



# GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT



# CONTENTS

- 4 Welcome
- 5 Executive Summary
- 6 Methodology and Sample
- 13 Adoption and Consideration of Automation Platforms
- 29 The Future of Sampling
- 38 Is Market Research Ready for GDPR?
- 47 Blockchain: Opportunity or Hype?
- 57 Business Outlook
- 71 Meeting Project Goals
- 79 GRIT Top 50 Most Innovative Suppliers
- 89 GRIT Top 25 Most Innovative Clients
- 96 Market Research Industry Lumascope
- 106 GRIT Regional Focus: Latin America
- 108 ADDENDUM: Corporate Researchers Speak About Conferences
- 111 Final Thoughts
- 112 Acknowledgments



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## COMMENTARY

- 18** Breaking Down Barriers to Reach the Consumer and Transform Your Business – *Zach Simmons, Discuss.io*
- 20** Something Old, Something New: The Evolution of Automation in Research – and Why It's a Net Gain – *Bob Fawson, Research Now SSI*
- 25** Start Your Engines. Choosing the Right Vehicle for Your Automation Adventure – *Shanon Adams, AYTM*
- 27** The Future of Marketing Automation: Faster and Cheaper Isn't Enough – *Steve Phillips, ZappiStore*
- 42** GDPR: Market Research Industry's Competitive Edge – *Richard Thornton, Cint*
- 44** GDPR in Practice – *Finn Raben, ESOMAR*
- 52** Blockchain – A Far Off Future in Research – *Rick Kelly, FUEL CYCLE*
- 54** Blockchain Enables a New Relationship Between Brands and Consumers – *Stephan Shakespeare, YouGov*
- 60** Delivering ROI so Everyone Wins – *Carl Wong, LivingLens*
- 67** Hyper Customization: What's Possible on a Small Budget – *Raj Manocha, Methodify*
- 69** View Technology as Tools, Not as Insights – *Rebecca West, Civicom®*
- 75** How a Brand Insights Team Can Deliver More Impact – *Jim White, RealityCheck Consulting*
- 77** Project Success in the Insight Economy™ – *Margaret Mueller, Shapiro+Raj*
- 94** Three Ways To Be An Innovative Client – And Three Reasons You Should Want To Be – *Leigh Caldwell, Irrational Agency*
- 104** Audiences Are the New Norms: Activating Strategy in a Modern, Agile Way – *Matt Warta, GutCheck*

# OUR PARTNERS...







# WELCOME

Welcome to the 23rd edition of the **GreenBook Research Industry Trends Report**, using data collected in Q1 and Q2 of 2018.

This edition features the “GRIT Top 50” rankings of research suppliers and “GRIT Top 25” client companies perceived to be the most innovative (the closest thing to a brand tracker for the industry), as well as our expanding exploration of automation, issues surrounding sample, research budgets, and changes in the business of insights.

As new topics become pertinent, we roll them into the study. In this report, we investigate both GDPR readiness, and perceptions of blockchain and its potential impact on insights. We also look at how well research projects actually deliver on organizational needs.

For the first time ever, we have developed a map of the industry (a *lumascape*) based on granular self-categorization of GRIT respondents by their companies' focus and positioning. We hope to utilize this new segmentation model in the future to better frame the insights industry and understand its dynamics.

Findings in this report are powered by the biggest GRIT sample ever, with 3,930 completed interviews globally! Although we're still not quite at the “representative” level across many world regions, we are getting close and are confident about the strength and reliability of the GRIT report's directional

implications. In keeping with the GRIT spirit of transparency and collaboration, we have made the the data available to everyone for further analysis.

So, what is the upshot here? The industry remains under intense transformative pressures and GRIT continues in its attempt to understand what's taking place to formulate the implications for today and tomorrow. We think this report does it rather well and we hope you will agree.

As always, we couldn't do this alone: our authors, commentary providers, sample partners, advertisers, and most especially research partners make this all possible. Special thanks goes out to the organizations who helped with data collection and analysis, including AYTm, Azure, KnowledgeHound, OdinText, and OfficeReports. We acknowledge all authors, analysts, and others involved in making it happen at the end of the report; check them out.

One final note: please let us know what you think; what could we do better, and what should we focus on next? The GRIT effort is “by the industry, for the industry” so your input is essential to ensure we meet your needs.

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



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

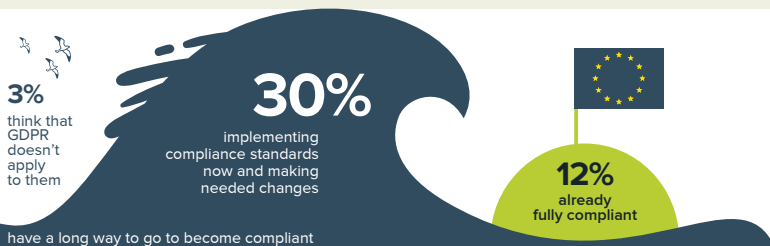




# EXECUTIVE SUMMARY

## IS THE INDUSTRY READY FOR GDPR?

Only half of GRIT respondents were familiar with GDPR. Of them, less than 1 in 4 are ready for it. The clock is ticking and there is much work to be done by many companies to be in compliance with GDPR.

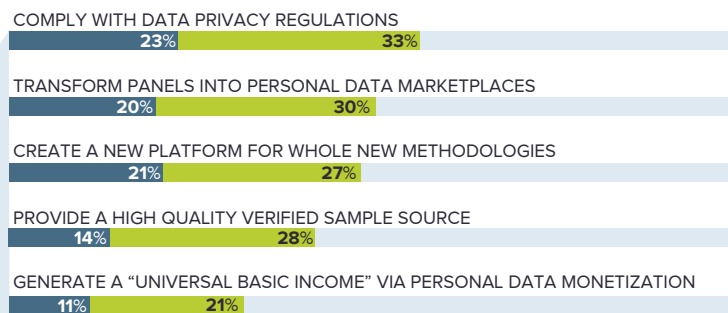


50% BLISSFULLY UNAWARE

## BLOCKCHAIN: HYPE OR HOPE?

Only 40% of GRIT respondents were familiar with blockchain, and for the majority of them, the vote is out, with most taking a "wait and see" approach on the potential use and impact of this technology for research.

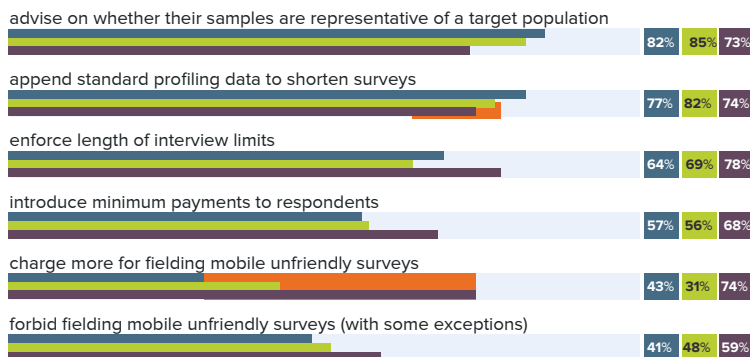
Where does the potential of Blockchain technology lie?



## GRIT 10 MOST INNOVATIVE CLIENTS



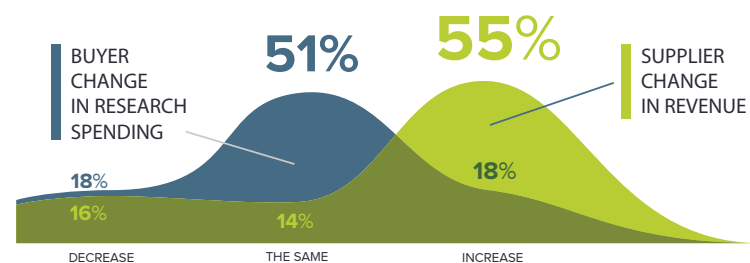
## TO IMPROVE SAMPLE QUALITY SAMPLE PROVIDERS SHOULD...



A plurality think sample quality is getting worse, but the industry remains resistant to solutions that impact cost or limit study design.

Substantial differences remain around cost and the LOI restrictions.

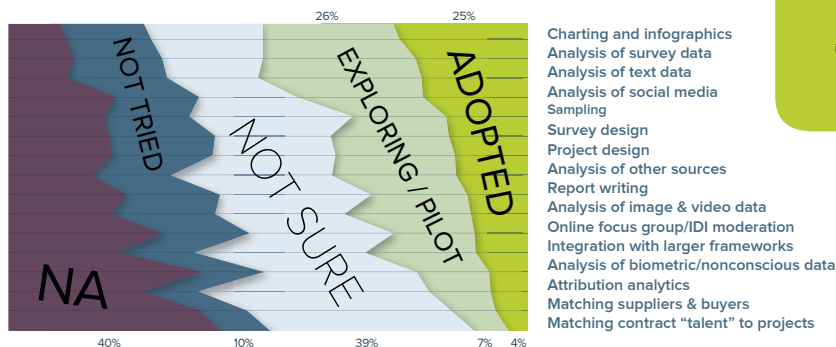
## BUSINESS IS GOOD!



Suppliers, especially those who are smaller, newer and more "tech-driven" report an increase in revenue while clients mostly are holding the line, with some growth in budgets.

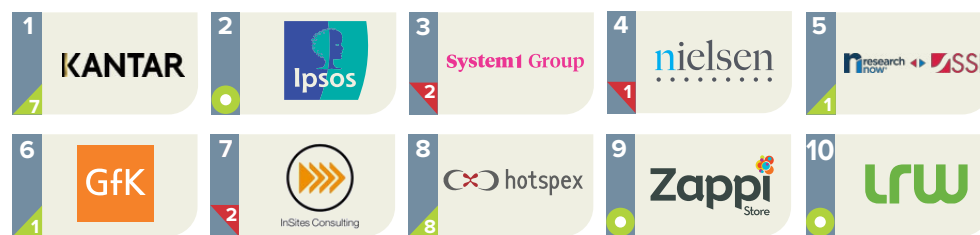
14% were not sure on both sides

## ADOPTION OF AUTOMATION



What can be automated will be automated, and not only is adoption reaching maturity for many functions, but business impact is being felt across the industry.

## GRIT 10 MOST INNOVATIVE SUPPLIERS



# METHODOLOGY AND SAMPLE

GRIT respondents are recruited via email and social media channels by GreenBook and GRIT partners. These lists are comprised of both research providers and clients. The sample size for this GRIT edition is significantly larger than for previous editions, which is wonderful in many ways, but some variances should be expected in certain findings based on sample artifacts. Overall, we see the composition of the sample remaining fairly stable both in terms of firmographics and regionality while increasing in volume. Nonetheless, variances do exist and we attempt to call those out in the written narrative of the report where we believe it is pertinent. Since sample quality is a topic we explore in this study, we think it's worth mentioning that it is an issue we pay attention to as well.

Because of the unique sampling approach we use, once all surveys are completed, we go through a rigorous cleaning process to remove duplicate responses, low quality responses (it does happen, even with researchers as the sample universe), and any other types of response that we determine to be subpar. In this wave, we deleted over 500 completed interviews, because they did not meet our quality standards.

For this report, the analysis is based on 3,930 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.

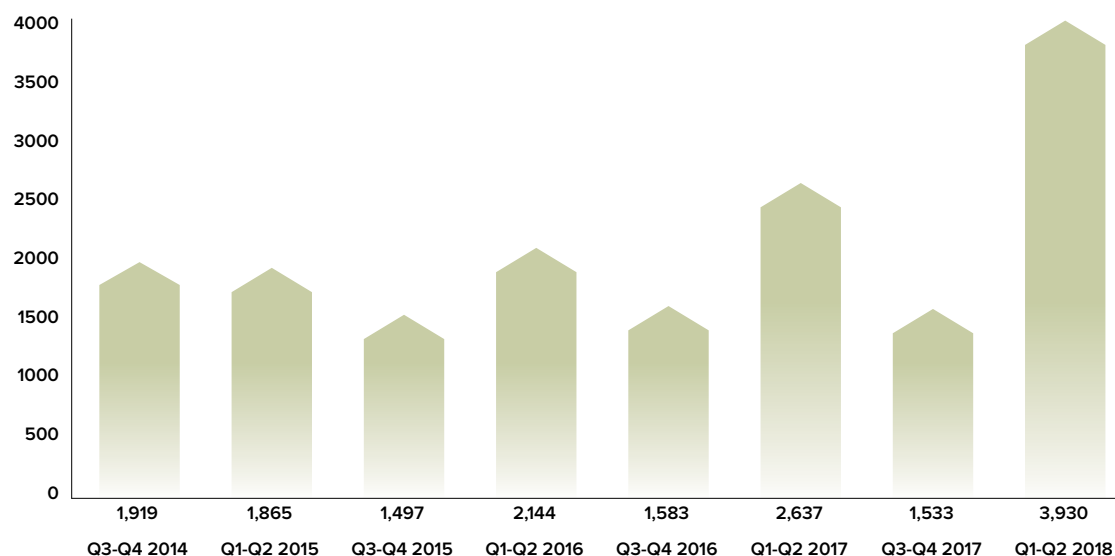
A note on naming conventions for all trending data: GRIT editions are described by the time period each study was fielded and published. This is the Q1-Q2 2018 edition because data collection occurred in March and April of 2018 and it is being published in Q2.

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

The sample size for this GRIT edition is significantly larger than previous editions

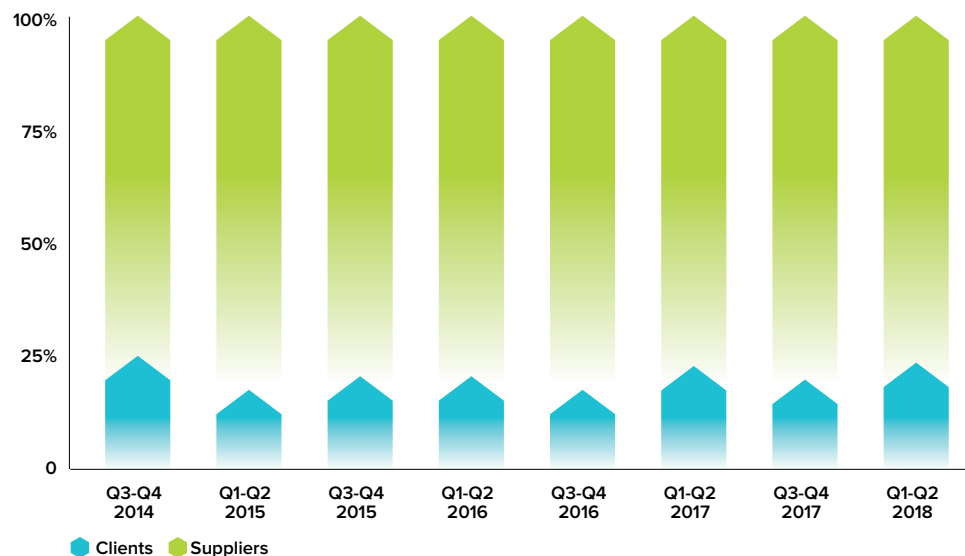


GRIT SAMPLE SIZE TREND



## METHODOLOGY AND SAMPLE

## BUYERS VS. SUPPLIERS TREND



The mix of respondents has stabilized over the past few waves in terms of percentage, while increasing in net sample size. For this wave, the distribution of clients vs. suppliers is detailed in the table below:

RESPONDENT TYPE	FREQUENCY	PERCENT
Insights buyer or client	981	25.0%
Insights provider or supplier	2949	75.0%
TOTAL	3930	100.0%

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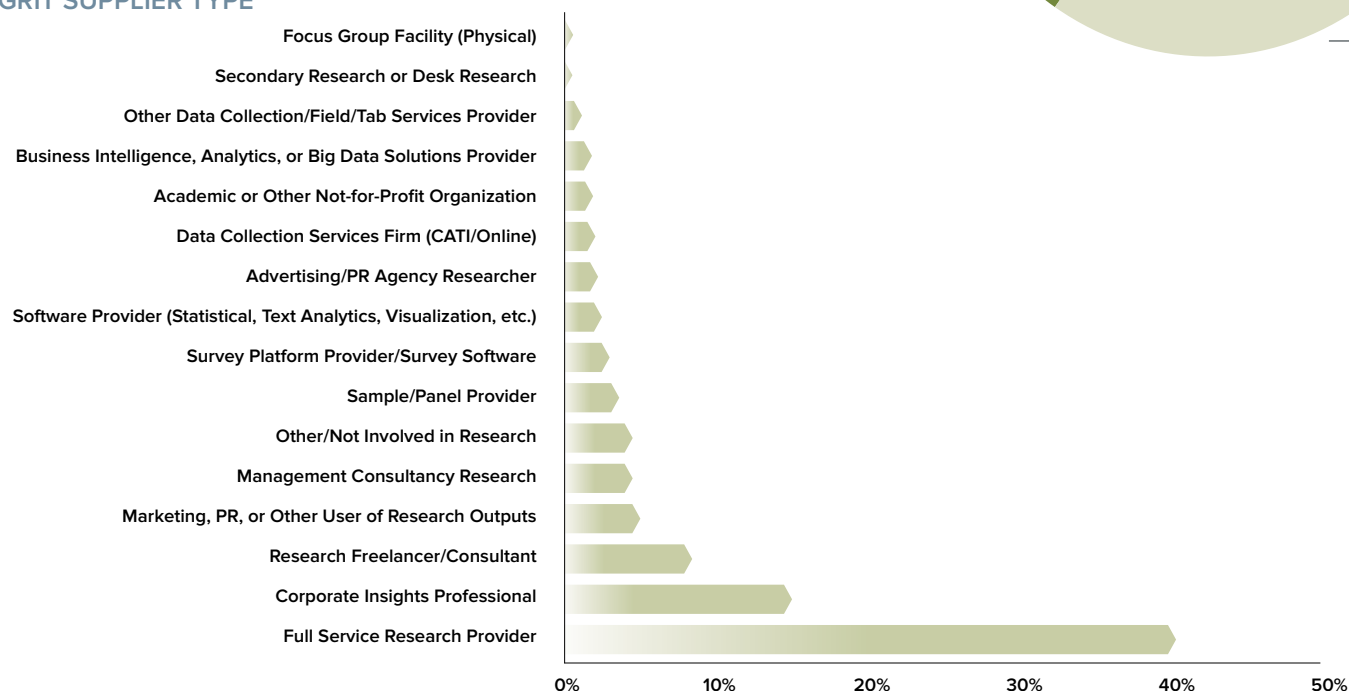
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## METHODOLOGY AND SAMPLE

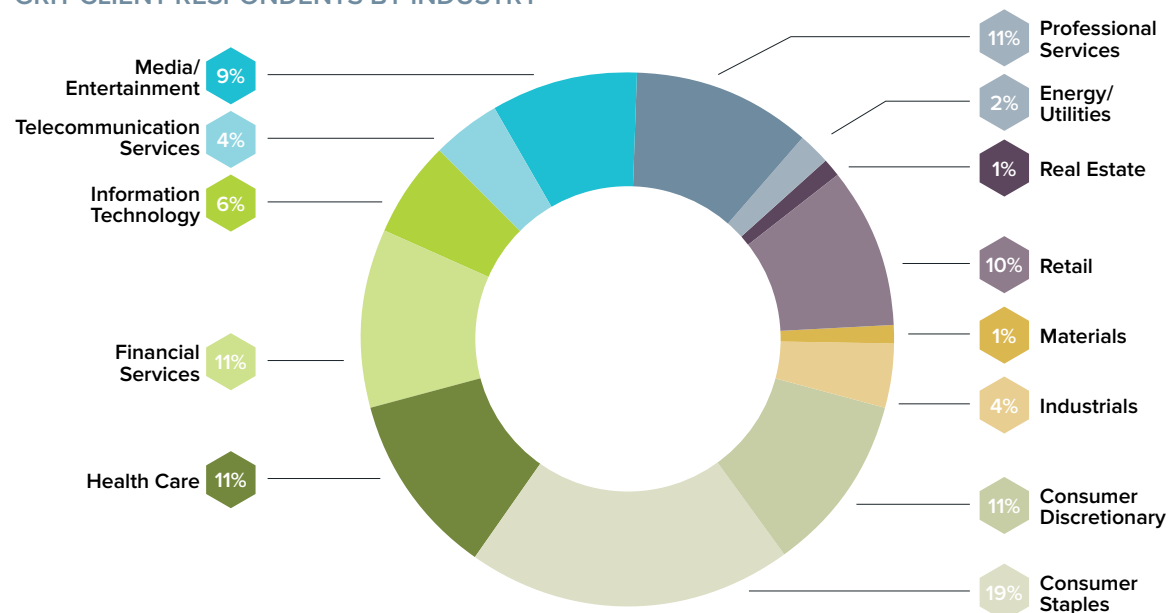
GRIT sample is comprised of a robust cross-section of the various sectors of the industry, although over 40% of respondents describe themselves as working within a full-service agency vs. any other organization. Proportionally, representation from all industry sectors has remained relatively constant across the last five waves of the study.

Client-side respondents are equally well distributed and roughly analogous to other industry data on research spend by vertical, meaning again that GRIT data is close to representative of the makeup of the industry as a whole.

### GRIT SUPPLIER TYPE



### GRIT CLIENT RESPONDENTS BY INDUSTRY



Proportionally, representation from all industry sectors has remained relatively constant





## METHODOLOGY AND SAMPLE

Regional sample sizes remained proportionally consistent, with increases in the number of completed interviews within each region. North America was perhaps over-represented based on global contribution to industry sizing estimates. However, considering the overall leadership position of North America in the global market, we believe the impact of any oversample is negligible for our purposes of identifying trends.

LOCATION	FREQUENCY	PERCENT
North America (US, Canada & Mexico)	2179	55.4%
Central and South America	145	3.7%
Europe	1230	31.3%
Middle East & Africa	80	2%
Asia	183	4.7%
Australia, NZ & Pacific Islands	113	2.9%
TOTAL	3930	100.0%

The table above is indicative of where the organizational headquarters of each respondent is located. We collected separate data on where the individual respondent was located, and all additional regional breaks in the report are based on the respondent location vs. the HQ location.



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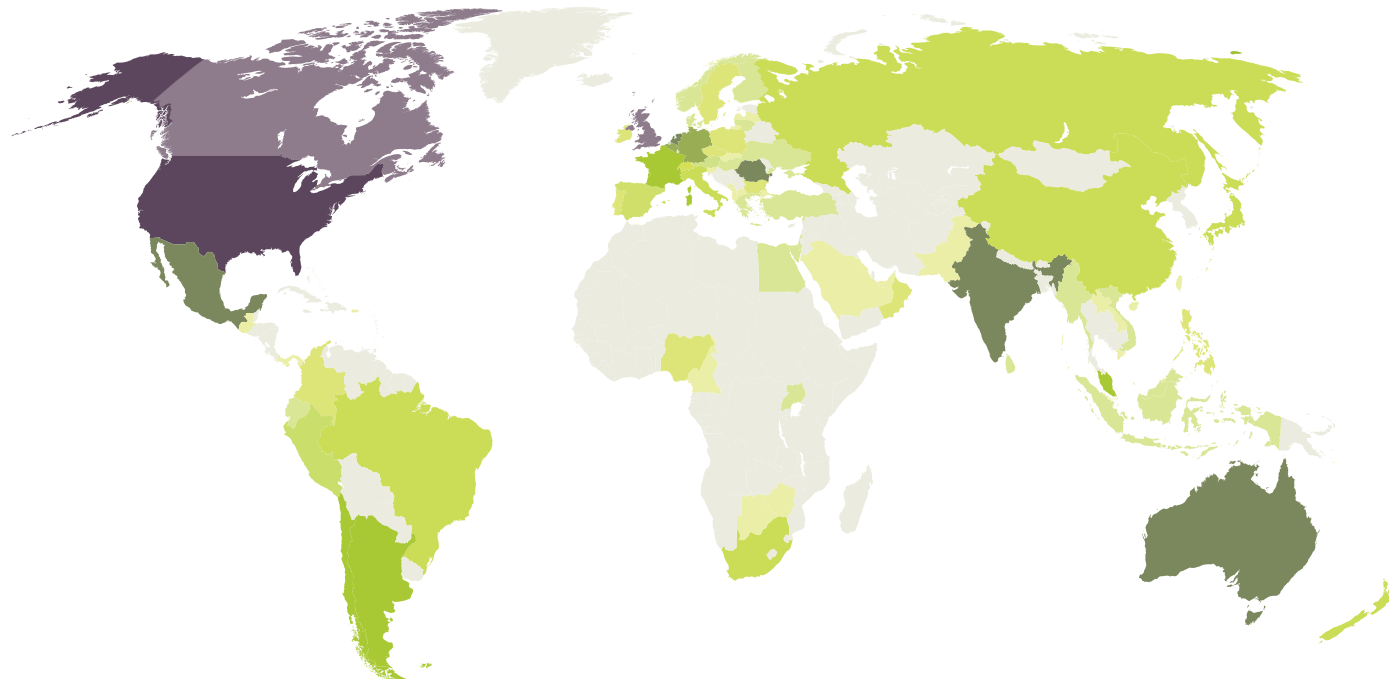
## METHODOLOGY AND SAMPLE

In total, 87 different countries are represented within the sample, with respondent density shown in the map on the right.

For several years now, GRIT has been a truly global study, giving a view of the industry around the world, and that is more true than ever in this wave. In terms of completes, the top ten largest contributors to GRIT by country were:

COUNTRY	FREQUENCY	PERCENTAGE
United States	1923	49%
United Kingdom	446	11%
Canada	377	10%
Romania	116	3%
Mexico	110	3%
India	104	3%
Netherlands	97	2%
Australia	96	2%
Belgium	91	2%
Germany	90	2%

### RESPONDENT DENSITY



GRIT respondents generally fall into three camps, with roughly 30% being from small (under 11 people) organizations, 30% from mid-size (between 11- 100 people) organizations, and 40% from larger (over 100 people) organizations. This has remained broadly consistent over the last several waves as well and, despite the larger sample size in this wave, remained in line with past data. We believe this distribution is largely consistent with the makeup of research organizations in the industry.

In total, 87 different countries are represented within the sample

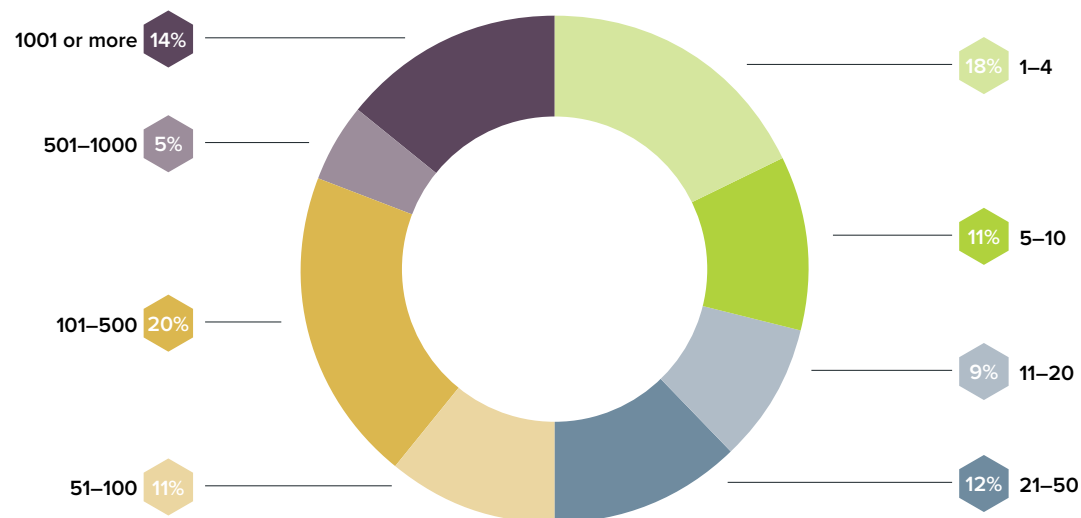


## METHODOLOGY AND SAMPLE

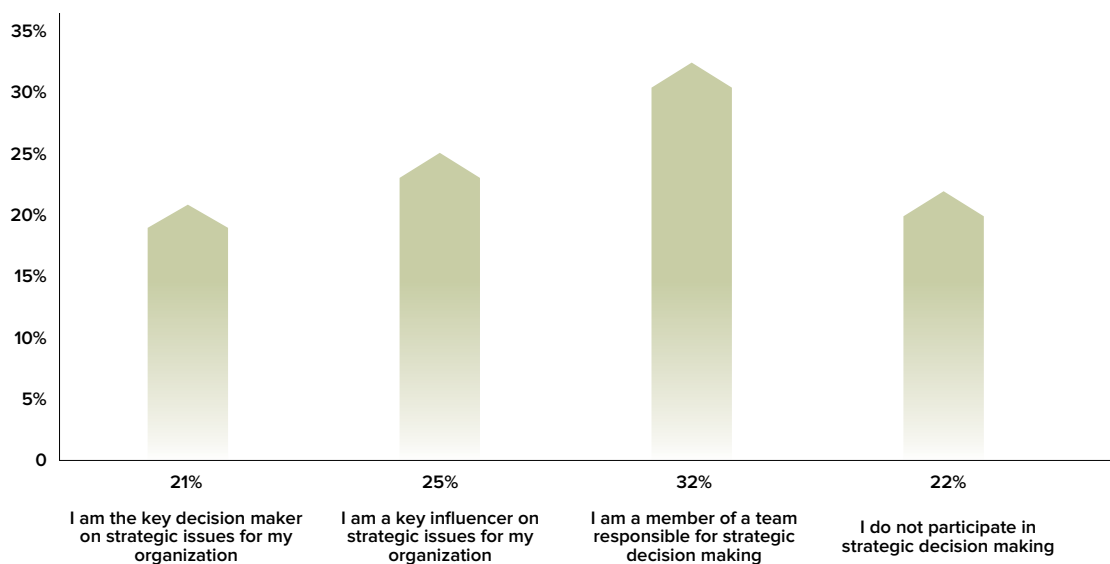
Almost 50% of GRIT respondents are in senior-level roles within their organizations, thus ensuring that this data is largely reflective at both an organizational level as well as at a personal level.

New in this wave, we also asked respondents to select their level of decision-making participation and found that just less than 80% are what we could consider “senior decision-making participants”, with the remainder working primarily at an operational level.

### GRIT RESPONDENTS BY RESEARCH ORGANIZATIONAL SIZE



### GRIT RESPONDENT DECISION MAKING ROLE



Almost 50% of GRIT respondents are in senior-level roles within their organizations, and almost 80% are senior decision-making participants



## METHODOLOGY AND SAMPLE

When we cross-reference organizational roles with decision making, we get an expected yet still interesting snapshot of how roles in the industry correspond to decision-making empowerment.

## THE BIG PICTURE

The GRIT sample population continues to grow in size and reach globally, while being made up of a relatively diverse group of participants in terms of the sectors, categories, company size, and seniority they represent. That being said, GRIT clearly attracts a relatively senior group of respondents from the largest markets in the world. We interpret this to mean that GRIT represents the views of the industry as a whole, while being particularly relevant to those who want to understand what senior leaders think.

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

Which of the following describes your decision making involvement for your organization?	I am the key decision maker on strategic organization	I am a key influencer on strategic issues for my organization	I am a member of a team responsible for strategic decision making	I do not participate in strategic decision making
Base	823	977	1,271	859
Owner	51%	2%	1%	0%
Partner or part owner	19%	8%	2%	0%
Principal	6%	2%	1%	0%
C-Suite	5%	3%	1%	0%
Executive Management	5%	10%	4%	0%
General Manager	1%	3%	2%	1%
Vice President	3%	12%	9%	4%
Group Director	2%	14%	8%	1%
Group Manager	1%	7%	7%	4%
Research Director	2%	17%	17%	11%
Project Manager	1%	7%	19%	27%
Department Head	1%	6%	8%	3%
Associate	0%	2%	9%	16%
Professor/Instructor	0%	1%	1%	1%
Research Assistant	0%	1%	4%	11%
Other title (please specify)	1%	5%	7%	18%
Total	100%	100%	100%	100%

The data represents the views of the industry as a whole, while being particularly relevant to those who want to understand what senior leaders think



# ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

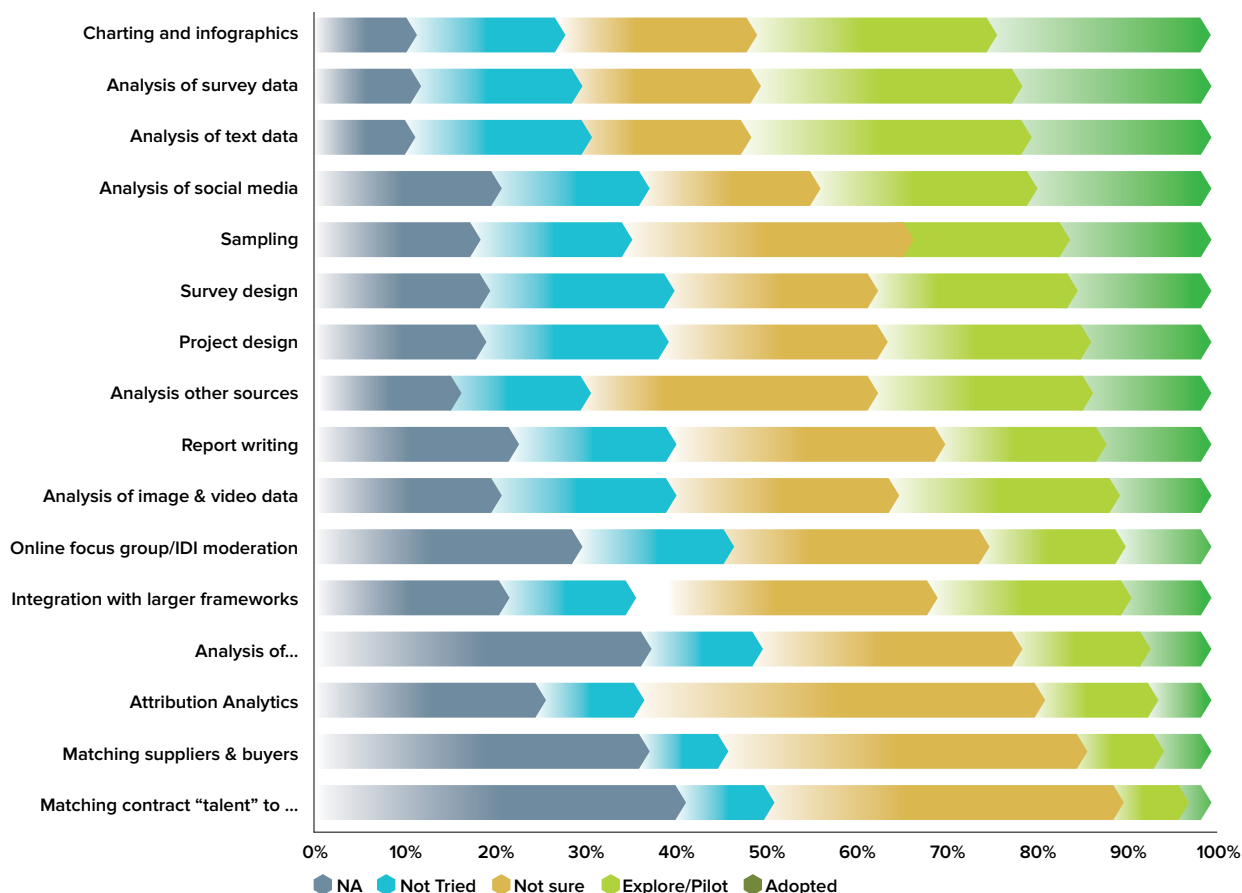
Automation continues to be one of the key topics of conversation in market research. In 2017, we created a benchmark for the adoption of automation, and this year we have re-visited the topic to evaluate the latest trends and changes.

## Automation is widespread in market research

Many organizations have adopted automation platforms, and this is especially true in the area of quantitative research. This widespread adoption is illustrated in the chart on this page. The dark green sections show areas where automation platforms are already in widespread use, and the light green shows where they are being explored and/or piloted.

The top four categories all have 20% or more organizations saying they have already adopted them, and in combination with those who are piloting and/or exploring these approaches, the numbers are around 50%. The top four areas of automation include charting, analysis of survey data, analysis of text data, and analysis of social media. However, as we shall see later in this section the numbers have fallen a little from 2017 to this year.

## AUTOMATION ADOPTION ACROSS PLATFORMS





## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

### Link between experimentation and adoption

The pattern between adoption and experimentation is generally similar; the more people are using something, the more others are experimenting with it. However, if you look at the chart on previous page, you will notice some interesting exceptions. In particular, “analysis of image and video data” and “integration with larger frameworks” both have larger numbers of people experimenting/piloting than the number of organizations who already have them in widespread use. These are clearly two areas where the change might be even faster than the rate of change for automation in general.

### When Not Applicable

In analyzing the automation of tasks and functions, it is important to consider the extent to which an organization conducts that activity. If an organization does not conduct an activity, then it is unlikely to automate it. The chart shows that 41% of organizations say they do not “Match contract talent to projects”, 37% are not “Matching suppliers & buyers” and 37% do not conduct “Analysis of biometric/nonconscious data”. Whether these functions become more mission critical as the industry evolves with automation in general is unknown, although we suspect internal processes and business models will adapt and we will see growth in experimentation in these areas in the future.

The top areas of automation include charting, followed by analysis of survey data, analysis of text data, and analysis of social media



## COMPARISON WITH 2017

The chart on the next page shows the data for 2017 and 2018, including two items that were not asked in 2017. The data shows the combination of Adopted and Piloting/Exploring, producing a net “in use” figure.

The first key message is that the tasks that are being automated most in 2018 are very similar to those in 2017 – the r-squared value between the two is 91%. The top five tasks in 2018 were the top five in 2017. Note, two items have been added to the list, “Analysis of data from other sources” and “Integration with larger frameworks”, which can’t be compared with 2017.

### Narrowing of Focus

The second message is that the numbers from 2018 are slightly lower than 2017. One possible explanation that we should keep in mind is sample wobble, a possibility that will be clarified when the next wave of data is collected. However, we can speculate about other possible reasons. The Q3-Q4 2017 GRIT edition suggested that in terms of new techniques, there had been a narrowing of focus, as companies focused on monetizing some of the things they had been trialing over the previous few years. This narrowing of focus in terms of automation adoption may represent a similar interest in maximizing the performance and costs savings that

The tasks that are being automated most in 2018 are very similar to those in 2017



## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

automation offers. The “narrowing of focus” hypothesis is further supported by the increase in the use of the answer “Not applicable to our organization”, which is a statement of what an organization does not do. For example, when comparing 2017 and 2018 responses, “Matching contract talent to projects” the Not Applicable value increased from 38% to 41%, “Analysis of biometric/nonconscious data” NA increased from 35% to 37%, and “Online focus group/IDI moderation” NA increased from 25% to 30%.

Another question to consider is when does automation cease to be automation and simply become mainstream? Most researchers are using computers for a wider variety of tasks, all of which would have counted as automation in the past. For example, most survey research is conducted via online research, which would have counted as automation in the past, and most charts are produced not with a pen and graph paper, but at the push of a button – but we do not think of these as automation in 2018. As automation becomes common, we tend to stop calling it automation.

The one task that has showed an increase in automation adoption from 2017 is Project Design. Project Design is a good area to keep an eye on, as this is a task where AI could make a big difference. At the moment, it can be slow, expensive, and error prone, but automation could make Project Design faster, cheaper, and better.

## COMPARING AUTOMATION ADOPTION

AUTOMATED TASKS	USE 2017	USE 2018	CHANGE
Analysis of text data	53%	52%	-1%
Analysis of survey data	56%	51%	-5%
Charting and infographics	56%	51%	-5%
Analysis of social media	46%	44%	-1%
Survey design	41%	38%	-3%
Analysis other sources	*	38%	NA
Project design	29%	37%	+7%
Analysis of image & video data	36%	35%	-1%
Sampling	42%	34%	-8%
Integration with larger frameworks	*	31%	NA
Report writing	32%	30%	-2%
Online focus group/IDI moderation	36%	26%	-10%
Analysis of biometric/nonconscious data	25%	21%	-4%
Attribution Analytics	26%	19%	-7%
Matching suppliers & buyers	17%	15%	-2%
Matching contract “talent” to projects	16%	10%	-6%

The rows are ranked in descending order of “in use” in 2018.

The one task that has showed an increase in automation adoption from 2017 is Project Design



## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

## BUYERS VERSUS SUPPLIERS

The table in this section shows the automation adoption rate for clients compared with suppliers and is sorted by the difference (i.e. Client minus Supplier values).

Of the 16 tasks, 10 of them showed relatively small differences (from -5% to +5%).

There are 5 tasks where research suppliers report higher levels of automation adoption. These 5 areas, from Report Writing to Charting and Infographics, relate to the design/implementation of projects, and the creation of finished outputs – and are focused on survey research.

Clients are well ahead of suppliers in adopting automation for the analysis of social media data. 55% of clients say they have automated tasks, but only 41% of suppliers are saying this. This replicates findings from previous editions. Clients seem to be more engaged with analyzing social media, compared with suppliers, which would support the view that clients are sourcing large amounts of social media analysis from non-market research sources.

However, it might also be true that clients, as a group, have a common need to have social media analysis done, but only a few suppliers specialize in it. A lot of the analysis might come from research sources, just not spread across companies that don't supply it (such as sample providers).

## COMPARING AUTOMATION BETWEEN CLIENTS AND SUPPLIERS

AUTOMATED TASKS	CLIENT	SUPPLIER	DIFFERENCE
Charting and infographics	42%	54%	-13%
Sampling	27%	36%	-9%
Survey design	32%	40%	-8%
Analysis of survey data	45%	53%	-8%
Report writing	24%	32%	-8%
Project design	33%	38%	-5%
Analysis of text data	50%	53%	-3%
Matching suppliers and buyers	13%	15%	-3%
Analysis of image and video data	35%	36%	-1%
Matching contract “talent” to projects	10%	10%	0%
Analysis of biometric/nonconscious data	22%	21%	0%
Online focus group/IDI moderation	28%	25%	3%
Analysis of other data sources	40%	37%	3%
Attribution Analytics	22%	18%	4%
Integration into larger organizational business intelligence frameworks	35%	30%	5%
Analysis of social media data	55%	41%	15%

Clients are well ahead of suppliers in adopting automation for the analysis of social media data



## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

## DIFFERENCES BY REGION

The table in this section shows the differences in terms of four broad regions. The four regions that are North America (USA, Canada, & Mexico), Europe, APAC (Asia Pacific region), and the Rest of the World.

The tasks are sorted in descending rate of adoption at the global level. The color coding for the regions ranges from bright green for the highest values (e.g. APAC's 59% for "Analysis of text data"), through to bright red for the lowest values (e.g. Europe's 9% for "Matching contract talent to projects").

The last two columns spell out which region has the highest and lowest rate of adoption for each task. This information duplicates the information in the tables and the colors – but makes things easier to read.

The main message from this data is that the global picture is also the picture in each region, with a few subtle differences. For example in the Rest of the World area, "Analysis of text data" is a bit lower (perhaps because of the number of languages not well supported by automated techniques in these countries), and "Charting and infographics" is a bit higher at 59%.

North America and Europe tend to score slightly lower than Asia Pacific region and the Rest of World in terms of adoption of automation. This could be because the GRIT study is able to reach a bit deeper into the market research and insights profession, which could result in slightly lower scores. Also, as mentioned before, automation is a term we tend to use for new automation. As a new approach becomes a standard, it often ceases to be seen as "automation" – which could account for

## COMPARING AUTOMATION ADOPTION ACROSS REGIONS

Regions	N. America	Europe	APAC	RoW	Highest	Lowest
Analysis of text data	52%	52%	59%	42%	APAC	RoW
Analysis of survey data	49%	55%	58%	52%	APAC	N.America
Charting and infographics	49%	53%	54%	56%	RoW	N.America
Analysis of social media data	44%	42%	52%	48%	APAC	Europe
Survey design	37%	39%	43%	39%	APAC	N.America
Analysis of other data sources	38%	37%	42%	38%	APAC	Europe
Project design	35%	39%	44%	39%	APAC	N.America
Analysis of image and video data	34%	38%	39%	33%	APAC	RoW
Sampling	33%	34%	38%	36%	APAC	N.America
Integration into larger organizational business intelligence frameworks	33%	30%	33%	27%	APAC	RoW
Report writing	28%	33%	34%	32%	APAC	N.America
Online focus group/IDI moderation	24%	25%	35%	34%	APAC	N.America
Analysis of biometric/nonconscious data	21%	22%	21%	25%	RoW	APAC
Attribution Analytics	21%	15%	22%	15%	APAC	RoW
Matching suppliers and buyers	14%	16%	17%	16%	APAC	N.America
Matching contract "talent" to projects	10%	9%	12%	17%	RoW	Europe

some of the lower scores in North America (a market often associated with the early adoption of technology).

Note the four regions are not equal in terms of the dollar values of research conducted. According to ESOMAR's 2017 Global Market Research Report, North America accounts for 44% of global research spend, Europe 36%, APAC 15%, and the Rest of the World about 5% (although the volume figures would be different). The amount of money spent in a region or country will be one of the drivers of developments in automation.



## BREAKING DOWN BARRIERS TO REACH THE CONSUMER AND TRANSFORM YOUR BUSINESS

### Zach Simmons

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**T**he GRIT Report serves as an excellent resource for us to discover new trends, technologies and innovations. Ultimately, however, when you look at all of these tools and innovations in tandem, they are all attempting to achieve one sweeping goal: to better understand the consumer.

For all of the billions of dollars spent on research and for all of the methodological approaches and rigorous standards for research best practices, we still seem to have barriers holding us back from understanding our consumers. Over time, research has made itself too expensive, too time consuming and too often siloed from key stakeholders and decision makers across the enterprise. At its origin, qualitative research was simple. A conversation, first conducted door-to-door, later with focus groups and IDIs, created an opportunity to discover insights about consumers' daily lives. As the industry evolved, those conversations became increasingly hard to justify with high expenses and tight time constraints. And yet, the need for qualitative insights has never been greater.

While GRIT highlights some of the inventions that are transforming the world of insights, it reveals the barriers to adoption, as well. What would happen if we broke down those barriers and made the consumer accessible again?

We could get back to understanding and building empathy for the consumer. We could get back to having consumer conversations that reveal insights. At all levels of the organization.

Budgets are tight. Brands need to make agile decisions. The fight for market share is more urgent every day. Data can expose behavior, but it cannot reveal insights into motivations and need states. This provides challenges and opportunities for research to innovate and reinvent itself.

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We embrace technologies to facilitate our professional and personal lives. By highlighting the topic of automation, this year's GRIT Report proves that research is no exception to that rule. We see the adoption of tools and platforms that simplify processes and automate cumbersome tasks as promising steps towards achieving faster and better consumer engagement. The report includes statistics about automation and intentions to experiment with new techniques, including webcam interviews (41.5% say they currently use, 22.6% say it's under consideration). With the increasing popularity of video platforms in consumers' own lives, webcam interviews are revolutionizing the ways in which researchers are reimagining scalable, affordable qualitative research.

At Discuss.io, we have taken cues from the consumer world and injected those trends with SaaS functionality in order to fulfill a business need. Specifically, we have taken the popularity of live video, combined with the desire to

understand consumers, and created a technology that allows the age-old activity of having conversations to be systematized, organized, archived and accessed rapidly and at scale. We look at the steps that make talking with consumers challenging and we automate the process where technology can serve a useful purpose. We streamline the steps so that more time can be left for what's important: asking questions, uncovering meaningful insights and interpreting what they mean to the brand. In simplifying the process, we remove barriers and are able to democratize access to the consumer across the organization.

That is the challenge to the entire industry. Fundamentally, we should all be harnessing technology that makes it easier for brands to gain better understanding of what makes consumers tick. Research is no exception to the rule: it is just as important for research strategies and teams to evolve, innovate and take advantage of automation.





## SOMETHING OLD, SOMETHING NEW

### THE EVOLUTION OF AUTOMATION IN RESEARCH – AND WHY IT'S A NET GAIN

#### Bob Fawson

EVP of Product Development, Research Now SSI

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

**T**he impression today is that automation in research is a newly emerging phenomenon, potentially upending the field and its practitioners.

The reality is more nuanced; everything old is new again as automation is now being applied to some aspects of the research process for the first time.

But many other elements of research have been automated for years – online sampling would be impossible without automation.

So why the alarm?

Automation can undeniably be a disruptive force; it has reshaped the competitive landscape in sampling, even as it has enabled access to high quality, diverse samples, quickly and at scale.

In addition, the march of automation is not always perfect. When automation was first applied to sample blending, sample routing and sourcing, results were uneven. Some providers did it well, others not so well. Now, however, responsible users of sample routers are able to provide

survey data more quickly than ever before, with no loss of accuracy or trustworthiness. As a result, businesses can operate with greater agility in identifying and meeting the needs of their customers.

#### **The progression of automation in research in a simple framework**

Digital data ingestion and manipulation, fed by structured online surveys, replaced manual processes and greatly improved the speed and reliability of survey research. This is perhaps the simplest example of research automation.

As computing power increased, and online data permitted the creation of large datasets, the automation of survey sampling, blending and routing challenged traditional research methods. In this instance, automation changed the

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industry landscape by creating new companies and entirely new expectations in a digital age for speed, value and agility.

The explosion of survey data made available by the automation of online research virtually demanded automated processing and data processing techniques such as text analytics, coding, categorization and others. As with previous innovations, early attempts in these areas could lead a researcher to make incorrect conclusions, but today there are many capable solutions which continue to improve.

### **The current frontier, and beyond**

Machine learning and artificial intelligence, along with the exponential increase in available data is inaugurating yet another wave of disruptive automation, necessitating better, faster data-supported guidance.

Today, we are automating data analysis and display in an effort to provide faster, more iterative data without sacrificing quality. These tools have been incorporated into offerings such as our end-to-end automated research platform and our campaign effectiveness solution.

Automated access to relevant data only makes the insight professional's role more productive. For the foreseeable future, human intelligence is still required to synthesize qualitative, quantitative and organizational observations into actionable insight.

Automated charting of cross-media campaigns, for example, cannot tell marketing professionals how to allocate their media spending, but the data visualizations enable planners and buyers to quickly grasp complex data results from multiple media channels to make informed judgments.

If history repeats itself, we should embrace automation. Early challenges will yield new successes; providing more opportunities to help shape the world around us with faster, accurate and agile insights.

Ultimately, they will enable research professionals to focus on exploring data more deeply, examining results across multiple surveys and data sources, and uncovering the kinds of insights that will enhance and strengthen the value they provide to their organizations.



## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

## WHAT HAS AUTOMATION DELIVERED?

## WHAT WILL IT DELIVER?

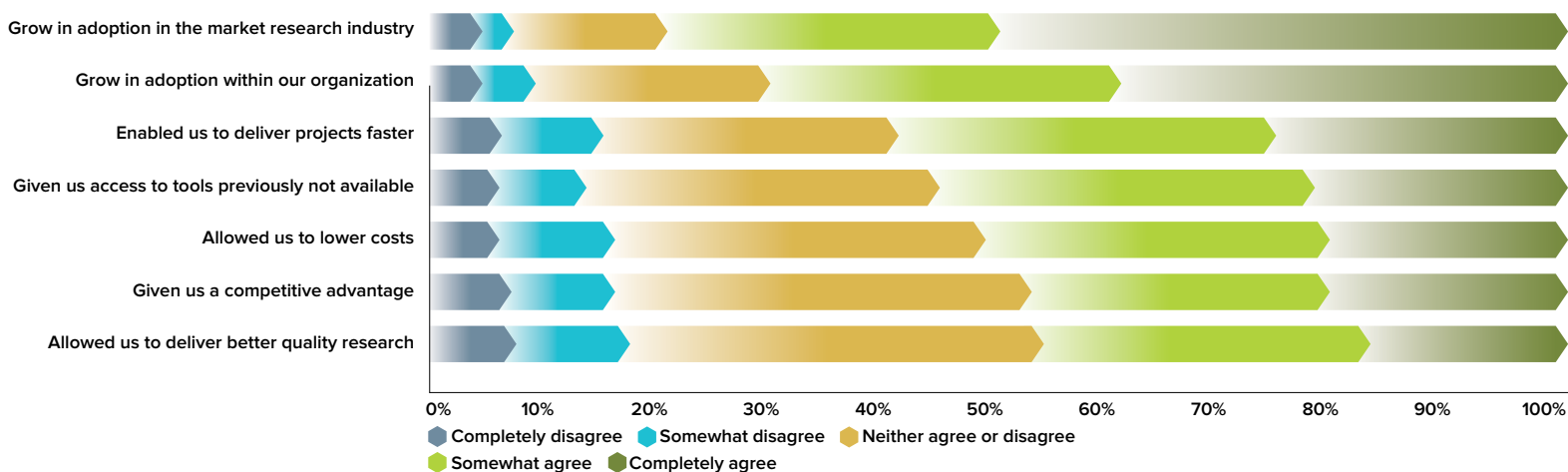
To further clarify the impact of automation, a new question grid of seven items was added for the 2018 study, looking at what automation will deliver and what it has delivered. The chart below shows the results.

The expectations for automation are very high, with almost 80% of researchers agreeing (somewhat or completely) that automation will grow in adoption in market research, and over 70% think that it will grow inside their own organization.

In terms of what automation has delivered, the key benefit is “faster”, with almost 60% of researchers saying it has delivered this benefit. The data provides strong evidence that market research automation has enabled access to new tools, lowered costs, and generated competitive advantage. In some cases, it has allowed suppliers to deliver better quality research to their clients. Few people (between 7% and 17%) disagree with these statements.

In terms of what automation has delivered, the key benefit is “faster”, with almost 60% of researchers saying it has delivered this benefit

## AUTOMATION WILL / HAS ...



The chart is sorted in descending order of the percentage saying 'Completely agree'.

## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

## Clients Versus Suppliers

There are some marked differences in the experiences of buyers and suppliers of market research, which are shown in the table in this section.

The three statements that show clear differences are: “competitive advantage”, “deliver projects faster” and “better quality research”. All show higher values for suppliers, compared with clients. This suggests that automation provides more of a direct competitive advantage for suppliers than for clients and that suppliers are more often responsible for the processes that need to be automated.

The areas of agreement comprise statements about the future adoption of automation (i.e. it will happen), and statements about the benefits of lower costs and access to new tools.

Net Agree Automation will/has ...	Client	Supplier	Difference
Given us a competitive advantage	39%	50%	-11%
Enabled us to deliver projects faster	52%	62%	-9%
Allowed us to deliver better quality research	40%	49%	-9%
Grow in adoption in the market research industry	76%	80%	-4%
Given us access to tools previously not available	54%	56%	-3%
Allowed us to lower costs	50%	52%	-2%
Grow in adoption within our organization	70%	71%	-1%

The table is sorted by the differences between Clients and Suppliers.



## ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

### Differences by Region

The table on the right shows the patterns of agreement with the seven statements, across the four regions.

The table shows a clear pattern with APAC reporting the most positive picture and the Rest of the World region the least optimistic. However, it should be noted that even in the region comprising Central and South America, Africa and the Middle-East, over 50% of people remain positive about the prospects for growth in the use of automation.

One interesting statement is the one related to “competitive advantage” in the North American column – which shows a relatively low value. Perhaps the widespread availability and adoption of automation (as reported in earlier studies) has eroded the competitive advantage to some extent in North America and made it something organizations need to do, just to stay in the game. As automation becomes more mainstream, pressure to raise the bar and innovate further will become more apparent.

Net Agree Automation will/has ...	North America	Europe	APAC	Rest of World
Grow in adoption in the market research industry.	79%	82%	88%	56%
Grow in adoption within our organization.	70%	74%	79%	52%
Enabled us to deliver projects faster.	58%	63%	68%	43%
Given us access to tools previously not available.	55%	55%	66%	49%
Allowed us to lower costs.	49%	56%	63%	43%
Given us a competitive advantage.	45%	50%	60%	46%
Allowed us to deliver better quality research.	45%	49%	53%	43%

The rows are sorted from the highest net agreement with the statements, to the lowest net agreement, for the total sample. Green cells highlight high values, red cells highlight lower values.

As automation becomes more mainstream, pressure to raise the bar and innovate further will become more apparent



## THE BIG PICTURE

Automation continues to be a hot topic and a good news story for market research. Sometimes you will read posts by pundits who argue that the market research and insights industry are bad at innovating. However, the data makes it clear that a large part of the industry has automated, is

automating and will continue to automate. The focus has been around the design, implementation, and reporting of survey-based research, but there also seems to be real interest in moving on to the analysis of text, social media, images, and video.



# START YOUR ENGINES

## CHOOSING THE RIGHT VEHICLE FOR YOUR AUTOMATION ADVENTURE

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**P**er this report, almost 80% agree that automation will grow in adoption and over 70% think that it will grow inside their own organization, but what does automation actually mean?

Automation isn't a new word. As a marketer, I've been working with automation for a decade. Prior to that, we did things manually and via full service providers much like in research. Marketing automation empowered marketers to work smarter and faster, but it also changed the skills needed. We are as much technologists as we are creative folks these days. I see the same shift happening in research today.

Automation is not all the same, nor should it be. In essence, anything is automation if it is a technology that does something a human used to do manually. So far in market research we have seen three major types of automation emerge. To explain in a more interesting way, I like to think of automation as a vehicle.

### **The Multi-Purpose Vehicle:**

Automation driven by flexibility and customization. The multi-purpose vehicle is whatever the user wants. Unfortunately, there are no seat belts or guardrails. In research terms, it can include specialized tools for complex research tests built to be used by highly skilled researchers. The interface is designed to be customized but not necessarily user friendly. For skilled researchers, these tools are exceptionally valuable, but for those that aren't quite as hands on, it can be complex to learn and easy to screw up.

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### **The Automobile:**

Automation for users who like flexibility but still need some safety features. This form of research automation allows for the flexibility of a customizable platform but does not leave you totally on your own. Essentially, it is built to empower but not overwhelm. This allows researchers at all skills levels to easily conduct research without fear of making mistakes. However, technology isn't everything - the human touch is still needed. For automation providers like AYTm, we teach users to be independent vs. keep them stuck in a cycle of paid services. However, it's admittedly not for everyone. Seasoned researchers may find the automobile limiting, and for those coming from full-service, there is a learning curve.

### **The Elevator:**

Automation built for ease of use. You get in, you press a button and the elevator moves. This form of automation is often referred to as a "black box". In this case, the box does a

good job of automating specific tasks or research tests with limited need for user interaction. The pro being that it does not require a lot of skill to use, and the con being that it's built to only conduct certain types of research. In some cases, you also get the benefit of trusted methodologies without as much of a learning curve, but again, the trade-off is flexibility.

### **So, what type of automation is best for me?**

The answer to that depends on a combination of factors including resources, technical skills and budget. It's also an ecosystem where different forms of automation are good for certain types of projects. I think the key is for researchers to explore these options and find what works best for them. We can build templates and black boxes to ease us into this new world, but in the end, the time for the technologist researcher is not just coming, it's here.





## THE FUTURE OF MARKETING AUTOMATION: FASTER AND CHEAPER ISN'T ENOUGH

### Steve Phillips

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**A**utomation is old news. The human race has been automating for centuries. In “The Iliad”, Hephaestus meets his challenging client deadline (given by the Gods of Olympus) by crafting a team of ‘automatons’ to help him produce a shipment of weaponry in time.

As a researcher and automator, I’m pleased to see our industry believes in the growth of market research automation. According to this report, researchers believe automation is growing and adoption is increasing. However, a large group does not believe that it gives them a competitive advantage or allows them to deliver better quality research. Slice the data by client and the fault line widens to well below half of those surveyed.

With most market research automation software able to give prospective customers hard numbers around speed of completion or reduction in cost (Zappi’s, for an example, is results in days, six tests for the cost of one), it’s clear that this isn’t enough for researchers to feel they’re receiving *value*.

As it stands, consumer insights automation has a value problem. Automation is unequivocally faster and cheaper, but in order to have staying power, it also needs to be *better*. What do *value* and *better* mean for consumer insights automation?

Google CEO, Sundar Pichai’s describes value for a new Google product as ‘helping users to get things done.’

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At Zappi, we also believe value means assisting in efficiency and helping users make an impact. When we think about value in market research automation, we think about learning platforms. Repositories of data that get smarter over time and are predictive, such that our users make more informed decisions. Single platforms with standardized modes of data collection that facilitate cross-project analysis, integration of non-survey-based datasets, and powerful analytics all with a mouse-click. Or better still, platforms that are busy in the background, slicing and analyzing data in ways you hadn't thought of and drawing out meaning that solves the business challenge you didn't even know you had.

When compared to other industries, market research is late to the automation game. It's not surprising the industry has yet to find footing beyond the expected *faster, cheaper* value proposition.

Speed and cost efficiency are a natural outcome of automated research, and are important, but **they are a race to the bottom.**

Automation is here to stay and that's great. For it to deliver its full potential, we need to see less emphasis on the technical innovation and more on the value it unlocks for the user. If we don't enter the age of competitive advantage and quality, it will be a Greek tragedy.





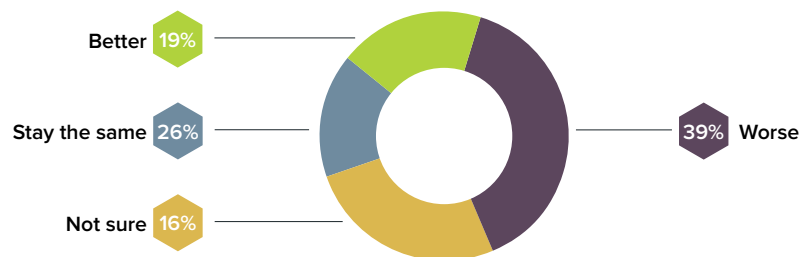
# THE FUTURE OF SAMPLING

As we have seen over the last several waves of GRIT, pessimism about the future of sampling continues: 39% of researchers surveyed expect sample quality to worsen over the next three years, while 19% expect it to get better (down from 26% in 2017 who expected it to get better).


While sample providers themselves are the least pessimistic, with only 23% expecting panel quality to worsen, fewer than a third of sample providers expect panel quality to get better.

Expectation for the Future of Sample Quality	Insights provider or supplier	Insights buyer or client	Sample / panel provider
Better	19%	19%	31%
Worse	40%	38%	23%
Stay the Same	26%	23%	37%
Not sure	15%	19%	9%

IS THE OVERALL QUALITY OF SAMPLE GOING TO GET BETTER, WORSE, OR STAY THE SAME OVER THE NEXT THREE YEARS?



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## WHY WILL SAMPLE GET BETTER OR WORSE?

Respondents were asked to explain their prediction for the future of panel quality. Those who viewed sample quality as getting worse referenced six major themes, from privacy concerns, competing distractions, the proliferation of surveys and long questionnaires on the respondent-experience side to the rise of fraud and the unwillingness to pay much on the quality side. A few of these verbatim comments categorized by general topic are illustrative of the general sentiment we saw in the detailed analysis:

### Privacy concerns reduce people's willingness to share information online:

- ” “People are becoming more concerned about their data privacy and will be less willing to participate in online research (even though this has nothing to do with data privacy).”
- ” “Incidents of data privacy violations such as the Facebook/Cambridge Analytica debacle will make respondents wary about sharing honestly.”
- ” “Potential respondents will become increasingly uncomfortable sharing their thoughts and feelings as privacy concerns become more widely discussed.”
- ” “Negative media coverage of privacy issues is going to make panel participants question their participation. This will lead to a less heterogeneous panel composition.”
- ” “GDPR means panels are basically illegal unless respondents are like employees since they will be so burdened with questions. Clients know panels are increasingly less reliable and request more and more non-panel quotes or need justification for why panels are being used, being seen as unscientific and anti-innovative.”
- ” “People will fear to share private data. People would not to participate in panels. Only specific kind of respondents would be available in panels.”

### Mobile devices are sources of distraction and offer more engaging activities than surveys:

- ” “I think capturing respondents' interest will remain a challenge -- the more we become immersed in mobile, the more there are platforms and activities competing for our time.”
- ” “Surveys are competing for attention and screen share across devices -- they need to jump ahead of the curve to be relevant / interesting enough to complete in a post-digital world.”
- ” “More respondents will be taking surveys on their mobile devices, almost exclusively as desktop surveys begin to fade out. It's much easier for respondents to get distracted taking a survey on their phones.”
- ” “I am concerned that sample providers will rely too heavily on respondents with mobile phones and panels could become skewed over time.”

### The proliferation of surveys is stretching a limited resource (the respondent pool) too far:

- ” “So many more surveys around. All the VOC surveys after every purchase. People will get survey fatigue.”
- ” “It has steadily gone downhill as the number of surveys fielded per company has increased. There are not enough people to go around and it is showing. Consolidation of companies will help but it is only a temporary fix.”
- ” “Surveys are pervasive across CPG and point of sale and will continue to drive fatigue and over-advertising to complete.”
- ” “Changing behaviors, device usage and overburdened people receiving too many requests will further limit the audience willing to participate and reduce relevance for the broader population.”
- ” “Survey overload. No real interest in the actual respondent experience. Feels like a race to the bottom.”

39% of researchers surveyed expect sample quality to worsen over the next three years, while 19% expect it get better



## The excessively long surveys degrade respondent experience and quality:

- ” “Sample is changing. People don’t want to do 20-minute surveys anymore.  
People don’t want to sit at home at their desktop computers anymore. Mobile is increasing. Behavioral data is more prevalent. Until we make grander steps to address these issues, the same old sample data sets will decrease in quality.”
- ” “We can’t do research the same way. We will have to develop simpler surveys with fewer questions and data fusion techniques. Otherwise it will be worse.”
- ” “Questionnaires are way too long and boring, which opens the door to bad respondent behaviors.”
- ” “Long surveys cause drop-offs and/or lying to get to completion.”
- ” “We are drying out our panels with our long and boring survey formats; we need to rethink our business in order to make it last.”
- ” “As consumer attention spans shorten, so too will the quality of their answers to traditional surveys.”

## Increase in fraud, especially through automated bots:

- ” “More and more dirty data. We had an entire survey completed by Chinese bots. There is nothing in place to stop this from happening.”
- ” “Because bots are becoming more and more sophisticated, and humans have becoming less and less patient.”
- ” “The prevalence of bots will increase, and the bots will get smarter.”
- ” “We keep running into cheating – especially in niche audiences or foreign markets. Not bots anymore but click farms. People are googling the topic/key words from the question and copy-pasting in verbatim text from company sites/news articles about the topic (including copyright marks/quotations/stock ticker symbols/etc.). This has happened on several large, non-gen pop studies lately.”
- ” “I think it’s increasingly difficult to verify that someone is real, and not a bot.”

- ” “Completely frustrated with the quality of sample now and have no confidence that the panel companies will do anything to improve it. Frankly, it’s a slimy business and if clients knew half of what goes on behind the scenes, a lot of online research would go away.”
- ” “People are becoming more sophisticated at how to get around QC checks and screeners – a good example is how many bots are out there, and how many obvious duplicates I get from panels that promote digital fingerprinting and high-level quality control.”
- ” “Surveys becoming part of the gig economy, attracting low-skilled labor and low-income households.”
- ” “Because it has clearly gotten worse. Our panel partners have not been able to restrict membership to valid respondents. The cheaters/fraudsters are getting smarter and smarter and we seem to often be one (or more) step(s) behind them.”
- ” “Shrinking survey pool leads to higher incentives which then lead to higher likelihood for respondent fraud. The greater their proportion in the sample pool, the more it impacts the projectability of the sample. Note that today’s data collection is not completely random, so technically no supplier can claim to be representative. Those with address-based recruitment methods or other probabilistic mixed models (e.g. Gallup) come closest.”
- ” “Respondents are becoming more and more savvy on how to ‘beat the system’ and get more perks/incentives. Those who are honest are getting tired of surveys leaving only dishonest/money driven respondents left to guide online surveys.”
- ” “With technology increasing there are just too many ways to cheat the system. The more we do with technology, the more doors open for fraud.”
- ” “Because it is easy to hide behind an IP address. No-one knows who you are, or what you do, or if you even are who you said you were. There is complete anonymity and sample companies (or any company which manages its own ‘panel’) are not doing true verification). Just knowing an NPI number for ‘Dr. John Smith’ is perfectly enough to get you into some companies’ ‘physician panels.’”

## THE FUTURE OF SAMPLING

### Low sample prices reduce the ability to provide quality responses:

- ” “Clients don’t seem to care as much about quality, more about price.”
- ” “Industry folks will not agree on reasonable steps to increase quality, and (more importantly) folks will not be willing to PAY for better sample quality.”
- ” “Because there is little movement around standards of sample development and desire for lower cost will drive down quality.”
- ” “Less engaged respondents not being paid enough.”
- ” “Price more important to buyers than quality.”

Those who said that sample quality is improving, on the other hand, believe improving quality should be a key focus of the industry and that technology offers many ways to do so, from appending data to better integrating mobile and embracing innovations like AI and ML (machine learning). Meanwhile, the ever-growing ownership of smartphones is expanding the representativeness of online work.

### Sample quality is becoming a key area of focus for the industry:

- ” “There is such a focus on sample quality now, I think the industry finally ‘gets it’. Plus, when you start asking panelists to record videos, the overall panel IQ has to go up, or else companies will lose business.”
- ” “Because it is more and more focused on as a topic. As technology advances and respondent experience improves, I believe they will provide better quality responses.”
- ” “Because the industry has finally realized how bad it is!”
- ” “Sample providers are starting to create more industry standards and better technology that prevents fraud.”

### Appending data to surveys can reduce questionnaire length while improving accuracy:

- ” “Ability to micro-target, append behavioral data to sample.”
- ” “We are advancing in the ability to collect ‘big data’ about populations. I think that we will be able to have better panels, better background info on populations. I feel optimistic about this.”
- ” “More data will be appended and technology will increase engagement and interest in giving feedback.”
- ” “Digital allows us to get to more people with better profiling capabilities.”

### Surveys taken on mobile devices offer many more methods of validating respondent identity and location:

- ” “It will get better only if the medium changes. Mobile-first sample introduces higher quality data at larger scale vs. traditional online panels because Mobile Ad IDs (MAID) are harder to ‘dupe’ than online cookies.”
- ” “Using technology, the survey can be scripted to achieve an alignment between GPS coordinate of respondent’s location and where survey is uploaded. This is especially efficient working on B2B and Trade/Channel surveys.”
- ” “Mobile in-app solutions provide for more accurate, reliable and representative sample. As market research suppliers start to adopt this gold standard of data collection, sample and the data output will become better.”
- ” “With mobile being omnipresent, we may be able to tap more genuine respondents.”
- ” “Through mobile and increasing tech, we may be able to know more about the respondents and it will be able to avoid fraud.”

Those who said that sample quality is improving believe improving quality should be a key focus of the industry and that technology offers many ways to do so



## THE FUTURE OF SAMPLING

### Technology investments are being made to combat fraud:

- ” “2017 was the year of fraud via bots in surveys. Most of the work to fix this has been accomplished.”
- ” “Technology will improve to enable better detection of false profiles and responses. Also, reward systems will evolve to increase the motivation to participate.”
- ” “With the help of AI and ML, it is easier today to find genuine respondents and it will only help in future.”
- ” “Implementing AI in order to track fraud before it even starts.”
- ” “Technology and forensics are improving.”

### The rising ownership of smartphones is providing greater representation of both older and lower-income populations:

- ” “More of the population online, older age groups better represented, high penetration.”
  - ” “Improved targeting (Cambridge Analytica / Facebook aside) and improved profiling as well as greater penetration to lower demographic groups should improve panel nat. rep. profile.”
  - ” “Current online access panel respondents are heavy internet users and tech savvy, so not really representative for certain topics.
- Also, most online panels consist mostly of PC owners and exclude mobile-only internet users. Mobile technologies that collect data from non-emplanelled respondents will change that and get a more representative sample.”



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## WHAT SHOULD THE INDUSTRY DO?

As in previous waves, we asked GRIT respondents to indicate their level of agreement with a list of steps that the industry has been discussing for years as a way to control sample quality and the respondent experience more fully. A look at the differences between clients and suppliers shows how perception of these steps are faring in the minds of the industry.

What can be done to strengthen sampling's future? Here are some areas where there is broad agreement but where sample providers are slightly less agreeable:

- Sample providers should advise on whether samples are representative of the target population, according to 82% of insights providers, 85% of insights buyers, and 73% of sample providers.
- Similar agreement exists regarding the need for appendable data, in order to shorten surveys and improve the respondent experience.
- Developing a consistent standard for the collection of profile data is something 70-78% of each group agree with.

Other initiatives are more agreeable to sample providers than their customers: 74% of sample providers believe it would be reasonable for sample providers to charge more for surveys that are not mobile friendly, compared to 31% of insights buyers and 43% of providers. Similarly, 59% of sample providers agree they should restrict surveys to device agnostic with rare exceptions, compared to 48% of buyers and 41% of providers.

How should the industry address sample quality?	Insights provider or supplier	Insights buyer or client	Sample / panel provider
Sample providers should advise on whether their samples are representative of a target population	82%	85%	73%
Sample providers should provide more in-depth profiling and append-able data so surveys can be made shorter and not have to always ask the same questions	77%	82%	74%
Sample providers should introduce consistent standards in the profile information they gather to make it easier to use different sample sources	73%	78%	70%
It would be reasonable for sample providers to enforce length of interview limits	64%	69%	78%
Sample providers should provide more consultative help with questionnaire design to help ensure that surveys are suitable for completion on different types of devices	58%	63%	77%
It is reasonable to introduce minimum payments to respondents to protect the ongoing supply of sample to the industry	57%	56%	68%
It would be reasonable for sample providers to charge more for surveys that are not mobile friendly	43%	31%	74%
It would be reasonable for panel providers to restrict to ONLY allow device agnostic/mobile optimized surveys unless specific device features are part of the study design	41%	48%	59%

78% of sample providers agree that they should enforce length of interview limits, compared to 69% of clients and 64% of insights suppliers

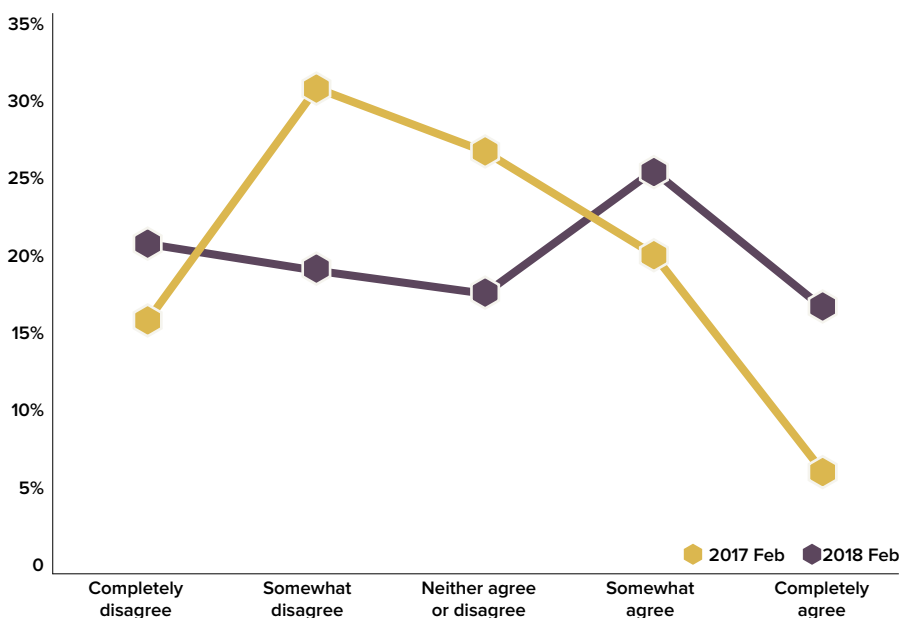
## THE FUTURE OF SAMPLING

A majority agree that respondent incentives should have a “minimum wage” as it were, 68% of providers to ~57% of others.

78% of sample providers agree that they should enforce length of interview limits, compared to 69% of clients and 64% of insights suppliers. Interestingly, providers are more eager to provide questionnaire-design consultation than their customers are to receive it: 77% agree, compared to 63% of clients and 58% of suppliers.

Attitudes towards these issues have not changed since 2017 with one exception: there is now greater agreement about the need for charging more for surveys that aren't mobile friendly, up from 26% in 2017 to 42% this year.

### IT WOULD BE REASONABLE FOR SAMPLE PROVIDERS TO CHARGE MORE FOR SURVEYS THAT ARE NOT MOBILE FRIENDLY



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## MARKET DYNAMICS IN ACTION

Technology markets have traditionally been deflationary markets: the processing power of computers and smartphones increases each year, even as prices are stable or decline. Researchers have experienced a similar decline in the cost per interview of online surveys over the years, even more so when compared to telephone interviews. Because panelist recruitment and routing are opaque to outsiders, research buyers have started to treat sample sourcing as any other technology they buy, expecting increasing utility, quality, and affordability year over year.

Yet panels aren't powered by silicon chips but by real people taking surveys, and those people need to be treated respectfully and compensated for their time. Long surveys treat consumers as robots, with tedious questions that assume respondents have perfect recall about their past purchases and have a clear understanding about their own motivations. Surveys often repeat questions from panelist profiles or that respondents just answered earlier in the session in a survey screener that somehow didn't terminate them.

Industry inflection points are hard to predict in advance. Look at the sudden collapse of taxi businesses in many cities in the past year due to the rise of ride-sharing. The stress points are there for the panel industry:

- Buyers enjoying steep discounts that result in respondent incentives so low that many fewer citizens of Western countries are willing to participate in panels, while the incentives are high enough to attract systematic fraud from developing countries.

- A refusal to re-factor traditional surveys to focus on respondent experience by minimizing length and tedium and leveraging other data.
- An erosion of trust from potential respondents in the privacy and usage of collected data.
- Organizations increasingly relying solely on the house lists used for prospects and customers.

To enforce quality, certain sample providers are transforming themselves into respondent-first organizations. They are putting strict limits into place, fielding screeners as compensated profile questions rather than as part of their customers' surveys, restricting questionnaire length, rejecting questions available from profile data, requiring mobile optimization, fielding all surveys on their own platform, and appending panelist data. All of this provides a much better respondent experience but by doing so rejects many traditional survey projects.

Traditional providers have simply pushed their panelists to survey links from their clients, lacking any control over the experience and simply compensating respondents based on the length of interview. No wonder panel providers want to be more consultative about questionnaire design and need to penalize length and a lack of mobile optimization; research "worst practices" are driving up their costs of panel recruitment and retention.

There is now greater agreement about the need for charging more for surveys that aren't mobile friendly, up from 26% in 2017 to 42% this year



To enforce quality, certain sample providers are transforming themselves into respondent-first organizations





## THE BIG PICTURE

The frustrations from all sides are real, and the risks are growing. Technology can mitigate some of the issues, but in the end panel providers may need to begin refusing certain projects and types of work. While declining to field low-quality, desktop-only questionnaires may cause short-term

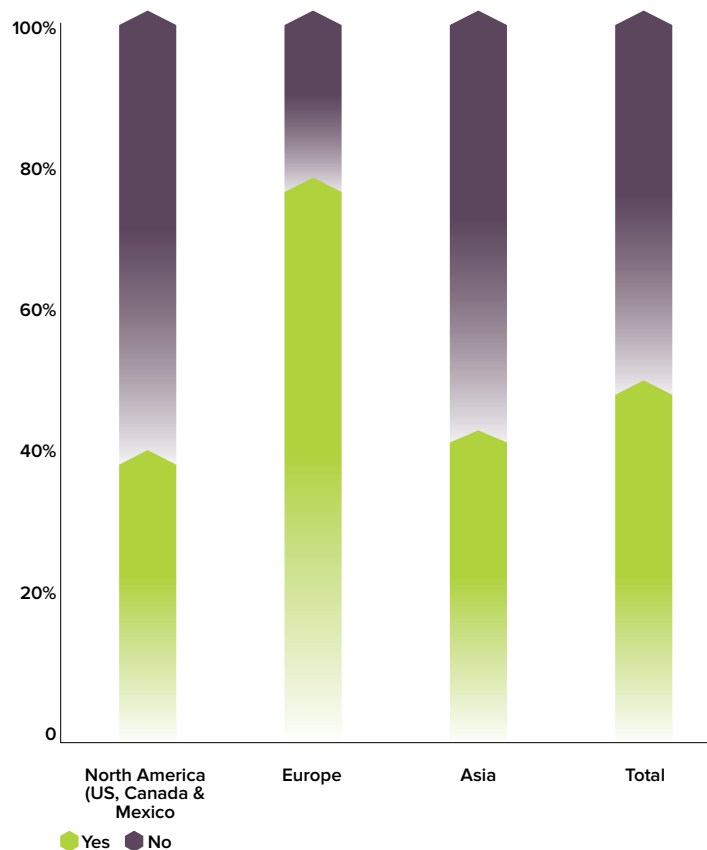
shortfalls in sales for traditional providers, pushing these surveys to a few desperate suppliers may cause them to collapse and improve the survivors' business model in the long term. The traditional model is no longer sustainable and will require painful change up and down the survey ecosystem.

# IS MARKET RESEARCH READY FOR GDPR?

Given the relevance of the EU's General Data Protection Regulation (GDPR) to the industry, and specifically as it relates to research respondents, we added two questions about awareness and compliance readiness, before GDPR goes into effect on May 25. The news isn't particularly good.

Overall, half of all GRIT respondents globally are not familiar with the basics of GDPR. Regionally, there is more awareness in Europe, as you might expect, with three-quarters of all participants aware of the basics, but this number is still too low given the effective date of the regulation. In North America and Asia, the numbers are well below half, which is problematic since adherence to GDPR is required for any company engaging with European Union citizens, regardless of the location of the business or its employees, or even the current residence of the EU citizens themselves.

GDPR AWARENESS



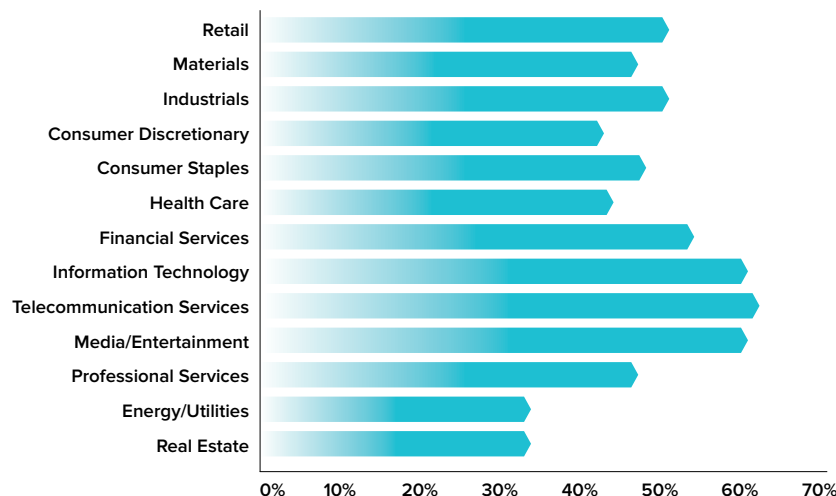
Half of all GRIT respondents globally are not familiar with the basics of GDPR

## SUPPLIERS VERSUS CLIENTS

The levels of GDPR awareness are similar for buyers and suppliers, with 49% of buyers and 51% of suppliers aware. However, it does differ by buyer industry, with the highest awareness in Telecommunications and Media and the lowest in Energy and Real Estate.

Awareness also differs by supplier type. Technology and Sample/Panel providers are ahead of other firms in awareness of GDPR basics, which is reassuring given the global data collection implications they face. A concerning 24% of Advertising / PR Agency and 39% of Secondary Research participants indicated awareness, which is often where the use of data without explicit consent can come into play. Many would suggest that consumers are particularly sensitive to privacy violations in advertising (where these are also the most visible), so it's surprising to see ad agencies not being well-versed in GDPR.

GDPR AWARENESS BY BUYER INDUSTRY



GDPR AWARENESS BY SUPPLIER INDUSTRY



The level of awareness of what GDPR means is similar for buyers and suppliers

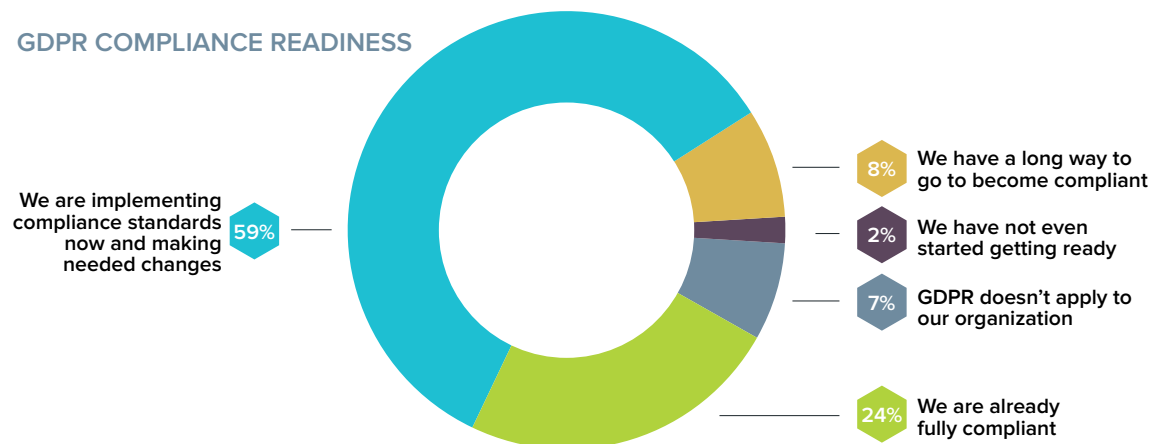


## COMPLIANCE READINESS

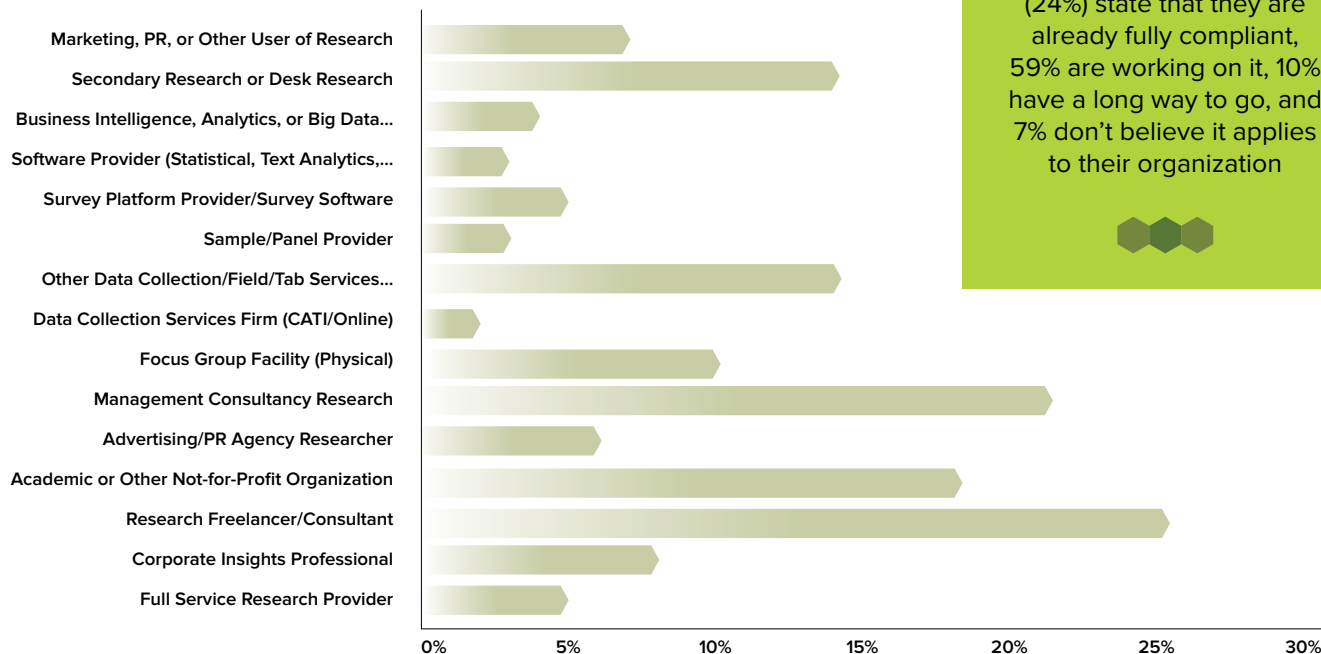
Being aware of the basics of GDPR is certainly not the same as being compliant, so we followed up with a question about compliance readiness. Of those aware of the basics of GDPR, less than a quarter (24%) state that they are already fully compliant, 59% are working on it, 10% have a long way to go, and 7% don't believe it applies to their organization. Bear in mind, this is a subset of the respondents who were even aware of GDPR at all, so these numbers are actually significantly lower when projected out to the industry as a whole.

Looking at those who feel GDPR does not apply to them reinforces a lack of understanding of GDPR basics in some sectors. One quarter of Consultants and 21% of Management Consulting firms seem to believe that GDPR doesn't apply to them, but given the broadened definition of personal data, consultants should now be expected to be able to provide solid design guidance on the legal considerations for data collection. Many industry leaders and experts expect GDPR will be used as a starting point for data legislation in countries around the world, which makes understanding it a must for everyone.

### GDPR COMPLIANCE READINESS



### GDPR DOESN'T APPLY TO OUR ORGANIZATION



Of those aware of the basics of GDPR, less than a quarter (24%) state that they are already fully compliant, 59% are working on it, 10% have a long way to go, and 7% don't believe it applies to their organization



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When you apply the readiness scores to the awareness scores, the result is that only about 12% of total participants are aware and ready, with another 30% implementing standards. That means nearly 6 out of every 10 participants will not be ready for GDPR by the time this edition of the GRIT report is published. While companies that are aware and ready, or preparing to be ready, are likely larger and represent a greater proportion of total industry revenue, the results indicate what could be a very difficult second half of 2018 and 2019 for many MR companies and their legal teams.

## THE BIG PICTURE

Data Privacy is no longer an abstract or political consideration; it is real, it is here, and it has far ranging implications for market research and data services. Our industry and colleagues must evolve and adapt to the changing consumer, technology, methodological, and regulatory environments simultaneously, and at a faster pace than ever before. Advertising, secondary research and consulting professionals need to brush up quickly, or risk missing important advice that could cost them and their clients. If you or your company need a GDPR primer, the **EU GDPR** site is a great starting place.

Nearly 6 out of every 10 participants will not be ready for GDPR by the time this edition of the GRIT report is published







## GDPR: MARKET RESEARCH INDUSTRY'S COMPETITIVE EDGE

### Richard Thornton

COO & Deputy CEO, Cint

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**T**he General Data Protection Regulation (GDPR) is the most significant data privacy regulation introduced in more than 20 years. It mandates new requirements for the collection, processing and transfer of the personal data of EU citizens and comes with high fines for noncompliance. As such, we are seeing a fair amount of “gloom and doom” in the media regarding the May 25, 2018 deadline. GDPR has influenced the strategy of some businesses, including smaller businesses that have reassessed their operations in the EU.

Fortunately, for most in market research, GDPR is the realization of many of our industry's best practices around data governance, data protection and data quality.

*MR professionals are in a unique position to leverage GDPR compliance as a competitive advantage.*

### Why MR is ahead of the pack on GDPR?

By no means is GDPR-readiness easy, simple, or cheap. ClickZ reported 77% of US-based multi-nationals are preparing to spend over \$1 million on compliance efforts, including 7% planning to spend \$10 million or more. However, it doesn't have to be expensive if you use the right partners and resources to meet compliance obligations. Thankfully, for MR, many organizations have had the right compliance programs in place to streamline the process.

*Common challenges businesses face on their road to GDPR compliance include:*

- Company management that isn't fully educated about GDPR
- Inadequate funding

CONTINUED ON NEXT PAGE



- Not having adequately mapped the data collected, stored and processed
- Not having enough time (May 25th is nearly upon us)

By comparison to other industries, coming to terms with data handling jargon and standards, most of these hurdles are not challenges for MR, but rather are part of the market research industry's DNA. The minutia around data, panellists/participants, panel/source owners and the responsibilities and definitions of data processors versus data controllers have been part of the industry's vernacular from the inception of online research. Another industry competency is a profound understanding of how contracts are structured to ensure compliance and the satisfaction of legal obligations. An essential point to understand is that the measures and costs associated with GDPR readiness and compliance far outweigh any costs of non-compliance. Under the Regulation, organizations can be fined up to 4% of annual revenue or 20 million euros (whichever is greater).

Compliance and data protection are table stakes for any company, in any industry, to remain relevant and competitive. While some businesses outside the EU may delay GDPR compliance, that is not a sound strategy, as data has no boundaries in a digital, global economy.

### **Steps to better understanding GDPR, and how compliant you are**

As GDPR goes into effect this year, it is generally expected regulators will move cautiously on enforcement. They will be covering new ground and have concerns about budget and how best to handle enforcement. That said, companies should remain vigilant about their progress toward GDPR-compliance, as violations will bring enforcement. Regardless of the fines described above, the reputational impact of an alleged violation could be devastating to a business on its own.

GDPR is our new normal. We are all navigating a complicated and new regulatory process together. Key steps towards compliance to keep in mind:

- Gain management support for GDPR compliance efforts
- Perform a Data Protection Impact Analysis (DPIA) and build an action and remediation plan (one can never be too prepared)
- Address information security compliance (this is specifically required under the GDPR)

For those looking for additional resources on how GDPR may impact their business, there are a wide variety of informational resources from the EU Commission, country specific data protection authorities, professional associations, as well as service and technology providers, and specialists specializing in data protection and GDPR compliance. For US companies, information is also available from the US Department of Commerce.





## GDPR IN PRACTICE

### Finn Raben

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**G**DPR, for many people, is a “four-letter word” that immediately strikes fear amongst companies in the four corners of the world! With its headline grabbing penalty of 4% of annual global turnover, and its tentacular reach across almost all business operations due to the pervasiveness of data in all companies today, many believe they are facing into a potential compliance nightmare.

BUT...

There’s actually quite a lot of miscommunication – or perhaps misunderstanding – about what it actually entails, and our first priority must be to clarify and align exactly what this regulation means.

- For starters, many view the upcoming date of 25th May 2018 as the day the regulation becomes law...actually, the regulation is already law! – we were just being given a two-year grace period to get our houses in order, and it is this grace period that ends on the 25th May 2018 and when “real” enforcement begins.
- Another is how one legally collects consent, considering the detailed requirements outlined explicitly by the GDPR – one questions whether all those newsletter re-consent requests fully pass the test (many do not!!). Data Protection Authorities, which will be spearheading those enforcement actions, have been kind enough to suggest they don’t intend to pull the fines trigger right away, but companies should NOT mistake that for a get out of jail free card either.

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Misconceptions about GDPR are spreading fast and so too are the number of examples of questionable implementation of the principles that GDPR espouses – which only further underline the information/understanding gap that we're facing. Almost every survey recently conducted shows a lack of awareness of the GDPR as well as a concern that acceptable levels of compliance will only be achieved by a minority of companies, by the deadline (a recent survey sponsored by law firm McDermott Will & Emery reported that only 40% of companies expect to be compliant by May 25th). Now more than ever, it is vitally important that companies be careful in who's advice they follow so that they don't get led astray.

If ever there was a moment when your association membership fees can generate a return on investment, that time is now. We've seen many associations across the world stepping up to the plate in delivering thought-provoking and reassuring webinars that ensure their members are getting up-to-date access to good, actionable guidance on the major points to focus on, for the types of data collection and processing that our industry is carrying out.

ESOMAR's role in assisting the EU in refining and securing the language of GDPR for the market research and insights profession, has also led us to consider how we can step up to the plate and what role we can play to accompany our members even further on their compliance journey. ESOMAR has now grown from being just an information dissemination

platform to becoming a full consultancy service, supporting its member companies with practical training, guidance, and providing access to independent, expert legal advice at a reasonable cost through our ESOMAR Plus service.

The founder companies of our new service range from multi-national client groups to start-ups; half of these companies are based inside the EU, half outside – demonstrating the range of organisations that are impacted by GDPR, all of whom are looking for a dependable, pragmatic partner to work alongside with.

We have really been able to see the most common pain-points that these – and no doubt many other – companies, will discover as they get to grips with GDPR. Let me focus on four of these, here, to give some examples:

The first pain-point is undoubtedly one of basic awareness amongst staff; what do we mean when we talk about personal data? Is an IP address personal data? Is the fact that a person suffers from hay fever personal data? It might seem an obvious question, but we are always fascinated in our training workshops how even these basic scenarios can lead to quite passionate discussions surrounding perceptions of what is or isn't personal data and what we can and can't do with it.

The second pain-point is the exercise of mapping data flows, in order to clearly understand how exposed the company is.



This sounds like a fairly simple exercise but once we scratch the surface, you quickly realise how daunting this challenge can be! Nonetheless, this is an essential exercise to achieve GDPR compliance, and – as we are increasingly seeing – is also a vital element in enabling companies to respond to their client requests which seek proof of compliance with GDPR.

The third pain-point we're witnessing is the massive confusion around what GDPR calls its legal bases (or legal grounds). There are many ways to get legal permission to collect personal data. Many organisations believe that consent is the gold-standard basis, yet often we discover that (for the particular process under review) it may not actually be the best legal basis to use, because of the very detailed requirements that consent entails under the GDPR.

Lastly – and as mentioned earlier – the fourth pain-point is not really coming from the GDPR itself, but in fact comes from our own business partners. Many organisations now require their partners to respond to an ever increasingly detailed client questionnaire form(s); each of these have their own format, and each asks the same question but in different ways, and each feels it is 'guaranteeing' compliance. Currently, this creates not only a lot of internal pressure to respond – which (if we're honest) is primarily serving the interest of tick-boxing a process – it does not really get down to the essential matter of developing a

culture of continuous internal and external responsibility, and where relevant, accountability.

This segues into a point that is very important to underline: the GDPR was never developed with the aim of hindering innovation or blocking new data-driven business models; quite the opposite!! The GDPR was proposed as a means to enable an entire continent to accelerate the development of its digital single market and to foster trust and confidence between companies and data subjects as well to drive consumption, using a common appreciation of what data means and represents to its citizens. Remember that the 2016 Truste/National Cyber Security Alliance Consumer Privacy Index clearly showed that 9 out of 10 Internet users avoid doing business with companies that do NOT protect their users privacy....

At the end of the day, GDPR offers a real opportunity for companies that respect people's privacy and dignity to use that as a winning business argument allowing those that have invested in ethical approaches and high professional standards to collect their return starting on the 25th of May and well beyond.

If you need help, ESOMAR can and will help you find your way successfully through the GDPR!







# BLOCKCHAIN: OPPORTUNITY OR HYPE?

A new area of exploration for this wave of GRIT was the hot topic du jour: blockchain. Using the “Hype Scale” we have deployed previously to gauge industry views on other buzz topics, coupled with a general awareness screener similar to GDPR, we wanted to understand what insights professionals think about the opportunity for this technology to impact the industry.

For the uninitiated, here is a definition from Wikipedia that sums up the model well:

*A blockchain is a decentralized, distributed and public digital ledger that is used to record transactions across many computers so that the record cannot be altered retroactively without the alteration of all subsequent blocks and the collusion of the network. This allows the participants to verify and audit transactions inexpensively. A blockchain database is managed autonomously using a peer-to-peer network and a distributed timestamping server. They are authenticated by mass collaboration powered by collective self-interests. The result is a robust workflow where participants' uncertainty regarding data security is marginal. The use of a blockchain removes the characteristic of infinite reproducibility from*

*a digital asset. It confirms that each unit of value was transferred only once, solving the long-standing problem of double spending. Blockchains have been described as a value-exchange protocol. This blockchain-based exchange of value can be completed more quickly, more safely and more cheaply than with traditional systems. A blockchain can assign title rights because it provides a record that compels offer and acceptance.*

The issues of data privacy and sample quality have driven consideration of how blockchain might (or might not!) be applicable to the insights industry. We are witnessing emergence of numerous start-ups working on blockchain applications related to the insights industry, while there is a growing debate on whether the technology is even fit for purpose. We thought GRIT would be the ideal vehicle to get a sense of what the broader industry may be thinking.

The issues of data privacy and sample quality have driven consideration of how blockchain might (or might not!) be applicable to the insights industry





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## BLOCKCHAIN: OPPORTUNITY OR HYPE?

### General Awareness

GRIT respondents are generally considered the most forward-thinking and technology-oriented members of the industry. However, in respect to blockchain, regardless of being a client or supplier, the majority were unfamiliar with blockchain.

Similarly, we did not see much regional variance on this question other than in 2 regions: LatAm and Africa. Respondents from those regions were almost twice as likely to be unfamiliar with blockchain than those from other regions.

### ARE YOU FAMILIAR WITH THE BASICS OF BLOCKCHAIN MODELS?

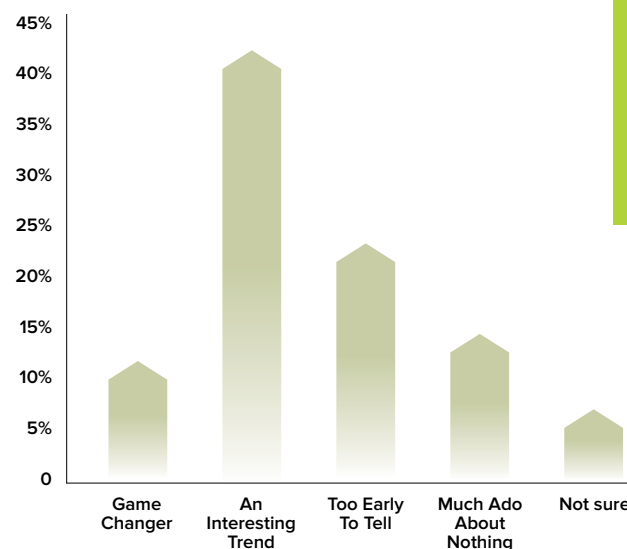


## POTENTIAL IMPACT OF BLOCKCHAIN ON MARKET RESEARCH

For those respondents who said they were familiar, we asked them a series of follow-up questions to determine their thoughts on potential impact of blockchain on the world of market research.

The short answer is that they are interested, but they feel it is too early to say much right now about its impact. Only around 1 in 10 of the researchers familiar with blockchain were prepared to say they thought that the opportunities it offered would be game changers for the industry. This was matched by a similar number of those who felt it would be unimpactful.

### WHAT IS THE LEVEL OF IMPACT OF BLOCKCHAIN IN MARKET RESEARCH?



Only around 1 in 10 of the researchers familiar with blockchain say that the opportunities it offered would be game changers for the industry

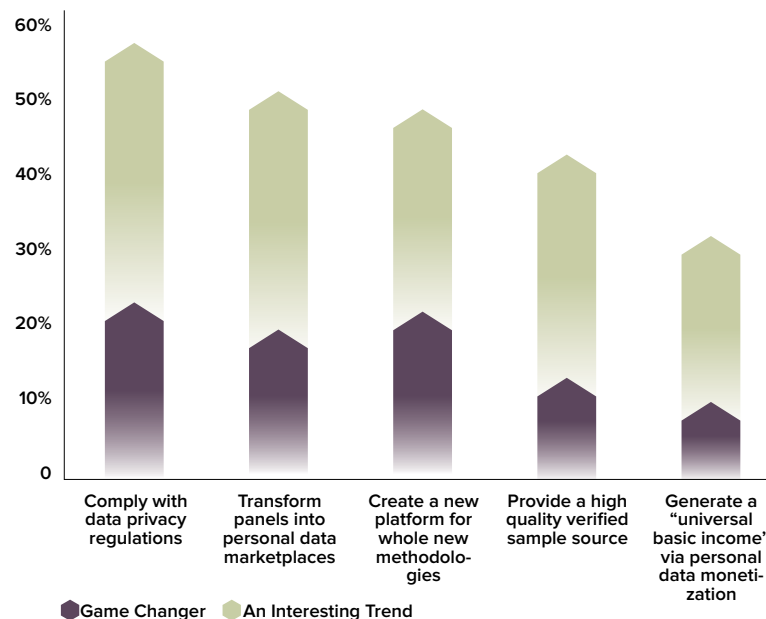


## BLOCKCHAIN: OPPORTUNITY OR HYPE?

### Potential Use Cases

After ascertaining general perception, we asked respondents to consider a few potential use cases that have been discussed publicly to see if anything caught their attention. Researchers believe the greatest potential for blockchain technology lies in the way we use and access sample, potentially helping to improve our industry's compliance with data privacy regulations and the opportunity to transform panels into personal data marketplaces. Many also feel that the real potential lies in new, or unconceived platform solutions.

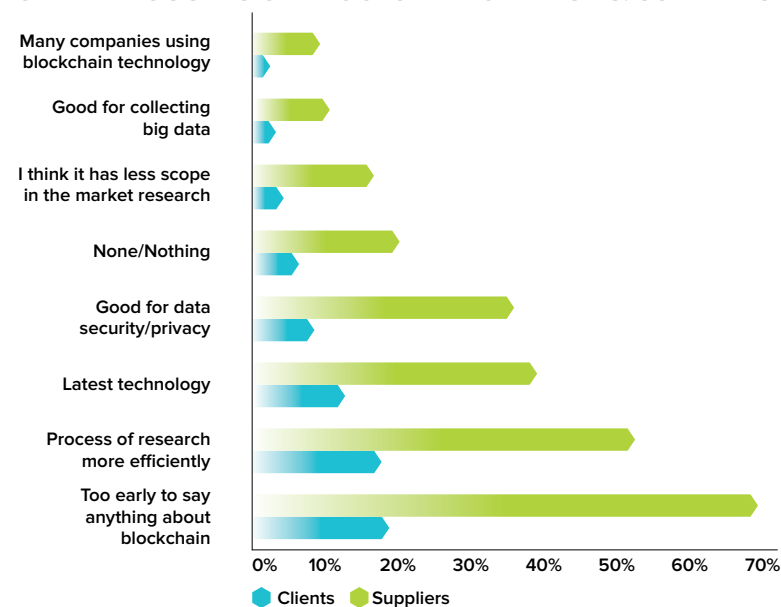
### WHERE DOES THE POTENTIAL OF BLOCKCHAIN TECHNOLOGY LIE?



### Other Thoughts

Finally, we asked respondents to share any other thoughts they might have related to blockchain. As usual, GRIT respondents didn't disappoint, providing 1,561 comments to code. In keeping with our standard approach throughout the report, we looked at the top mentions by both region and clients versus suppliers.

### OTHER THOUGHTS ON BLOCKCHAIN CLIENTS VS. SUPPLIERS



Researchers believe the greatest potential for blockchain technology lies in the way we use and access sample

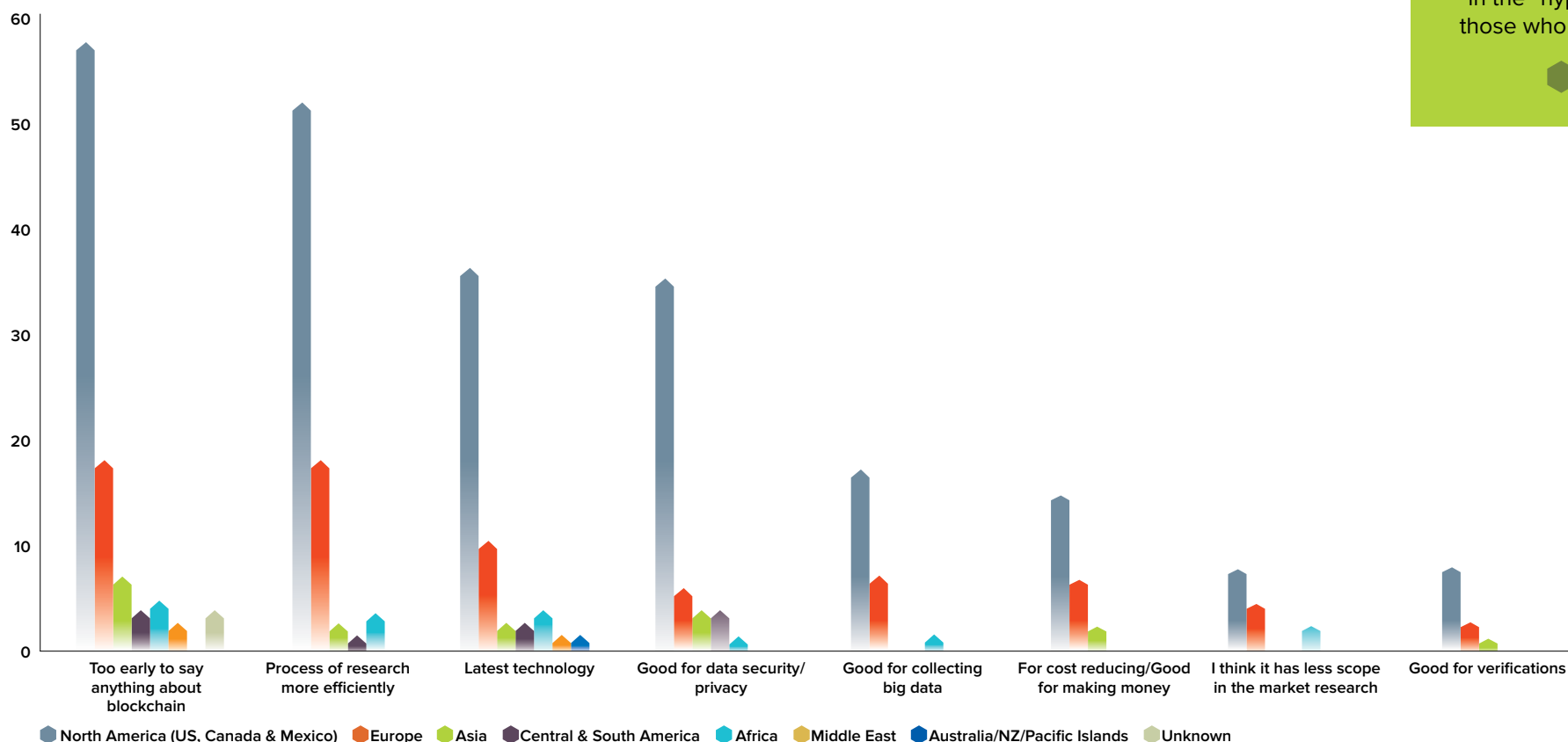


## BLOCKCHAIN: OPPORTUNITY OR HYPE?

The upshot is that there are no real differences by either cut that are not simply reflections of the bases. The gist is that the majority of GRIT respondents are taking a “wait and see attitude” because they think it is too early to consider other use cases, although a smaller but still sizable group of respondents consider a combination of process efficiencies, data security, and new business models.

As far as the research industry goes, blockchain still sits firmly in the “hype” bucket for those who are aware of it. At the same time, some early adopters see potential in a variety of use cases. Will blockchain become the next automation and in short order transform the industry? Maybe, but we are not going to bet our bitcoins on it just yet.

### OTHER THOUGHTS ON BLOCKCHAIN BY REGION



Blockchain still sits firmly in the “hype” bucket for those who are aware of it





## BLOCKCHAIN – A FAR OFF FUTURE IN RESEARCH

### **Rick Kelly**

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**I**n the past few years, the world has seen the meteoric rise of public awareness of blockchain and cryptocurrencies, most notably Bitcoin. If your office is like Fuel Cycle, blockchain buzz has ebbed and flowed with the price of Bitcoin (in fact, about 1/3 of my colleagues own some form of cryptocurrency). Google Trends reports that search queries for “blockchain” more than quadrupled during 2018. All the hype has led numerous commentators to call blockchain a “revolution.”

#### **What is blockchain?**

But, what does blockchain have to do with market research? If you’ve wondered this before, you’re not alone; 56% of GRIT respondents professed no familiarity at all with this apparent, revolutionary technology.

As a primer, let’s start with a short, nontechnical explanation: At its essence, blockchain distributes trust between individuals rather than using third parties like banks or governments. This bilateral trust is accomplished through peer-to-peer transactions recorded on an immutable software-based ledger. Because blockchain effectively decentralizes trust, its potential applications are numerous: new currencies, smart contracts, supply chain transparency, and many more use cases. More importantly to researchers, blockchain may potentially solve significant, fundamental issues within market research.

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### **Blockchain in market research**

Blockchain could revolutionize the way personal data is shared with researchers, primarily as an identity management solution that authenticates an individual to another party and gives them control over who has access to their data. There are clear benefits to both researchers and research participants. In the first case, many existent issues regarding fraud in market research panels can be solved with an authenticated identity. By authenticating through a blockchain-based identity solution prior to research participation, market researchers would have increased confidence in the validity of their respondents.

Secondly, individual research participants increase the level of control they have over their data. For instance, rather than participants providing their full contact information, a respondent with blockchain-based identity can authenticate their identity with a research platform and provide the bare minimum level of detail to the researcher (such as demographic information) and then revoke access to that data whenever they choose to do so. This significantly decreases the amount of data shared with researchers and ensures it's used only in permitted instances.

Both use cases for blockchain could greatly improve current processes in market research. The benefits would be incredibly valuable to both respondents and researchers. Given this, when should we expect the blockchain-based research revolution?

Unfortunately, not soon.

### **Misaligned incentives**

For blockchain to be widely adopted, there must be a strong pull - an incentive - for both parties to want to participate. This is necessary to overcome the woefully painful user experience of managing blockchain-based technologies. There's a reason most people don't own Bitcoin or know much about blockchain: it's a challenge to learn and requires significant effort to use. For blockchain to gain widespread adoption in market research, one of two conditions are necessary. First, the user experience of participating in blockchain tech needs to improve dramatically - on the level of creating accounts with an email and password - to reduce the friction on participation. The second possible condition is that consumers become so concerned about privacy that they refuse to participate in any type of data sharing that isn't blockchain-based. In the near-term, neither scenario is likely. So, while blockchain may be revolutionary, the revolution in research is at least a few years away.







## BLOCKCHAIN ENABLES A NEW RELATIONSHIP BETWEEN BRANDS AND CONSUMERS

### Stephan Shakespeare

CEO and Co-Founder, YouGov

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**T**he world of marketing is facing another huge disruption. Concerns about online privacy have been growing steadily over the years, with ad blockers becoming increasingly common among the young. But it was the Facebook/Cambridge Analytica story that made the issue break through to the front pages. This came just as Europe was launching an extensive new regulation system to protect personal data.

The challenge to the marketing industry is well merited. Digital platforms were supposed to improve the quality of ad targeting but, from a consumer point of view, the experience of online advertising has gotten much worse. Visit a certain site, get a certain cookie, and for the next two weeks you are bombarded with ads assuming you want to lose weight, buy a pension or visit Greece. This may slightly improve ROI for the advertiser but it degrades the consumer experience. Huge amounts of personal data are being misused to little real purpose

The EU's new privacy regime, GDPR, should not be seen as a constraint for advertisers but a liberation for consumers - and in that spirit marketers and researchers will find new opportunities to better serve their clients and consumers in general.

GDPR requires all commercial use of personal data to be explicitly permissioned at a granular level. At YouGov we have concluded that this is best achieved by deploying the new technology of Blockchain to efficiently and transparently create an interface between consumers and businesses.

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We believe Blockchain will have an impact on market research industry by enabling the ability to reduce the friction between brands and organizations that wish to engage with consumers with the appropriate controls and value exchange for the consumer participant through the use of smart contracts.

YouGov Direct will allow our panelists to provide personal data to a dashboard where they, the panelists, fully control how that data is used. The trick is to make it easy, enjoyable, and mutually beneficial for consumers and advertisers. Our interface does that, and not only allows our panelists to engage in new kinds of research and marketing, but allows their data to be used, legitimately accountably and profitably, to improve targeting across all marketing platforms.

The model creates a best in class system, which not only complies with GDPR regulation, but also puts the panelists in control of their own online experience. Rather than accept a poor online experience, irrelevant ads and at worst feel like they are being abused, YouGov Direct participants can help build a better ecosystem.

A new model for data permission also benefits the other participants in marketing; the brands looking to attract and retain customers and the publishers who wish to fund high quality content through advertising sales. Brands will be able to use high quality data for targeting – no longer subject to whatever questionable data has been packaged up and distributed through Data Management Platforms (DMPs) for which the provenance cannot often be proved. And for the first time brands will be able to verify who is engaging with their campaigns in a transparent fashion. Publishers will also be able to use YouGov Direct's technology to enable their audience to control their data in a granular fashion in exchange for fair value, be it free content or monetary gain.

A controllable, transparent and auditable system like Blockchain creates a new opportunity to address issues of poor ad performance, fraud and fairness for all the users of the internet; the audience and the companies that rely on them.



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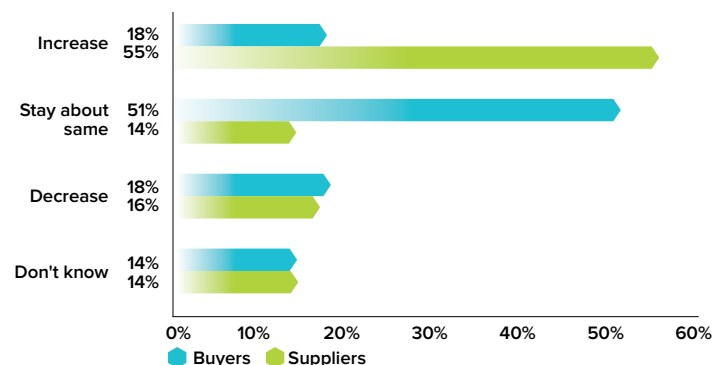
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# BUSINESS OUTLOOK

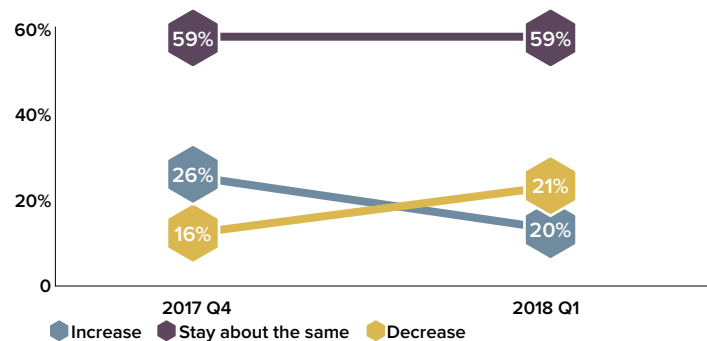
Heading into 2018, research spending continues at a level similar to 2017 from the buyer perspective, while most suppliers report revenue increases. Half of buyers say that spending has remained about the same, with an equal number reporting increases vs. decreases. If anything, buyer research budgets may be increasing as more buyers (36%) claim budgets in excess of \$5M than in the previous GRIT report (30%).

More suppliers (25%) experienced *significant* revenue increases than experienced *any* magnitude of decrease (16%). The percentage of suppliers reporting revenue increases grew by 30% since the last edition of the GRIT report.

## BUYER CHANGE IN RESEARCH SPENDING/SUPPLIER CHANGE IN REVENUE THIS YEAR COMPARED TO LAST YEAR



## BUYER CHANGE IN RESEARCH SPENDING (THIS YEAR COMPARED TO LAST)



The percentage of suppliers reporting revenue increases grew by 30% since the last edition of the GRIT report

## BUSINESS OUTLOOK

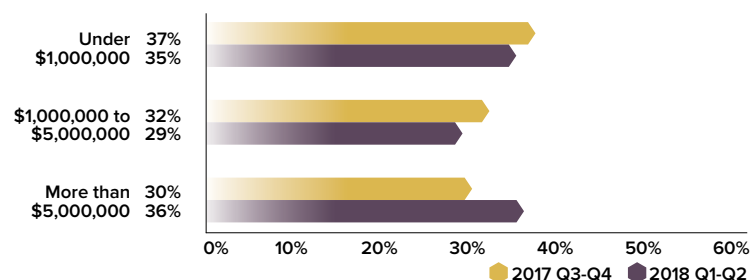
When buyers who “don’t know” if their spending increased are removed and results are compared to the last GRIT report, we see that the number of buyers reporting decreases has risen slightly to converge with the number reporting increases.

More buyers have research budgets in excess of \$5M compared with the last GRIT wave, but, within that tier, more buyers reported decreases than increases. This suggests that even as more buyers enter the highest reported tier, churn within it may offset any budget gains from the new entrants.

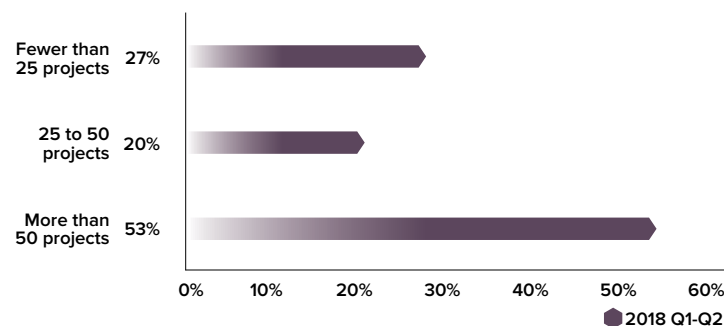
The number of projects overseen by buyers has remained steady, indicating stability with respect to their research needs.

Meanwhile, nearly two-thirds of suppliers have experienced revenue increases compared to only half in the last edition of the GRIT report.

### BUYER RESEARCH BUDGET



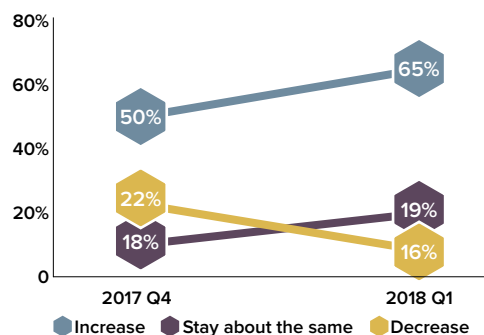
### NUMBER OF PROJECTS BY BUYERS



The number of projects overseen by buyers has remained steady, indicating stability with respect to their research needs



### SUPPLIER CHANGE IN REVENUE (THIS YEAR COMPARED TO LAST YEAR)



Nearly two-thirds of suppliers have experienced revenue increases compared to only half in the last edition of the GRIT report





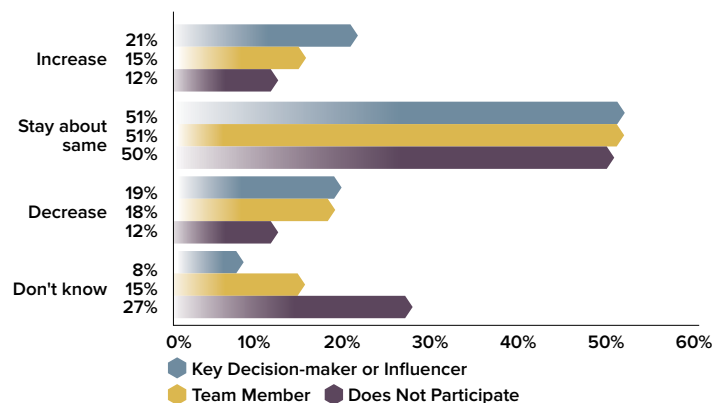
## BUSINESS OUTLOOK

On the surface, it may seem counter-intuitive for suppliers to report increases, while buyers indicate that spending is flat. However, it is important to remember that the data reflect the proportion of suppliers and buyers who report increases or decreases, not the dollar value of the increases. Given this perspective, there are some hypotheses that might account for this apparent discrepancy, such as:

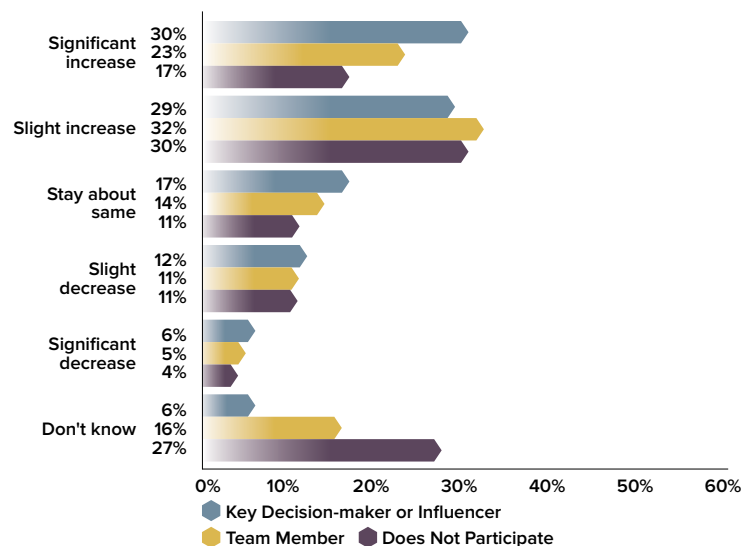
- The budget increases among buyers may increase the number of suppliers who receive new revenue more than budget reductions decrease the number of suppliers. Reported supplier revenue increases may be small enough to allow multiple suppliers to benefit from a single budget increase.
- Suppliers may be getting revenue from budgets not represented in the buyer sample.
- Similarly, buyers may have spent some of their budget with other kinds of suppliers, then reallocated it to suppliers in our universe without increasing or decreasing their budgets.

The apparent gap is not due to the presence of non-decision-makers in the sample. Those who say that they do not participate in strategic decisions are in step with key decision makers and influencers, except for their disproportionate tendency to admit they don't know whether budget or revenue increased or decreased. The trend is similar among buyers and suppliers, and those who are most responsible for strategic decisions are more likely to say that revenue and budgets have increased.

### BUYER CHANGE IN RESEARCH SPENDING BY ROLE



### SUPPLIER CHANGE IN REVENUE BY ROLE





# DELIVERING ROI SO EVERYONE WINS

## Carl Wong

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**C**ost, price, budget, fees, however you package it up it's an unavoidable element of any relationship. Client or supplier, we all want to feel we are getting a fair exchange for solutions or services, whatever the price point. More importantly, we are all striving to deliver additional differentiated value. The latest GRIT survey reveals how and why budgets and revenues are changing.

### **The highs and lows of budgets**

The clients audience is divided when it comes to budgets, 17.8% predict spending less this year, but a similar proportion (17.5%) predict spending more. Increased spend is driven by business need, customer centricity, innovation and staying ahead of the competition, with market research seen as vital in delivering on these broad areas.

Although we aren't seeing a surge in spending from buyers, with over half stating spend is static, suppliers seem to be faring well with 55.2% predicting an increase in revenues. This pattern may be a reflection of GRIT survey respondents hailing from suppliers that are driving innovation and embracing technology, not only as a means to improve margins but to meet client demands of better and faster.

### **Automation, a great opportunity or a threat?**

Automation is a consistent theme and plays a key role at both ends of the spectrum. For forward-thinking clients spending less, or at least not spending more, automation is enabling them, in essence, to do more with less. Budgets can be stretched further through the use of automation and other advancements in machine learning technology. However, this isn't hindering the growth of suppliers as you

CONTINUED ON NEXT PAGE



might expect. Automation is seen as a driving force behind revenue growth for many in the GRIT community, delivering higher quality insights faster than ever before, improving efficiency and providing a competitive advantage.

At LivingLens, AI and machine learning are powering our video intelligence platform. This unlocks the ability to analyze video content at speed and scale, transforming the use of video within research. Our clients benefit further from lowered costs and improving insight.

### **The prize is large for forward-thinking companies**

Forrester has coined the phrase 'insights-driven businesses', which describes companies who use a combination of data, analytics, and software to continually inform decisions. These insights-driven businesses will take \$1.2 trillion a year in revenue by 2020<sup>1</sup>. Forrester also predicts these businesses will grow at least eight times faster than global GDP, by harnessing digital insights to optimize products, services, and operations.

Within the insight industry, we see companies moving in this direction, with the adoption of analytics and knowledge hubs that build lasting legacies from data and content.

Project data commissioned to answer specific business questions can now serve an ongoing purpose, providing a greater return on the initial investment.

For some, this means spending less on research, but we view this as a way for research to increase its reach and value within an organization. We believe it's an emerging trend of the most innovative, forward-thinking brands (and agencies).

### **We need to demonstrate ROI**

Despite a largely positive view from the GRIT survey, some budgets are still being cut, due to economic pressures and other factors. Research budgets can 'easy' to cut if ROI isn't clear. We are rightly being held to account to justify spend. We need to embrace the challenge and use it as an opportunity for suppliers and buyers to work together to deliver a powerful value message; building business cases for where insight discovery is needed, identifying where past research can play a role and supporting insight teams in their activation of different audiences.

Market research needs to be a 'must have' rather than a 'nice to have'. Accelerating our adoption of value adding technologies can be a key enabler to achieving this.

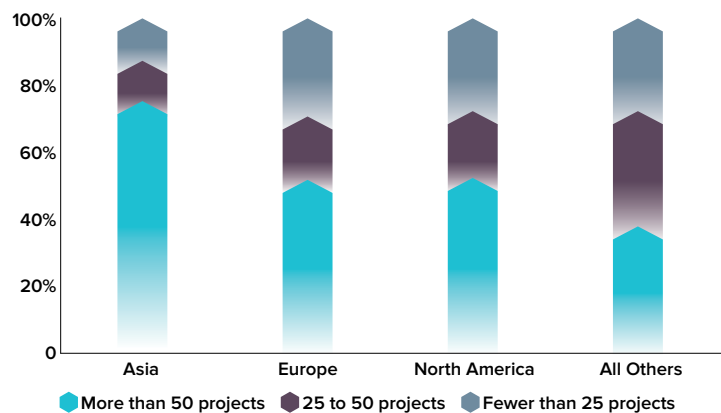


## DRIVERS OF SPENDING AND REVENUE CHANGE

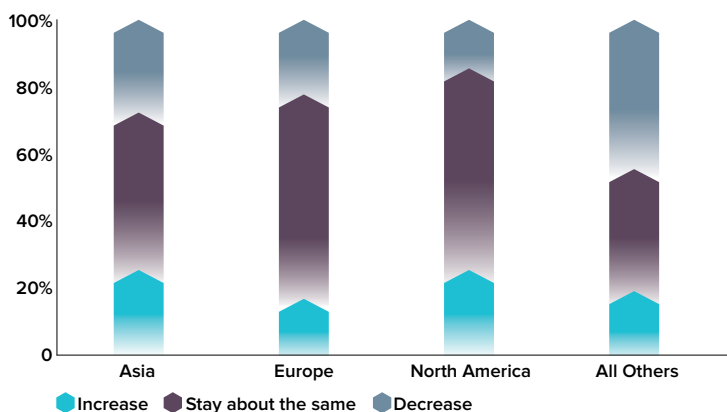
Buyers headquartered in Asia are more likely to report increases in spending (24% of buyers) and to have more than 50 projects (74%). Taken as a whole, buyers outside of Asia, North America and Europe are more likely to have experienced a budget decrease (45%) and are least likely to have more than 50 projects (39%).

Most suppliers headquartered in Asia report increases in revenue (54%), but this lags North American (67%) and European-based suppliers (64%) and is on par with Central/South America (57%), and Africa/Middle East (57%).

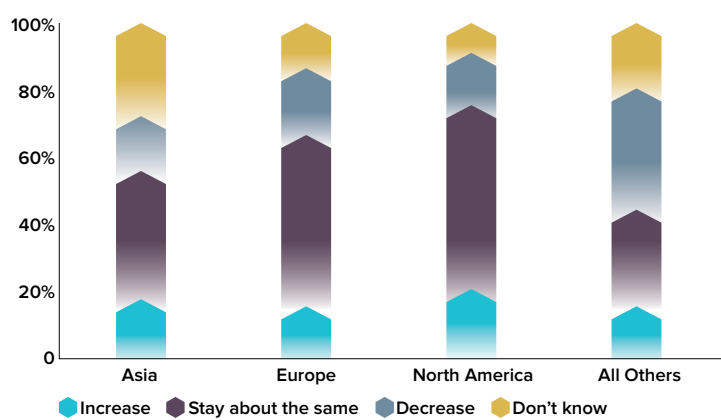
NUMBER OF PROJECTS BY REGION



BUYER RESEARCH BUDGET CHANGE  
(EXCLUDES "DON'T KNOW")



BUYER RESEARCH BUDGET CHANGE  
(INCLUDES "DON'T KNOW")



Even though likelihood of a budget decrease grows with company size, project volume remains strong



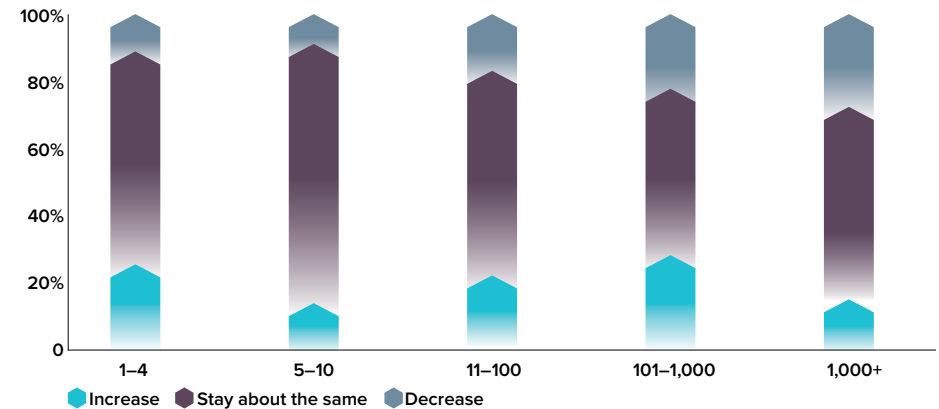
## BUSINESS OUTLOOK

Buyers from the largest companies had the weakest budget increase trend (15%) and highest proportion of decreases (28%) of any employee size category. In general, as company size grows, the research budget is more likely to have decreased, although increases did not show a complementary pattern. Over 20% of companies with one to four, 11 to 100 and 101 to 1,000 employees experienced increases, while companies with five to ten employees were as unlikely as the largest companies (14%) to experience an increase.

Even though likelihood of a budget decrease grows with company size, project volume remains strong as employee size increases. Although the project volume was not asked in terms of how it is trending, we might hypothesize that larger companies are prioritizing efficiency gains and doing more projects with the same or less budget. The section on automation adoption in this GRIT report would seem to validate this as well.

In every region, most suppliers report revenue increases with the largest proportions in North America and Europe.

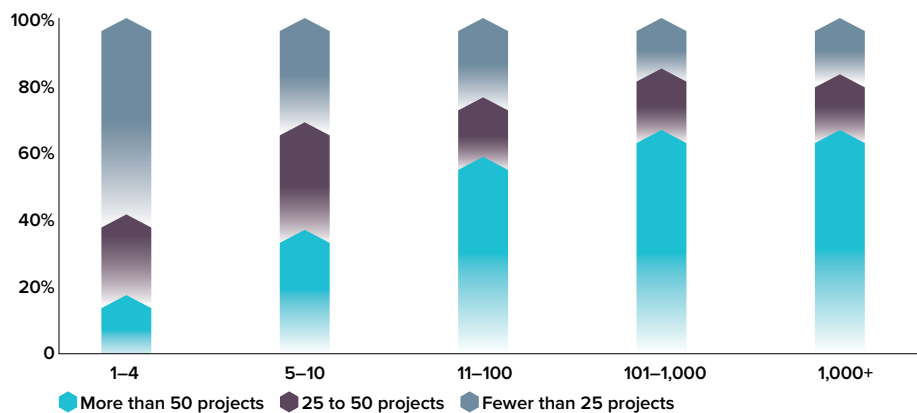
### BUYER RESEARCH BUDGET CHANGE



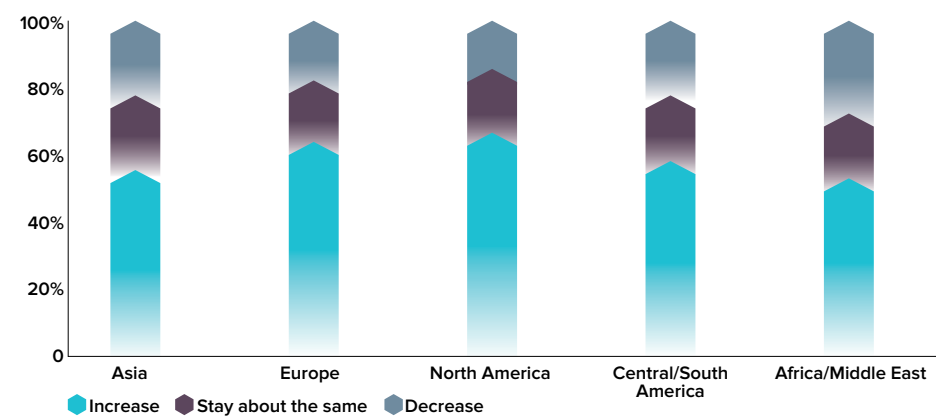
In every region, most suppliers report revenue increases with the largest proportions in North America and Europe



### NUMBER OF PROJECTS BY EMPLOYEE SIZE



### SUPPLIER REVENUE CHANGE





## BUSINESS OUTLOOK



## DRIVERS OF BUDGET INCREASES AMONG CLIENTS

Research clients who experienced budget increases are not very strongly differentiated from those who did not, but some directional differences emerge:

### Firmographics/Demographics

- In business for 11 to 20 years
- Key decision-maker for strategic issues
- 101 to 1,000 employees

### Attitudes and Beliefs

- Believe at least 30% of projects exceed business needs outlined in project brief

### Automation

- Widely adopted matching suppliers and buyers and biometric/non-conscious data
- Completely agree automation has allowed them to deliver better quality research



## DRIVERS OF BUDGET INCREASES AMONG SUPPLIERS

On the other hand, characteristics of suppliers who are more likely to report significantly increased revenue are much more robust:

### Firmographics/Demographics

- Analytical software, survey platform/software, and sample/panel providers
- 11 to 20 employees
- In business for 2 to 5 years
- Key decision-maker for strategic issues

### Attitudes and Beliefs

- Believe at least 70% of projects exceed business needs outlined in project brief
- Familiar with blockchain and believe it will be “extremely unimpactful”
- Believe compliance with data privacy regulations and personal data monetization are “much ado about nothing”
- Have not started getting ready for GDPR

### Lumascope

- Provide access to sample/recruit for studies
- License online qualitative tools or platforms
- License online quantitative tools or platforms

### Automation

- Widely adopted project design, survey design; sampling; online focus group/IDI moderation; analysis of biometric/non-conscious data, text data, image and video data, and other data sources; attribution analytics; integration into the larger business intelligence framework; and matching suppliers to buyers and talent to projects
- Charting and infographics are not relevant to them
- Completely agree automation has allowed them to deliver better quality research; faster delivery; lower costs; access to tools not previously available; giving them a competitive advantage; and will grow in adoption within organization and across the MR industry

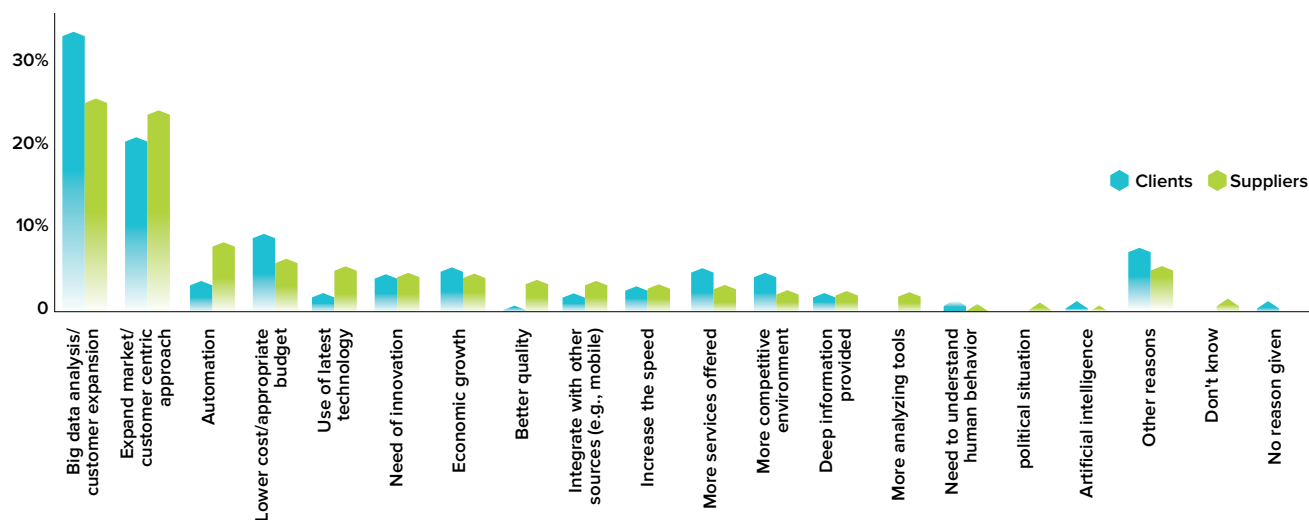
# DEALING WITH DECLINE AND DRIVING GROWTH

We asked GRIT respondents who are experiencing budget/revenue growth about the drivers of continued success, and we asked those reporting a budget/revenue decline about the cause and how they would deal with it. The following charts are coded from verbatim comments and show a variety of perspectives.

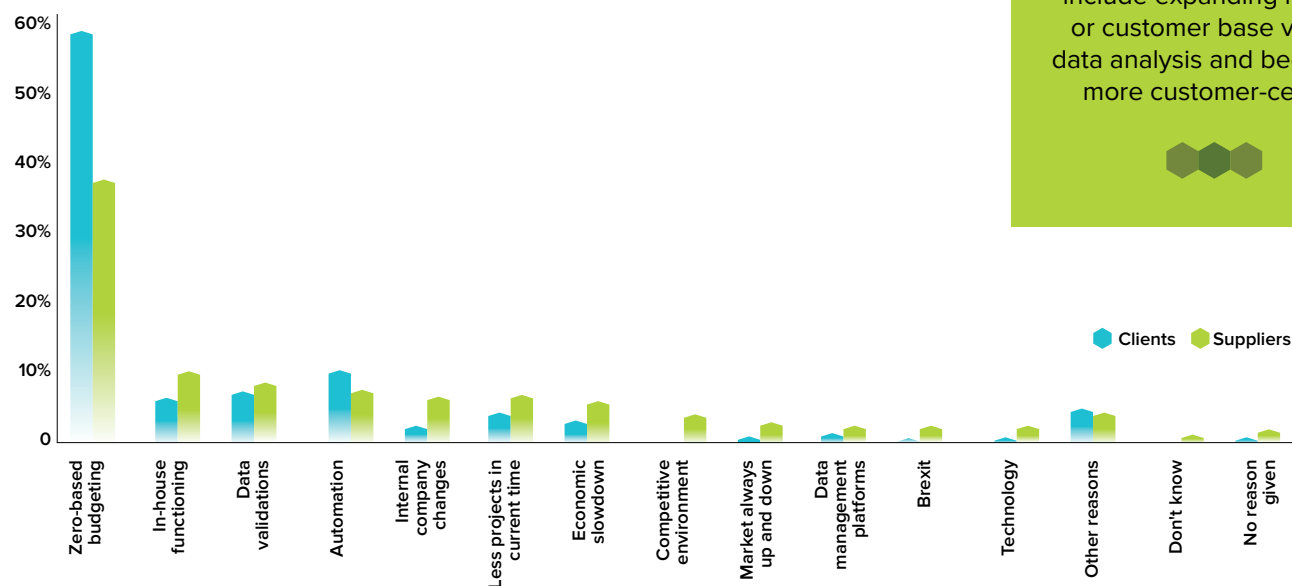
The strongest growth drivers include expanding market or customer base via big data analysis and becoming more customer-centric. Clients, in particular, clustered around the idea of customer expansion via big data analysis, though this driver led both groups. The next tier of drivers include lower costs, automation, technology, and innovation.

For both clients and suppliers, the strongest perceived cause for declines is zero-based budgeting. This is followed by in-house issues, data validation and automation. While those who report increases see automation as an ally, those reporting declines may see it as a threat to their budgets and revenue.

## WHAT WILL DRIVE GROWTH IN SPENDING ON RESEARCH PROJECTS?



## WHY DO YOU BELIEVE THERE WILL BE A DECLINE IN SPENDING ON RESEARCH PROJECTS?



The strongest growth drivers include expanding market or customer base via big data analysis and becoming more customer-centric

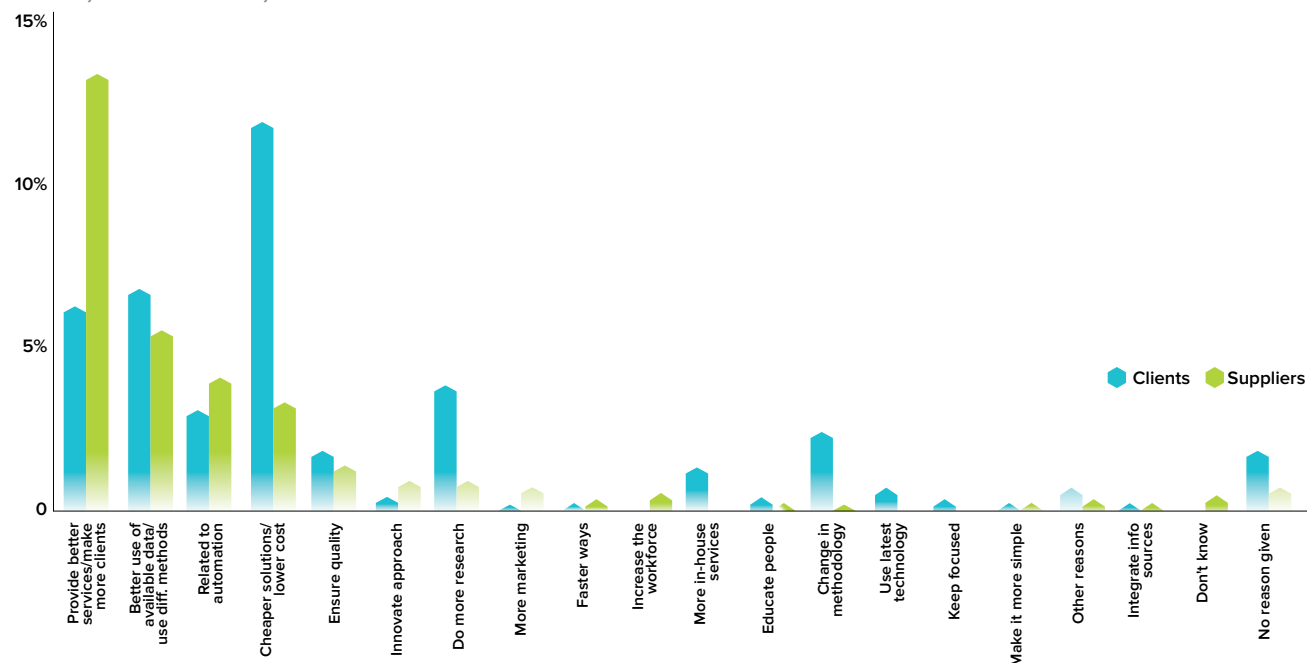
## BUSINESS OUTLOOK

With respect to addressing the decline, GRIT respondents showed little consensus on actions they would take. Supplier suggestions were led by improving service to gain new business, while clients were led by finding cheaper, lower cost solutions.

For both buyers and suppliers, the strongest perceived cause for declines is zero-based budgeting



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



## THE BIG PICTURE

Some research buyers are limited by budget decreases, while a few are blessed with budget increases, and the main challenge seems to be how to get more projects done with the same or less money. Interest in research projects remains strong, though spend may be spread across more suppliers, more data sources, and more types of analyses.

Increased budgets are related to exceeding business needs and using automation to improve quality. Companies with increased budgets are more likely to be well-established (11 to 20 years old, 101 to 1,000 employees) but not overly mature.

Overall, suppliers are enjoying increased revenue, especially those who connect with buyers on automation, quality, and exceeding business needs. These companies tend to be newer (2 to 6 years), technologically-driven, and strongly committed to automation, which they believe is their platform for growth.

Prospects for the industry are bright and seem brightest for those who embrace some form of automation to deliver a larger number of faster, higher quality projects.

Increased budgets are related to exceeding business needs and using automation to improve quality





## HYPER CUSTOMIZATION: WHAT'S POSSIBLE ON A SMALL BUDGET

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**I**n today's landscape, marketing and insights teams are under tremendous pressure to produce breakthrough ideas and creative that exceeds business objectives—and they're often being asked to do so with fewer and fewer resources.

In other words; do it faster, cheaper, better. And, while you're at it, create a customized strategy and experience that reflects the brand.

That might seem like a tall order when the traditional market research approach typically takes between four to eight weeks, just to run a simple concept test. Then there's the cost, which can quickly escalate from the tens of thousands to more than \$100,000 for a single research program.

So, the question is: if your business is allocating a big spend towards each and every research project, are you really getting value for every dollar you're spending? And, how are you customizing that research to ensure the right brand fit?

The reality is that most organizations never have enough money to undertake full research programs on everything they'd like to do.

According to the results of this year's GRIT survey, 55.1% of participants reported that their organization has seen an increase in revenues this year over last year. Yet, 50.9% say spending on research projects has stayed about the same. And 26.8% say their organization's total annual research budget is under \$1 million.

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## GRIT COMMENTARY

method!fy  
a delvinia company

Given the lack of growth in research budgets and the cap on spending, marketing research teams are faced with difficult decisions about how to execute. So how can you derive value from your research budget, shorten the process, and do more custom work with less?

When faced with budget and time constraints some teams opt to forgo research altogether. Others only do research in the initial stages of a project, while others are choosing to bypass traditional research firms and opting to use do-it-yourself platforms in an effort to cut costs and increase turnaround times. Because let's face it, time is money.

However, with research automation technologies, all of the steps in a traditional program are compressed into one interface and executed in as little as 24 hours, for a fraction of the cost of traditional work. That's common knowledge in the industry today.

But what many don't realize is the fact that it's possible for flexibility to be built into automation without requiring massive budgets. The perception is that customizing automated research platforms to suit your brand is too expensive to even consider, but that's not the case.

We live in an age of hyper personalization. In every industry, there are organizations that are tailoring their offerings to create personalized experiences for consumers and clients; and this industry isn't any different.

At the end of the day, you shouldn't have to fit automation. Automation should fit you and your research needs.

Whether your team wants to adapt a standard marketing research method, create audience profiles to match your segmentation models, include customized questions, or modify reports to highlight specific insights, it is possible to create a custom solution that will meet your needs.

By adopting a test-and-learn approach to undertake automated research projects more frequently, you can scale back your costs significantly, bring your customer into the boardroom, and get the research you need, the way you need it.







# VIEW TECHNOLOGY AS TOOLS, NOT AS INSIGHTS

## Rebecca West

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

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

**T**error repeatedly strikes in the hearts of researchers who have long done research using a traditional approach. Much is being written today about how historically experienced market researchers will be left behind in competing for business against all the new innovative tech solutions companies that are marketing directly to their clients. In this environment, it is easy to conclude that individual research skills are superfluous to the glistening array of technology research tools, some of which suggest that the answers can found entirely within use of the tools themselves.

Yes, it is true, technological changes are indeed having a significant impact on market research. But adapting to new technologies does not negate the research process. The fact is, as a researcher, what you know about how to analyze material and formulate findings from research remains relevant and important. The need for astute thinking will not go away. But it does require transitioning how you do the research to a more contemporary and digitally inclusive approach to getting the job done. You have to believe in the ongoing value and marketability of your skill set in drawing perceptive conclusions. But you must envision technology as a tool that enables you to do it. It is important to see technology as tools, not as insights.

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A good example of this is the concept of message testing in story building. As global facilitators of market research, at Civicom Marketing Research Services, we helped clients last year run more than 35,000 web-enabled IDIs and focus groups – a number which we will surpass this year. These represent numerous companies, large and small, and in-between, who are in every instance using their well-honed research skills to uncover insights through tried and true methods of presenting concepts for respondents to react to isolating the ones that resonate, then engaging the respondents in building them into a sequence of how they most positively will receive those messages – in short, storytelling – using research to build the message that the respondent wants to hear.

Civicom expounded on the relevance of this research approach at IJeX Health this year, when our Global Manager, Annie McDannald, gave a talk called: *Tell Me a Story: Take your Message Testing to a Higher Level*. This session was about showing researchers how to engage in storyboard creation in an online in-depth interview setting, and how to present multiple messages to respondents with the flexibility for them to identify their preferences and build storyboards in a web-enabled interview. This is a really good example of how to combine research skill with technology solutions through partnering with an experienced technology solution provider that enables the researcher to do what they do best – concentrate on the research.

The application of sound methodology, solid recruiting and experienced evaluation of results is still important. At the same time, digital transformation is here. Transformative advances in technology are indeed changing market research. Researchers have no choice but to embrace technology if their businesses are to remain relevant.

The answer is, learn to manage the digital world to your advantage. Stay current with technology options. Begin using new technology and sharpening your skills. We've all heard it: *success in the past becomes enshrined in the present*. Don't be a testimony to the past. Bruce Henderson, founder of the Boston Consulting Group, fifty years ago said "*all organizations must adapt or die*." Steven Hawking understood this when he said, "*Intelligence is the ability to adapt to change*." Technological advancement is having a significant impact on market research. Embrace the opportunities presented by market research technologies by making them part of what you do. In summary, think this way: "I can't change the direction of the wind, but I can adjust my sails to always reach my destination."



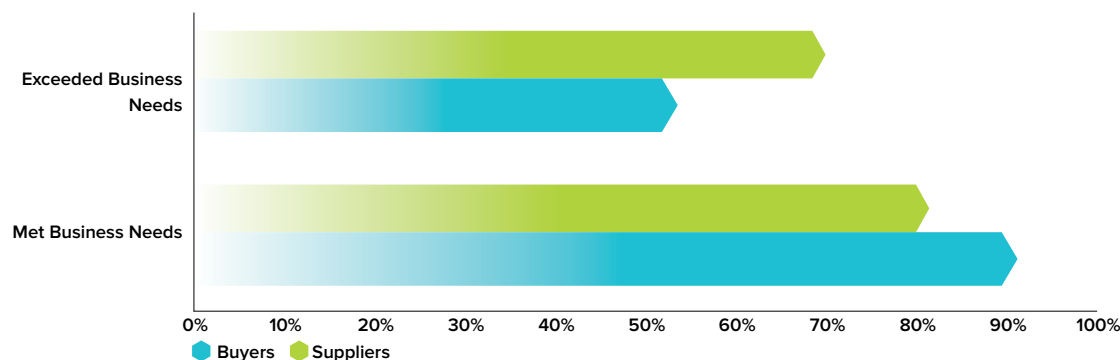
# MEETING PROJECT GOALS

The American philanthropist, environmentalist and activist Tom Steyer says, “Clarity of vision is the key to achieving your objectives”. Meeting the business needs set out through a project brief is no different. The more insights providers meet the business needs expressed by insights buyers and their internal clients, the more services from insights providers will be in demand. The formula is simple.

In this wave of the GRIT survey, we explored the percentage of projects which buyers and suppliers believe met business needs as outlined in the project brief. The results are clearly positive. One-third of research buyers say the needs of the business as outlined in the project brief were exceeded. More than half (average, 56%) say their needs were met.

Research suppliers are more optimistic about performance, with an average of 43% saying the projects they work on exceeded the needs of the business as outlined in the project brief. More importantly, few buyers or providers felt the projects they worked on did not meet the needs as outlined

AVERAGE PERCENT INDICATING BUSINESS NEEDS WERE EXCEEDED OR MET



in the project brief (on average – 11% buyers, 7% suppliers). Little in the way of regional differences were identified for this question, although suppliers in Asia tended to be slightly more positive.

One-third of research buyers say the needs of the business as outlined in the project brief were exceeded



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## MEETING PROJECT GOALS

When asked what separated a project that exceeded the needs of business from those that did not meet the needs of business, the most frequent responses from buyers and suppliers centered around the themes of clarity of the initial remit, the depth of the insight and strategic thinking provided, and the availability of the required information to address the business objective. Going beyond the requirements in a way that augments business strategy is also mentioned. The responses are illustrated by this word cloud based on input from research buyers:





Notable comments on what separated a project that exceeded the needs of business from those that did not meet the needs of business:

- » Deeper insights that drive strategies, advanced analysis. Art combined with science. Consultative and forward-thinking. (buyer)
- » Insight into the true business question, including cost implications. Not just a project level objective. (buyer)
- » Answers questions the business didn't realize they had. Delivers a clear, crisp result and actionable recommendation. (buyer)
- » Insightful analysis, thorough evaluation, and adding the "so what?" (buyer)
- » It tends to be higher profile studies (those that are going to mean more to the business) that provide an opportunity to deliver above expectations. (supplier)
- » Going above and beyond on service. (supplier)
- » Forming a strategic partnership/relationship with the client and their business. (supplier)
- » Not just doing what clients ask but understanding enough about them and their needs to be able to suggest things they haven't considered. Not just answering their questions with the data but bringing out things they haven't even thought to ask that you see in the data. (supplier)

It is important to emphasise that achieving higher level of engagement with clients (internal or external) – participation in strategic discussions or conversations about business implications – can only occur when foundational research project elements are met, and quality data is delivered fast, accurately and on budget. This is true whether the insight team is from a buyer organization or the supplier side.

Insights professionals on both sides of the table seem to feel good about succeeding in aligning project deliverables to organizational needs. In an industry coping with many diverse challenges, ability to deliver business value provides a firm foundation on which to build. We need to make sure we keep our eye on that ball specifically while we juggle all the others we have in the air.

Achieving higher level of engagement with clients can only occur when foundational research project elements are met





# HOW A BRAND INSIGHTS TEAM CAN DELIVER MORE IMPACT

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**W**e see almost every day that the global economy is rocking. Consumer confidence is rising. And corporations are flush with cash. But even so, market research budgets shrink. It seems insights teams continue to be asked to do more with less and we expect that to continue.

Here are two ways your insights can have more impact:

### **Tell the C-suite something they don't already know**

If you want the attention of senior stakeholders in your organization, tell them something they don't already know.

How do you do this? Start by looking for human insights instead of consumer insights.

Most brand teams – particularly those managing large legacy brands – have researched their consumer to death. They

already know everything they're ever going to know about the consumer part of people; that is, the part of people that shops and buys. But our consumer-self is only a fraction of who we are as human beings. Think about this personally. Are you defined by your life as a consumer?

So instead of researching consumers again, spend some time listening to peoples' human stories. What's on their minds? What do they care about? What is the life story they are trying to write for themselves? What tensions are they struggling to manage? And then, and only then, ask yourself, "How can my brand help them with this?"

I guarantee you, if you take a human insights approach to your work in 2018, you'll find things to tell senior stakeholders that they don't already know.

CONTINUED ON NEXT PAGE



### **Become a great red zone team**

We have had many clients express a common frustration. They get great, meaningful insights that create excitement among the immediate team. They can see the potential for innovation that will transform a brand or a messaging strategy. They feel a sense of progress and hope. But after the presentation, things get bogged down. The team doesn't have a plan for "selling" the insight throughout the organization. The project loses steam. It flounders. And then it gets overshadowed by day-to-day priorities.

Pardon us while we use a football analogy. In football, they call this getting to the "Red Zone" but failing to score. The "Red Zone" is the part of the field that is within 20 yards of the goal line. In the "Red Zone," everything gets harder. There's less room to work with. The defense stiffens. The pressure mounts. Some teams are great "Red Zone" teams. They are masters at traversing the final 20 toughest yards to the end zone. Other teams can move the ball down the field but can't get it into the end zone.

Failing to score from the "Red Zone" is what so often happens with insight activation. For your insights to have impact, you have to be great in the "Red Zone." You have to develop ways not just to find great insights, but to activate them. Your research plan should include how you're going to sell your insights throughout the organization and inspire activation across multiple channels. Team immersions, innovation workshops and co-creation work sessions are all ways our clients have become better in the "Red Zone."

So there you go. Two ways your insights can have more organizational impact in 2018. We hope you find these tips, and the invaluable insight from the GRIT Report Survey, useful in making an impact on your organization.





## PROJECT SUCCESS IN THE INSIGHT ECONOMY™

### Margaret Mueller

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**T**he Insight Economy has raised the bar for researchers on both the supplier and buyer sides of the business. With access to more data and more innovative methods at our disposal than ever before, we expect more. Buyers of research want suppliers to help them get closer to their customers and uncover insights that lead to transformative business platforms. Suppliers crave closer partnership, clarity and engagement from their clients to live up to the increasing demand to deliver smarter, faster and more economically. A new model is required to live up to these expectations—one that requires reimagining the provider-client relationship. It is only with true partnership between providers and clients, as well as collaboration across organizational functions, that research projects can live up to the promises of the Insight Economy. At Shapiro+Raj, we are fortunate to have many great clients. Through our partnerships with them, we have identified four principles that we believe are the keys to success.

#### 1. Start with what you know.

Many research projects boil the ocean in search of magic bullets and unicorns. The result? Uncovering what you already know and 200-page decks filled with data that no one uses. The new mantra should be: Don't spend a dime on what you already know. That means tapping multiple data sources across the organization that can establish context on the company, category, competition and customer to determine what it is you really need to know. We now always begin our projects with a meta-analysis of existing data and knowledge synthesis before engaging in any primary research. In some cases, once we've helped connect the dots, it's clear that there isn't a need to engage in primary research at all. More often there is a need, but this initial step makes the primary research more focused, strategic and high impact. This should be the new normal.

CONTINUED ON NEXT PAGE



### **2. Don't do research. Solve problems.**

There's a common denominator to great projects that exceed expectations—having a distinct problem to solve. Too often research becomes a fishing expedition—hoping a single data point or a respondent's comment will magically light a path forward. Unfortunately, research can't replace the hard work of teams identifying what levers can be pulled to move the business forward. Clients that are clear about what they know, what they don't, and what they need to solve get the most out of their research investments.

### **3. Plan for tomorrow, not for today.**

Some say that historically, at its best, market research was able to describe today and at its worst simply described yesterday. What our industry really needs is to help predict tomorrow. Thanks to behavior economics-inspired methods, we're getting much better at that. We are no longer at the mercy of relying on consumers—most of whom can't tell you what they had for breakfast yesterday—to self-report on what they like and how they would behave under certain circumstances in the future. Now, we can put people into experiments and watch them behave. Going beyond traditional methods and incorporating behavioral science moves a project away from merely reducing uncertainty to predicting outcomes.

### **4. Collaborate, collaborate, collaborate.**

Great strategic research and insights cannot be outsourced—it is a collaboration. It is incumbent upon research providers to help their clients bring the right people to the table to contribute to the framing of the research, demand engagement of those stakeholders during the project and keep them informed of learnings throughout the entire project. While we once thought of a final report as something we delivered to clients, we now treat it as something we create together. We have done our best work when we have included clients throughout the process. And they have found these to be most rewarding projects to work on as well.

At Shapiro+Raj we love where this industry is going. Through strong partnerships, we are helping our clients uncover the kinds of commercially viable insights that inspire business-building ideas to move people to act. The result? Insights professionals are having more impact on their businesses because suppliers are better equipped to deliver the kind of high impact work that leads to action. We are all feeling more fulfilled with a strong sense of purpose... because we are working together.







# GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

Over the past eight years, the GRIT Top 50 has become one of the key metrics many companies use to understand their position in the marketplace. At its core, it is a brand tracker using the attribute of “innovation” as the key metric. Each year we measure how market research suppliers and clients 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 considered 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.

We’re often asked how companies can “get on the list” and our response is always the same: effective marketing. Because of the nature of the question, there is no option but for a company to build organic awareness among insights professionals in connection to the idea of being “innovative”. There are many ways to get there: events, content marketing, educational programs, advertising, word-of-mouth, social media, etc. Regardless of the channels used and marketing tactics employed, every company on the list has become top of mind for many in the industry when they think of innovative companies.

While a company’s inclusion and relative position in the GRIT Top 50 rankings mostly reflect successful marketing, we believe the rankings are also a good proxy for business footprint and growth, based on financial performance information – including funding rounds (in some cases).

We are also aware that some companies attempt to “game the system” in a variety of ways, but due to our data cleaning process, those efforts are ineffective; we catch them and delete them. On a related note, some have mentioned that the larger companies in the industry have an advantage due to their number of employees who may take the survey. While there might be a modicum of truth to that on the surface, our analysis looks at IP addresses and email domains and we have never seen evidence that this is a significant factor. If large companies have an advantage, it is through their reach and marketing budgets, not in “stacking votes”. This is also borne out by the in-depth demographic and firmographic analysis we conduct; the sample is simply too diverse and large on all measures to be suspect.

We’re often asked how companies can “get on the list”, and our response is always the same: effective marketing



## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

For this wave, using the aggregate of total mentions, we developed a list of over 1,598 unique companies (slightly down from 2017) from 8,492 total responses, which is significantly more responses than in 2017 due to an almost doubling in sample size.

Only companies that received 22 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 very competitive environment for companies vying to be identified with the “innovative” brand attribute.

As always, a note on our process is warranted. Because the rankings are derived from verbatims, it’s messy. We utilize text analytics (via OdinText) to help streamline the initial process, but a significant amount of human intervention is needed due to name changes, M&A activity, variants, spelling, translations, etc. It’s as much an art as a science. As such, we established a few rules to guide our process that are useful to know as you review the list:

1. Normalizing all spellings or alternates (ex: Nielson, Neelson, Nelson, Nielsen, etc.)
2. If a company has changed its name, we recode to the new name (ex: BrainJuicer to System1 Research)
3. If a company bought another company and rolled them in as a *division or product*, we recode to the acquiring company (ex: FocusVision and Decipher, 20/20 and iModerate)

4. If it is a *product or division* of a parent company, we recode to the parent company (ex: Nielsen BASES becomes Nielsen, Ipsos Neuro becomes Ipsos)
5. If two companies have the same name, we default to the larger company as what was intended
6. If a company has split, we count both (ex: Vision Critical & Maru)
7. Gobbledygook, comments such as “I don’t know”, “there are none”, etc... we code as “none”

In previous waves, this was problematic, primarily because of the “house of brands” represented by Kantar with Millward Brown, TNS, Added Value, etc. In 2017, Kantar shifted not just their branding, but their operational model to an integrated, centralized organizational model with a single unifying brand (perhaps with the exception of Lightspeed). This is now reflected in the rankings because, following our own rules, Kantar is now treated exactly the same as their largest competitors and no longer a house of independent brands. They are simply one entity with multiple products or operating divisions counted as part of the parent company.

Now, after providing the appropriate context and other details, without further ado, here are the 2018 GRIT Top 50 rankings:

Using the aggregate of total mentions, we developed a list of over 1,598 unique companies from 8,492 total responses



## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

## RANKING OF THE TOP 50 MOST INNOVATIVE SUPPLIERS

2018 Rank	Company	Mentions	2017 Rank	Change
1	*Kantar	583	8	7
2	Ipsos	511	2	0
3	System1 Research	373	1	(2)
4	Nielsen	355	3	(1)
5	Research Now / SSI	275	6	1
6	GfK	255	7	1
7	InSites Consulting	224	5	(2)
8	Hotspx Inc.	216	16	8
9	ZappiStore	205	9	0
10	LRW	190	10	0
11	Toluna	148	22	11
12	OdinText	139	4	(8)
13	Qualtrics	133	14	1
14	Lucid	127	19	5
15	VoxPopMe	104	26	11
16	Google	85	12	(4)
17	SKIM Group	80	28	11
18	Cint	72	24	6
19	Shapiro+Raj	63	DEBUT	DEBUT
20	Discuss.IO	63	27	7
21	Fuel Cycle	62	DEBUT	DEBUT
22	Vision Critical	61	18	(4)
23	AYTM	60	31	8
24	FocusVision	58	20	(4)
25	DIG Insights	56	53	28

2018 Rank	Company	Mentions	2017 Rank	Change
26	Remesh	55	37	11
27	20/20 Research	52	17	(10)
28	Macromill	51	23	(5)
29	Methodify/Delvinia	50	DEBUT	DEBUT
30	GutCheck	40	29	(1)
31	TRC Market Research	36	DEBUT	DEBUT
32	Survey Monkey	35	33	1
33	De la Riva Group	35	DEBUT	DEBUT
34	Hall and Partners	34	50	16
35	Streetbees	32	DEBUT	DEBUT
36	C Space	30	DEBUT	DEBUT
37	Schlesinger Group	29	51	14
38	InsightsNow	29	49	11
39	Sentient Decision Science	28	44	5
40	Irrational Agency	27	DEBUT	DEBUT
41	RIWI Corp.	25	34	(7)
42	Maru/Matchbox	25	46	4
43	MaritzCX	25	DEBUT	DEBUT
44	Isobar	25	DEBUT	DEBUT
45	Buzzback Research	25	52	7
46	YouGov	24	DEBUT	DEBUT
47	Mfour Mobile Research	24	38	(9)
48	LivingLens	24	DEBUT	DEBUT
49	Critical Mix	23	DEBUT	DEBUT
50	ProtoBrand	22	DEBUT	DEBUT

## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

The big story is a new #1 for the first time since we launched the GRIT Top 50 rankings: Kantar.

\*The jump from #8 to #1 for Kantar is slightly misleading: If all Kantar divisions were combined in 2017, they would have totalled 421 mentions for a #2 position on the 2017 GRIT Top 50 rankings. However, since last year Kantar, Millward Brown, TNS, etc. were listed separately, we used the rank of “Kantar” for comparison.

As we mentioned above, Kantar has been reorganizing the past few years and it is working; their ranking is reflective of how the marketplace now thinks of the company. When we dive into the details of how GRIT respondents describe the company, “Kantar” is now stated by the large majority, either alone or in conjunction with a legacy division name. Mentions of “Millward Brown” or “TNS” without “Kantar” also being mentioned are down compared to both 2017 and 2016. The success of the reorganization has had benefits for the company’s perceived position as an innovator. If we look at the rolled-up data from 2016 or 2017, total votes for Kantar would have had them hovering around the #1 or #2 mark, but now it has a clear lead, garnering nearly 15% more mentions than the #2, Ipsos.

As avid industry observers and also the industry’s marketing platform, we see the high rankings of the large global players as well-earned; they have clearly been leading with innovation in their communications efforts, achieving big impacts in their brands’ perception around the “innovation” attribute.

We have generally avoided discussing declines in ranking, but with a new #1 we feel it is instructive to review this specific instance. While Kantar is up, the long-time GRIT Top 50 leader System1 Research (formerly Brainjuicer) has dropped to #3. Plainly the transition to a new name and the ensuing repositioning is still a work in progress. While, in 2017, mentions of Brainjuicer alone would have been enough for it to remain #1, and System1 Research mentions were enough to be a top 20 brand, this year Brainjuicer mentions have decreased to a third of the total for the brand. The large increase in System1 Research mentions has not been enough to make up for the Brainjuicer decrease, hence the overall decline. In fact, System1/Brainjuicer is the only top five brand to have seen a decline in absolute mentions in a year when the respondent base increased by 50%. However, considering that they are surrounded in their ranking by much larger firms, we think the story does have a silver lining.

The rest of the top ten are similar to 2017 – the major global companies (Ipsos, Nielsen, GfK), as well as InSites Consulting, Research Now/SSI (the newly combined company moves up a spot from last year, when Research Now was #6 and SSI was #11), ZappiStore and LRW. The one newcomer to the top ten is Hotspex, which at #8, moved up strongly from last year’s #16, supported by a well-timed marketing and PR push in Q1 of various new products. The only company to leave the top ten was OdinText, which is now #12, but they are still widely seen as an innovator. As the smallest company in this mix, OdinText must still be considered a formidable marketing presence to go “head to head” with far larger competitors for mindshare.

The big story is a new number one for the first time since we launched the GRIT Top 50 rankings: Kantar



30 of the Top 50 are either debuts (14) on the list, or they moved up at least 5 spots (16)



## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

Beyond the above, if we were to characterize this year's list in one word it would be **volatility** – 30 of the Top 50 are either debuts (14) on the list, or they moved up at least 5 spots (16). A further 5 went down at least five spots. The number of debuts matches the large number from last year, while the number moving up at least five spots doubles last year's figure.

Of last year's list of 14 debuts, 8 are still in the Top 50. 6 of those 8 (SKIM, Remesh, Insights Now, Schlesinger Group, Buzzback, and Dig Insights) are continuing to move up the list strongly.

If we go back to 2016, 8 of the 11 companies debuting in the Top 50 that year are still in the Top 50 – Macromill, MaritzCX (which was off in 2017 but returned this year), Cint, Sentient Decision Sciences, OdinText, TRC (which also dropped off in 2017 to return this year), AYTM and Voxpopme. In fact, four of these companies – Cint, OdinText, AYTM and Voxpopme – are now ranked higher than they were in 2016.

The top ten companies can be loosely segmented into 3 buckets:

1. Next Generation Consultancies (System1 Research, InSites Consulting, LRW)
2. Tech Players (Hotspex, Research Now/SSI, ZappiStore)
3. Behemoths (Ipsos, Nielsen, GfK, Kantar)

This basic categorization applies to the remainder of the list, with more of the first two dominating as we move past the top ten.

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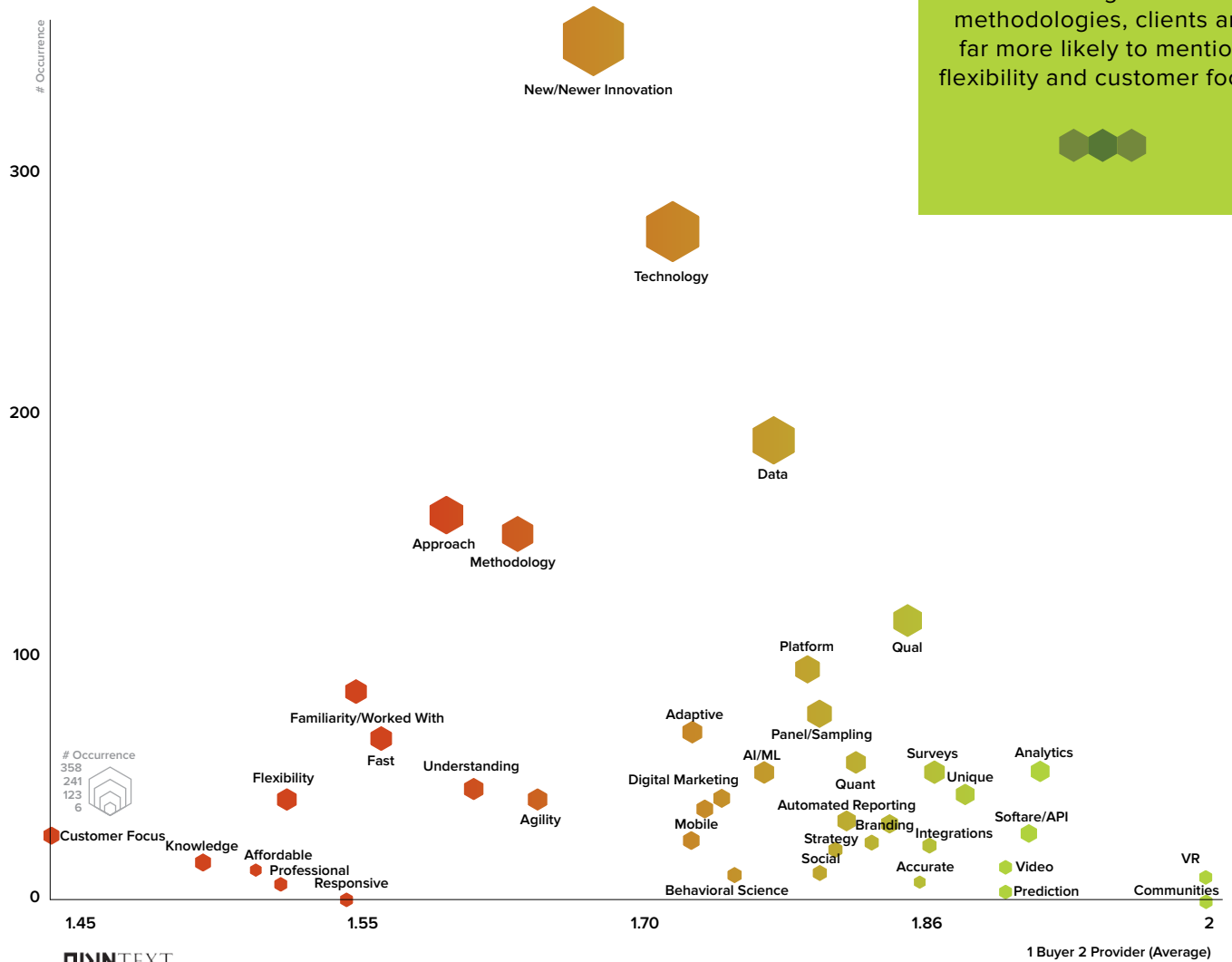


# WHY ARE SUPPLIERS CONSIDERED INNOVATIVE?

In terms of why these companies are innovative (beyond the use of words like 'new' and 'innovative'), we used advanced text analytics from our friends at OdinText to look at the verbatims and get an understanding of what was driving interest from a commercial perspective. The analysis is telling:

## WHY SUPPLIERS ARE SEEN AS INNOVATIVE

Clients vs. Suppliers



## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

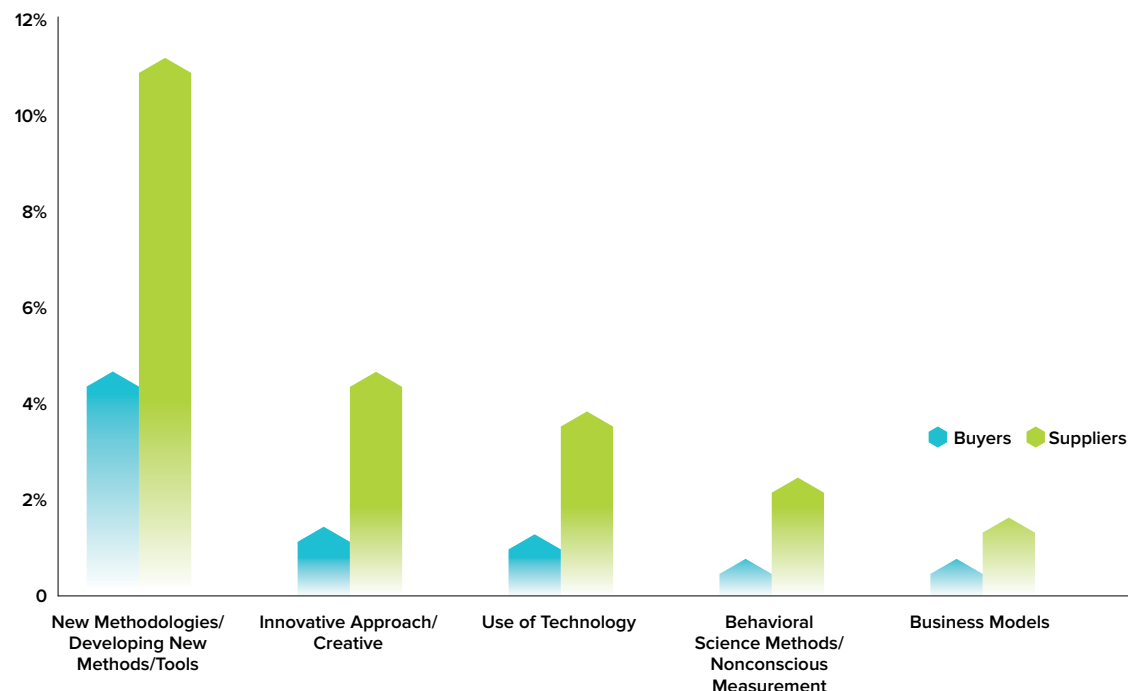
We asked respondents to explain their choices for describing marketing research suppliers as innovative, and once again this year, there are clear differences between suppliers and clients. In fact, the differences are even more pronounced. While suppliers think in terms of more explicit tactical features referencing specific technologies and methodologies, clients are far more likely to mention more tacit features like “flexibility”, “familiarity” (usually due to previous work experience with said supplier), and customer focus.

Suppliers are seemingly more likely to mention items which they feel help them win contracts, help them stand out from the competition, and execute effectively. Clients, like the buyers we study in other categories, seem to place more value on the softer, more emotional attributes.

It seems that a truly innovative business needs to balance the speed and flexibility required to stay current technologically and methodologically with the softer, human side of the business.

A more traditional analysis of coded verbatims offers both confirmation of this interpretation as well as more nuance. The top five reasons cited for a company being considered innovative cluster around a combination of “new”: methodologies, technology, creativity, business models, with a specific mention of usage of applied behavioral science as a standout for many.

## CLIENTS VS. SUPPLIERS TOP 5 REASONS FOR DESCRIBING INNOVATION



In total, 40 codes were created, with the remaining 35 all garnering 1% or less mentions from the base of 3,930 interviews.

It seems that a truly innovative business needs to balance the speed and flexibility required to stay current technologically and methodologically with the softer, human side of the business



## DIFFERENCES BY REGION, COMPANY SIZE, AND ROLE

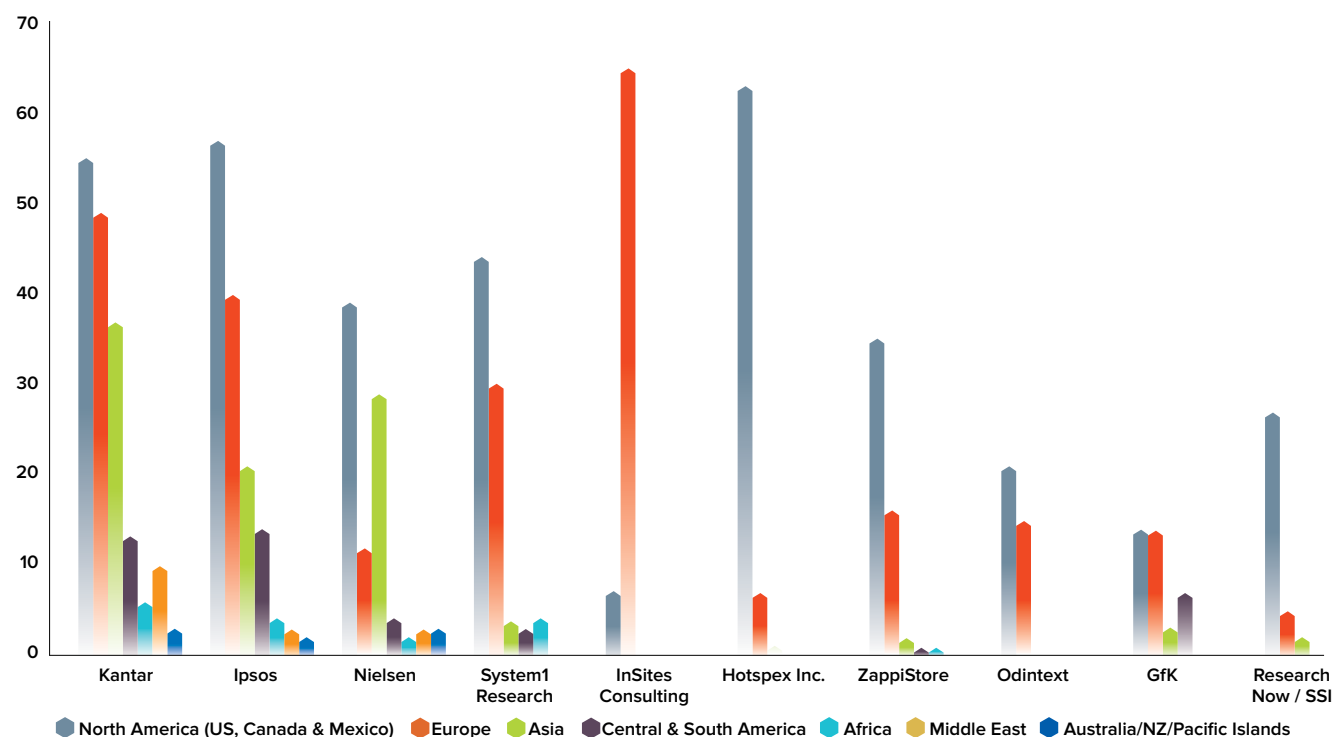
When we take a deeper look at the GRIT Top 50 by a few other variables, we get a slightly different rankings that yield interesting insights into what works in different parts of the world and across other segments.

Let's look at the top mentions by clients by world region.

First, we see the benefit of scale and reach for the “Big 3” of Kantar, Ipsos and Nielsen. They are also the only companies with penetration in every market globally, with the others showing less awareness in markets outside of North America and Europe. It is interesting to note that although Nielsen is by far the larger organization in terms of revenue, their mindshare is smaller globally, which could be a reflection of Nielsen's efforts to not be considered a research provider but rather a data platform.

Perhaps unsurprisingly, among research clients, InSites Consulting dominates in Europe (their home territory), while Hotspex, a Canadian firm, achieves the same in North America. For suppliers wishing to achieve solid brand recognition among clients/buyers, these are useful examples to use as comparison.

GRIT TOP 10 BY CLIENT & REGION



Among research clients, InSites Consulting dominates in Europe (their home territory) while Hotspex, a Canadian firm, achieves the same in North America



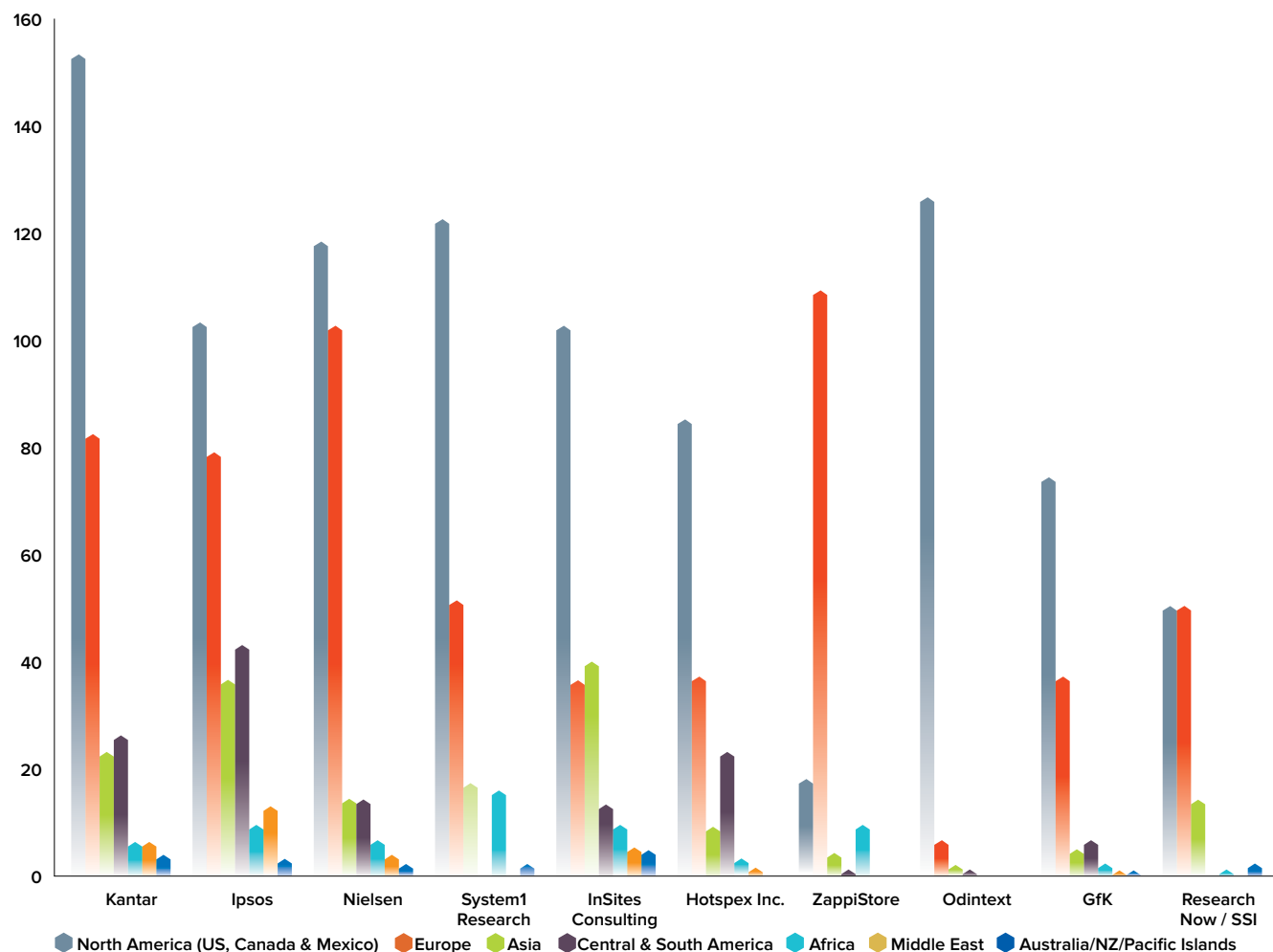
## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

Overall, the story is similar among suppliers' responses with some shuffling of order, and one major difference; OdinText drops out to be replaced by Toluna in the Top 10. This shows how OdinText has focused their marketing efforts in a very targeted way on buyers of research vs. other suppliers, which is in line with their market strategy.

When we look at the top mentions of suppliers by world region, we see higher awareness for most of the top ten companies in more regions in this analysis, with the exception of InSites Consulting and Hotspex still showing a huge disparity between their home and other markets.

As expected, the sample-centric Research Now/SSI and Toluna, as well as the tech company ZappiStore, show strong awareness in multiple markets, not dissimilar to the larger global full-service firms. As we pointed out last year, these companies conduct their marketing efforts in a more industry-wide way and here we see how those efforts are paying off.

TOP 10 SUPPLIERS BY REGION



## GRIT TOP 50 MOST INNOVATIVE SUPPLIERS

## THE BIG PICTURE

As we said in 2017: “The GRIT Top 50 is designed to do one thing: identify how much the brand attribute of innovation drives brand awareness and what the term innovation means to the insights industry. Our belief, based on market dynamics, financial performance, M&A activity and other independent measures, is that the more strongly a supplier is connected with the attribute of innovation, the more likely they are to succeed in the marketplace. While we are far away from developing a predictive model to quantify this, anecdotal evidence certainly points in the direction of a strong relationship”. This story remains the same in 2018.

The volatility in the rankings shows how newer companies continue to disrupt the status quo while perfecting their marketing, earning the awareness of the industry in the process. This competitive pressure is forcing larger incumbent players to sharpen their own efforts, up their own game, and work hard to stay ahead of the pack, which is illustrated by the strong performance of companies like Kantar and Ipsos. This all points to a healthy and dynamic industry where no one can rest on their laurels, and we look forward to seeing how things shift again in 2019.

The volatility in the rankings shows how newer companies continue to disrupt the status quo while perfecting their marketing, earning the awareness of the industry in the process



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# GRIT TOP 25 MOST INNOVATIVE CLIENT COMPANIES

To accompany our review of the most innovative suppliers, we asked researchers who the most innovative clients/brands are (and why). The data was collected in exactly the same way as when we asked about the most innovative suppliers.

As in 2017, we present the Top 25 brands clients/brands perceived to be most innovative based on the number of mentions. Beyond the Top 25, number of mentions became very small quicker than for suppliers and brands were often “tied” as a result.

The list on the right shows the Top 25, as determined by participants in the GRIT survey, and shows the rankings in 2017, 2016 and 2015 for comparative purposes.

Change	2018 Rank	2017 Rank	2016 Rank	2015 Rank	Brand	Mentions	Country	Category
0	1	1	2	3	Unilever	490	UK/Netherlands	CPG
+4	2	6	1	1	P&G	378	USA	CPG
-1	3	2	3	4	Google	295	USA	Online
-1	4	3	4	2	Coca-Cola	239	USA	Soft Drink
0	5	5	6	10	Pepsico	147	USA	Soft Drink
+2	6	8	7	31	Amazon	143	USA	Online
-3	7	4	8	19	Facebook	89	USA	Online
-1	8	7	5	6	Apple	83	USA	IT
0	9	9	9	11	Nestle	77	Switzerland	CPG
+2	10	12	*	*	Netflix	54	USA	Online
-1	11	10	11	7	Microsoft	52	USA	IT
+6	12	18	13	15	Samsung	50	Korea	IT
DEBUT	13	*	27	42	Diageo	48	UK	Alcoholic Beverages
-3	14	11	12	18	Heineken	43	Netherlands	Alcoholic Beverages
DEBUT	15	*	46	*	McDonalds	35	USA	Fast Food
-2	16	14	16	24	Disney	34	USA	Entertainment
+7	17	24	*	*	Merck	32	USA	Pharma
-3	18	15	20	9	Johnson & Johnson	31	USA	Pharma / CPG
DEBUT	19	*	26	35	L'Oreal	30	France	CPG / Personal Care
DEBUT	20	*	42	33	MARS	29	USA	Confectionary
+1	21	22	25	20	Danone	29	France	CPG
+2	22	24	39	*	Uber	29	USA	Transport
*	23	*	17	48	IKEA	26	Sweden	Furniture
-7	24	17	50	*	Pfizer	24	USA	Pharma
-9	25	16	37	*	Tesla	23	USA	Auto

## GRIT TOP 25 MOST INNOVATIVE CLIENT COMPANIES

For the second year in a row, Unilever is considered the most innovative, a position we think is well deserved for a variety of reasons. No other brand of its size takes such an active role within the industry – through engagement at events, via publications, and other channels – discussing critical new thinking around the marketing and research process. That isn't to say other brands do not engage in similar activities, but we do not see them doing it as often and consistently. Also, Unilever very visibly “walks the talk” with an active investment strategy in emerging companies, helping promising, early-stage suppliers build up capabilities (the GRIT Top 50 supplier rankings has several examples of such companies). Unilever is perhaps the best example of a client-side company understanding the critical importance of consumer insights and using its scale and influence to drive change and support innovation.

There is relatively little change at the top of the table. Nine of the top ten in 2018 were also in the top ten last year. Microsoft has dropped out of the top ten by falling one place to #11, and Netflix has edged into #10 place, up from #12 last year. It is interesting to see that P&G has climbed 4 places and is now in 2nd place, having dropped from 1st in 2016, to #6 in 2017. But, the overall pattern at the top of the table is one of stability, with a few big moves. Notable moves outside the top ten include Samsung up six places to #12, Merck up seven places to #17, while Pfizer fell seven places to #24 and Tesla fell nine places to #25.

Outside of the top fifteen, the absolute number of mentions for each brand is relatively small (e.g. McDonalds at #15 has 35 mentions and Disney at #16 has 34 mentions). With variable number of mentions within the rankings, the key messages are who is in the top few (i.e. the top six), who is in the Top 25 (and who is not), and the performance of different business verticals.

The strongest verticals, by this measure, are CPG, soft drinks, online and IT. Unilever, P&G and Nestle, Google, Facebook and Apple, and Coke and Pepsi and Netflix typify the concept of an innovative client.

The Top 25 showed four debut brands:

- Diageo debuts at #13 – one place above Heineken – so there are now two alcoholic beverage companies among the Top 25.
- McDonalds enters the GRIT Top 25 for the first time, having been #46 in 2016, suggesting a marked change in direction over the last two years. It is still only one fast food chain in the Top 25.
- L'Oréal enters the rankings at #19.
- MARS joins the GRIT Top 25 at #20.

IKEA also re-enters the GRIT Top 25 at #23, having been #17 in 2016.

Unilever is perhaps the best example of a client-side company using its scale and influence to drive change and support innovation



## GRIT TOP 25 MOST INNOVATIVE CLIENT COMPANIES

### Who is not on the list?

In many ways, the key message from this report relates to those brands and sectors that did not make the Top 25. There are no media companies (other than Disney and Netflix, whose interests include media), no financial companies, no retailers (other than Amazon and Ikea), no telecoms, and no management consultancies. Many of these sectors are spending billions of dollars on research, often through approaches such as brand and ad trackers, customer satisfaction, and the NPS. In contrast, the brands on the GRIT Top 25 Most Innovative list are leading the industry by demanding more innovation and supporting that with their budgets.

### Link between innovative research and value?

The top five brands on the Forbes 2017 list of the most valuable brands all came in the top ten of the GRIT list of innovative research buyers:

1. Apple
2. Google
3. Microsoft
4. Facebook
5. Coca-Cola

The top five most valuable brands all came in the top ten of the GRIT list of innovative research buyers



## CLIENTS VERSUS SUPPLIERS

Looking at the differences between the views of clients and suppliers of research in terms of which clients are perceived to be the most innovative, we can see that the differences are very few – as illustrated in the table to the right:

The only brands that are not on both top ten lists are Diageo (which is only on the clients' list) and Samsung (which is only on the suppliers' list).

Buyer	Suppliers
Unilever (196)	Unilever (294)
P&G (102)	P&G (276)
Google (87)	Google (208)
Coca-Cola (67)	Coca-Cola (172)
Amazon (47)	Pepsico (103)
Pepsico (44)	Amazon (96)
Apple (32)	Nestlé (60)
Facebook (30)	Facebook (59)
Diageo (19)	Apple (51)
Nestlé (17)	Samsung (43)

## GRIT TOP 25 MOST INNOVATIVE CLIENT COMPANIES

## DIFFERENCES BY REGION

In order to make the bases large enough to look at the regional data we have used three regions: North America, Europe, and Rest of the World (APAC, Middle-East, LatAm and Africa). The table on the right shows the top ten for each of these regions.

The 1st position reflects familiarity, proximity and relative market presence, with more North American researchers mentioning the American P&G and more European researchers (plus in the Rest of the World) mentioning the Anglo-Dutch Unilever.

Six brands make the top ten in all regions: Unilever, P&G, Google, Coca-Cola, Pepsico, and Amazon. This is an interesting mix of four traditional household CPG brands with years of brand building savvy, and two very successful new(er) brands.

In North America, four tech-focused brands complete the top ten: Facebook, Apple, Microsoft, and Netflix. In Europe, the additional four bypass the technology sector and comprise Diageo, Heineken, Danone, and Ikea.

North America	Europe	Rest of World
P&G (245)	Unilever (176)	Unilever (154)
Google (186)	P&G (67)	Coca-Cola (87)
Unilever (153)	Google (59)	P&G (61)
Coca-Cola (102)	Coca-Cola (50)	Google (45)
Pepsico (101)	Diageo (30)	Nestlé (34)
Amazon (99)	Heineken (28)	Pepsico (26)
Facebook (61)	Amazon (24)	Amazon (19)
Apple (52)	Danone (21)	Samsung (18)
Microsoft (46)	Pepsico (18)	Apple (17)
Netflix (37)	Ikea (18)	Facebook (15)

Six brands make the top ten in all regions: Unilever, P&G, Google, Coca-Cola, Pepsico, and Amazon



## WHY ARE CLIENTS CONSIDERED INNOVATIVE?

Using text analytics, we looked at the themes associated with the reason these client organizations were considered most innovative. Commonality emerges on some levels with suppliers around the use of new technologies and approaches/methods. We also see far more specific mentions of the applications of insights such as their use of data, digital savviness, and sophistication of marketing activation.

As in the supplier analysis, client brands that want to achieve the same level of success as the firms in the GRIT Top 25 rankings should consider embracing innovation by trying and testing new approaches with new partners, while publicly setting the expectation that the company is going to speak with its budget to make that vision a reality.

Reason for Being Considered Innovative	Percentage Mentioned
New/Newer Innovation	23.43%
Data Focus	9.28%
Technology	8.49%
Approach	7.15%
Methodology	5.74%
Familiarity/Worked With	3.46%
Customer focus	3.22%
Digital	2.75%
Adaptive	2.67%
Marketing	2.67%



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## THREE WAYS TO BE AN INNOVATIVE CLIENT – AND THREE REASONS YOU SHOULD WANT TO BE

### Leigh Caldwell

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**O**ur industry loves the idea of innovation. The GRIT rankings are closely watched every year, while conferences and publications around the calendar are dedicated to the newest, shiniest methods.

It's easy to see why suppliers want to be innovative. New technologies and new ideas help us stand out and maintain margins. But as a client, why should innovation matter? Shouldn't you let someone else be the guinea pig?

Behavioural science confirms: we are all risk averse. The extra insights from new methods are weighed against the potential downside of unpredictable results. System 3, the brain's imaginative function that complements system 1 and 2 decision making, can make new ideas exciting but also reminds you of what could go wrong.

**But here are three reasons client-side researchers might want to innovate too.**

First, to retain an edge over competitors. In a world where technology is commoditised, understanding your consumers better is one of the remaining ways to stay distinctive, grow market share and brand equity. New methods are only part of this – you also want an agency who focuses on your business goals, and tailors solutions for you, not just a new piece of tech. But new methods are important too.

Second, for the sake of your own career. There will always be an employer out there ready to hire a new insight director with experience of neuro, implicit or semiotics.

CONTINUED ON NEXT PAGE





Third, to benefit our industry. Your willingness to try something new will help improve the state of research practice, and that makes all our lives better – researchers and consumers.

**As important as *why* clients should innovate, is *how*.**

For some suppliers, an “innovative client” means anyone willing to buy the new stuff they’re selling. Innovation means more than that. Here are three ways for clients to get on next year’s GRIT list:

First, innovative clients do engage with new methods, not just as a buyer but as an active co-designer. A client who helps us understand what their business really needs, and shape new research methods to achieve it, is our ideal customer.

Second, clients can also create innovative working models. Commission mini-projects in an innovation lab, like Unilever. Co-fund comparative tests of new methods versus old ones, to establish norms and benchmarks, like some of our clients.

How about getting three agencies to partner up, or linking agency compensation to the KPIs we help you achieve? Thanks to our recent client who challenged us to use our own understanding of psychology and limited attention to improve how we communicate insights to his stakeholders!

Third: if the supplier’s job is to come up with answers, a client can innovate by asking new questions. New questions drive new ways to do business and inspire new research methods. Some of our favourite projects started from original questions about how to define customer gratification, the ethics of digital addiction, or measuring the monetary value of intangible aspects of brand and service.

Inevitably, big clients have an in-built awareness advantage in the GRIT ranking, as big agencies do. But just as a small agency can climb the rankings by doing good work and telling people about it, clients can make a name for themselves too.

Here’s to the creative ones, the deep thinkers, the visionaries, the champions, the brave. You make our industry worth working in.



# MARKET RESEARCH INDUSTRY LUMASCAPE

In an effort to create some structure for better understanding of the market research landscape, this GRIT edition takes on the challenge of creating a lumascape. First, let us define what it is: a lumascape is a visual document that places companies within a particular industry into categories and places the categories in sensible relation to one another. In terms of format, it is a series of charts that organize an industry by grouping together similar companies on a single page to understand how companies are aligned and fit together.

Generally, lumascales are tackled by a few industry experts who put their time and knowledge into creating the document. However, what we decided to do instead was to harness the contribution of as many industry experts (GRIT respondents) as possible. It worked... sort of.

Researchers were asked to place their company, either supplier or client, into one of several categories. For the supplier side, the categories covered different types of companies, based on their primary focus - research, analytics, technology, research process, etc. On the client side, the focus was more on the nature of interaction with internal clients.

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After data cleanup, 681 organizations classified themselves as clients and 1,297 classified themselves as suppliers. In some cases, we had individual respondents from the same organization classify their companies in different categories, so to develop this lumascape, we used the most common category for each company as the final positioning segment.

Next, we looked at adding a dimension based on where the categories fit on a spectrum of strategic vs. tactical for clients, or service vs. technology for suppliers (with some gradations in between).

Finally, we used a combination of response density for each company and our expert judgment to come up with a broadly representative list of as many as seven companies in each category. We did not focus on company size but rather included companies that represented the types of companies in each category.

We could have done this analysis as a straight quantitative analysis exercise such as a correspondence map (and we still might as a follow-up to this report!), but we also wanted to do something visually interesting and, dare we say, fun. We thought that a map could serve as a conceptual framework for a lumascape, and this is where artistic creativity came in. Inspired by the show *Game of Thrones*, specifically the opening credits that use an animated “map” of the show’s imaginary world. We labelled each category as a “kingdom”, selected one of the companies in each kingdom to be a “capital”, placed clients and suppliers on separate continents, and then let our imaginations loose to fill in the details. You’re about to see the result of that effort, and I trust you will let us know whether we achieved our goal or went off our rockers.

So, here is our GRITSCAPE followed by insights gained from the data.

*To fully explore the GRITSCAPE, we suggest that you click on the provided link to open it as a standalone high-definition PDF document.*

In an effort to create some structure for better understanding of the market research landscape, this GRIT edition takes on the challenge of creating a lumascape



Researchers were asked to place their company, either supplier or client, into one of several categories







## About GRITscape

The GRITscape is a fun way to visually describe how insights suppliers and clients - participants in the GRIT Q1-Q2 2018 survey - define themselves.

Organizations are clustered based on which category most respondents from each company self-selected as the best fit. Supplier categories are laid out along the service-technology dimension (vertical). Client categories represent the different roles internal insights departments can play within organizations on a strategic-tactical continuum.

Relative placement and size of logos have no defined meaning and are only driven by design considerations.





## THE FOLLOWING TABLES CAN SERVE AS YOUR INDEX FOR THE GRITSCOPE:

Client Organizations	Kingdom	Client Organizations	Kingdom
3M	Internalia	IKEA	Cxia
Accenture	Free Cities of Niche	J&J	Internalia
Aetna	Internalia	LinkedIn	Hybridorea
Aflac	Cxia	Mary Kay	Internalia
AIG	Hybridorea	McDonald's	Strategia
Airbnb	Internalia	McKesson	Outsourciana
Amazon	Cxia	Merck & Co	Strategia
AT&T	Cxia	Microsoft	Hybridorea
Barnett Waddingham	Analytica	Moreketing	Outsourciana
Blue Cross Blue Shield	Hybridorea	Nationwide	Analytica
Capital One	Strategia	P&G	Hybridorea
Chase	Analytica	PennMutual	Free Cities of Niche
Choice Hotels	Hybridorea	Pobl	Analytica
Coke	Hybridorea	Quest Diagnostics	Free Cities of Niche
Colgate	Outsourciana	Reckitt Benckiser	Strategia
Comcast Business	Free Cities of Niche	Samsung	Internalia
Dell	Strategia	Sony Pictures	Hybridorea
Deutsche Telekom	Free Cities of Niche	Sprint	Outsourciana
Diageo	Hybridorea	Suncor	Analytica
Disney	Cxia	Sunlife	Outsourciana
FedEx	Free Cities of Niche	Unilever	Strategia
Ford	Cxia	VICE	Free Cities of Niche
Formica	Analytica	vivid	Outsourciana
Forst	Outsourciana	Walmart	Internalia
Heineken	Strategia		

Supplier Organizations	Kingdom	Supplier Organizations	Kingdom
20 20 research	Qualitoolia	Lucid	Samplania
Abt Associates	The Free Cities of Niche	MAP MR	Hybridorea Protectorates
Ameritest	Brandstrategia	MaritzCX	Cxiaconsult
AYTM	Hybridorea Protectorates	Marquant	Analyserv
BASES	Innovatia	Maru Group, Inc	Hybridorea Protectorates
Bluefrog	Marcomia	MetrixLab	Strategiaconsult
BuzzBack	Innovatia	MFour Mobile Research	Samplania
Campos, Inc	Brandstrategia	MindProber	Neuroland
Cint	Samplania	MMR Research Worldwide	Innovatia
Confirmit	Quantitoolia	Morpace	The Free Cities of Niche
Crowdemotion	Neuroland	National Research	Fieldservicia
Dapresy	Analytool	NeuroSpot	Marcomia
De la Riva Group	Cxiaconsult	NeuroStrata	Neuroland
Delvinia	Samplania	Nielsen	Hybridorea Protectorates
Discuss.io	Qualitoolia	NLogic	Analyserv
Displayr	Analytool	OdinText	Unstructured Territories
DSS Research	Cxiaconsult	Optimization Group	Analyserv
EMS Analytics	Analyserv	ORC International	The Free Cities of Niche
Eolas International	Cxiaconsult	P&K Research	Cxiaconsult
Field Agent	The Free Cities of Niche	P2Sample	Samplania
Focus Pointe Global	Fieldservicia	Phoenix VII Predictive Analytics	Analyserv
FocusVision	Quantitoolia	Populus Data Solutions	Fieldservicia
Fuel Cycle	Quantitoolia	PREDIQT	Datania
GfK	Fullservicia	Provokers	Strategiaconsult
GIM	Marcomia	Qualtrics	Quantitoolia
GLG	The Free Cities of Niche	Radius Global Market Research	Strategiaconsult
Glimpzlt	Unstructured Territories	Red Centre Software	Analytool
GlobalData	Analytool	Remesh	Qualitoolia
GutCheck	Innovatia	Research Now - SSI	Samplania
Hall and Partners	Brandstrategia	RIWI Corp.	Hybridorea Protectorates
Happy Thinking People	Hybridorea Protectorates	Schlesinger Group	Qualitoolia
Harris Interactive	Fullservicia	SCL Group	Marcomia
Hill+Knowlton Strategies	Marcomia	Sentient Decision Science	Neuroland
Hotspx	Brandstrategia	SKIM	Brandstrategia
House of Marketing Research	The Free Cities of Niche	Space Doctors	Strategiaconsult
InCrowd	The Free Cities of Niche	Stratigir	Innovatia
Infotools	Analytool	SurveyMonkey	Quantitoolia
InsightsNow	Innovatia	System1 Group	Strategiaconsult
InSites Consulting	Fullservicia	The Kantar Company	Strategiaconsult
IntelliClear	Fieldservicia	The NPD Group	Strategiaconsult
Ipsos	Fullservicia	thinonline	Fieldservicia
Irrational Agency	Neuroland	Tobii Pro	Neuroland
Isobar	Fullservicia	Toluna	Hybridorea Protectorates
Itracks	Qualitoolia	TRC	Fullservicia
J. D. Power	Cxiaconsult	Undertone	Marcomia
Jackson Associates	Fieldservicia	Veylinx	Innovatia
Kwantum	Analyserv	Vision Critical	Quantitoolia
Language Connect	Datania	Vista Research Services	Datania
Lightspeed	Samplania	Voxpome	Qualitoolia
LivingLens	Unstructured Territories	ZappiStore	Quantitoolia
LRW	Strategiaconsult		

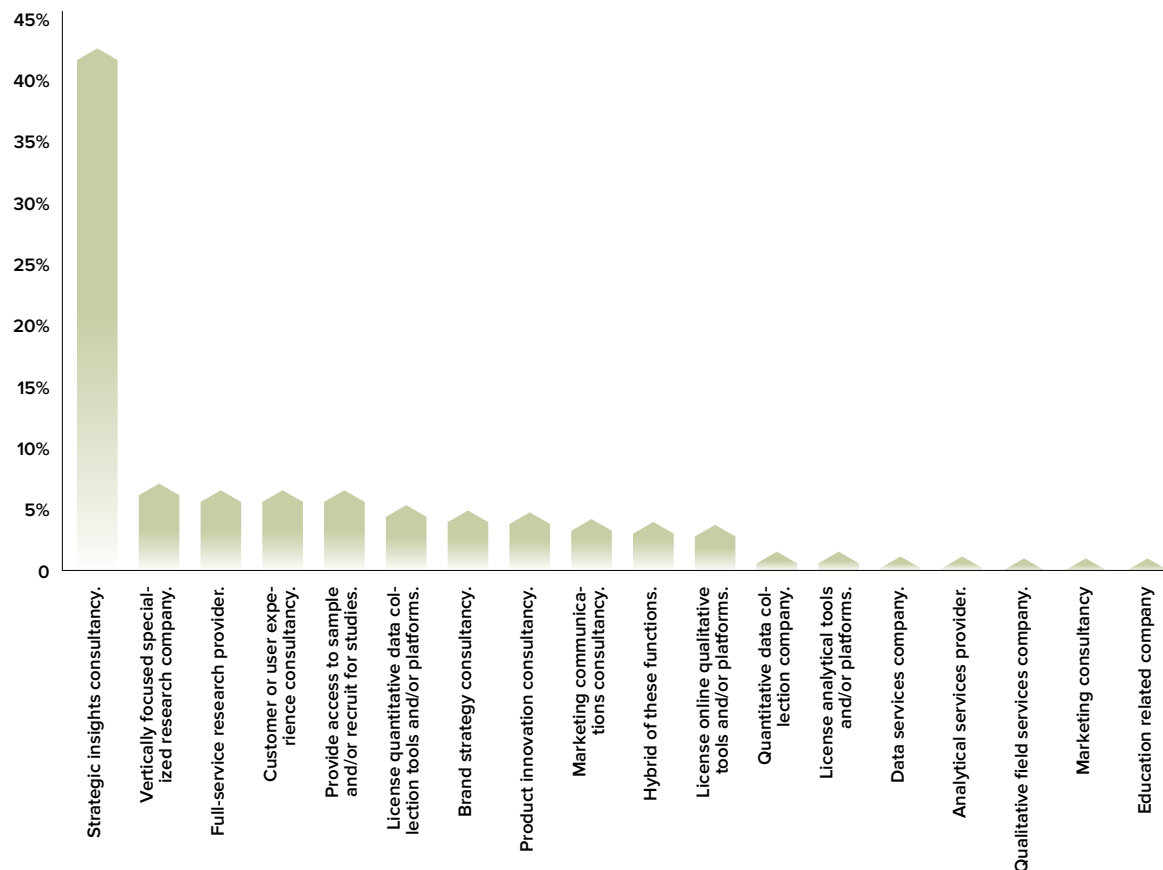
## MARKET RESEARCH INDUSTRY LUMASCAPE

### What does this tell us about research suppliers?

The first thing that we learned in this analysis is something we have been observing for many years – researchers don't make good marketers. The premise of positioning is knowing what you do and what you don't do. In this survey, there was a great inconsistency from the respondents within a company regarding the company's function. Here is an example, just one of many: This particular supplier had seven people from their company respond to the lumascape question. These seven people categorized their company in five different categories. The takeaway is that their own employees aren't really sure what the company does, or don't know how to talk about it consistently. This inconsistency was more pronounced within some supplier companies than others, but it was evident to some degree in almost every supplier that had three or more respondents. A quick sample of twenty different suppliers that fit the profile showed that 19 of them exhibited this issue. This means that leaders of supplier companies need to clarify their market positioning and communicate that definition effectively throughout their organizations.

One of the most notable findings concerns the shift from "research" to "insights". The categorical options to choose from included both Full Service Research Provider and Strategic Insights Consultancy. When looking at the actual firms that were listed in each one of these, there was a lot of overlap – both from our perspective and the respondent's perspective (see prior paragraph). However, positioning

### SELF-CATEGORIZED COMPANY TYPE



yourself as a Strategic Insights Consultancy is much more popular (42% respondents categorized their company that way) compared to positioning as a Full Service Research Provider (6% categorized that way). While all companies want to be recognized for the deepest level of engagement, knowledge, and skills that is reasonable, being a Strategic Insights Consultancy doesn't buy you marketplace

Leaders of supplier companies need to clarify their market positioning and communicate that definition effectively throughout their organizations





## MARKET RESEARCH INDUSTRY LUMASCAPE

advantage unless you are bringing something more to the table than what a Full Service Research Provider usually offers. In a review of revenue growth, both categories see about the same percentage expecting growth (59% for Strategic Insights and 54% for Full Service Research).

Strategic Insights Consultancy was just one of the consultancy options, the “other Consultancies” either listed or from open ends are Product Innovation, Marketing Communication, Customer/User Experience, Brand Strategy, Marketing, and Management. Consultancies of any kind accounted for a little over 60% of all categorizations, dominated by Strategic Insights.

We would be remiss if we didn’t add a few comments to the preceding analysis: The pertinent question in the survey asked about “organization,” which someone could interpret as the parent company or as their office or department. Someone who works for the survey group might answer differently than someone on a client team. If a company had several respondents, they are somewhat likely to come from separate “organizations”. Also, while we do not believe this had meaningful impact on the results, we always have to assume that the company categories themselves might not have been as clear to all the respondents as they were to the survey authors.

### Supplier categories and growth expectations

If we look at growth expectations across all suppliers, the average we are working from is 57%. That is the percentage of supplier respondents that expect some growth (slight or significant) from last year to this year. We then looked at the categories that have at least 10 responses. The process of research is the most disrupted category. It is both the area with the most expected growth and the least expected growth. Tools and platforms are replacing more traditional approaches.

Sample providers are the category with the most respondents within those companies who are expecting growth (80%). Tools that make the research process happen are also expecting growth that is above the average: Quantitative data collection tools/platforms (68%), Qualitative data collection tools/platforms (71%), and Analytical tool/platforms (67%).

There are three categories that are meaningfully below the average growth expectation. All three are being impacted by automation and new tools and methodologies. Quantitative data collection (48%), Qualitative field services (36%), and Analytical services (45%) are all seeing less than 50% expected growth in their companies.

Positioning as a Strategic Insights Consultancy is much more popular compared to positioning as a Full Service Research Provider



Sample providers are the category with the most respondents within those companies who are expecting growth (80%)



## CLIENT ORGANIZATIONS LUMASCAPE

We also asked clients to undertake a similar task, although with far less granularity in segments, in an attempt to understand how these organizations view themselves by role and impact within their organizations. Here is what we learned, again followed by a more nuanced analysis.

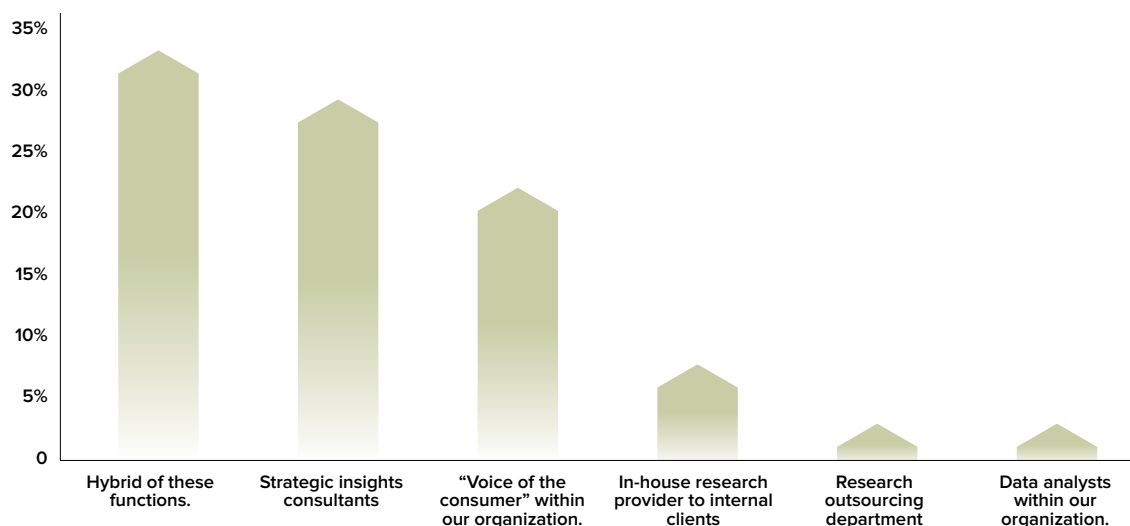
### What does this tell us about client organizations?

Three functions dominated client-side research organizations. These three are either functioning as strategic insights consultants (29%), voice of the customer for the organization (22%), or a hybrid of these and other research/analytic functions (33%). There was no correlation between these three options and research budget growth expectations. All other research functions listed represented less than 10 respondents. There does not appear to be any meaningful variations by the size of the organization or the industry vertical.

The full list (with at least 10 responses) is on the right:

The issue of positioning also occurs in client organizations, but the problem is not nearly as pronounced. There could be a couple of explanations: the first is that client organizations are often more focused in their scope and therefore, they know both what they do and what they don't do.

### SELF-REPORTED CLIENT FUNCTION



Three functions dominate client-side research organizations: strategic insights consultants (29%), voice of the customer for the organization (22%), or a hybrid of these and other research/analytic functions (33%)



Secondly, there are fewer possibilities of categories, and therefore more consistency. However, the fact that this exists means, once again, that as researchers, we need to become better marketers. Not just for our benefit, but also for the benefit of our clients – internal or external.

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## THE BIG PICTURE

To no one's surprise, the research industry is a very segmented marketplace. Understanding where you play, especially as a supplier, is important for positioning and marketplace success. And, based on the data from this edition of the GRIT study, this understanding of where a supplier fits is often not clear or is not communicated effectively within organizations.

Based on the changing nature of the industry due to automation and other technologies, methodology changes, and resource constraints (including time), we would expect to see significant shifts in the number and size of the companies in the categories that we defined in the lumascape exercise. The shift in how research is done will continue to impact processes, within both supplier and client organizations. Our understanding of what we do (and what we don't) will constantly evolve.



# AUDIENCES ARE THE NEW NORMS: ACTIVATING STRATEGY IN A MODERN, AGILE WAY

## Matt Warta

CEO and Co-Founder, GutCheck

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

Over the last few years, we've seen hundreds of companies emerge or evolve to become part of the Display Lumascape, a framework for digital marketing and advertising that tells us what roles companies and their associated technology play in a process from marketing strategy to consumer activation. These companies all have a common goal: playing their part in reaching targeted consumers in a personalized way. We've been determining product and ad success by traditional norms, but if the end goal is consumer activation, why aren't we organizing our processes around the people who drive the market? We're missing a critical upfront process, an integration led by research and technology, that enables personalization to be carried through to inform the media plan—ensuring the right target consumers are activated.

We must first identify and understand rich target consumers in an agile way that allows us to make the audience the new normative measure. This is a big opportunity for market research. By starting with the audience, and making it the

currency throughout development—instead of traditional norms—we can ensure relevancy throughout activation. Why does this matter? \$70B<sup>1</sup> is being spent annually on digital ads—in a very personalized way. If we take personalized assets built for the audience, and use those specific audience insights to inform media buying, we can increase ROI.

So, why isn't this being done today? Most development processes test products against products, and ads against ads, not unique audiences that need to be activated against.

CONTINUED ON NEXT PAGE



In CPG, 1.5%<sup>2</sup> of shoppers (early adopters) determine new product success within the first year. We also know 85% of product launches fail and only 20% of ads are effective. We can do better than that—by understanding the target and activating against them in a more robust way. Given these numbers and the myriad of technology solutions within the Lumascope, it's no wonder why analytical solutions are a top expense area in 2018: CMOs understand analytics is central to delivering customer experience, identifying, understanding, and growing customers, and measuring and optimizing marketing performance<sup>3</sup>.

To grow market share, we must start with the 1.5%. To identify these audiences and activate against them, we need modern solutions that harness big data and combine it with other first-party data, like survey data, in a dynamic, agile way. Imagine a world where we produce high-fidelity segmentations, tightly integrated with a media plan, in a few weeks...this is an existing reality.

For example, we used our agile solution with a coffee brand to deliver insights that identified at least 4.78M consumers available for the taking, while uncovering their

demographics, unique behaviors, and interests; the insights specified how, when, and where to engage them. This real-time study then seamlessly fed product development, communications, and media planning and buying—as an API integration into the digital lumascope.

Fortunately, there are people offering these solutions, not just us. If you're uncertain about adopting, ask yourself...

- Can you effectively and efficiently map your segmentation to a media buying platform?
- When testing ads and products, how will you ensure they'll resonate with that 1.5% audience you should target?
- Does your media buy effectively target the early adopters for which you build your products and advertisements?

This is the next wave of agile, wherein we intelligently connect the dots among data gathered throughout the entire development process, apply iterative learnings, and in real-time integrate those insights into the Display Lumascope. By leveraging the audience as currency from identification and understanding to activation, you can make your brand more relevant, efficiently increase ad effectiveness, and truly make an impact on your business.



1. <https://www.emarketer.com/Report/US-Ad-Spending-eMarketer-Forecast-2017/2001998>

2. <https://www.businesswire.com/news/home/20120521005277/en/1.5-Shoppers-Decide-Success-New-CPG-Products>

3. <https://www.gartner.com/binaries/content/assets/events/keywords/digital-marketing/gml4/gml4-cmo-spend-survey.pdf>



# GRIT REGIONAL VIEW: LATIN AMERICA

For the first time since its inception, the GRIT Report is including a deep analysis of the opinions of the insights community in Latin America. This is thanks to the 286 professionals who participated in the study, answering the questionnaire in either of the two versions, English or Spanish.

It is quite interesting to observe the similarities and differences of this sub-sample with respect to the rest of the world. We will highlight some of those here, giving you a taste for what will be the subject of a special regional report soon to be published by GreenBook LATAM.

## The Most Innovative Suppliers in Latin America

As is true with most things, the LATAM insights industry has its own unique view on what suppliers are considered most innovative, so we undertook a special analysis of the “GRIT Top 50” to reach a subset of the “LATAM Top 10”.

TOP10 innovative companies	
1	Kantar Group
2	IPSOS
3	GfK
4	De la Riva Group
5	System1 Research
6	Nielsen
7	LEXIA
8	ZappiStore
9	Provokers
10	Insitum

In the Top 10 companies identified as most innovative, there are six international companies with a presence in some LATAM countries, and the other four are local firms: three from Mexico (De la Riva Group, LEXIA and Insitum) and one other multinational (Provokers). There is also significant overlap with the global Top 50, with Kantar and Ipsos specifically maintaining their positions on both lists.

The LATAM insights industry has its own unique view on what suppliers are considered most innovative



### GDPR, Blockchain and Automation

LATAM participants are less familiar than the global average with some issues that might have great repercussion in the industry, such as blockchain (familiar to 22% in the region compared to 38% in the rest of the world) and GDPR (37% vs. 47%).

In terms of the adoption of automation for different tasks of the research process, the trends in LATAM are similar to those in other regions. Automation has a significantly higher perceived incidence to change tasks such as: generating graphics and infographics; data analysis, either from surveys or social networks, and sampling or survey design. It is

worth noting, however, that automation in LATAM is less frequently used for integrating research processes into larger intelligence frameworks or matching buyers and sellers of insights. In contrast, there is greater adoption of automation in LATAM in matching talent to projects.

Furthermore, there is a more positive view towards automation in LATAM compared to the rest of the world, since the LATAM community seems to believe that automation will radically improve processes, increase speed and quality, and, in general, have a positive, powerful impact on the industry.

## THE BIG PICTURE

While LATAM is generally considered an “emerging market”, we see that it is working hard to stay abreast of all the major trends in the industry and in many ways is facing the same challenges as in larger markets. As we mentioned previously,

we will be publishing a special LATAM edition of the full GRIT report to be used for strategic comparative analysis. We hope that our effort can (in its own limited way) help this increasingly important market achieve its massive potential.



# ADDENDUM: CORPORATE RESEARCHERS SPEAK ABOUT CONFERENCES

## What Corporate Researchers Like Most and Least About Professional Conferences

*The following is excerpted from “Corporate Researchers Speak: How to Engage & Sell Us”, the first-ever qualitative deep-dive to discover the path to purchase (and the ensuing pain points and opportunities) for marketing-research and insights projects. This study was a collaborative effort led by David Harris of Insights & Measurement and was funded by several suppliers through Collaborata, the market-research marketplace. GreenBook funded a section about the value of conferences, which we now share with the industry as an addendum to this edition of the GRIT Report.*

28 corporate-research buyers (screened based on a number of dimensions) participated in a two-phased study. These clients generously shared about how they prefer to be “sold” by research suppliers and what really turns them off during the entire process. As suppliers know, it’s more difficult than ever to engage new clients, let alone build an ongoing trusted advisor relationship.

So, we asked clients how they like to meet and learn about new suppliers. Not surprisingly, being hounded by emails and voicemails doesn’t endear suppliers to clients. And, almost as predictable, the somewhat nebulous phrase “word of mouth” topped respondents’ list (which we’ll explain later).

One of the key takeaways from the research focused around **the value of attending professional conferences** (see table on next page)\*. What these respondents appreciate most about conferences include being able to easily see (on their own terms) what suppliers offer, giving them an opportunity to assess new tools and techniques, and learn about how researchers are innovating.

## ADDENDUM: CORPORATE RESEARCHERS SPEAK ABOUT CONFERENCES

Although suppliers are eager to discuss with clients how they are superior collaborators and possess the requisite tools, skills, and methods, corporate researchers have been burned before. So, they tread carefully. Conferences help mitigate the risk, giving clients the opportunity not only to be “shown and told,” but also to network with their peers – fellow corporate researchers (aka “word of mouth”).

As these corporate clients explained, conferences also offer *efficiency*: the ability to meet a lot of suppliers, see a lot of demonstrations, and compare notes with plenty of peers in just a couple of days. This in-person experience, within the framework of a professional event, gives them far greater value than a cold call, a social-media post, or a trade ad (not that these methods at times don’t also have their place).

” “Love how I can watch 10-plus presentations a day and get new ideas for how to frame an issue and to see how different suppliers think about that issue.”

” “Conference presentations...allow me to see how different methods are used to solve specific business issues.”

Methods to Get Your Attention	1st	2nd	3rd	Total
Word of mouth	25	4	–	29
Conferences	5	11	11	27
Webinars	–	10	9	19
Direct mail	–	3	2	5
LinkedIn	–	2	3	5
Advertising in trade publications	–	–	2	2
Video blogs	–	–	2	2
Twitter/social media	–	–	1	1
Cold calls	–	–	–	0

## ADDENDUM: CORPORATE RESEARCHERS SPEAK ABOUT CONFERENCES

\* Q: If you had to evaluate all the methods [listed] that research suppliers can utilize to get your attention, how would they stack up in terms of effectiveness? Please rank the top three.

NOTE: This question was posted as part of a weeklong exercise on a qualitative online-research platform. The tallies in the chart on the previous page, of course, are not in any way projectable; still, they provide clear direction.

Corporate researchers expressed that they frequently turn to each other for advice about suppliers; conferences are a natural place to connect with peers for this purpose.

”Hearing from other client-side colleagues on what studies and suppliers worked for them sparks my thinking on what could work in my organization.”

Asked what they like least about professional conferences, respondents discussed how they literally feel hunted by suppliers, as characterized by the comments below:

”All the emails and phone calls I get a few weeks before [a conference] from people who want to meet me but don’t take the time to understand my business or my role.”

”Feeding frenzy! As a client with a budget, I often feel like raw meat that suppliers are hoping to gobble up.”

Similarly, respondents were asked to describe how they do not like to meet suppliers at conferences. The three responses below were typical:

”Being pulled into a booth by a pushy vendor that I’m not interested in.”

”Cold calls about setting up time to discuss my strategic plans for the year and how they can help.”

”Being chased in the common areas so that they can give me their elevator pitch in a robotic manner.”

Conversely, respondents were also asked to describe how they like to meet suppliers at conferences. They said that they prefer meeting agencies by seeing their presentations and by reading about their expertise and approaching them (rather than being approached by suppliers). The three verbatims below summarize respondents’ answers:

”I like to get a summary of their specific expertise and where they think they can really add value. I then prefer to approach them at a conference if I have a need for that expertise.”

”Presentations of case studies to show their abilities.”

”Meeting them through a recommendation of another corporate researcher in attendance or seeing them present something at these conferences about how they were able to change their client’s business.”

The implications of this exploration are clear:

First, clients value professional conferences as an efficient, appropriate, and safe venue to discover, meet, and evaluate suppliers (as well as learn about new tools and techniques).

Second, suppliers, therefore, should leverage professional conferences to display and present their expertise, tools, and the value they bring to a client. And don’t forget: back off on the hard sell! If what you’re presenting and offering brings real value and differentiates you meaningfully, clients want to discover you. And, they’ll look to hear about you from their network of peers. So, think about how you can leverage your current clientele (and your successes in bringing value to their brands and businesses) to meet new ones.



# CONCLUSIONS & FINAL THOUGHTS

In decoding the amounts of data available from this wave of GRIT, I'm reminded of what a manager told me early in my career. She said "We're looking for the WHAT (*What does the data say about our business?*), the SO WHAT (*What impact will that have on our business?*), and the NOW WHAT (*How do we activate what we have learned?*)."

I've heard this many times since that conversation with my manager in the mid-1990s. The reason I am reminded of it is because how we collect data to get us to the WHAT is changing. And the ability to answer the NOW WHAT – *What action should I take next to solve my problem?* – seems to be getting more valuable and important than it's ever been.

If we look at the big movers and new entrants to the GRIT Top 50 rankings, we see a pattern emerge. Companies like Toluna, VoxPopMe, DIG Insights, Methodify, LivingLens, and Remesh make getting to the WHAT simpler, more accessible and efficient. We observed in the lumascape analysis that companies categorized under sample and platforms (quant, qual, and analytics) have more respondents with higher than average growth expectations. When looking at clients and suppliers that experience growth, either in budget or revenue, a similar pattern shows:

- Clients – Increased budgets are related to producing insights that exceed business needs and using automation to improve quality.
- Suppliers – Overall, suppliers are enjoying increased revenue, especially those who connect with buyers on automation, quality, and exceeding business needs. These companies tend to be newer, technologically-driven, and strongly committed to automation, which they believe is their platform for growth.

That is not to say that WHAT is the only way to go. At the end of the day, we are all still looking for the next best action to take – the NOW WHAT.



Nowadays that comes from a variety of directions. Respondents are seeing value in tools such as predictive analytics and omnichannel consumer journey (SKIM), while suppliers are seeing their budgets grow by delivering on the business needs of their organizations. Value is also seen in multi-disciplinary approaches (De La Riva), behavioral economics (System1 Research, ProtoBrand), and new methodologies enabled by technology (StreetBees, C-Space).

The middle ground, the SO WHAT is still incredibly important, but less differentiating. The number of suppliers that self-identify as an insights consultancy or full-service research company far outnumber any other segment of the insights marketplace. The demand is still there but the differentiation is not. The question remains. For how long will that demand be there? Anecdotally, our guess is that the demand for NOW WHAT is growing much faster than the demand for SO WHAT.

As the tools, approaches, and methodologies improve our ability to move quickly past the SO WHAT to the NOW WHAT, both clients and suppliers will need to change to understand and then exceed the new business expectations. That is what it will take to grow and remain relevant, as has always been the case.

A handwritten signature in black ink, reading "Gregg Archibald". The signature is fluid and cursive, with a large, stylized "G" and "A".

GREGG ARCHIBALD  
Managing Partner,  
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ESOMAR

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Living Lens

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RealityCheck Consulting

Research Now/SSI

Shapiro+Raj

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



# RESEARCH & PRODUCTION



**aytm**

## **AYTM – Ask Your Target Market**

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

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



## **Gen2 Advisors**

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

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



**Azure**

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

Azure helps companies build, harness, and leverage DATA as a strategic asset and competitive differentiator. Azure is trusted by its clients for simplifying and streamlining the process of capturing, managing, organizing, sharing and experiencing data. With headquarters in New Jersey (USA) and offices, staff, proprietary field network and strategic partnerships covering 120+ countries, Azure has delivered over 16,000 projects covering 30 mn+ surveys over the last 15 years. Azure's DigiWalks™ platform creates VR/AR environments (virtual stores, hospitals, car clinics etc.) for stated and observed data capture including navigation data, eye tracking etc. Panelogy™, Azure's panel initiative, includes proprietary panels and databases focusing on B2B and healthcare respondents as well as niche B2C audiences covering 40+ countries.



## KnowledgeHound

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

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

## LIGHTSPEED

### Lightspeed

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

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



### NewMR

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

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



### OdinText

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

The leader in text analytics for marketing research.



### OfficeReports

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

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

- OfficeReports Analytics automates cross-tab and stat-test processes in Excel •
- OfficeReports Link populates data from Excel into Infographics in PowerPoint



### Research Now/SSI

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

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



### Researchscape International

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

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



### Stakeholder Advisory Services

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

Stakeholder Advisory Services partners with its clients to incorporate insights of key stakeholders within two critical areas for business success – ensuring alignment of the organization's strategy and services with market needs and the management of reputational risk. To achieve its mission, Stakeholder Advisory Services provides a range of consulting services in reputation assessment, key customer relationship management, development of customer advisory boards and business transformation for the market insights industry.



### Keen as Mustard

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

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



# COMMENTARY PROVIDERS



**aytm**

**AYTM - Ask Your Target Market**

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

**Cint**

**Cint**

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

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

**Civicom**  
MARKETING RESEARCH SERVICES  
Ask Why We're Better

**Civicom**

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

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

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a delvinia company

**Methodify**

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

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



## Discuss.io

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

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

## ESOMAR

### ESOMAR

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

ESOMAR is the global voice of the data, research and insights community. A truly global association since 1947, ESOMAR is a not-for-profit organisation that promotes the value of market, opinion and social research and data analytics. ESOMAR has been providing ethical and professional guidance and advocating on behalf of our global membership community for more than 70 years.



## FUEL CYCLE

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

Fuel Cycle is a mobile-first market research and community intelligence platform for supercharging the relationship between brands and customers. From discussion boards and live chats to gamification and rewards management, Fuel Cycle offers an easily customizable and robust solution for brands and businesses to build high-impact online experiences for their customers.



## GutCheck

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

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



## LivingLens

[livinglens.tv](http://livinglens.tv)

LivingLens is the world's leading video capture and analytics platform which unlocks the insight in people's stories to inspire decisions. The LivingLens platform captures & analyzes multimedia content, translating human behaviour into a usable data asset. Putting the consumer just one click away, LivingLens is redefining how brands get closer to their audiences, by utilising the range of information held within video content including, speech, emotions, activity and objects. LivingLens makes leveraging the power of video efficient and scalable for global brands, agencies and technology providers, enabling fast insight generation.



## RealityCheck Consulting

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

RealityCheck is more than a research firm. We're a global partnership of experienced creative facilitators, strategic conceptual analysts, and storytellers who believe in the power of human insight to make marketing better. Our insight strategists come from different backgrounds including journalism, advertising, brand marketing, psychology, and yes, market research. This diversity and experience allows us to provide the kind of insightful clarity and strategic direction that can transform a brand and a business.



### Research Now/SSI

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

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



### Shapiro+Raj

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

Shapiro+Raj is a strategic brand and marketing insights company built for the Insight Economy™ by connecting Shapiro's 60-year leadership in research, insights and analytics with new-world brand strategy, innovation and ideation capabilities. Shapiro+Raj delivers powerful insights that inspire ideas that move people to action. We help Fortune 500 clients improve the value of their brands while driving profitable growth of their business. Headquartered in Chicago, the independent firm also has offices in New York, Los Angeles and Pune, India.



### Irrational Agency

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

Research consultancy with offices in London & Amsterdam specialising in nonconscious research techniques & applied behavioural science. We help clients uncover the hidden logic of consumers' choices and turn them into actionable, commercial insights.

We use the latest qual/quant techniques from behavioural science to understand what your customers really value, how to change their choices and behaviour, and the intangible factors that make up their subjective experiences and motivations.



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[today.yougov.com](http://today.yougov.com)

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YouGov combines this continuous stream of data with deep research expertise and broad industry experience to develop the technologies and methodologies that enable more collaborative decision making. This approach provides a more accurate and more actionable portrait of what the world thinks.



### ZappiStore

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

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

# REPORT AND QUESTIONNAIRE CONTRIBUTORS



## **Gregg Archibald – Gen2 Advisors**

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



## **Tom Anderson – OdinText**

Tom is passionate about making advanced analytics actionable and easy to use. He is a pioneer in the field of text mining, and OdinText, which he founded in 2015 has quickly become the most awarded and respected text analytics software platform in the field of marketing research.



## **Melanie Courtright – Research Now**

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



## **Nelson Whipple – Independent Consultant**

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



## **Jeffrey Henning – Researchscapes International**

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



## **Sue York – NewMR**

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



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Ray is a co-author of The Handbook of Mobile Market Research and The Handbook of Online and Social Media Research, co-founder of NewMR.org, co-editor of the ESOMAR book Answers to

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Jon Puleston is VP of Innovation at Lightspeed a Kantar business, where he leads an international team called QuestionArts specializing in survey design and research

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### **Leonard Murphy – GreenBook**

Leonard Murphy is the executive editor and producer at GreenBook: guru in residence, influencer-in-chief, and product mad scientist. Over the last 15 years, Lenny has served in various

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

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

two critical areas for business success – ensuring alignment of the organization's strategy and services with market needs and the management of reputational risk. Prior to founding Stakeholder Advisory Services, Jeff held a variety of executive roles at ORC International including President of its U.S. Group. Jeff is a political junkie by nature and initiated and managed the CNN|ORC Poll for more than six years. He had the honor of serving as Board Chair for CASRO (now the Insights Association) in 2012.



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

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

market research. Larry consults extensively with senior level client executives on the business implications of their research. He also publishes widely, and speaks before numerous industry forums, including ARF, IIR, AMA and ESOMAR conferences. He is a winner of a 2009 ARF "Great Mind in Innovation" Award. Larry's market research experience began at General Foods Corporation. Since then he has worked in numerous categories, including FMCG, financial services, pharmaceuticals (OTC and Rx), IT, telecoms, automotive and others. He has considerable experience in a wide variety of research areas, including brand equity research, tracking research, communications research (digital and traditional), social media, customer experience research, strategic/segmentation studies, and new product development. He has extensive experience with integrating these different types of research and distilling larger strategic implications from them.





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GREENBOOK RESEARCH INDUSTRY TRENDS REPORT

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