panel is getting better. The building of sample exchanges and online community platforms give more control to the buyer to manage procurement and delivery of sample to their projects.

*"Programmatic sampling is delivering better results at a higher quality through technology"*

*"Better blend of sourcing, increasing internet penetration enabling better representativeness."*

*"The leading providers are moving away from old panel models to multi-source sampling and improving data/respondent validation procedures"*

*"The methods of reaching a larger and more diverse sample size is improving daily. There are a variety of methods available to gather data from samples globally that were previously unavailable."*

*"More options. Not just relying on DOI panel. Technology and exchanges allow us to blend"*

*"Consolidation is underway with the higher quality providers being the healthiest. They should weed out the weaker river providers and leave the industry better off"*

*"We live in an age of increased transparency. Clients are demanding accountability in order to avoid "professional" respondents. Social media and digital sourcing makes it easier than ever to engage the wider population to participate in market research. No more tired samples!"*

*"Our ability to source and evaluate panels will only increase, and recruiting techniques broaden every day."*

*"Better analytics and more cross-provider samples (provided by services like Fulcrum) will lead to better samples overall."*

"The leading providers are moving away from old panel models to multi-source sampling and improving data/respondent validation procedures"

Surprisingly, technology or lack thereof, is the prime culprit for sample getting worse: from bots, to survey design, to mobile enabled surveys, all these are driving sample quality down. Many respondents have a strong sense that there are only professional survey takers and fraudulent bots that are taking all the surveys because there is a race to the bottom in terms of cost.

“Feel like quality control is a thing of the past and it’s only about what’s fast and cheap”

“It’s so bad now no one knows how bad it is. An ugly sausage”

“Harder to reach a representative market sample, harder to target a dynamic consumer, as consumer get more accustomed to tech they will either become more savvy and routine survey respondents or desire to drop off the grid.”

“We are seeing an alarming increase in speeders, flat-liners and downright frauds from panel-recruited surveys. Even honest and diligent respondents are becoming reluctant to participate due to poor engagement and low incentives.”

“The sample industry as a whole has gone from being pure panel providers to wannabe full service agencies and this is impacting the quality of the research being done and clients are getting a bad deal all round. “

“Data privacy concerns increasing; trust in industry, attention span, and coverage of relevant groups decreasing”

“Too many crap surveys are causing panelists to no longer participate. Only biased, die-hard panelists remain”

So here’s the rub: which is it? Is sample quality getting better or getting worse? Perhaps it was so bad a few years ago that incremental improvements in response rates or fraud detection haven’t been detected?

We don’t have a clear answer to this question but plan to research it further in the future. For now, GRIT shows that a large segment of the industry is pessimistic about quality and only those who are most engaged in delivering sample (and arguably are closer to the issue) are more optimistic about the future.

However, we did not stop there. We wanted to explore ideas that many sample providers have surfaced as potential solutions to these issues.

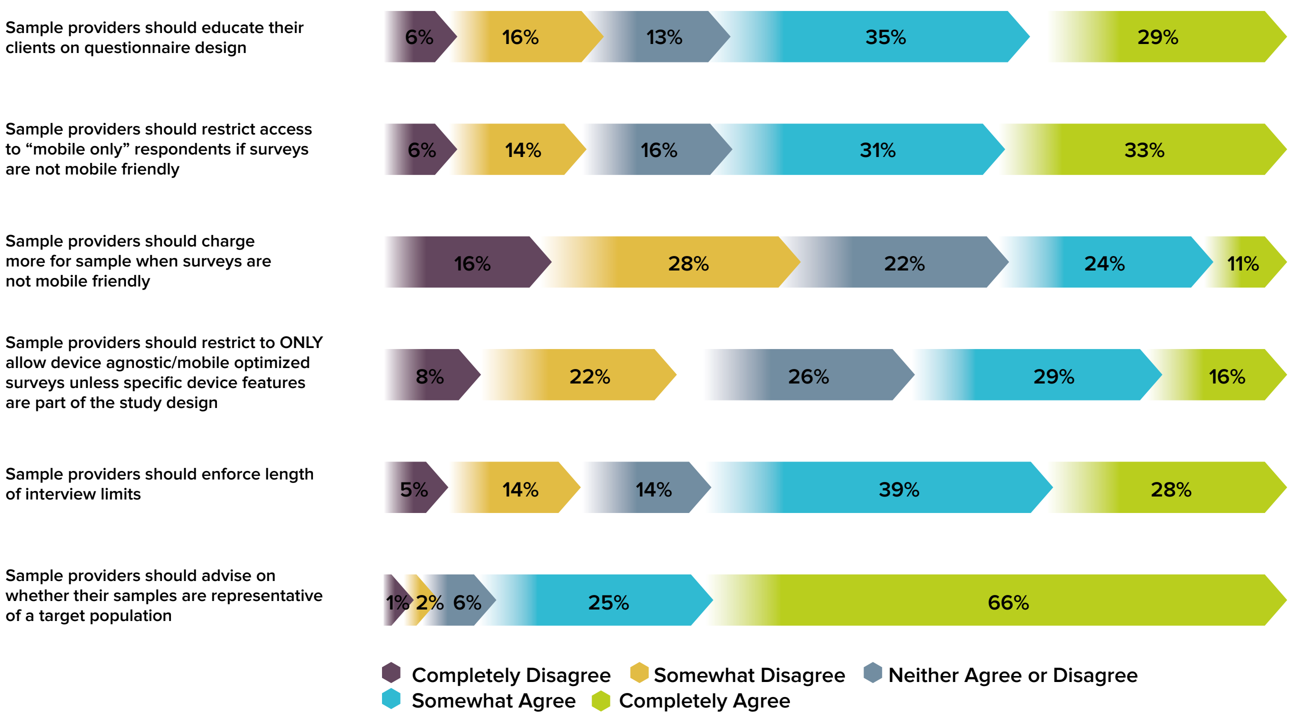
“Feel like quality control is a thing of the past and it’s only about what’s fast and cheap”

# WHAT STEPS SHOULD SAMPLE PROVIDERS TAKE?

We asked GRIT participants what steps should sample or panel providers take to help address these issues, ranging from educating clients on survey design to charging more for studies that aren't mobile-friendly. The responses were surprising.

Clients were far less likely to agree with paying more for non-mobile-friendly studies

AGREE/DISAGREE WITH PROPOSED SOLUTIONS




These are not encouraging responses. For a full third of respondents to not agree to even having sample providers playing an educational role, let alone the other, more proactive ideas put forward, suggests that there are a lot of people who lack firsthand experience with some of the terrible surveys that are *still* in the field today.

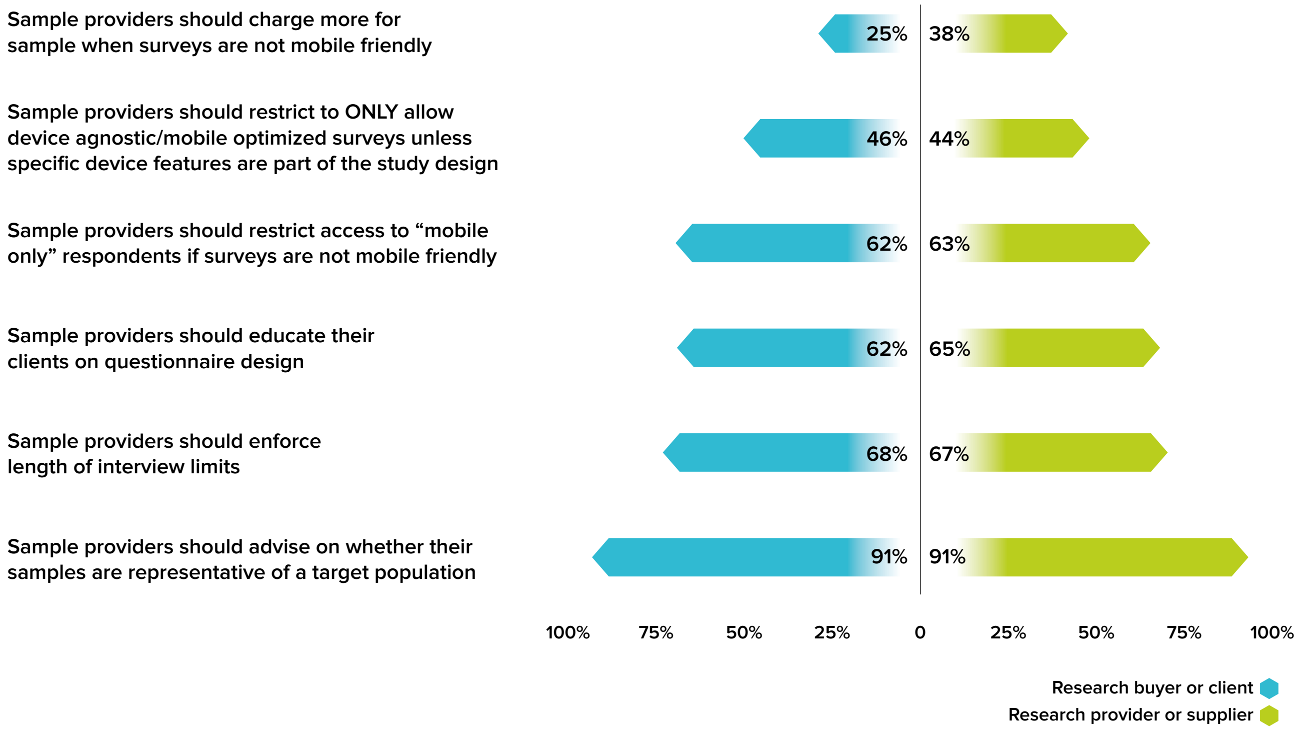
It's hardly a secret that the research industry is facing significant challenges getting respondents to join panels and participate in surveys. Various solutions have been proposed, from education to the imposition of strict guidelines, to address the issue.

However, GRIT data indicates that none of these are slam dunk solutions and that sample providers should only actively communicate on issue of representativeness, not quality or design.

It's also worth noting that there were no significant differences between end-clients and research suppliers on these perspectives save for one question: clients were far less likely to agree with *paying more for non-mobile-friendly studies,* which should come as a surprise to absolutely nobody.

Sample providers should only actively communicate on issue of representativeness, not quality or design

## TOP 2 BOX PROPOSED SOLUTIONS BUYERS VS. SUPPLIER




## PROPOSED SOLUTIONS BY COMPANY SIZE

| | Company Size | |
|---|---|---|
| Completely Agree – Topic: | Less than 10 | More than 100 |
| Educate on Questionnaire | 27% | 33% |
| Restrict to Mobile Surveys | 28% | 36% |
| Charge More for non-Mobile Surveys | 8% | 15% |
| Mobile Survey Only | 13% | 16% |
| Enforce LOI Limits | 26% | 30% |
| Maintain Rep Sample | 71% | 63% |

Interestingly, large firms view the role of sample providers very differently than smaller firms. Across every category tested, large firms seemed to expect *less* of sample providers and to cede more control or authority to them. Perhaps the consultative nature of smaller firms with sample companies is very different than the rather transactional relationships with larger companies.

## A known problem...

While the above questions were asked objectively, they are in fact "leading" questions. They reflect the belief of many that the smartphone revolution and declining participation are indeed problems that need to be addressed. Few disagree with this belief, but there is far less consensus around the extent of the problem, its implications, and the range of solutions.

As we mentioned earlier, these questions were first asked in conjunction with the SampleCon 2016 conference, where the issue of participation has been discussed since the conference's inception in 2013. In the SampleCon study, panel and sample providers were far more likely than GRIT respondents to agree that they should enforce device-agnostic surveys and mobile guidelines. There was one exception however: in the SampleCon study, both sample buyers (typically full service research houses) and sample providers both disagreed strongly with the idea of enforcing limits, almost the reverse of what we see in this GRIT study.

## ...with no solution in sight

What are we to conclude from this data?

1. Self-interest will continue to rule the day.
   There are few legitimate excuses one can muster for not confronting the sample problems that plague the industry. There's no doubt that the solutions are hard, but when you combine this data with the observations in the next section about threats to the industry, it would certainly appear that, irrespective of motive, far too many people on both the client and the supplier sides are dragging their feet.
2. The idea of centralized standards or enforceable guidelines is a fantasy.
   While there are majorities of opinion, they are hardly overwhelming and wouldn't have the weight to create a mass movement. Moreover, it would be naïve in the extreme to think that the industry would be able to find an effective platform for compromise. Even the most basic attempts at setting standards have tended to unravel as each company wants to create its own solution.
3. The real existential threat to our industry is neither automation nor competing methodologies: it's the future of research participation.

The real question therefore is *when will people catch on? When will responses to these questions drive change?*

Our data don't speak to this. The optimist could conclude, perhaps justifiably, that we've been discussing these issues for years and yet life goes on. We move on to the next conference and start the discussion over. There are others who might conclude that the industry will limp along into its new future and, like other challenges it has overcome, will overcome this one as well. As analysts at GRIT we tend fall into the latter camp, though we think the change will be a lot bumpier.

Nevertheless, we do see a reason to be hopeful. We believe that the death spiral is accelerating for those researchers who fail to act. The poor experiences they create are starting to contrast markedly against the unique and engaging experiences by new entrants as well as the small number of innovators who've been unafraid to embrace change. That should be our north star.

The idea of centralized standards or enforceable guidelines is a fantasy

The real existential threat to our industry is neither automation nor competing methodologies: it's the future of research participation

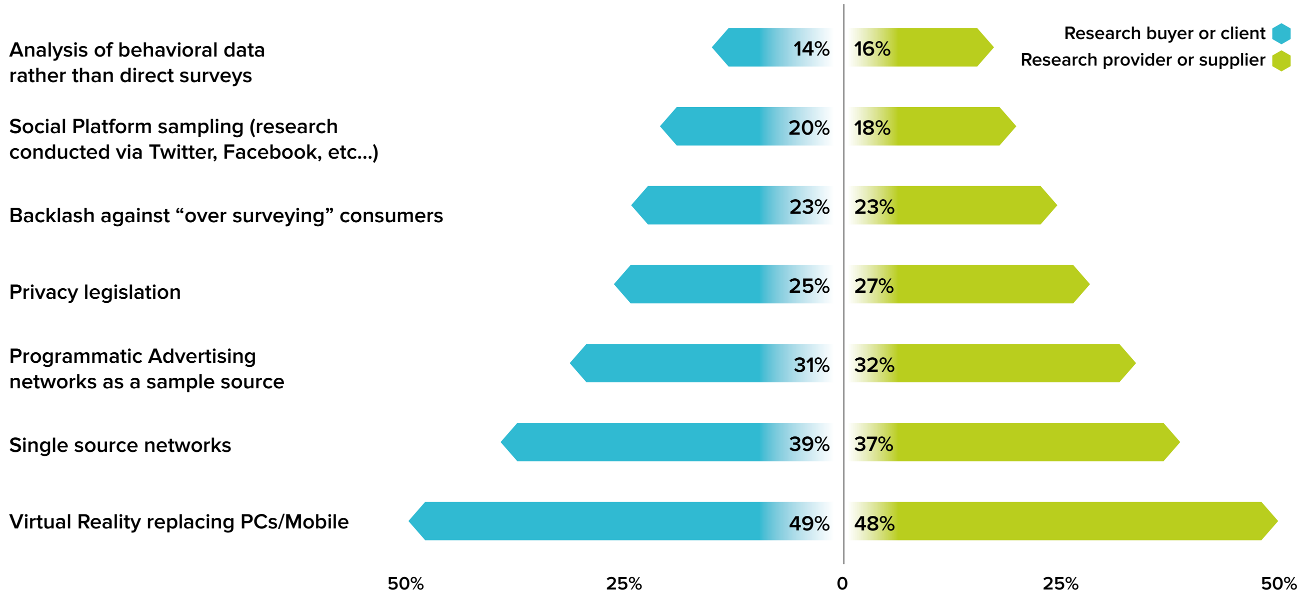
Programmatic sampling, single source networks and virtual reality are seen by solid pluralities as most disruptive

# DISRUPTIVE FORCES

In another set of questions replicated from the SampleCon study, we asked GRIT respondents to think about potentially disrupting forces and to rank a series of scenarios from potentially most to least disruptive.

As we look at the breakdown of results by buyers vs. suppliers for those who ranked each scenario as either first or second position as most disruptive, what jumps out is the surprising consistency of responses across the two groups.

TOP 2 BOX DISRUPTIVE POTENTIAL BY BUYERS VS. SUPPLIER




Secondly, the advent of programmatic sampling, single source networks and the looming paradigm shift of virtual reality as a new computing platform are seen by solid pluralities (and in the case of VR almost a majority) as most disruptive.

Privacy legislation, over-sampling, and social platforms entering the sample business are seen as having only moderately disruptive potential, and at the end of the pack is a concern about direct behavioural analytics (think Big Data merged with IoT) replacing surveys entirely.

Privacy legislation, over-sampling, and social platforms are seen as having only moderately disruptive potential

So what does all this mean for the research industry?

We think the lesson can be condensed into three salient points:

1. Sample quality remains a major issue for the industry, with a real disconnect between key stakeholders on not just how severe the problem is, but what should be done about it and who owns the responsibility to implement a solution.
2. The ideas that have been put forth for sample providers to take a more proactive role in controlling the issue that may impact quality such as mobile unfriendly surveys, length of interview, and education on quality design do not seem to appeal to many outside of sample providers.
3. Looming potential disruptive forces may change the nature of sampling fundamentally making these questions moot, or they may add orders of magnitude to greater challenges that we as an industry cannot even conceptualize yet.

Perhaps market forces will simply resolve these issues organically, but until then the debate will continue to rage on.

# LEVERAGE EMERGING TECHNOLOGY FOR BETTER SAMPLE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Data is everywhere and everyone is collecting it. The emerging world runs on data. The amount of data has even reached "big" level. And as *big data* joins terms like *millennials* and *mobile* as this year's inductees into the buzz hall of fame, it's only because trends like these are great news for sample providers and market researchers – though, the GRIT results suggest otherwise: 37.7% of respondents believe the quality of sample will get worse in the next three years.

The industry is feeling a squeeze! The prevalence of data and on-demand analytics is contributing to serious price competition and the emergence of do-it-yourself insights. The squeeze is forcing faster turn-around times with fewer quality controls for sample. However, in the hands of professionals, the technology of this new age should speed the delivery and improve the quality of sample. Here are some new technologies and how we see them prevailing in other markets where we provide incentives.

**Internet of Things –** Everything can be connected! That's a good thing for qualifying, engaging, and delivering sample. However, only 13% of the GRIT respondents claim to be using the "Internet of Things". Digital marketers currently build significant profiles for individual prospects and customers – leveraging social media data, on-site data, mobile data, wearable data and content-interaction data. Analyzing this data in real time to find inflection points to deliver incentivized offers or personalized messages puts marketers out ahead of the competition. Sample providers can learn from this and create community data schemes to first qualify, and then continue to build profiles (insert micro-incentives and game mechanics), and finally to deliver the right questions at the right time to the right consumers.

**User Interfaces –** Whether it's a PC, smartphone, VR headset, smart-watch, or whatever – consumers now have a wide range of choices to interact with technology. It took a long time for researchers to get to 74% use of mobile surveys – and that hardly even addresses the problem. Consumers have choice and the research industry has to meet them where they interface – not the other way around. We provide incentives for large scale enterprise wellness challenges. They use wearables, phone apps, and PCs all together to create an engaging experience for employees of their customers and then quantify the results and formulate a story. The phone has become home base for a whole new generation – moving from thinking in terms of "mobile surveys" to mediums that engage the consumer where they are is key to obtaining relevant, quality sample.

**Parting thoughts –** Technology can never replace the expertise that exists in the market research industry. However, any industry can be disrupted if incumbents give disrupters enough time to also become experts. In all of the industries in which we operate the leaders develop and maintain best practices. Best practices are a culmination of technology focus and industry expertise that honor past success, guide current operations and inform new developments. Leading sample providers should be able to publish best practices for delivering quality sample and raise the industry reputation. That way they own the technology and the best way to wield it to deliver useful insights. The GRIT report looks negatively on sample this year, but I remain optimistic that acceptance of emerging technologies should always improve sample.

# FINANCIAL OUTLOOK

Vast majority (71%) of research firms expect research-based revenue to increase in 2016 compared to 2015, even as only 44% of client firms see an increase in research spending

The great news for the research industry is that the vast majority (71%) of research firms expect research-based revenue to increase in 2016 compared to 2015, even as only 44% of client firms see an increase in research spending. On the supplier side, this is a marked increase from the last wave, while on the client side it is relatively unchanged from the last wave. How to explain the discrepancy in expectations?

Research firms may be seeing significant growth from a few key clients, who are spreading their business across a portfolio of firms.

Firms may be expanding the market for research, reaching buyers not part of the traditional industry and therefore not covered by the survey.

Research firms may be overly optimistic, while clients may be overly pessimistic.

Changes in research buyers' budgets may not yet have trickled down to research firms, who are working on currently booked projects and forecasting continued growth.

To the latter point, clients are more optimistic about 2016 than they were 12 months ago, when 37% expected the coming year to show growth (vs. 44%). Research firms are slightly less excited than 12 months ago (71% vs. 73%).

### HOW WILL YOUR PROJECTED SPENDING ON RESEARCH THIS YEAR COMPARED TO LAST YEAR?

| | Wave | | | |
|---|---|---|---|---|
| | 2014 Aug | 2015 Feb | 2015 Oct | 2016 Feb |
| Base | 239 | 371 | 196 | 455 |
| Increase over last year | 43% | 37% | 45% | 44% |
| No change from last year | 44% | 44% | 42% | 40% |
| Decrease from last year | 13% | 19% | 13% | 16% |

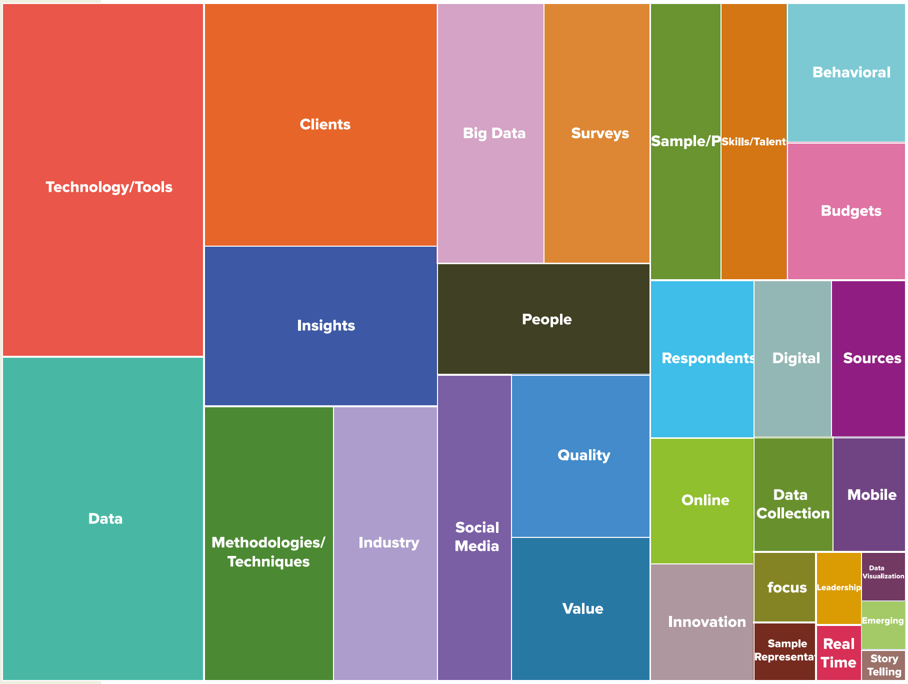
### HOW WILL RESEARCH-BASED REVENUE FOR YOUR ORGANIZATION THIS YEAR COMPARE TO LAST YEAR?

| | Wave | | | |
|---|---|---|---|---|
| | 2014 Aug | 2015 Feb | 2015 Oct | 2016 Feb |
| Base | 741 | 1,493 | 836 | 1,608 |
| Increase over last year | 63% | 73% | 64% | 71% |
| No change from last year | 30% | 22% | 29% | 22% |
| Decrease from last year | 6% | 5% | 7% | 6% |

Those respondents who expected a decline were asked to elaborate, and the word cloud here effectively captures the major issue: budgets. Almost every other challenge cited has some linkage to budgets, so in all cases declines appear to be directly correlated to corresponding budget shifts within the organization.


Conversely, when asked what would drive growth the answer was also fundamentally obvious: the demand for new research, although certainly drivers rise towards the top to help support that demand.

# THREATS TO THE MARKET RESEARCH INDUSTRY




As we have done for the last several waves of the GRIT study, we finally asked participants a series of voluntary verbatim questions focused on challenges, opportunities, and how to deal with both.
Again, a simple word cloud speaks volumes on the major themes we discovered:

Although we did code this data and analysis of the coding is available to any who wish to dive in via the GRIT dashboard, we believe it is both interesting and instructive to pull out a selection of comments falling under a number of themes. With that in mind, here is what GRIT respondents had to say, in their own words.

## CHALLENGES

### The drive to automation

"I think in the next 10 years 25% (at least) of MR jobs will either be automated or outsourced."

Whilst seen by many as an opportunity, one of the most mentioned threats identified in the GRIT survey is the secondary impact automation may have. Over 50 individual references to automation and the consequences of the drive to automation were noted.

"Biggest threat? automation as a replacement for researcher skills"

"I think in the next 10 years 25% (at least) of MR jobs will either be automated or outsourced."

"Automation. The trend toward tech only solutions may end up cheaper, but it also exacerbates one of the biggest current issues, the lack of thoughtful and insightful analysis."

## The impact of self-serve & DIY solutions

In reaction to the growth of self-serve and DIY solutions, we are starting to hear a lot more negative kick back from some research quarters in this year's survey. There is a fear that we are making research too easy and cheap to do and that it is undermining quality.

"A giant wave of crappy tools that convince clients that they can get data and research results for very little cost or very little effort."

"A crippling obsession with emerging technology, in order to distract ourselves from the hard task of correctly interpreting people's behavior."

"The 'anybody can do market research' approach is undermining our industry."

"Bad research is getting easier to do!"

"Bad research is driving out good (because of cost and time factors). Too much emphasis on technology; not enough emphasis on expertise. Too many poorly-done DIY projects."

## Other data sources are no solution either

"Social media is even worse..."

"I have concerns about the accuracy of data within social media as some users are not true to the demographics they publicly share."

## The difficulty of accessing truly representative samples sources

This could be viewed as the single largest area of concern for the industry: the quality of sample supply. We are running out of online panelists, people are not picking up the phone to take part in telephone interviews making it harder for researchers to access representative audiences, and professional respondents are making even convenience samples unreliable, let alone representative.

"Our biggest challenge? Getting people to answer surveys."

"Huge response bias: the people who are willing to complete surveys are not necessarily representative of the populations we want to reflect."

"Non-response bias is slowly undermining the entire integrity of our industry – who believes a political opinion poll these days?"

"Sample quality is declining all round."

"Death of the traditional market research panels."

"Declining response rates, over-researching the same audience groups, under-representing others."

"There are demographic groups who are simply refusing to engage in research these days: high-end C-suit, young males and essentially anyone who is busy."

"My biggest challenge: Effectively finding, targeting, engaging and nurturing Millennial respondents (basically 18 to 35 year olds)."

"We have bored millions of our customers to death with our long dull surveys, customers who are going to be really hard to win back."

"Bad research is driving out good (because of cost and time factors). Too much emphasis on technology; not enough emphasis on expertise. Too many poorly-done DIY projects."

"We have bored millions of our customers to death with our long dull surveys, customers who are going to be really hard to win back."

## Privacy issues

Many concerns were raised over privacy issues and the impact this will have on conducting research.

"The tech companies running roughshod over privacy of data, gathering people's own data and using it without their real permission is going to have some consequences that are likely to hit the market research industry hard in the future. Data privacy laws are going to become tougher."

"I think privacy concerns and legislation is the biggest challenge."

"Being able to conduct surveys via telephone and email in compliance with privacy laws"

"Privacy is really in flux right now, seems like we need a consistent set of rules that makes sense, is fair to all parties, and allows the industry to develop around that without fear of imminent change."

"We are stuck largely in project by project based relationships with clients rather than fostering longer term more strategic partnerships."

## The prevalence of project-based relationships between suppliers and clients

"We are stuck largely in project by project based relationships with clients rather than fostering longer term more strategic partnerships."

"With a project based approach there is no incentive for an agency to invest time and effort into closely watching the client's needs and business. When the project is over and bill is paid, agency moves to another project."

"Agencies need to get much stronger on the consultancy part of the business and try to understand not only the researched objects but also the consequences for the company business."

"The C-Suite needs convincing that market research is a necessary investment with an ROI that is higher/comparable to other dollars that are invested in the business."

## Junk science

There is criticism of the number of new techniques that have not been subject to rigorous scientific testing.

"Lots of shiny new things that marketers want (e.g. VR, social media, neuromarketing, etc.) instead of traditional research, but not all are proven and/or capable of replacing any/all of traditional techniques."

"Over saturation and companies throwing around words like Emotion or Behavioral Science without really understanding it."

"Techniques like implicit association research being sold like snake oil"

## Researchers are not being invited to the party

Because companies have access to so much of their own information and there are so many free tools and technologies available, there is a sense that they are not inviting researchers to the party so often.

"Companies think they can get the information they need without the use of true market research (they are usually wrong!)."

"We are having an ongoing struggle for relevance amid an ever growing influx of "the new".

## Proving our worth

Tied to the previous point are concerns about our ability to prove our worth.

"Ability to assure clients that the research $ investment is going to help them grow their business. Too much work is nice to know but not actionable."

"The C-Suite needs convincing that market research is a necessary investment with an ROI that is higher/comparable to other dollars that are invested in the business."

"Proving ROI and that we are a revenue source, not a cost center."

## Too much cheap data – easy to gather, difficult to analyze

Whilst everyone is celebrating the growth in information sources and data supply, a lot of researchers are concerned about our industry's ability to work with all this data.

"Too much data / too much information, and making sense of it."

"Data available everywhere for no cost. Why should client pay for something they believe they can get for free?"

"Discriminating between useful data and the deluge."

## Our inability to adapt

We need to adopt and embrace new data collection methods and technologies and GRIT researchers raise a lot of concerns about our ability as an industry to adapt.

"We need to adapt to embrace new technologies and skills."

"Adapting to the needs of the client – especially in terms of speed of delivery of outputs and the move towards faster data (i.e. moving from monthly data to daily/weekly) to align with other data sources such as onsite and broader online metrics."

## The skill gap for handing diverse data sources

Our industry is suffering from a big skill gap to handle all the new types of data we have the opportunity to mine and process for insight. We have not learnt to do this effectively yet. In this group of responses, there was definitely a sense that we are not making the most of all the information that is being generated because we simply do not have the skills to analyse and interpret it.

"Making sense of an overwhelming amount of data, all of which can impact our clients' businesses in various ways."

"Integrating data in various formats from different sources is my biggest challenge."

"Lack of skills to work with new types of data."

"Our lack of ability to organize and make sense of the data that is being collected and take action based on that data."

"From the big volume of data at our disposal, the challenge will be to mine data that are relevant. Combining it with data on emotions will be another challenge."

"How to integrate multiple data sources in the most seamless way that allows easiest gleaning of insights."

"From the big volume of data at our disposal, the challenge will be to mine data that are relevant. Combining it with data on emotions will be another challenge."

"Clients demanding faster, cheaper insights. Driving industry towards automated research methods."

## Clients demanding faster cheaper insights

There is some frustration being expressed by the expectations of research clients for more cost effective research solutions.

"Clients demanding faster, cheaper insights. Driving industry towards automated research methods."

"Reduced funding and faster timing but increased expectations."

"Twice the insight, half the cost mentality it is a mathematical equation that frankly does not add up, be careful what you wish for. We are at the point I believe where our industry actually needs investment to develop the higher-end analytical tools to really properly start to process and understand big data. We should not be wasting our time chasing around looking for quick and dirty shortcut solutions."

"DIY, better/faster/cheaper is resulting in less credibility and success with MR. Clients are demanding new techniques but not being willing to try/fund them."

## Competition from outside our industry

The big tech firms, small tech companies, internal company IT departments, consultancy firms and even media planning companies are all seen as competitors encroaching on the market research space.

"There's a threat from data analytics organizations selling analytics with little insight on top, making clients unwilling to pay for decent interpretation and analysis."

"Artificial intelligence techniques are likely to have a big impact on our industry in the future but the question is about our ability to compete in this arena."

"Giants like Google and Facebook will become serious threat to conventional MR."

"There's a threat from data analytics organizations selling analytics with little insight on top, making clients unwilling to pay for decent interpretation and analysis."

## And the usual...

Budget cuts. Unimaginative client researchers, lack of innovation from market research firms....

This is a snapshot of the challenges GRIT respondents reported, and they haven't changed much for as long as we have been asking the question, although automation and artificial intelligence are certainly coming up more than they did even a year ago.

Does this mean the industry is stuck in a rut? We would argue no. In fact, some of the very things that some see as challenges such as automation and AI have been making inroads in MR precisely because they address challenges related to cost and speed. We also see change occurring in the adoption of new methods and models in response to the demand for innovation. However, as in all things there are trade-offs and obviously we have yet to find a balance to address many of these issues to the satisfaction of many researchers. However, hope springs eternal, and in the next section we shift gears to looking for solutions from the wellspring of the GRIT participants' responses.

# SOLUTIONS

A great deal of the advice about how to solve the industry's problems is dominated by common wisdom:

*"Be more consultative", "become better story tellers", "work together more", "be more innovative", "be smarter", "employ more data analytics expertise", "focus on automation", "adopt agile/quick turnaround methods", "invest in data analytics solutions", "train people better", "make surveys mobile compatible", "write shorter surveys", "develop better panels", "pay panelists more", "take more risks, invest more".*

While all of those are most certainly true, we wanted to dig deeper to find more thoughtful suggestions and GRIT respondents did not disappoint. Here is a summary of the main themes in this feedback.

"It is important to marry the data departments with insights departments in any firm."

## Improving the quality of panel supply

The message is that we need to recognise this as an industry problem that we collectively have to tackle.

"Work across sample suppliers to create more reliable & representative sample pools."

"Buyers should pay the price for sample that makes it possible to give respondents a good experience. Providers should care – now it is only lip-service, trying to solve a human problem with technology, as that is cheaper."

"Walking the talk as an industry, we are all blaming sampling providers but even the new kids using automation are using traditional sampling methods... so change is only a result of a collective movement... we all have to adapt."

"Market research needs to be distinct and recognized, beyond what the average marketer can do."

## Giving research organizations a stronger mandate to set standards

Linked to this are many calls for our research organizations to be given a stronger mandate to set standards.

"ESOMAR, MRS, CASRO, AMSRS, EphMRA etc., need to establish some firmer standards on sample quality."

"Need to carve out legislative / regulatory rules for research."

"We need to set standard on mobile compatibly and maximum length of surveys."

"Industry watchdogs pointing out scammers, low quality providers, shell companies, etc."

"We need to set up common privacy rules and standards."

## Re-organizing the research function

Many of the pieces of advice centred around the reorganization of research functions and the structure of research companies to embrace different types of skills.

"It is important to marry the data departments with insights departments in any firm. I think it is technologically doable but it is not a priority for corporations"

"Deeper integration of the research team within the business/marketing decision making."

"Incorporating business intelligence and social media analytics into MR."

## Promoting our work

There are many calls to do more to promote what we do as an industry.

"More case studies and examples to celebrate the impact of market research. Look at the work that the IPA does to promote advertising."

"A research marketing body like many that exist in the media industry with a commercial agenda to promote the market research industry."

"Need the industry to put together a coherent campaign about the role and benefits of market research, especially in the light of recent poor election poll behaviour as well as misrepresentation of survey findings in the press."

"Continue to showcase effective use of good research – what are the specific business outcomes that were impacted? Continue to showcase the downside of poor use of research – what business outcome was negatively impacted."

"How about we use the participants in the next GRIT study to help conceive and develop and advertising campaign for the research industry?" (We really like this one!)

"Strong ownership of what we can and cannot do. Focus the profession on the value we add to business."

"Show ways in which research companies can do research in tandem with behavioural information to tell a bigger story."

"Fund a lobbying force to promote market research."

"Advocacy and lobbying. More transparency with consumers so they understand the values and limitations/protections of our work."

## Developing the skill sets of research companies

Linked to this are suggestions about how the skill sets of research businesses need to be developed.

"Recruit more young people with coding skills."

"More technologists."

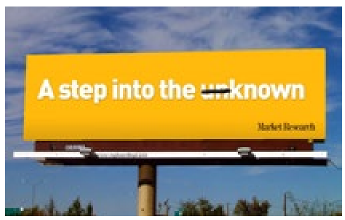
"Smart companies will be bold and replace their old-school talent for new thinkers from a broad swath of disciplines. We need to rebuild the science of MR in a way – needs to be distinct and recognized, beyond what the average marketer can do."

"Accept breakage and change the talent we hire."

"Continue to showcase effective use of good research – what are the specific business outcomes that were impacted? Continue to showcase the downside of poor use of research – what business outcome was negatively impacted."

Jon Puleston even went so far as to mock up potential ads to help jump start the conversation:




## Adopting a more thoughtful, creative approach

Science should be enriched with research "art" / "craftsmanship".

"Finding time to think...to discover the things other people miss. Using the creative brain to gain insight."

## Leave it to the market

"The Market will take care of itself: it almost always does. There will be a thinning of the herd, consolidation through acquisition and attrition will result in a more efficient industry."

"More freedom. Less structure. Fewer systems. A bit more chaos please."

"Natural selection will handle it!"

## Educational solutions

There is a wide range of solutions centred on improving education and training in the industry.

"Send the entire industry on a tech course!"

"Conferences are a good forum for conversations and idea exchange but most of the presentations are by big name brands who are trying to sell their repackaged services. There needs to be something more along the line of SXSW or TED talks"

"Education with MRS, ESOMAR and 'schools' funded by large agencies."

"A new breed of leadership in the large research organisations and industry bodies."

"Learn Google Analytics, HTML/WordPress, SQL, Tableau, and Excel to view behavior. Make inferences from behavior (sales, online visits) rather than ask people "why"."

"More education on mobile friendly survey design."

"Find time to think...to discover the things other people miss. Using the creative brain to gain insight."



L&E research

# THE POTENTIAL OF TECHNOLOGY AND OBSERVATIONAL RESEARCH

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Can you observe the future? What about the past? Can you observe something you haven't seen? Watching a movie or reading a book can let our brain contemplate these issues – but not experience it. So until recently, the answer has been mostly 'no'. Observation has always been about what is happening now, and other qualitative techniques have been about "what would you do if….". There are two key developments in technology that have changed the "practical observable universe" – in both number and content – and will continue to do so. With over 2 billion of the 7.4 billion people on Earth on smartphones and social media – over a quarter of the world's population is now in this practical observable universe. The "smartphone" requirement is used to narrow the population, not to limit to a particular tool – though it is the most important one. Traditional ethnography has allowed us to see only 20 people, or 50, or 100.

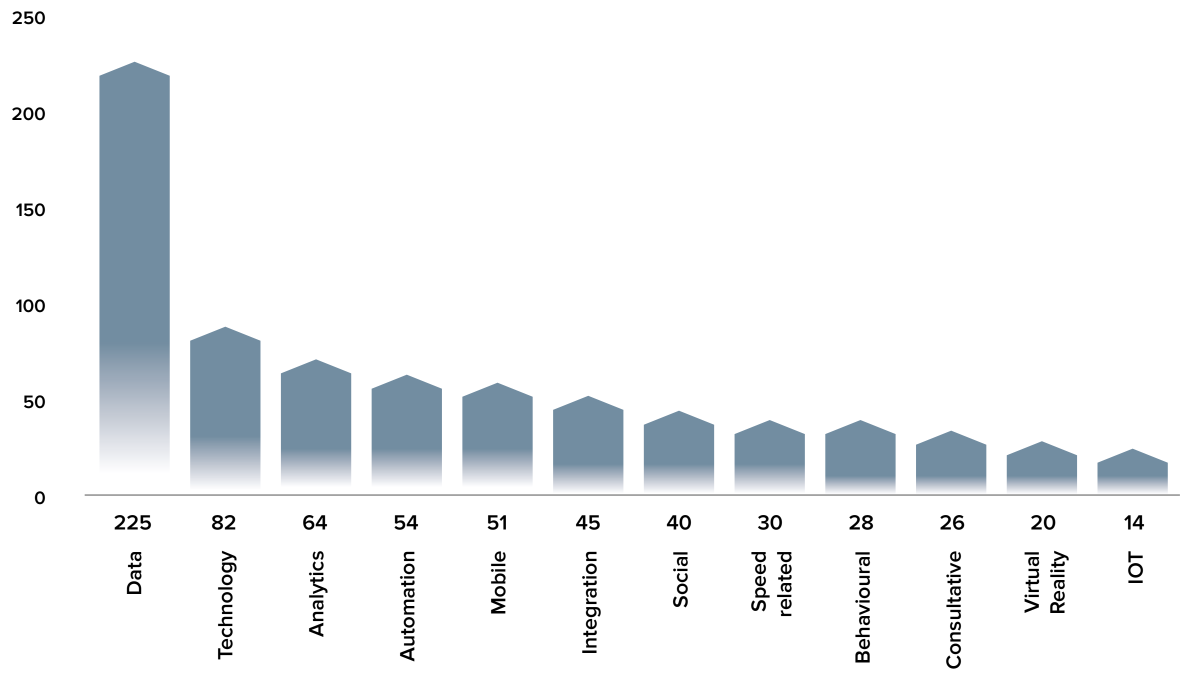
The passive role of our digital footprint allows us to share a lot of information with a lot of different companies. We share this information in ways that we don't often think about – but to which we actively agree – by hitting the "Accept" button, or using sensors, or having a wearable device, or using eye/fingerprint scanning. This information can tell where you are or have been, how you're feeling, what you watched on TV or listened to in your car, what and who you care about, what you shopped for and bought, and what you thought about and then read about online. Amazing information. When you add this information to the more active role of mobile ethnography or qualitative – the depth of information can be as impressive as the breadth. Several industries, other than the spy industry, are doing a good job of utilizing this information. Healthcare uses social media analytics and geo-targeting to identify and manage potential pandemics. The automotive industry is using the Internet of Things and sensors to understand driving styles and personal needs to adapt the time commuting to home more efficiently. These are just a few small examples.

The observable has always been in the present – but not anymore. Virtual reality allows us to experience non-existent situations – and what we would do in those situations – in a way that makes them feel very real. This technology allows us to create situations to understand consumer behavior in a "what if" manner. Projective techniques have often been used for this in a qualitative setting. Virtual reality is the mother of all projective techniques. Now that the headsets work with most popular smartphones and you can purchase them for $2 (I just checked Amazon) – their integration into marketing research is on its way to being ubiquitous. And the use cases – from advertising to product concepts to store layouts – are primed.

The "practical observable universe" is larger now than ever. One concern for learning from this universe is that our industry has lagged many in adopting new technologies (e.g., we still have methodological discussions about adapting to mobile as a data-collection channel). And aggregating and using the data is still a challenge as the "Wal-Mart" of data still doesn't exist – but it can be found, created, and used. The effort is time-consuming – but the benefits can be enormous.

# OPPORTUNITIES FOR THE MARKET RESEARCH INDUSTRY

OPPORTUNITY BUZZ WORDS (NUMBER OF MENTIONS)




## Data!

25% of all the feedback centred around data related opportunities.

"Just look at all that data!"

"We are sitting on a gold mine of data."

"Data. Everybody has access to it and thinks they don't need a researcher or analyst to help them use it. We need to educate our peers on the benefits of working with a researcher to get the most out of data."

"Forming data partnerships."

"Combining big data with market research data in an effective way."

"Complementing other sources of data (BI and Big) by 'human' data."

"Media activation – both in terms of identifying the optimal audience and in measuring impact across media platforms."

We need to educate our peers on the benefits of working with a researcher to get the most out of data

We're uniquely well suited to use advanced analytics to drive actionable analysis rather than generate telephone books worth of useless descriptive data

"Feel like quality control is a thing of the past and it's only about what's fast and cheap"

## Integrating data

Combining new sources of data with traditional techniques is seen as an opportunity for many researchers.

"Data integration opportunities are boundless for our industry"

"Mixing big data and research data"

"Meshing traditional with new data sources to generate future insights."

## Analytics

The opportunities to develop more sophisticated analytics tools is viewed as a big opportunity for our industry.

"Marketing research has a huge opportunity to get a seat at the Data Science table. We're uniquely well suited to use advanced analytics to drive actionable analysis rather than generate telephone books worth of useless descriptive data."

"Leverage existing competence in data processing and analytics and turn it around to apply in a world of big data."

"The convergence of insights and analytics."

"Analytics for social media data and other data sources."

## Automation

Whilst recognised as a threat, automation is seen as a big opportunity for many people in the research industry.

"We have a big opportunity to save time and costs through automation."

"Automation making the business insights link faster and easier."

"Automation allows less time to be spent on the low value work and frees up time spent on the consulting end."

## Mobile

Mobile research has been seen as an opportunity for many years but there is a sense that now we are at the stage where we can really start to exploit mobile data gathering techniques. There were over 50 references to mobile-based opportunities.

"Mobile studies. Potential with apps is huge."

"Mobile! Reaching more people more frequently vs. when they are sitting at a computer."

"It is becoming so much easier to connect directly with consumers using their digital devices."

"Connecting directly with consumers in an online qualitative IDI/focus group with real-time feedback using stimuli and dynamic questioning."

## Technology

There have been so many new and interesting techniques for conducting market research that have emerged over recent years largely fueled by technological innovation. All of these are there to be taken advantage of by market research businesses.

"Embracing new methods, being open to change, adopting technology."

"Continuing to evolve with emerging technologies."

## IOT

What is IOT you may ask? The internet of things (IOT) is providing new ways to conduct research. There were 14 mentions of opportunities to do with IOT but to be fair few suggestions on what actually researchers will do with the "things".

## Faster research solutions

We can gather research and disseminate research information so much faster and many spot opportunities to exploit this.

"The chance to make better decisions faster across the spectrum from Ideation through Launch and renovation."

"To use new methodologies to in fact generate more accurate and actionable results faster and at lower costs."

## Growing understanding of behavioural science

Our growing knowledge and understanding of behavioral science and our access to real behavioral data a is driving range of innovations.

"Confluence of understanding coming from the cognitive and social sciences as to how we truly think/feel/behave"

"Getting better at predicting behavior with triangulation of classic and new tools"

"I think we are getting close to being able to tie behavioral and attitudinal data together in a more systematic way – making the findings more powerful and reliable."

"The chance to leverage behavioural data"

## Becoming more consultative

With access to more data our growing ability to analyze and interpret and combine data will potentially allow us to have a lot more strategic roles within business in the future.

"Adding greater value through integrated analysis of multiple sources resulting in consultative-like recommendations back to the business owners."

"Clients can reach consumers directly in our days: social-media, free research platforms, internal tools... so our focus should be not to reach their targets, but to work as consultants for them, integrating several data sources."

"I think we are getting close to being able to tie behavioral and attitudinal data together in a more systematic way – making the findings more powerful and reliable."

# FINAL THOUGHTS

So what have we learned from this wave of the GRIT report? A few conclusions come to mind:

- The industry is in a period of disruptive change, with some areas being more exposed than others.
- Despite those who want to focus on the service side of the business as the driver of value, GRIT respondents see innovation in technology and process as the drivers of expanded value for the industry.
- The value of human capital is shifting from managing and reporting data to communicating insight and implications effectively.
- How we engage respondents continues to be a hot button issue and a weakness for the industry.
- There's a disconnect between expectations of increases in client spend and supplier revenue.

It's possible that GRIT respondents are more sensitive to what's changing than others due to their natural inclination or engagement with these topics, but we also believe the issues explored in this report are truly reflective of the important challenges before the industry.

We remain optimistic about the industry as a whole; the good news is innovation is occurring, capital is flowing, and awareness of the change is pervasive; the fundamental factors for successful transformation are there, and we believe the industry is taking steps to embrace change. Overall our future is unfolding as expected, and with a little work by industry constituents we can manage it.

Until then, we trust that the GRIT respondents and you, our faithful reader, will take to heart what you've learned herein and go forth to be the change you want to see in the industry as a whole.

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

# RESEARCH & PRODUCTION

### Ascribe

www.goascribe.com

Close the Insight Gap

Make the leap from customer feedback and sentiment to actionable insights with Ascribe Text Analytics and Coding Solutions. Our leading suite of technologies quickly delivers precise, actionable insights to inform decisions and identify opportunities.

### AYTM

www.aytm.com

AYTM's platform is designed with the user experience in mind for both the survey creator and the survey taker. We are mobile-friendly by design and have pioneered techniques to make the complex simple and beautiful. Our live statistics pages give you results in real-time, with stress-free exports into Powerpoint and embeddable charts that are perfect for data dashboards. Our CASRO-approved proprietary panels provide access to over 25 million consumers in 26 countries around the globe. Whether you're looking for a do-it-yourself (DIY) solution, some light consultation, or an expert-run project, we have the tools, sample, and expertise that will get you reliable results quickly

### Dapresy

www.dapresy.com

Dapresy is a global provider of data visualization and data integration software. It enables clients to deploy dynamic KPI-driven marketing dashboards to clearly communicate complex data from markets, users and customers.

### Gen2

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.

### Lightspeed GMI

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.

LUCID

### Lucid

www.luc.id

We make the unknown known. Lucid's global audience platform delivers powerful business insights for advertisers, brands, business consultancies, and other businesses. Lucid is based in New Orleans with offices in London and Gurgaon.

mTAB
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### mTAB LLC

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.

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### NewMR

www.newmr.org

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

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OfficeReports is a plug-in that adds analytical reporting power to Microsoft Office.
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Links all relevant data from Excel to native tables, charts and shapes in PowerPoint.

Researchscape

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We provide you feedback from prospects and customers so that you can make key business decisions about your market. Our consultants write the questionnaire, collect results from your target audience, and send you a detailed report. Starting at $1,995 for surveys of your house email list or for surveys of 350 U.S. consumers.

STAKEHOLDER
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### Stakeholder Advisory Services

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.

# SAMPLE PARTNERS

### ACEI

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

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

### AIP

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.

### AMAI

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.

### AMSRS

www.amsrs.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.

### ARIA

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.

### Asia Pacific Research Committee

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.

### 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

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

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

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

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.

### DC – DatosClaros

www.datosclaros.com

The dynamics of business bring up new questions constantly. Our solutions are based on years of experience and an innovative vision of our activity. This allows us to respond to the needs of our clients in the best possible way.

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www.estime-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

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.

**GIM**

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

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 researchcraftsmen at Lynx and everyone else.

**MRIA**

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.

**MROC Japan –Community Solutions Company**

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.

**MRS**

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.

## MSU MMR

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.

## New York American Marketing Association

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.

## NGMR

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.

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www.andersonanalytics.com/odintext

OdinText is a patented Next Generation Text Analytics software platform built especially for Consumer Insights, CS and CRM professionals. Request more information or a demo at www.odintext.com

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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.

## QRCA

www.qrca.org

QRCA is dedicated to fostering strong education and shaping the industry with innovative techniques and tools. QRCA members are involved in the design, implementation and analysis of qualitative research around the globe. Our goal is to promote excellence in the field of qualitative research by pooling experience and expertise to create a shared base of knowledge.

## SAIMO

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

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

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.

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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.

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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.

**Vision Critical**

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.

**WiRe**

www.womeninresearch.org

Women In Research is the only certified non-profit exclusively committed to connecting and supporting women in the market research community. WIRe facilitates education, entrepreneurship and other career development goals through informal networking events around the globe, an educational webinar series, "Office Hours" online Q&A series and an award winning one-to-one mentoring program.

**Wisconsin School of Business**

bus.wisc.edu

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.

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GutCheck is a global, online agile market research solution that enables our clients to get quick consumer reads to address business questions, whenever they need to be answered. Whether it's scheduled research or an un-planned question, our flexible quantitative and qualitative platform enables us to instantly recruit your target audience. Our full-service team designs and moderates the discussion to give you the insights and confidence you need to react and move your business forward.

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L&E Research connects clients with customers, consumers, medical professionals, patients, business professionals, and more – for virtually any market research project. We are Impulse Survey Top Rated with offices in Raleigh, Tampa, Charlotte, St. Louis, Cincinnati, Columbus and Baltimore. We make efficient and accurate connections through the ongoing development of our software and technology solutions. Our diverse member database of over 400,000 respondents ensures that you find the respondents you need for your project.

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InSites Consulting is the expert in generating extraordinary insights based on people's everyday life experiences using award winning online community, ethnography and survey methods. Our approach increases your "return on insight" as we activate executive audiences to think and act differently.

**Research Now**

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.

### Sentient Decision Science

www.sentientdecisionscience.com

Sentient Decision Science is a behavioral science based research and consulting firm. Sentient was created to bring the visionary advances from the behavioral sciences to the business community in a practical and accessible form in order to move global business forward. Sentient is a globally recognized pioneer in the development of advanced implicit research technology which taps the consumer subconscious and quantifies the effects of emotion on choice. Our implicit research technology is coupled with deep knowledge on the fundamental drivers of human behavior to provide unrivaled insight for our clients.

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### Aha! Online Qualitative Research Technology

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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.

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www.avplanners.com/grit/

AV Planners understands your audio visual communication needs, with well over a decade working alongside boutique and top market research companies.

### C + R Research

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 best-in-class methodologies, high-quality analytical insights and delivering senior-level attention throughout every phase of our clients' projects. We offer an array of customizable techniques for both qualitative and quantitative research, and have focused areas of knowledge and expertise in youth and family, Latinos and Shopper Insights. Our goal is to equip our clients with the insights they need to confidently develop successful brand strategies and grow their business.

### FocusVision

www.focusvision.com

FocusVision is the leading global provider of qualitative and quantitative technology solutions to the market research industry, providing an online survey platform, research facility video streaming, webcam focus groups, ethnography streaming and mobile device usability studies. Our services allow research professionals to engage with respondents in any place, at any time. FocusVision has over 400 employees and offices in the US, the UK, Bulgaria, Singapore and Brazil.

### L&E Research

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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.

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www.surveysampling.com

SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research, SSI reaches respondents in 100+ countries via Internet, telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 30 offices in 21 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's 3,600+ employees serve more than 2,500 clients worldwide.

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