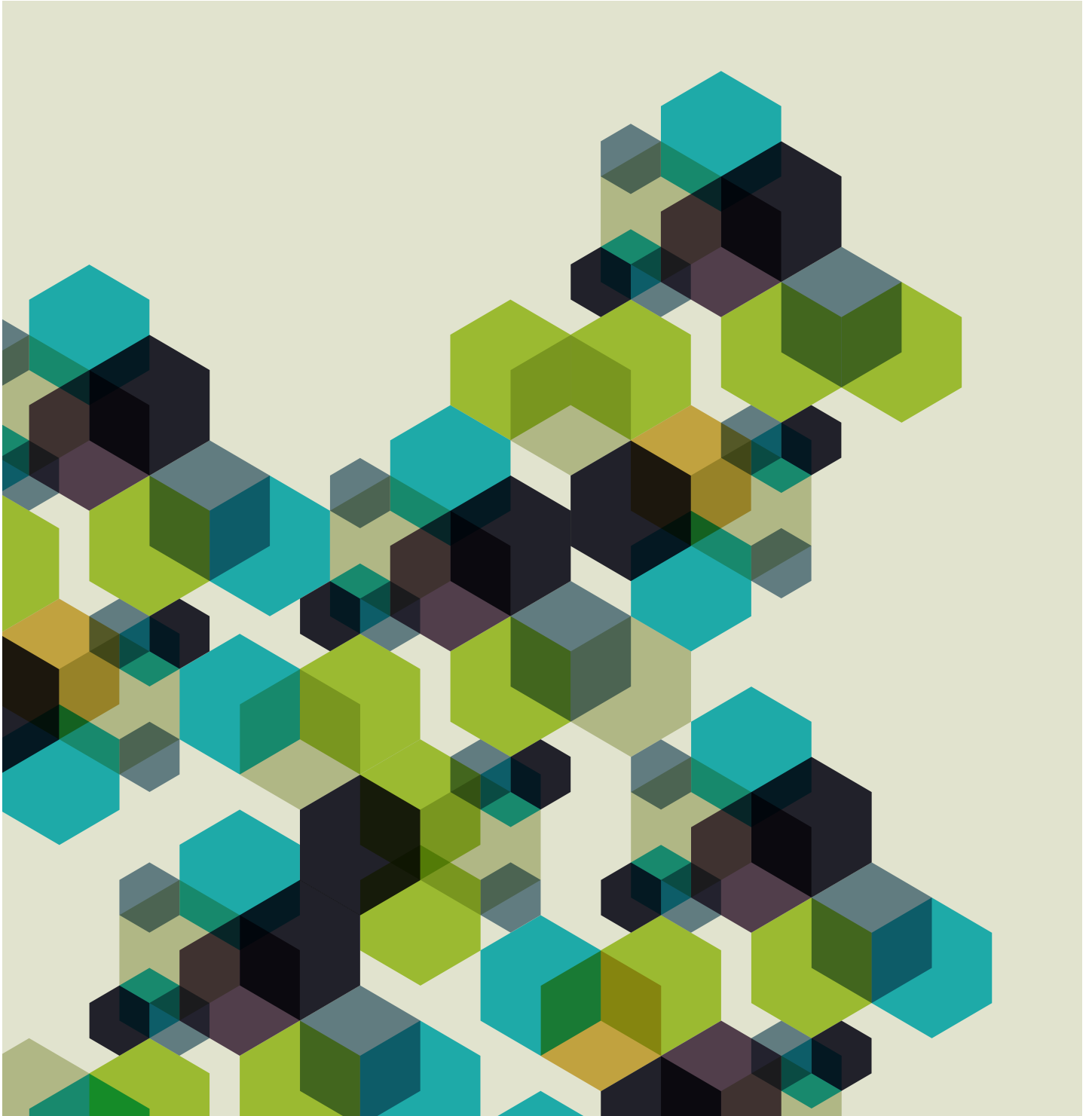




GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT





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

OUR PARTNERS...





WELCOME

Welcome to the 17th edition of the **GreenBook Research Industry Trends Report**, using data collected in Q1 & Q2 of 2015.

You might notice some differences with this edition of the report. Think of it as our “practice what we preach” pivot. Starting with this iteration, our Q1-Q2 Report tracks technology adoption, financial outlook, and the most innovative companies. The bulk of the study is dedicated to new topics such as understanding the evolving “Day in the Life” of research professionals, from the work they do to the tools they use to do it, as well as views on the future of the industry.

We have also continued our quest to shorten the survey itself, increase engagement via design, and incorporate a higher proportion of verbatim responses to allow for more richness and depth within the responses. To accomplish this, we’ve utilized new tools such as automated probing of open-ends via Quester, and advanced text analytics and contextual analysis through Decooda to deliver more value through verbatims. You will see less charts and more quotes, which lends to deeper insights into our changing industry and GRIT respondents.

One of our most popular topics is covered extensively herein; we showcase the GRIT Top 50 supplier companies perceived to be most innovative and dive deeper into what makes a company truly innovative. For the first time, we also explore the most innovative client-side organizations. These sections are far more than brand trackers— they offer a window into what constitutes innovation in this industry with some surprising results.

We continue our series of thought-provoking commentaries by various players in the industry. These expanded views on the implications of various findings provide a deeper context for the report’s results.

GreenBook partners with a variety of international entities to make the GRIT Report ever more representative of the industry on a worldwide level. While this still proves to be a challenge in some regions, we are committed and constantly inching closer to our goal.

Our research partners include Dapresy, Decooda, Gen2 Advisors, Lightspeed GMI, Quester, Q Research Software, Researchscape and Vision Critical University. Our design partner was Keen as Mustard Marketing.

All partners have contributed significant time, energy, and resources to the GRIT effort and deserve a big **THANK YOU** for their support.

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

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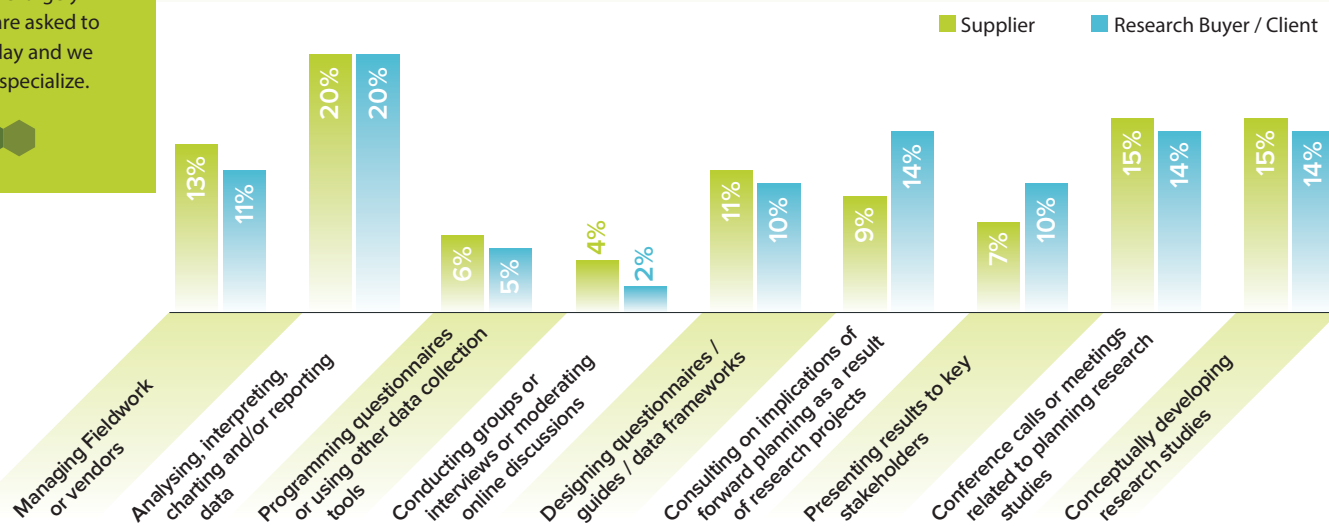
Go to www.GreenBook.org/GRIT to read the GRIT Report online or to access all GRIT data and charts via an interactive dashboard which you can use for your own analysis.



EXECUTIVE SUMMARY

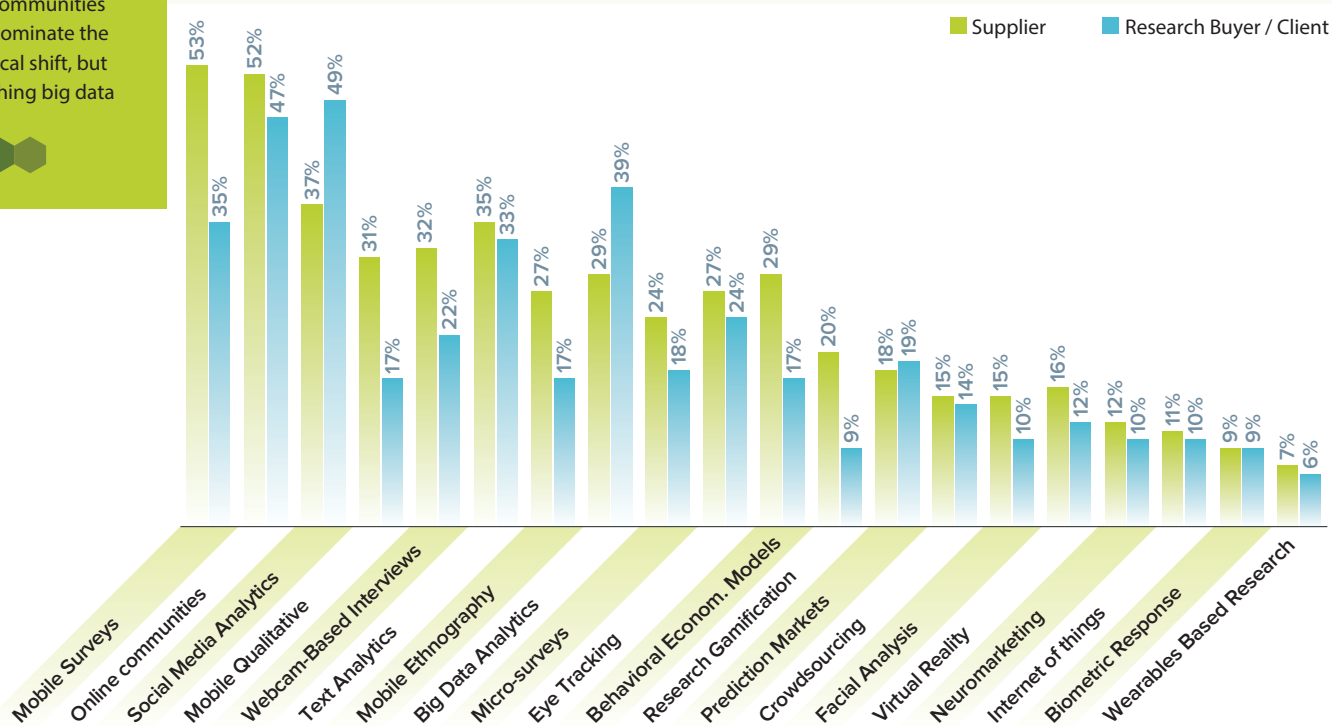
A DAY IN A LIFE OF A MARKET RESEARCHER PROPORTION OF TIME

Researchers are largely generalists: we are asked to do a lot every day and we rarely seem to specialize.



EMERGING METHODS ADOPTION

Mobile and communities continue to dominate the methodological shift, but clients are pushing big data

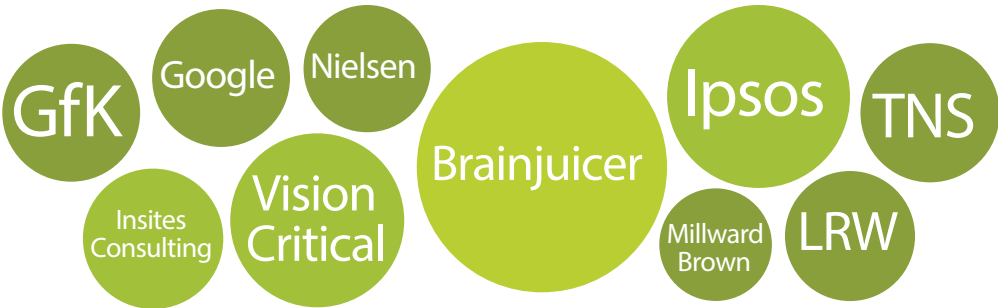


EMERGING SKILLS FOR MARKET RESEARCHERS



New entrants to market research can look at the list of talents needed as a smörgåsbord: something for everyone!

THE TOP 10 MOST INNOVATIVE SUPPLIERS



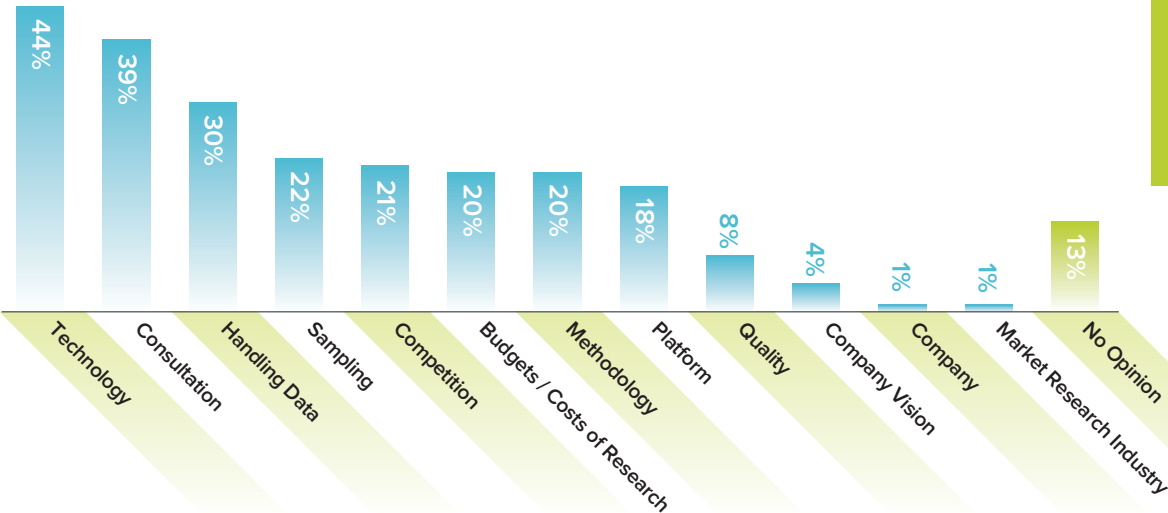
These companies “own” the innovation brand attribute in market research

THE TOP 10 MOST INNOVATIVE CLIENTS



Research is driven by supply & demand too: these are the companies demanding innovation and implementing it within their businesses

THE BIGGEST CHALLENGE FACING MARKET RESEARCH IS:



Market research faces some big challenges, but also has some big opportunities to go along with them.

Visualization by
dapresy

METHODOLOGY AND SAMPLE

GRIT respondents are recruited by email from lists of research providers and clients contributed by GRIT partners and by invitations delivered via social media channels. The sample size for this latest wave was roughly in line with previous waves, with more of the respondents coming directly through GreenBook than all other sources combined.

For this report, the analysis is based on 1,859 interviews, although for some questions, base sizes may be higher or lower due to skip patterns, rotations, routing, and other factors.

Here is a comparison of sample sizes over the last several waves.

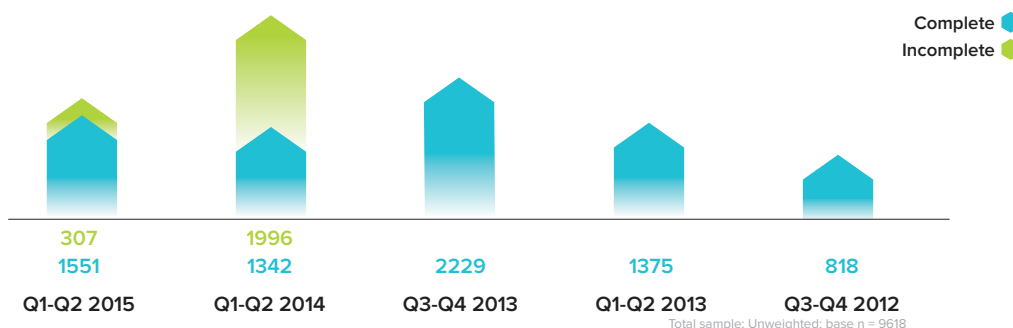
For this report, the analysis is based on 1,859 interviews



80% of respondents are suppliers and 20% are clients

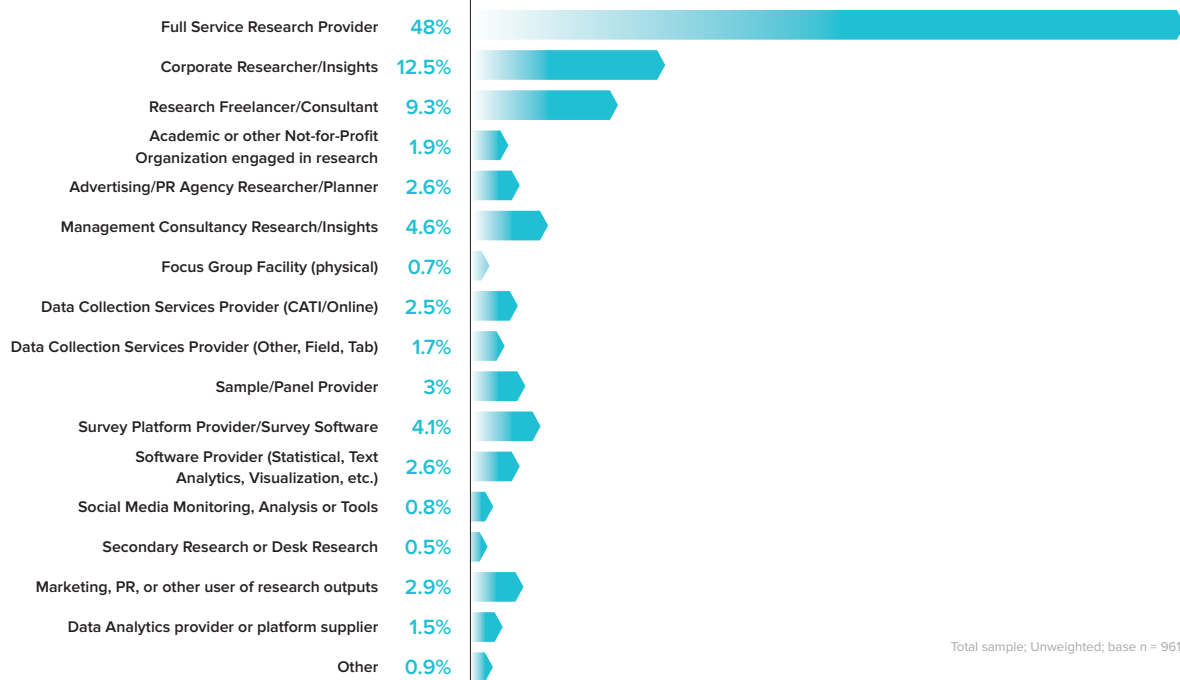


SAMPLE SIZE

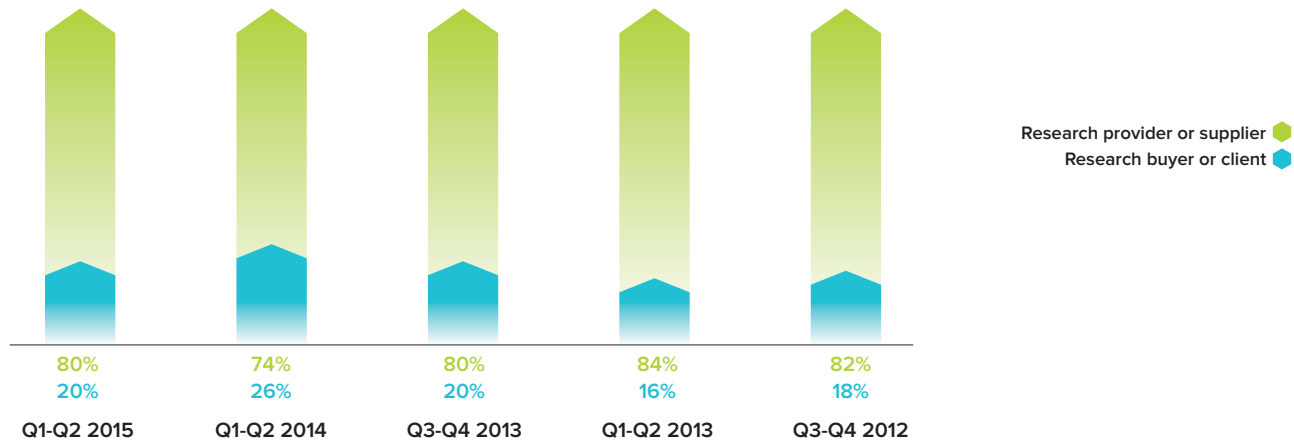


The mix of respondents has varied during the 12 years of this study, but within fairly narrow bands. We hold relatively steady at 80% of respondents being suppliers and 20% being clients, broadly

consistent with the last several waves of the study. Overall, almost half of all respondents identify themselves as working within a full-service market research agency.



WOULD YOU DESCRIBE YOURSELF AS A RESEARCH BUYER OR RESEARCH PROVIDER?



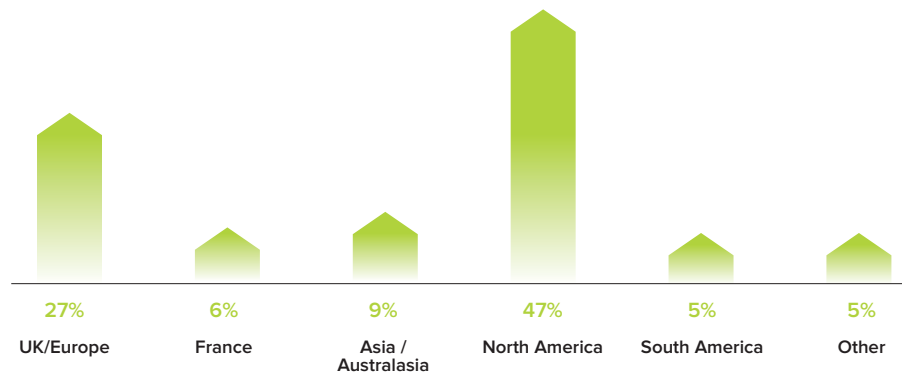
Total sample; Unweighted; base n = 8197; total n = 9618; 1421 missing; Q2a. Would you describe yourself as a research buyer or research provider?

Despite the robust sample size, the GRIT Report is not meant to be a census or representative sample (if such a feat is even possible in our fragmented industry!), but rather a snapshot of the widest swath of insights professionals we can achieve. With that in mind, we consider it “strongly directional” and recommend that you view it the same way.

One of the most notable differences in sample composition was a decline in German respondents due to the lack of participation of Research & Results as a sample partner. This however, was

accompanied by an increase in participation by French respondents through the collaboration with BVA for the French translation of the survey. The net result was a more balanced representation of Europe as a whole.

With increased international participation, the percentage of respondents from North America is stable at 47%. The next largest segment is Europe at 33%, Asia comprises 9%, Latin America makes up 5%, and all other geographies combined have contributed 5% of the sample.



Filter: Q1-Q2 2015; Unweighted; base n = 1858; 81% filtered out; Some empty rows or columns have been removed
Multiple comparison correction: None (p = 0.05)

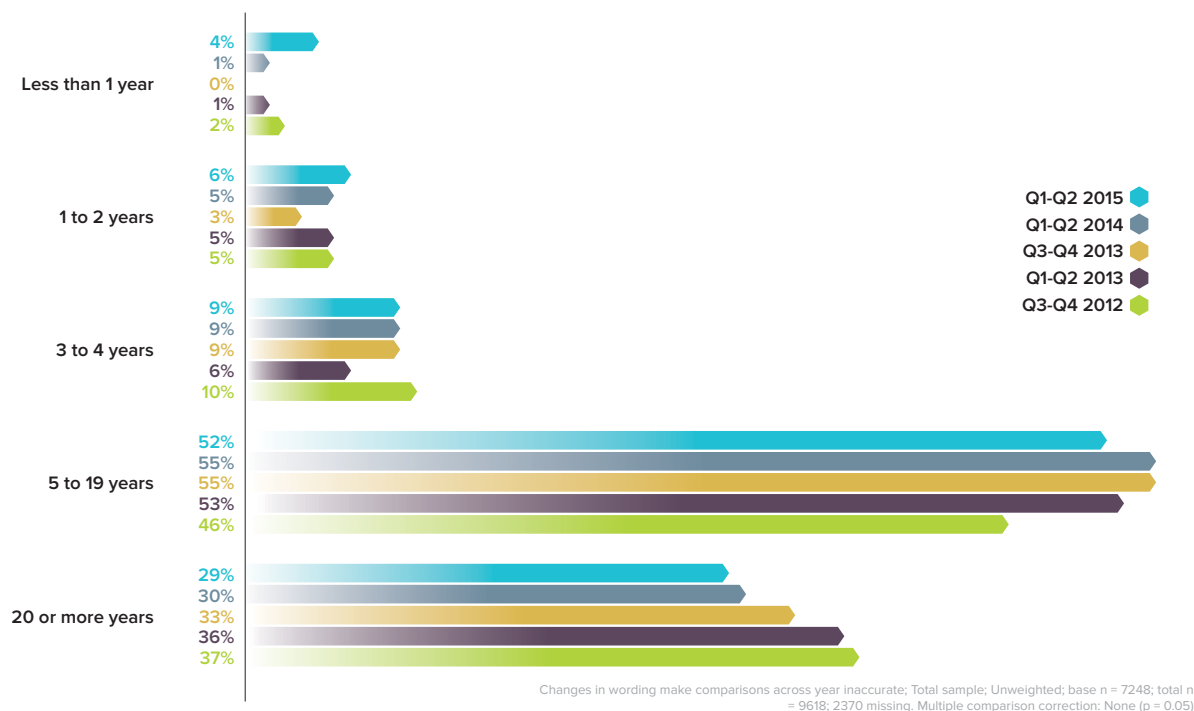
Due to the relatively small base sizes outside of North America and Europe, we have opted not to show regional breaks other than where we think it adds comparative value. However, as always, we encourage all readers to make use of the interactive online GRIT dashboard to conduct additional analysis.

In terms of the profile of GRIT respondents, almost 80% are experienced professionals who have worked in the industry for more than 5 years, with almost a third being 20+ year veterans. This is important because we can assume GRIT respondents have a deep well of experience to draw upon for their responses, as well as a contextual lens of having seen different periods of change, which we believe adds extra weight to their views.

Due to the relatively small base sizes outside of North America and Europe, we have opted not to show regional breaks



YEARS IN MARKETING RESEARCH/INSIGHTS



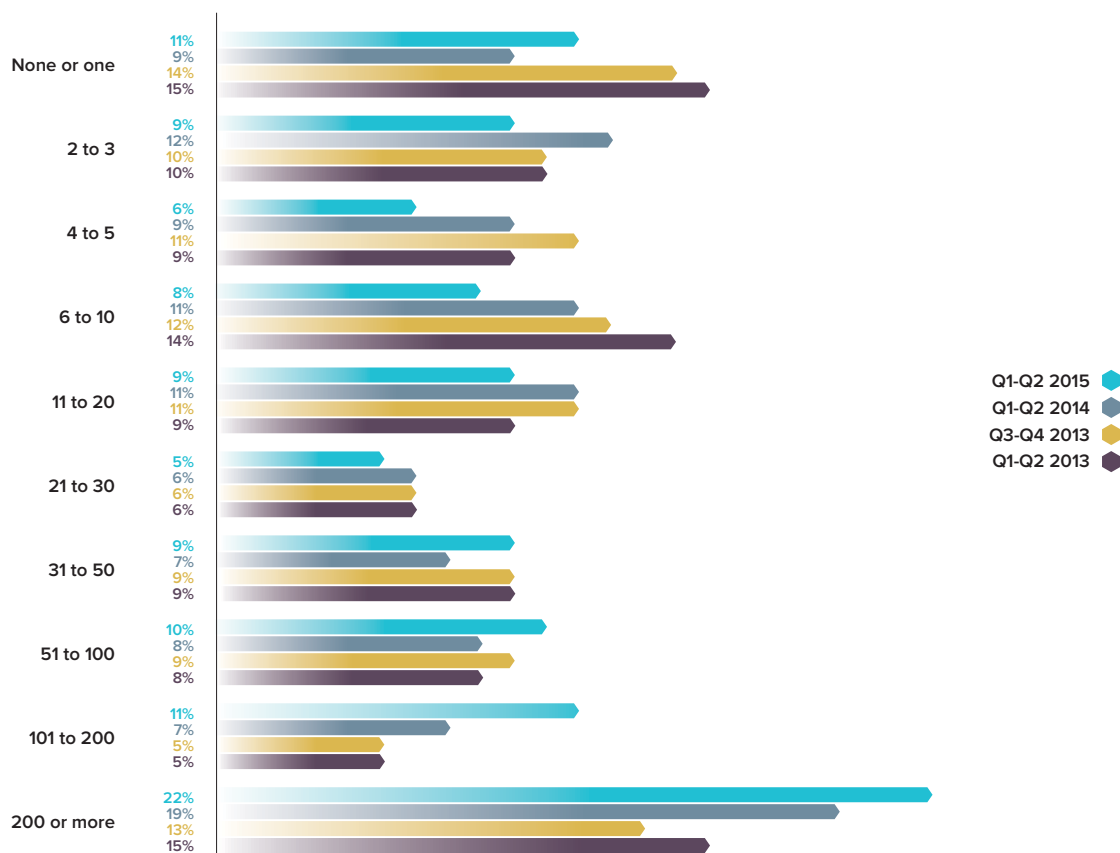
In addition to being experienced, GRIT participants reflect significant diversity in the size of organization they currently work in



In addition to being experienced, GRIT participants reflect significant diversity in the size of organization they currently work in. About a third

of the respondents work within companies of 100+ employees, a third in firms from 10 -100, and the rest within small businesses of under 10.

NUMBER OF EMPLOYEES IN ORGANIZATION/DEPARTMENT



Due to changes in questionnaire wording, differences between waves should be treated with caution.; Filter: 2013 to 2015; Unweighted; base n = 6420; total n = 8800; 2380 missing; 8.5% filtered out; Some empty rows or columns have been removed. Multiple comparison correction: None (p = 0.05)

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RESEARCH USE AND IMPACT

Market research is not the main way that most companies understand their market

For the first time, we decided to explore “a day in the life of market researchers” to better understand what functions they perform, what tools they use, and most importantly, how research is viewed and used within their organization. This section will explore those findings in depth.

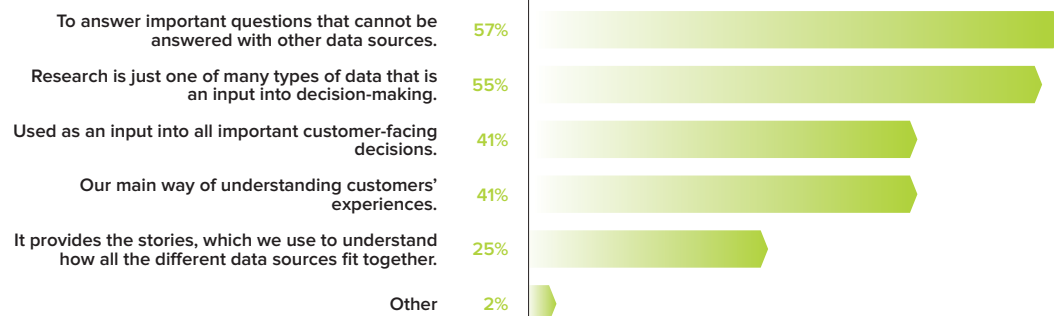
Market research is not the main way that most companies understand their market. Only 41% agree

it is the “main way” of understanding customers’ experiences. As the majority of people that answered this question work in corporate research departments, this figure is certainly over-stated.

The only notable except to this pattern is France (n = 39), where 62% regard research as the main way of understanding customers’ experiences, and 38% say it is “just one of many”.

Which of the following describe how market research is used in your organization?

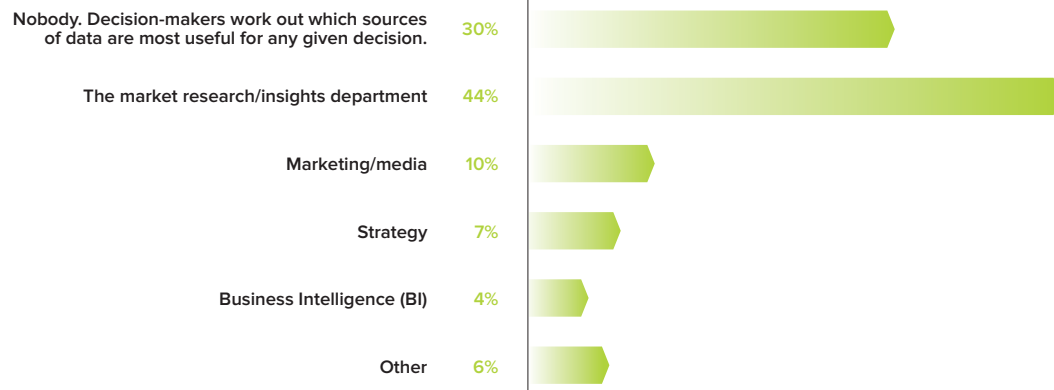
Filter: Research buyer or client AND Q1-Q2 2015 AND Answered Q9; Unweighted; base n = 366; 96% filtered out; Which of the following describe how market research is used in your organization?



While surveys are perhaps less central to decision-making than they used to be, research departments have broadened their focus to include responsibility for interpreting the abundance of new data sources. 44% say the research department has the main

responsibility for synthesizing data, with the next largest score being 10% for the marketing/media teams. 30% indicate there is no central ownership, suggesting that there is a lot of work to be done if insights teams want to own data synthesis.

Who in your organization has the main responsibility for synthesizing all the different sources of data about your market? That is, whose job is it to use all the market research data, customer feedback data, customer data, transaction data, and social media data, to work out how it all fits together?



44% say the research department has the main responsibility for synthesizing data

We asked people involved in analysis about the different types of analyses performed in the projects they had worked on over the past three months. Not surprisingly, survey analysis (88%) is well ahead of the newer types of data (operational data 42%, social media 40%, web usage 37% and automated customer feedback 32%). However, 72% had used at least one of these newer forms of data, further emphasizing

the transformation of the industry from survey practitioners to data experts.

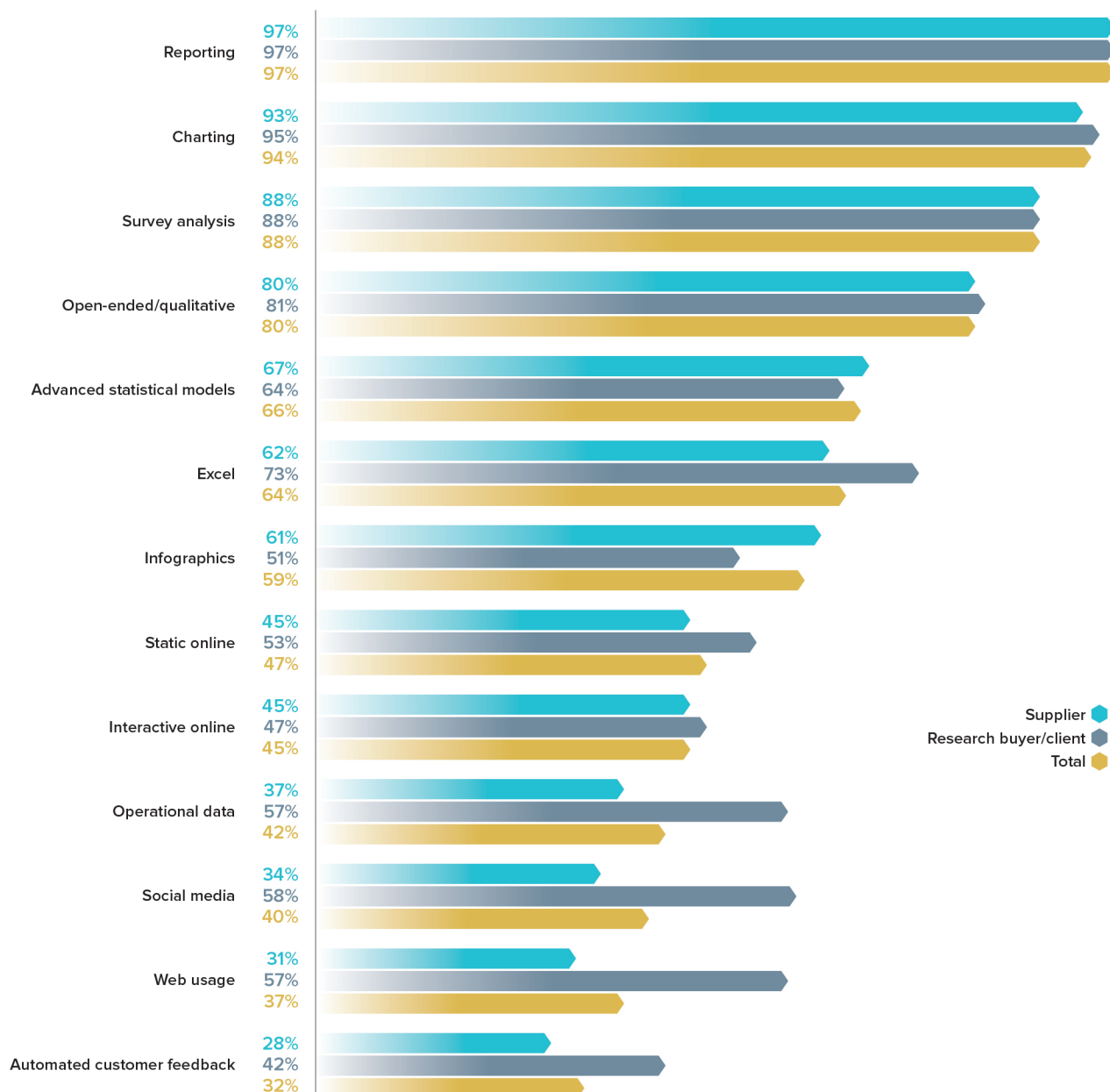
Amongst research buyers/clients, experience with non-traditional data sources was widespread. The majority had worked on projects with operational data (57%), social media (58%) and Web usage (57%). 85% had worked on projects involving at least one of these, or automated customer feedback.

Amongst research buyers/clients, experience with non-traditional data sources was widespread



Thinking back over projects that you worked on in the last 3 months, who mainly used the software that was used to...?

Chart shows *Myself + Colleague(s) + Supplier(s)*. Does not show 'Not required in last months' and 'Don't Know'.



Filter: Q1-Q2 2015 AND Field, researchers and users (i.e., no software vendors, focus groups or 'Others'); Unweighted; base n = 1180; total n = 1677; 497 missing; 83% filtered out; Q18. Thinking back over projects that you worked on in the last 3 months, who mainly used the software that was used to... Myself, Colleague(s), Supplier(s), Not required in the last 3 months, Don't know
Multiple comparison correction: None (p = 0.05)



THE IMPORTANCE OF THE STORY AND HOW IT'S TOLD

Jackie Lorch

Vice President, Global Knowledge Management, SSI

Email: Jackie.Lorch@surveysampling.com | Website: www.surveysampling.com

Researchers have been asking for a “seat at the table” for a long time. In fact this hopeful desire has become such a familiar industry goal that we almost don’t hear the words anymore and don’t think much about their meaning. But is this a big enough, bold enough industry goal? Should we be content with just a seat at the table, however peripheral our influence and involvement in key decisions? Is any seat OK, even if we get the shortest chair, furthest away from the head of the table?

Could research aspire to a more central position in the organization, with key decision-makers instead taking a seat at the research table where insights are shared and the data needed to support big strategic decisions is clearly and compellingly delivered? How would the research industry have to change to make that happen?

This GRIT survey asked some new questions to help shed light on how research is perceived and used by companies today, and how researchers define themselves. The results indicate that roles are shifting and there is no group clearly in charge of the data function within businesses.

Data synthesis opens doors

When research buyers were asked who in their organization is mainly responsible for synthesizing different data sources, almost a third said no one is responsible for this, and less than half (44%) cited a market research/insights department as having this responsibility. A 2014 BCG report said “Big data has brought game-changing shifts to the way data is acquired, analyzed, stored, and used,” yet “Less understood—much less put into practice—are the steps that companies must take in order to realize that potential.” This lack of cohesion and organization around data sourcing could represent a massive opportunity for researchers who know data better than anyone.

Transformation of data delivery

Researchers are rock solid when it comes to delivering reliable data – but may not be as strong when it comes to telling the stories that will grab the attention of the C-suite. Less than half (41%) of research buyers in this study say research is used in their

organization as an input into important customer-facing decisions or as a main way to understand customer experience.

Scientists have proved through biochemistry what we all know: stories resonate, stay in the mind and have the power to change behavior. Those who tell compelling stories get and keep their listeners’ attention. Yet only a quarter of research buyers in this study see market research as a way to tell the stories that help business understand how different data sources fit together. Is this because researchers spend too much time perfecting charts and tables and have no time to create meaning from the data? Or do researchers not see storytelling as their role?

The report also highlights the minimal amount of time researchers apparently spend presenting and consulting on the implications of research. Are we thinking enough about how we present data compared to how we collect and analyze it? Recent research we have done at SSI has highlighted the need to match the data presentation style to the listener, whether infographic or simple chart.

Opportunity is knocking

We are in a time of blurred roles within organizations and blurred lines about what the role of a researcher is compared to that of a consultant, an analyst or an advisor. This too creates massive opportunity for researchers.

But businesses will soon figure out how to handle big data and who should be in charge, because it represents too big of an opportunity for them not to. So the window of opportunity for researchers to own business data is limited.

In a recent editorial ESOMAR Director General Finn Raben and President Laurent Flores urged researchers to stand up for the value and relevancy of research, quoting poet Dylan Thomas and urging us to “rage against the dying of the light.” Dylan Thomas also said “A good poem is a contribution to reality... A good poem helps to change the shape of the universe, helps to extend everyone’s knowledge of himself and the world around him.”

We might say the same about a good research story, well told.

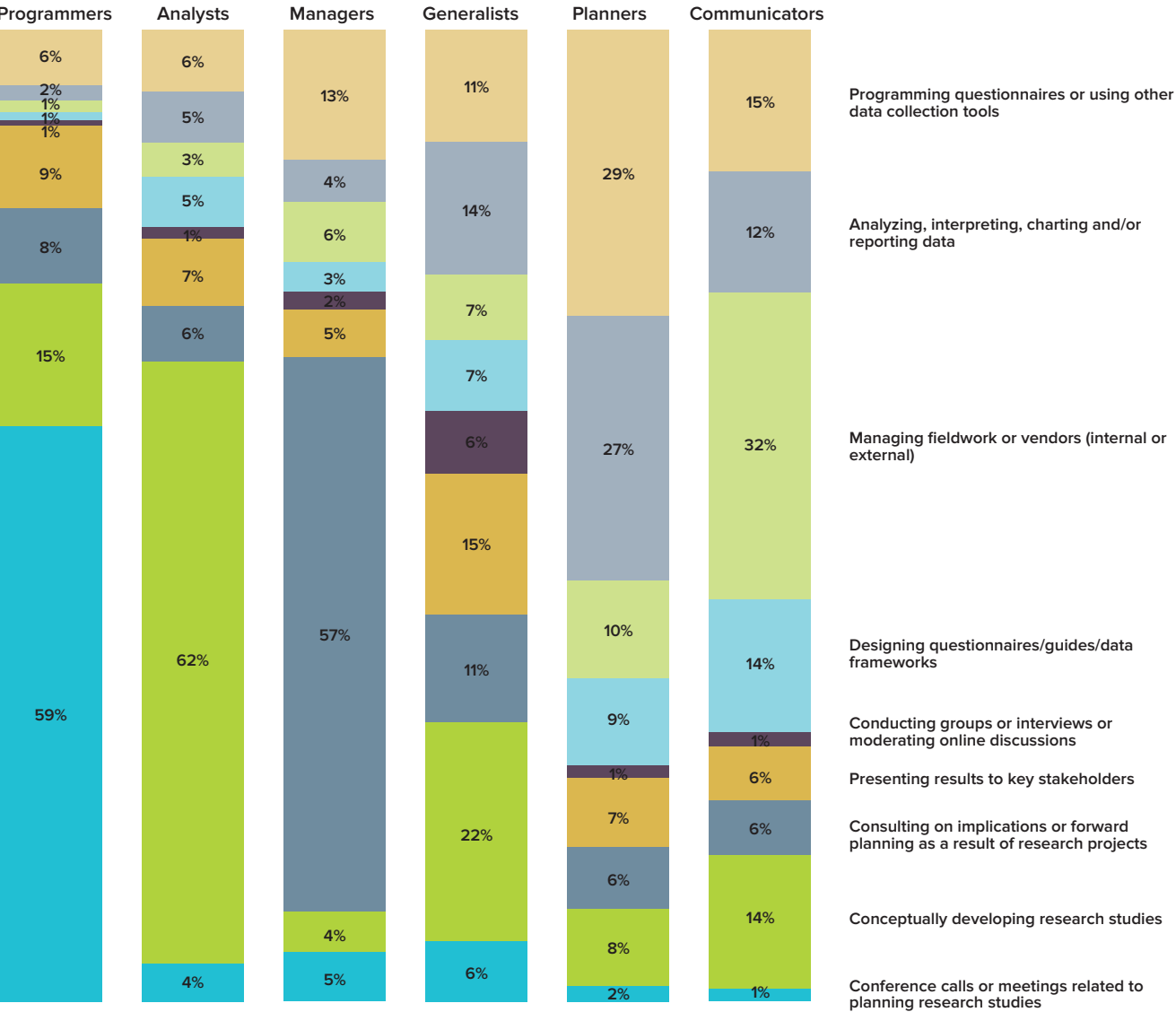
HOW WE SPEND OUR TIME

We asked people to indicate how many hours they spend per week on various tasks. The obvious forms of specialization are evident in the data: questionnaire *Programmers* (3%), *Analysts* (8%) and *Fieldwork Managers* (8%). However, the most striking finding is that specialization is rare. The vast

majority of researchers (80%) undertake a broad mix of activities. Almost half (45%) can best be described as *Generalists*, spending substantial amounts of time on all stages of the research process, from conception to working out the implications.

The vast majority of researchers (80%) undertake a broad mix of activities

This mosaic chart displays a segmentation of people according to the time they spend on various activities. Six segments, identified using cluster analysis, are shown at the top. The height of the columns under each segment shows how time is split amongst the various activities. The width of the columns indicates the size of the segments.



Filter: Total hours between 10 and 90 per week; Unweighted; base n = 1558; 84% filtered out; Q13/Q14. Thinking about a typical work week, how many hours do you personally spend on the following tasks?; values are % Total Share

SOFTWARE

PowerPoint, Excel and SPSS Statistics account for approximately 60% of all software usage



We asked people which software they had used for various analysis and reporting tasks over the past three months. Well over 200 different applications were named, but the top three – PowerPoint, Excel and SPSS Statistics account for approximately 60% of all software usage.

PowerPoint's position (34%) is driven by its ownership of *Reporting* (82%) and its leadership of *Charting* (50%) and *Infographics* (48%). Excel comes in at second place with 17% due to its ubiquity. Excel is in the top three for 11 of the 12 categories we examined.

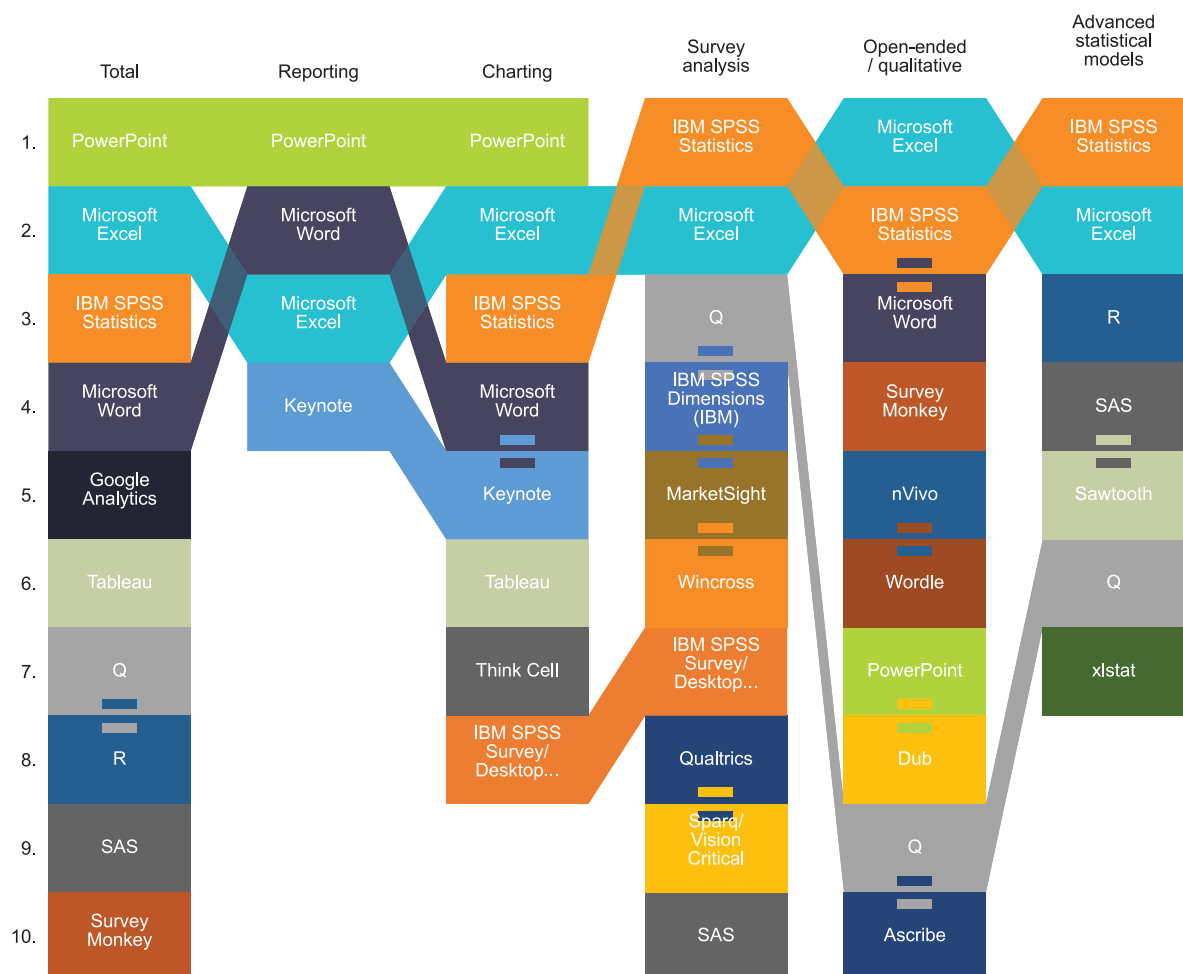
SPSS Statistics comes in a clear third with 9%.

Similar to Excel, it has wide usage, which is why we found it in the top ten for nine of the categories we examined. It also has clear leadership in two categories: *Advanced statistical models* (53%) and *Survey analysis* (29%).

Microsoft Word is in fourth place with 2.2%, followed by Google Analytics (1.5%), due to its dominance as a tool for monitoring *Web usage* (43%). Tableau is in sixth place (1.6%), primarily due to its use for creating dashboards.

Top 10 ranking of software main software used by application.

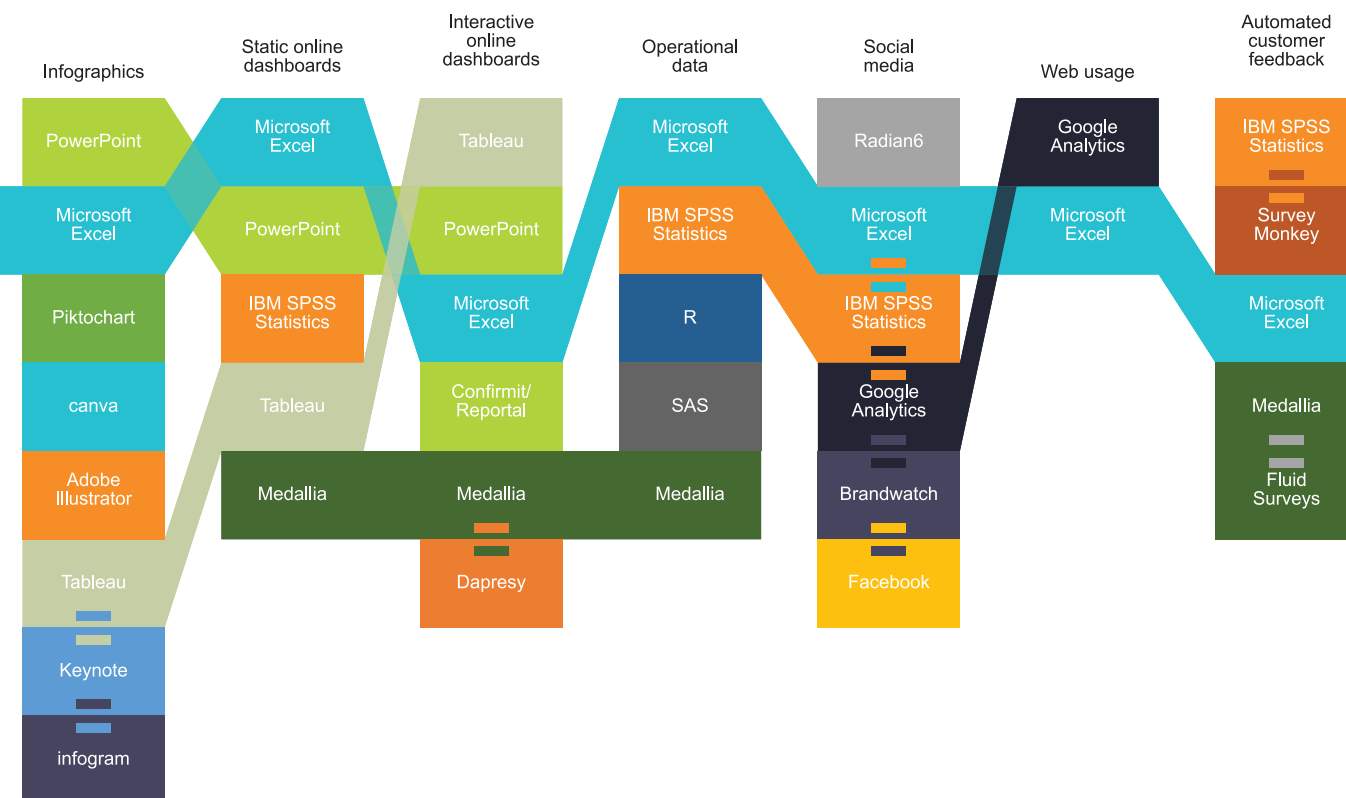
Only brands mentioned at least 3 times in a category have been shown.



The specialist analysis tools of Q (0.9%), R (0.9%) and SAS (0.8%) rank 7th, 8th, and 9th respectively (disclaimer: Q is a GRIT partner). SurveyMonkey comes in at 10th place (0.8%), with its strongest performance being in *Automated customer feedback*. Despite the sheer number of market research related startups over the past few decades, Q and SurveyMonkey are the only two specialist market research products in the top ten, and Q is the only product in this group that is less than a decade old. However, the GRIT survey inevitably focuses on people with a strong interest in all things research, and so is very likely to understate the role of analysis done in data collection platforms such as Confirmit, Qualtrics, SurveyMonkey and Vision Critical's Sparq.

What is the implication here? Despite the growth of sophisticated analytical and visualization tools outside of MR in the Business Intelligence and Big Data spaces, research remains pragmatically focused on using highly customizable tools to perform many of the functions we do day in and day out. Despite the clamor for new tools to make storytelling and visualization easier, new applications are not making a sizeable impact yet.

Despite the clamor for new tools to make storytelling and visualization easier, new applications are not making a sizeable impact yet



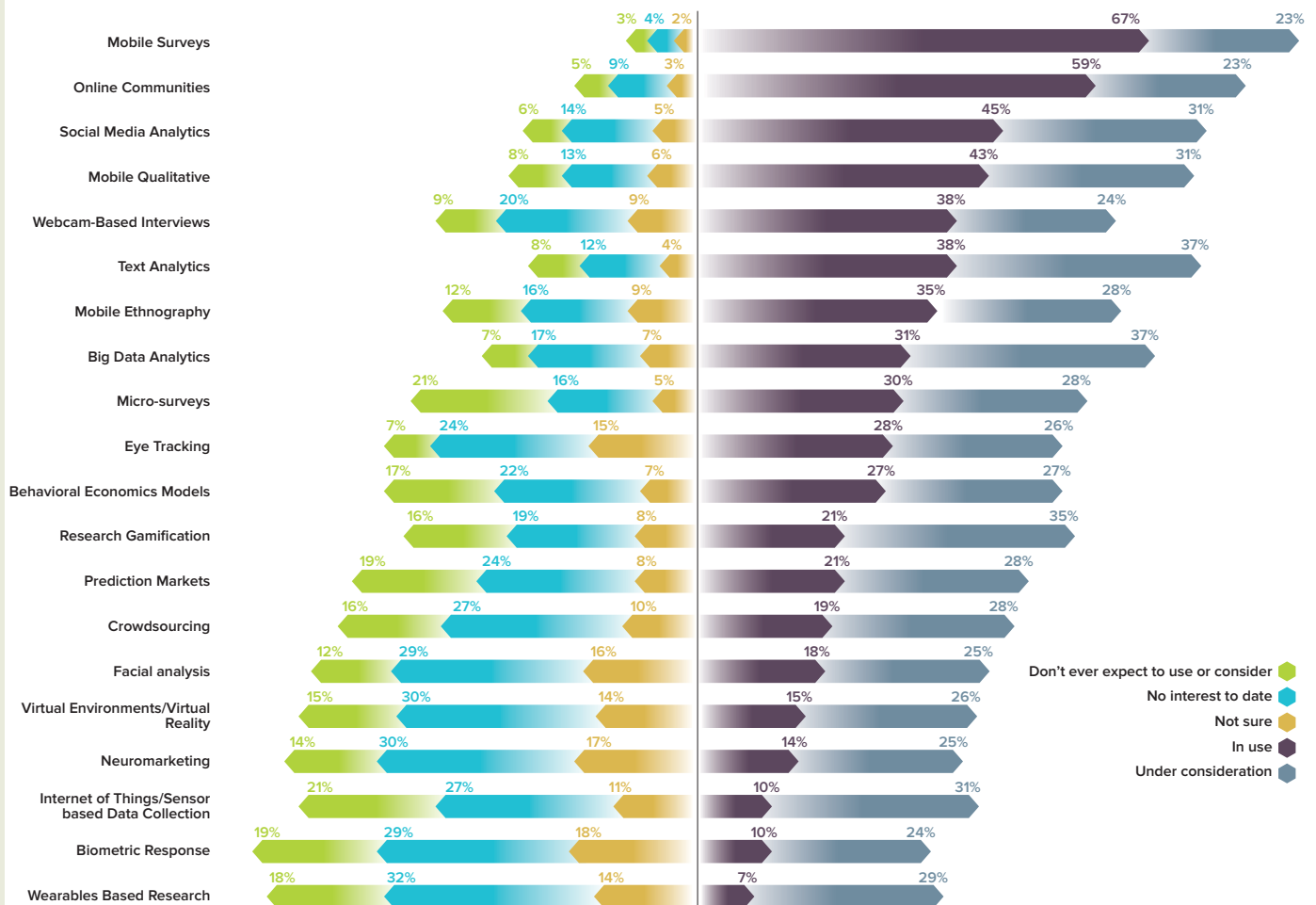
NEW TECHNOLOGY ADOPTION & USAGE

Mobile Surveys are the number one new approach

When reviewing the market research approaches and techniques being used or considered we need to keep in mind that the GRIT sample tends to be drawn from people more interested in change and

new approaches, so the numbers below reflect interest amongst the most interested, i.e. they are an indicator of change and rate of change, rather than an industry-wide market size estimate.

TECHNIQUES USED/CONSIDERED



This chart shows two clear messages. The first is that Mobile Surveys are the number one new approach – which is explored further in the next few pages. The

second message is that the eight techniques which score less than 50% in terms of In Use or Under Consideration are currently niche methods.



IT'S AN UBER WORLD AFTER ALL

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LinkedIn: <https://www.linkedin.com/pub/jeff-reynolds/2/60a/ab9>

A digital, social and mobile revolution is under way, and it's disrupting traditional marketing and altering the ways consumers engage with media, shop, browse, buy and tell others about their experiences. The change is profound, happening fast, and will continue to force change upon the business of market research.

Themes from this year's GRIT Report highlight the impact on our industry: speed, new platforms, and the quest for insights in a sea of data.

- Researchers recognize the need for speed. Business is moving fast and we need to see consumers, brands, categories and markets in real-time to provide optimal guidance for competing and winning in this complex world.
- As new platforms, especially in the social and mobile realms, increase in their ubiquity, marketers and researchers must seize new opportunities and respond to the constraints of the new media and platforms.
- We are not short on data sources but must do a better job deriving meaning and value from the available data.

Adapt, don't scrap

These issues echo the vision and strategy conversations we're having at LRW and with clients. In fact, I recently learned that the new VP of Consumer Insights at a global packaged goods company is considering dropping major tracking programs in favor of social media monitoring. He felt his traditional tracking program had grown too slow, unwieldy and costly.

While I don't think social media can ultimately replace much of what we do, the underlying sentiment rings true. Today, a CMO in Chicago can see social media feedback from consumers in Brussels minutes after they share their experiences, but it can take months to deliver "consumer feedback" in a global brand-tracking program. Data now flows instantaneously, causing traditional approaches to appear stale and awkward. Traditional tracking looks like a taxi cab in an UBER world. We must adapt!

I offer a new vision for brand and ad tracking based on these principles:

- Tracking must connect companies to the voice of their customers in real-time, 24/7 via nimble software accessible by phone, tablet and computer.

- It must integrate data from digital and social sources to understand the new consumer journey.
- It must integrate mobile and traditional survey feedback with text analytics to bring structure to the consumer voice in real-time.
- Automation must reduce costs such that we can get much MORE data, analysis and consulting for the same cost.

A little dust on the bottle

This vision led to the development of our new BX offering, which we will be highlighting at IIE X North America. BX has grown from an innovation pilot to an industry-changing offering in 24 months. We built it with one of our best clients who spends \$500M on marketing and promotions annually. Together we have taken a dusty, clunky brand and advertising tracker and turned it into a robust marketing and brand feedback system.

BX has already changed the way the client does business, even as it continues to evolve and improve. The company's CMO, a one-time critic of his marketing research department and brand-tracking program, now considers himself a proponent. Just last month, insights from BX drove recommendations to the Board of Directors.

Setting up for success

Along the way, we've learned that change is neither easy nor free. It requires BOLD leadership because there are trade-offs with the status quo.

It requires a shift in mindset from studies to "data systems".

More thinking, clarity and decisions must be moved UP FRONT in the process to design the system to meet marketing objectives.

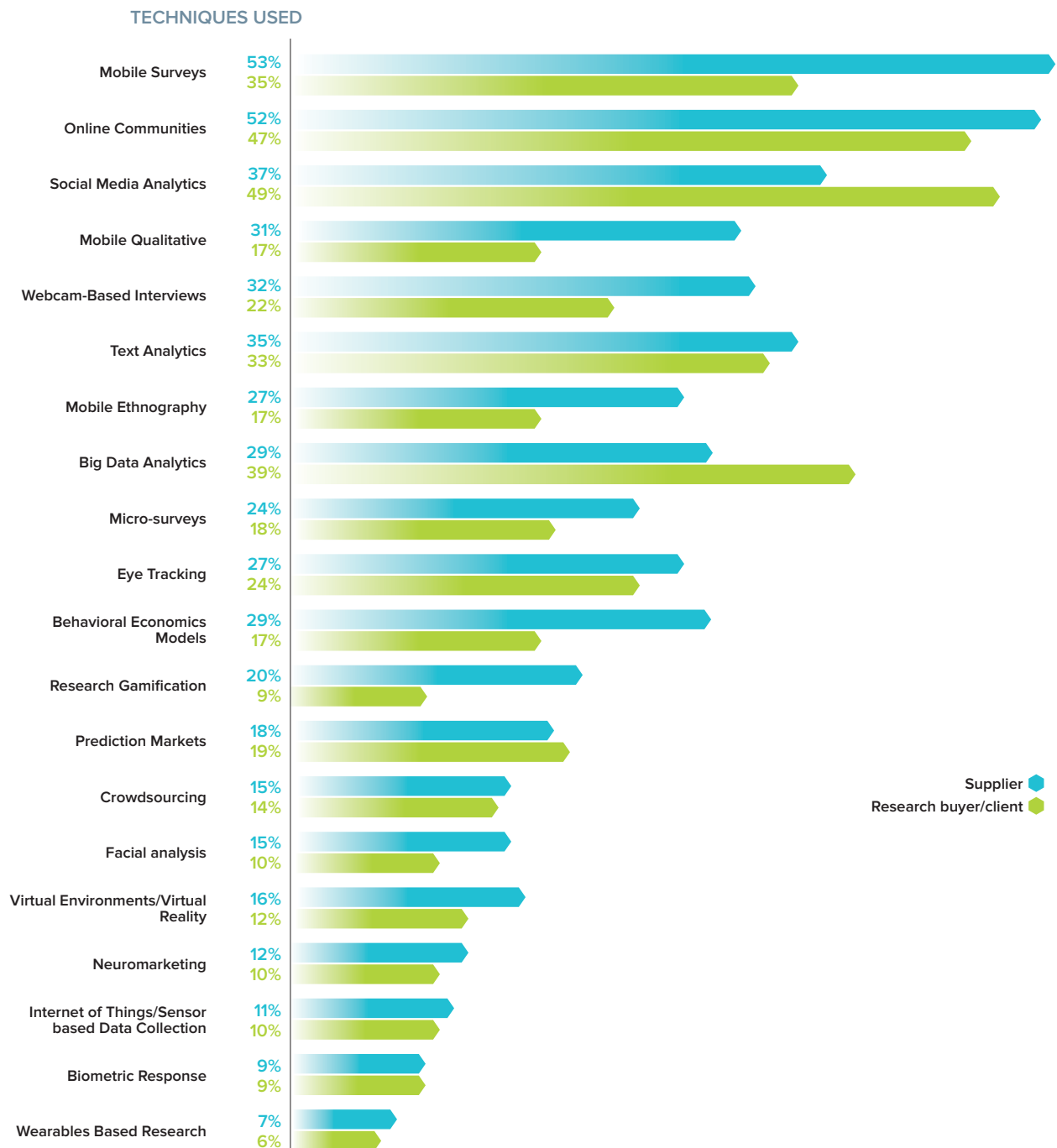
A large data system requires some trade-offs, mostly between short-term flexibility and medium to long-term power.

Data systems such as these require investment in infrastructure. Like many systems, they cost more in Year 1 for savings and benefits in Year 2 and beyond.

The industry requires real leadership to fight through the structural and economic barriers to change on both the client or supplier side. But I believe that this, and approaches like it, are the future of our industry. The yellow taxi will forever be iconic. But as the nostalgic stand street side with their hands in the air, the ready among us will zoom past in UberBLACKs.

CLIENTS AND SUPPLIERS

The chart below looks at technique usage in terms of clients and suppliers, while only focusing on the techniques and approaches that are currently 'In use'.



Total sample; Unweighted; base n = from 1387 to 4299; total n = 9618; 8231 missing; Q22. Do you currently use, or do you foresee this technique/approach in your future? Not sure, Don't ever expect to use or consider, No interest to date, Under consideration, In use. Multiple comparison correction: None (p = 0.05)

By focusing on clients, we can see that it divides the approaches into two groups. There are the five approaches that between a third and a half of clients are using, and the remaining approaches where fewer than a quarter of clients are using them.

Social Media Analytics and Big Data Analytics, are used by considerably smaller proportions of the suppliers than the clients. The comparisons are Social Media 37% v 49% and Big Data 29% v 39%. This may be because clients, in some cases, prefer to buy from non-MR sources for these services. Indeed,

these two services are not always managed by MR teams on the client side.

It is also interesting to note that 53% of suppliers say they are using mobile surveys, compared with 35% of clients. Perhaps more suppliers than clients are aware that almost all “online” is now mobile in the sense that about a third of online surveys are attempted by participants using mobile devices. Similarly, a large proportion of CATI and a growing amount of CAPI are conducted via mobile devices.

Social Media Analytics and Big Data Analytics, are used by considerably smaller proportions of the suppliers than the clients



TRENDS OVER TIME

The chart on the next page shows the trends over time. Since there are more suppliers than clients, the total picture tends to reflect the supplier picture – but there is generally a correlation between what people are selling and what they are buying.

The standout change is in mobile surveys, which has jumped nearly 26% since 2013. Strongly followed by Online Communities, which has grown in every GRIT wave and remains well ahead of any other technique or approach.

Other approaches that have grown over all of the GRIT waves since 2013 were:

- Mobile qual, from 24% to 43%
- Mobile ethnography, from 21% to 35%
- Webcam-based interviews, from 27% to 38%
- Micro surveys, from 19% to 30%
- Crowdsourcing from 14% to 19%
- Prediction markets, from 17% to 21%
- Neuromarketing, from 9% to 14%

Three strong techniques, which appear to have stalled, are [-] Social Media Analytics, Text Analytics, and Big Data. The suggestion here is that client needs in these areas are being met by non-MR sources, but this has not yet been shown by our own data.

Three techniques appear to have stalled – Social Media Analytics, Text Analytics, and Big Data



OTHER NEW APPROACHES

Participants in the study were asked to name other techniques that they regard as important. The most frequent response was ‘None’, and the second most frequent was mention of a technique already on the list (which is not surprising since each participant only saw a sub-set of the full list).

However, it is intriguing to note that a significant amount of people listed neuroscience, implicit techniques, and behavioural economics – all aspects of neuro that the current questionnaire is perhaps not picking up with simply “neuromarketing”. However, it is clear that at present, the neuro-related approaches remain something of a niche.

Neuro-related approaches remain something of a niche





PREPARED FOR TODAY, PREPARING FOR THE FUTURE

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There has never been a more exciting time to work in market research. New research methodologies driven by technological advances simultaneously present challenges and opportunities for market researchers. Keeping abreast of these new methods – especially ones that extend beyond most researchers' traditional core competencies – will pose significant challenges to both firms and individual practitioners. The adoption of these new technologies will enable researchers to provide better insights more efficiently and, thereby, be more valuable to their organizations.

Masters of mobile

The data in the 2015 GRIT Report are fairly clear: mobile has arrived and big data is coming. 67% of respondents of the GRIT survey indicated they are using mobile surveys today and another 23% report that mobile surveys are under consideration. Along with the near-universal adoption of mobile surveys, these devices are being used to collect data that heretofore were almost impossible to obtain. In fact, over a third of respondents are using mobile devices for new forms of ethnography and qualitative research. Being mobile-centric is no longer an option for market researchers – mobile data collection methodologies must be mastered in today's environment.

Decoding of Data

GRIT survey respondents are considering the mining of Big Data at high levels. Researchers report they're most interested in text analytics (37%), big data (37%), social media analytics (31%) and internet-of-things/sensor-based data (31%). The rapid pace of connected technology allows us to collect millions – even billions – of data points that will enable researchers to enhance their ability to predict behavior. Given that we're likely to see many additional sources of data – including niche social networks, wearables and more connected devices – analyzing and utilizing this information will become increasingly complex.

More than ever, both corporate researchers and market research agencies will need to analyze these large volumes of data to find meaning that gives their clients a competitive edge. To remain

competitive, researchers must simplify, synthesize and distill the ever-growing data deluge into actionable insights for their clients. One of the key analysis challenges with these new data sources is to explain the why behind the what. Big data and social listening can tell you what is going on but not why data relationships exist. Attitudinal research continues to be the gold standard in explaining why people behave as they do. Developing talent able to understand the analytic intersection of these new methods is critical for long-term success.

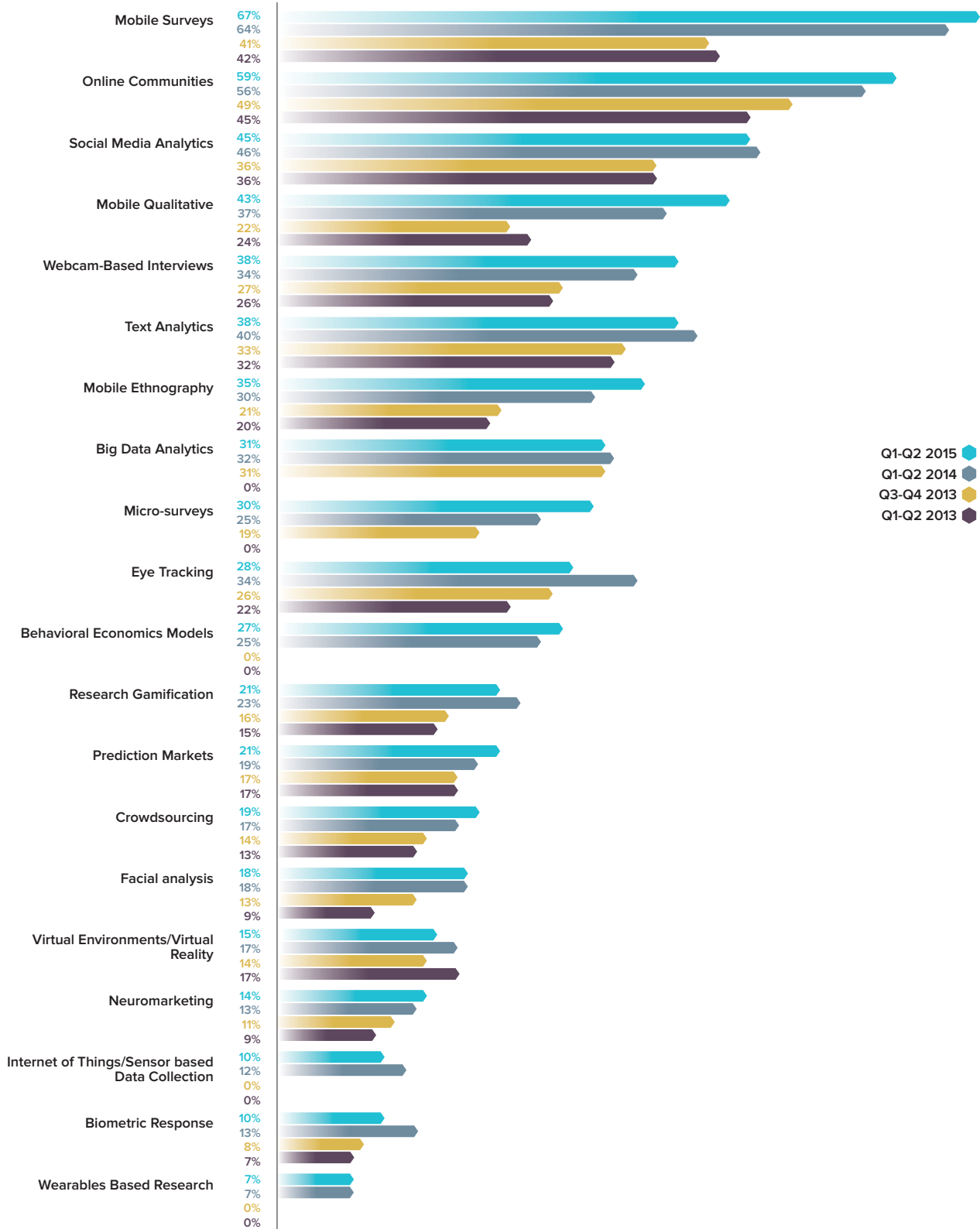
Information Integration

For providers of research tools and community software (like Passenger), the imperative is to build products that enable fast, efficient insights that meet researchers' needs to understand behavior. Communities that run parallel to big data analysis programs, for example, can provide the insights to understand patterns in the data collected from these programs. The GRIT data indicate that communities continue to be one of the fastest and consistently growing methodologies surveyed – over the last four surveys fielded from 2013 to 2015, community usage has grown from 45% to 59%. Passenger's own business has been fueled in part by client usage of communities to better understand behavioral patterns from other data sources.

In summary, the trends in the GRIT Report speak to the need for researchers to adopt and master an increasing array of methodologies that allow for better measurement – mobile – increase the availability of data – big data and social listening – and provide the qualitative and quantitative tools to more effectively understand consumer attitudes and behavior – communities.

This ever-growing set of challenges creates opportunities for the research community. As management of information increasingly becomes a core competency for all industries, researchers will be at the center of the decisions leading to success for their companies and their clients. As these new services provide unparalleled understanding of the consumer, the multi-disciplinary talent to exploit these technologies holds the key to driving change in both present and future market researchers.

TECHNIQUES USED OVER TIME



Filter: 2013 to 2015; Unweighted; base n = from 1387 to 4299; total n = 8800; 7413 missing; 8.5% filtered out; Q22. Do you currently use, or do you foresee this technique/approach in your future? Not sure, Don't ever expect to use or consider, No interest to date, Under consideration, In use; Some empty rows or columns have been removed

[illegible]

- Consulting and Synthesizing (22%)
- Data and Analytics (22%)
- Tech and New Methods Savvyness (19%)
- Flexibility and Agility (12%)
- Communication (10%)
- Other Useful Skills (14%)

Data is very much at the heart of what was suggested as the necessary emerging skills

This group splits very evenly into two subgroups—business savvy consulting, and synthesis of different streams of information. We have grouped them together as they are two sides of the same coin. Businesses have multiple data streams, many of them not derived from market research, and most of them in differing formats, veracity, and time frames. These need interpreting from a business point of view, i.e. synthesizing. These interpretations then need to be managed into the business to ensure they achieve impact, i.e. the consultative role.

Examples of this were:

- Insight-driven research, consultancy-based practice
- Business acumen
- Management consulting
- Strategic

Synthesizing

Examples of this were:

- Synthesis of data from multiple sources to create compelling stories
- The ability to draw insight from a wide range of data sources
- Ability to identify the big picture by looking at disparate data sets and types
- Holistic approach of different tools

DATA AND ANALYTICS

The Data and Analytics bucket was broadly formed from three sub-groups: Big Data, Social Media, and Other Analytics. It should be noted that this category sometimes overlapped with Synthesizing. Where the focus was the data and method, it was coded as Data and Analytics, and when the focus was the overall meaning, it was coded as Synthesizing.

Big Data

Examples of the suggestions for Big Data included:

- Big Data management
- Interpreting Big Data
- Integration with Big Data analytics

Social Media

Examples for Social Media included:

- Social Media analysis
- Social Media skills
- Social Media text analysis

Other Analytics

Examples for the other analytics category included:

- Data analytics
- Analytics, especially text analytics
- Predictive modeling
- Data science

TECH AND NEW METHODS SAVVYNESS

This bucket also subdivided into three groups: Mobile, Tech, and New Methods. Some of the material here also came close to being Synthesizing or Analytics.

Mobile

Mobile is seen both as a new tech and as a new method, for example:

- Understanding the research methodologies of using mobile and not simply the technologies
- Familiarity with apps
- Mobile ethnography

Tech

In terms of tech, people mentioned hardware, software, and systems in a variety of statements. For example:

- Tech savvy
- A grounded understanding in technology and how this can be applied in research
- Programming skills

New Methods

In terms of New Methods, respondents mentioned the following skills and qualifications:

- Ability to develop or use new methods for quantitative data collection
- Up to speed with IT skills & new methodologies
- Working with converging methodologies and approaches

FLEXIBILITY AND AGILITY

Unlike the groups above, this group does not subdivide into smaller groups.

- Examples that were cited were:
- Adaptive
- Agility
- Creativity and flexibility
- Ability to be flexible, current, always learning, and on top of changes in the research industry

COMMUNICATION

Communication does not have formal sub-groups, but there is clearly a mix of storytelling, general communication, and the ability to create and utilize devices such as infographics. Examples included:

- Storytelling and Data Journalism
- Visual thinking/infographics
- Ability to summarize results, derive insights, and then tell a compelling story so it makes the maximum impact
- Developing good communication skills to tell the story in a business context

Again, several of these skills come quite close to consulting and synthesizing. Where the statements seemed to focus on the method rather than the business, they were classified as a communicating skill, rather than the broader options of synthesizing and consulting.

OTHER USEFUL SKILLS

It is hard to summarize this group because it covers all the major bases not covered by the five categories above. It includes, for example:

- Behavioral Economics
- Psychology
- Online communities
- Breadth of knowledge, something Simon Chadwick describes as the polymath
- Problem solving

- Biometrics and neuroscience
- Creativity and curiosity

DON'T FORGET THE CURRENT SKILL SET

Several people made the point that when thinking about the emerging skills needed by our industry, we also need to value and promote the traditional skills.

Comments in this category included:

- *How to combine traditional methods with new platforms/mobile space/online community*
- *I think a new researcher actually needs to take a step back and make sure they have a firm understanding of the foundations of research & the basics, so they know they are applying methodology correctly*
- *A great grounding in research practices and the flexibility to apply it to new problems and new opportunities.*

AN IMPOSSIBLE CHALLENGE OR A SMORGASBORD?

A young researcher looking at the categories above has two choices; they could look at the diversity of requirements, from data analysis to creative communication, and tech savvy innovation to business consultancy and see it as an impossible and overwhelming challenge.

Or, new entrants to market research can look at the list of talents above as a smorgasbord. Asking questions such as "Which of these suit me best?" and "Where will I have the right balance of reward, challenge, and fun?" can be quite beneficial. It really does come down to whether it is seen as a glass half full or a glass half empty situation— it is all in the way you look at it.

Mobile is seen as both a new technology and a new method

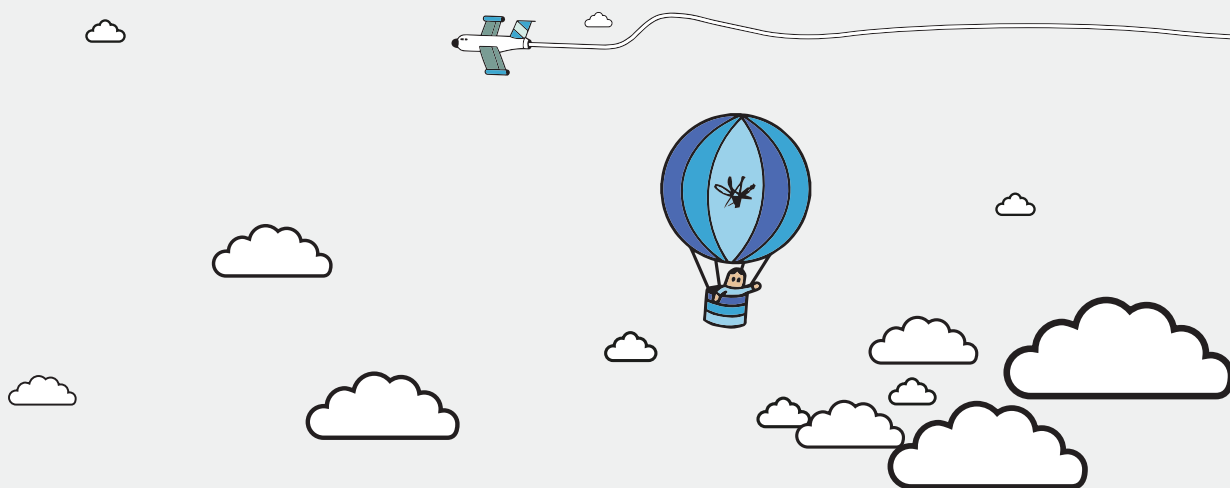


When thinking about the emerging skills needed by our industry, we also need to value and promote the traditional skills



Connecting People
to Brands
Through Smart Technology

Toluna Makes it Real



Over the last 15 years, Toluna has been at the forefront of innovation, developing the world's largest social voting community of now more than 7.8m members worldwide. As a leading all-in-one global source for actionable insights, we help market researchers, and insights professionals anywhere in the world make clearer and better business decisions that drive better business results.

Toluna provides the industry's leading survey product suite, including Toluna QuickSruveys, PanelPortal and TolunaAnalytics, enabling organizations worldwide to create online and mobile surveys, manage panels and build their own online communities.

View our new Corporate and Technology videos to learn more about Toluna and our commitment to innovation

go.toluna-group.com/GRIT2015



THE TOP 50 MOST INNOVATIVE SUPPLIER COMPANIES IN MARKET RESEARCH

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

1. Using an unaided awareness verbatim question, we ask respondents to list the research companies they 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.

For this wave, using the aggregate of the ranking question, we developed a list of 727 unique companies from 3,565 total responses. From that list, we have narrowed it down to the Top 50 (60 actually due to ties in mentions, but we will keep referring to it as the GRIT Top 50 for the sake of consistency) for additional analysis.


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

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

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

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

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





SSI FOLLOWS A DIFFERENT PATH

We're the only company running proprietary panels on a single, integrated global technology platform.

When it comes to survey research panel companies, there's no shortage of options. So how do you know how they differ and which way to go?

SSI takes a unique approach. Unlike companies who build and manage panels in silos, we operate 68 proprietary panels in 86 sample countries on a single, integrated technology platform worldwide which enables SSI to scale seamlessly.

Unlike many low-price, pop-up players in the industry, SSI panels use only the best quality sources that are over 90% proprietary (i.e. not "river"). That means we own the respondent relationship overall and are constantly optimizing, protecting and growing the community. The result is a sample blend that has been cited by an independent study* for consistency.

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Find out more about our panels and technology at www.surveysampling.com.

*Sample Source Auditors™. Grand Mean Project™



info@surveysampling.com | surveysampling.com

WITHOUT ROLLUPS

2015 Rank	2014 Rank	Change	Company	Count
1	1	0	BrainJuicer	178
2	3	1	Ipsos	95
3	2	-1	Vision Critical	86
4	9	5	Insites Consulting	56
5	6	1	TNS	55
6	4	-2	GfK	54
7	5	-2	Google	54
8	12	4	LRW	48
9	7	-2	Nielsen	46
10	8	-2	Millward Brown	36
11	13	2	20/20 Research	31
12	10	-2	Research Now	30
13	40	27	RIWI	28
14	15	1	Qualtrics	27
15	16	1	Hotspex	25
16	0	Debut	BVA	24
17	19	2	Toluna	17
18	33	15	Gutcheck	17
19	18	-1	iTracks	16
20	27	7	Decipher	16
21	38	17	Hall & Partners	14
22	0	Debut	Yougov	14
23	35	12	Surveymonkey	14
24	37	13	iModerate	14
25	0	Debut	Zappistore	14
26	17	-9	Lightspeed GMI	13
27	11	-16	Communispace	13
28	23	-5	Kantar	13
29	0	Debut	Join The Dots	12
30	14	-16	Affinnova	11
31	25	-6	Revelation	9

2015 Rank	2014 Rank	Change	Company	Count
32	21	-11	uSamp	9
33	49	16	Added Value	9
34	24	-10	Mesh Planning	8
35	0	Debut	Incrowd	8
36	0	Debut	Discuss.IO	8
37	0	Debut	Focus Vision	8
38	34	-4	Dub	7
39	42	3	Affectiva	7
40	0	Debut	Happy Thinking People	7
41	0	Debut	Metrixlab	7
42	28	-14	Face	7
43	26	-17	Gongos	7
44	0	Debut	SSI	6
45	41	-4	Harris Interactive	6
46	44	-2	Schlesinger Associates	6
47	0	Debut	Infotoools	6
48	45	-3	IBM	5
49	0	Debut	MMR	5
50	0	Debut	Buzzback	5
51	0	Debut	Facebook	5
52	0	Debut	C&R Research	5
53	0	Debut	Federated Sample	5
54	0	Debut	Flamingo	5
55	0	Debut	Peanut Labs	5
56	0	Debut	24tru	5
57	0	Debut	Incite	5
58	0	Debut	Antedote	5
59	48	-11	Comscore	5
60	0	Debut	Forbes Consulting	5
61	0	Debut	Confirmit	5

WITH ROLLUPS

2015 Rank	2014 Rank	Change	Company	Count
1	1	0	BrainJuicer	178
2	2	0	Kantar (Kantar, TNS, Millward Brown, Added Value, Light-speed GMI, Firefly)	126
3	3	0	Ipsos	95
4	4	0	Vision Critical	86
5	7	2	Nielsen (Nielsen, Harris Interactive, Affinova)	63
6	8	2	Insites Consulting	56
7	5	-2	GfK	54
8	6	-2	Google	54
9	11	2	LRW	48
10	9	-1	Research Now (Research Now, Peanut Labs)	35
11	47	36	Focus Vision (Focus Vision, Revelation, Decipher)	33
12	12	0	20/20 Research	31
13	37	24	RIWI	28
14	14	0	Qualtrics	27
15	0	Debut	Omnicom (Com-munispace, Hall & Partners)	27
16	15	-1	Hotspx	25
17	0	Debut	BVA	24
18	18	0	Toluna	17
19	30	11	Gutcheck	17
20	17	-3	iTracks	16
21	0	Debut	Yougov	14
22	32	10	SurveyMonkey	14
23	34	11	iModerate	14
24	0	Debut	Zappistore	14

2015 Rank	2014 Rank	Change	Company	Count
25	0	Debut	Join The Dots	12
26	0	Debut	Macromill (Metrix-Lab, Macromill)	11
27	20	-7	uSamp	9
28	23	-5	Mesh Planning	8
29	0	Debut	Incrowd	8
30	0	Debut	Discuss.IO	8
31	27	-4	Qualvu	8
32	31	-1	Dub	7
33	39	6	Affectiva	7
34	48	14	Happy Thinking People	7
35	22	-13	Cello Group	7
36	25	-11	Gongos	7
37	47	10	SSI	6
38	41	3	Schlesinger Associates	6
39	0	Debut	Infotools	6
40	36	-4	Anderson Analytics/Odin Text	6
41	42	1	IBM	5
42	0	Debut	MMR	5
43	0	Debut	Buzzback	5
44	49	5	Facebook	5
45	0	Debut	C&R Research	5
46	0	Debut	Federated Sample	5
47	0	Debut	Flamingo	5
48	0	Debut	Incite	5
49	0	Debut	Antedote	5
50	45	-5	Comscore	5
51	0	Debut	Forbes Consulting	5
52	0	Debut	Confirmit	5

For the fourth consecutive year, BrainJuicer is unequivocally considered the most innovative company



Most surprising was the number of startups— at least 6 companies that made the list are less than 3 years old



The perfect “innovative supplier” combines new methods and technology with future-forward thinking and enhanced deliverables



For the fourth consecutive year, BrainJuicer is unequivocally considered the most innovative company by GRIT respondents, a testament to their discipline, creativity, and focus when it comes to branding and marketing. They remain the “ones to beat” regarding innovative brand identification, and for the past four years no other supplier has come close to usurping this position. The strong lesson here is that any company who wants to be considered “most innovative” has a significant amount of work to do to achieve a comparable level of brand identification.

Other perennial leaders saw some position shuffling within the Top 10, but the real surprise was the number of debuts on the list. An unprecedented 23 companies debuted on the GRIT Top 50 list in this round, knocking out some previous favorites and

sending a clear message that new companies are working aggressively to embrace innovation in their marketing and branding efforts. Most surprising was the number of startups— at least 6 companies that made the list are less than 3 years old.

16 brands increased their position by moving up the ranks, with the single greatest gain being made by RIWI Corporation with a jump of 27 spots. 21 brands declined in the ranks.

So what does this tell us? For firms that debuted or moved up in the ranks in 2014, their branding efforts paid dividends for them in the minds of the industry. With each iteration of the GRIT Top 50, we are witnessing how brands are leveraging various marketing channels (social media, conferences, advertising) focusing on the broad idea of “innovation”.

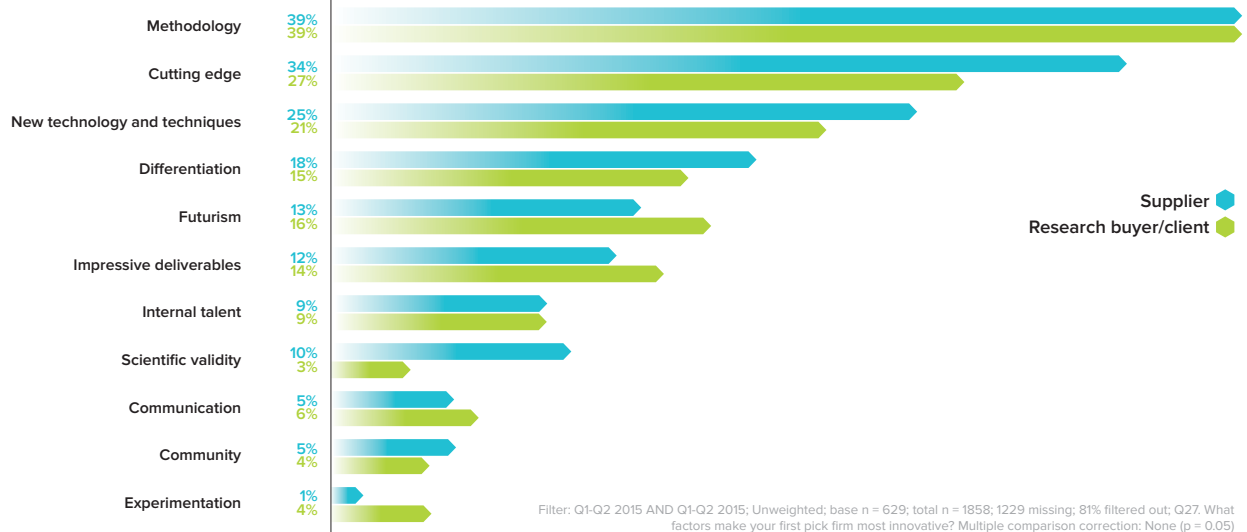
WHAT MAKES A COMPANY INNOVATIVE?

While watching the movement of the brands and correlating that to more anecdotal data such as event participation, advertising levels and social media activity is instructive, additional digging in to the verbatim question of why a firm is considered innovative yields compelling insights on how firms are perceived in the marketplace.

By using advanced text analytics to decode the responses further, we clustered the responses into 11 categories based on context and content.

Perhaps unsurprisingly, Methodology, Cutting Edge, and New Technology account for the majority of the perception of innovation across both clients and suppliers with some disparity between the two segments, although interestingly, Clients give greater weight to Futurism and Impressive Deliverables than suppliers do. This would seem to indicate that the perfect “Innovative Supplier” combines new methods and technology with future-forward thinking and enhanced deliverables.

WHAT FACTORS MAKE YOUR FIRST PICK FIRM MOST INNOVATIVE?





PLAY WITH ALL OF RESEARCH'S NEW TOYS, BUT DON'T DISMISS QUALITATIVE RESEARCH

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If you could do only one type of research, would it be qualitative or quantitative?

I was once asked this question in an interview for a corporate job. I paused at this question for two reasons. First, because it was a bit ludicrous. Second, it made me think about the role of each of these and how they're applied.

Human interaction counts

Every few years we hear predictions that hard data (quantitative) is going to replace qualitative. In fact, we've heard those predictions for many, many years now. The 2014 ESOMAR Global Market Research Industry report, and prior waves of the GRIT Report, suggest that these predictions are a bit exaggerated. Focus groups, in-depth interviews, and online qualitative are all either flat or growing slightly, depending on which numbers you choose. It's easy to understand why these predictions are made, but it's more than a bit shortsighted because human interaction counts for more than it's often credited for.

Digging into the "why" of behavior

Qualitative research provides the nuance to the "how" of consumer behaviors, and much more importantly, the power to the "why." While things like Big Data, passive measurement, geo-location, and data synthesis are grabbing many of the headlines in our industry, qualitative research goes on doing what it has always done: getting to the deeper understanding of the consumer.

Connects with people

The interactive conversation about the "why" of behavior is the essential benefit of qualitative and has yet to be surpassed for its depth, sensitivity, and flexibility. Topics that are difficult to cover otherwise, such as finances, health, relationships, sex, etc., can all be handled with a certain connection that is made between people instead of a survey.

And these qualities of qualitative research go a long way to meet the basic needs of a business's deep understanding of consumers. As one respondent in this publication of the GRIT Report said, the

biggest challenge of marketing research is to "understand and deepen knowledge of consumer behavior. The consumer [should be] viewed in all mindsets, perspectives and through his or her side." And much of this is the purview of qualitative research.

The effect of mobile technology

Today, one area of qualitative is growing substantially. This is the area facilitated by mobile technology. Currently, about 20-25% of corporate researchers and about 50% of research suppliers are using mobile for at least some of their qualitative/ethnography research. And another 35% of corporate researchers say it's under consideration.

Mobile qualitative has several unique benefits. First, it is real-time "in the moment" and consequentially allows an even deeper understanding of consumers because of the timing of an event and the understanding. Second, it can be non-intrusive as the tool is both available and comfortable for consumers. Lastly, it can be pretty fast, which is always good. In many cases, the mobile component of qualitative is simply that: one component. The mobile tool is often integrated with more traditional tools, such as in-depth interviews, for an even more substantive outcome.

There's a human gap in big data

No commentary on research would be complete without at least mentioning Big Data. We all have our favorite statistics about the proliferation of information. "It doubles every two years" is mine. However, there is a long distance between the implication of data and the human understanding that brings that data to a level where most of us can understand, empathize, and act.

Respondents to the current GRIT Report talk about this as well. One respondent noted, "Market Research needs to remain relevant by providing consultative resources and also helping to answer 'why' when big data seems to be revealing hard to understand insights." You simply can't (and shouldn't) get away from the importance of "why."

By the way, my answer to the interviewer was "qualitative". I didn't get the job. The company went bankrupt. Just saying.

The most prevalent feature of innovative suppliers is their ability to offer new techniques for analyzing data



A Deeper Dive Into the Driving Features of Innovation

After respondents ranked the companies, they were then asked to explain why they perceive the first company to be most innovative. We conducted an exploratory analysis using text analysis on the responses to this question to uncover the features of these companies that caused them to be perceived as innovative. Our analysis revealed that the uniting features that these suppliers share are:

- Using novel methodologies, particularly in the realm of social media
- Being a leader in data interpretation and insights
- Enhancing community and communication

Novel Technologies, Methodologies, and Techniques

The most prevalent feature of innovative suppliers in this analysis is their ability to offer new and exciting techniques for analyzing data, particularly in social media and other types of big data. The most valued suppliers are the ones who blend novel and experimental methodologies with scientifically valid and credible results. A few verbatims along these lines illustrate the sentiment:

[This company is using the] newest methodologies and techniques but still scientifically valid. – In reference to Insites Consulting

Multi-method research utilizing social media as qualitative, quantitative as validation and IDIs to gain even deeper insights into the quantitative answers. – In reference to Curiosity InsightStream

[They use a] novelty of methodologies, incorporating of learnings from other fields such as psychology – In reference to BrainJuicer

They have the best real-time text based focus group software (with media). Their mobile app for asynchronous qual is the leader in that space as well. They are also one of the top bulletin board focus group developers. They offer quant as well, and the integration between quant and qual is probably the best in the industry. Overall they have the greatest breadth of cutting edge technology for market research (ihut, video, concept markup etc...) – In reference to iTracks

Many companies were recognized for their excellent insights, with a particular focus on their ability to interpret the data



Insights and interpretation

Many companies who made the list were recognized for their excellent insights, with a particular focus on their ability to interpret the data. Respondents reported that they often receive data output and experience the “now what?” factor; they simply don’t know how to make actionable decisions based on the data alone. Therefore, suppliers who are capable of interpreting the data quickly and accurately were highly prized.

[They] provide real help to design initiatives which generate insights that actually drive consumer behaviour (unlike most of traditional survey-based market research) – In reference to Shift Consultancy

Delivers provocative marketing research insights that help clients confidently make informed and inspired decisions through consumer engagement and client engagement and business focused analysis involved in three areas client, JP & technology and culture. – In reference to Hotspx

Bring new tools to the marketplace, able to think outside the box, use techniques to ensure results are more actionable (take rate weighting, etc.), innovative brand measuring, etc. – In reference to Yougov

Community and Communication

Innovative suppliers were also those who were perceived as helping to establish a research community where ideas are exchanged, insights are shared, and growth can occur. Especially admired were those suppliers who have begun to establish online communities, especially for hosting panels.

... including setting up specific innovations and consumer trends teams, developing behavioural frameworks incorporating modern psychology to better understand consumer journeys, developing happiness and trends frameworks. – In reference to Join the Dots

Interest to go deep in the new research boundaries, such as mobile, internet, Social listening, social communities. – In reference to IPSOS

They think along with their clients and will create a solution based on their needs. They were one of the first to conduct research communities on the scale that they are using it, they have a unique way to conduct them, keep innovating each day. – In reference to Insites

Actionable Insights through Engaging Consumer Experiences.



BUILD

Create and manage vibrant online communities, empowering social collaboration with your customers, allowing them to interact to each other and with your brand. This way you can listen and learn.



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Key Features of Innovative Suppliers

In this section, we shine a spotlight on five of the GRIT Top 50 suppliers and unveil the reasons why they were cited as worthy of inclusion by respondents.

BrainJuicer

BrainJuicer was best recognized for its cutting-edge methodologies and techniques, and its commitment to considering humanistic elements like psychology and emotion. Many respondents applauded BrainJuicer's recognition that you can't tell the whole story by using a person's rational thought alone. In order to get the full picture of an individual, you have to understand how they think, how they emote, and how they express themselves.

Vision Critical

Vision Critical was recognized for using innovative and novel technologies. Perhaps more importantly, this supplier was highly recognized for its ability to engage the community. Indeed, Vision Critical received the most acknowledgements about their community involvement out of all of the GRIT 50 suppliers. This company is appreciated for bringing communities together in order to improve market research.

Insites Consulting

Insites Consulting was applauded for its ability to set itself apart from its competitors by being highly differentiated, novel, and creative. They were described as offering services that cannot be found anywhere else, which makes them a leader in their domain. This company was also recognized for having excellent, useful insights that are applicable and scalable.

IPSOS

IPSOS was described as being highly adaptive, innovative, creative, and credible. Respondents reported that IPSOS is known for working hard and making sure that insights are delivered faster, cheaper, and more reliably. Although many of these descriptors might cause IPSOS to sound like a very pragmatic and calculated organization that might not take many risks, respondents also highly praised IPSOS for being out of the box, extremely creative, and fun.

Hotspex

Respondents reported that Hotspex is best known for its adaptability and flexibility, particularly in the area of emotion measurement. This company was applauded for being a pioneer in the area of human emotion. Respondents also reported that Hotspex is an excellent provider for helping clients interpret their data, which many clients reported as a sticking point for them.

Congratulations to all of the companies on this year's list!

Vision Critical is appreciated for bringing communities together



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THE TOP 50 MOST INNOVATIVE CLIENT COMPANIES

For the first time, we decided to extend our inquiry around innovation to include client-side organizations. Since market research is driven by client demand, we felt just focusing on the supply-side of the business was an incomplete picture of the drivers of change, so extending our investigation to the demand-side would fill in some gaps. Our gamble paid off in droves, as you'll see.

Following the exact same question structure for the Top 50 Supplier rankings, we asked respondents to tell us which (and why) client-side organizations were considered innovative. The result was 1,816 total responses which were coded down to 544 unique companies. Below is our inaugural ranking based on number of total mentions.

P&G is considered the most innovative client organization by a wide margin to the remainder of the list. For many years, they have assumed an active and leading role in shaping new methods and approaches and this visible activity has clearly been recognized by the industry as a whole.

We also performed a slightly different analysis based solely on the follow up question to the verbatim exercise: "Please rank your top 5?" Although we do not consider this to be the definitive ranking (that is the previous table) since it does not capture all brand mentions, we think this secondary analysis is interesting. Since we previously published the Top 15 using this analysis on the GreenBook Blog, we are including that version here for the sake of completeness.

1. Procter & Gamble
2. Coca Cola
3. Google
4. Unilever
5. General Mills
6. Lowes
7. Apple
8. 3M
9. Microsoft
10. PepsiCo
11. Mondelez
12. ESPN
13. Intel
14. L'Oreal
15. RedBull

Using this framework the ranking changes for anything below the Top 5, but the leaders remain the same, proving that any way we look at the data, these Top 5 companies are considered the leaders in driving innovation.

P&G is considered the most innovative client organization by a wide margin to the remainder of the list.



Rank	Company	Mentions
1	Procter & Gamble	142
2	Coca-Cola	122
3	Unilever	63
4	Google	53
5	General Mills	41
6	Apple	21
7	Microsoft	18
8	Mondelēz International, Inc.	17
9	Johnson & Johnson	16
10	PepsiCo	15
11	Nestlé	14
12	Kimberly-Clark Corporation	13
13	Lowe's	12
14	Red Bull	11
15	Samsung	11
16	Anheuser-Busch InBev	10
17	Intel	9
18	Heineken	9
19	Facebook	9
20	Danone	8
21	Warner Bros. Entertainment Group	8
22	American Express	8
23	Campbell Soup Company	7
24	Disney	7
25	Netflix	7
26	3M	7
27	Kraft Foods	7
28	AstraZeneca	6

Rank	Company	Mentions
29	Discovery	6
30	ESPN	6
31	Amazon.com	6
32	AT&T	6
33	Mars, Inc.	6
34	Toyota	6
35	L'Oréal Group	6
36	Reckitt Benckiser	5
37	Eli Lilly and Company	5
38	Target Brands, Inc.	5
39	Bank of America Corporation	5
40	Kao	5
41	Sanofi	5
42	Diageo	5
43	Nike, Inc.	5
44	Philips	5
45	Colgate Palmolive	4
46	Capital One	4
47	IBM	4
48	IKEA	4
49	SABMiller	4
50	NBCUniversal	4
51	HERSHEY'S	4
52	Clorox	4
53	MasterCard	4
54	Kellogg Company	4
55	BMW	4

WHO'S ON THE LIST, AND WHO IS MISSING?

There are two interesting things about most lists, who is on the list and who is not, and this is very true of this list. We'll use the filter of the top 20 mentions as a frame of reference

On the List

Business sectors that show themselves to be innovative by being in the Top 20 include:

- **CPG** – P&G, Unilever, J&J, General Mills, Mondelez, and L'Oreal – with Kimberly Clark and Nestle just outside the top 10.
- **Non-alcoholic Beverage** – Coke, Pepsi, and Red Bull
- **Tech** – Samsung, Google, Apple, Microsoft, and Intel. Note that Google is the only company in the top 20 for both supplier and buyer categories.
- **Alcoholic Beverage** – Ab Inbev and Heineken
- **Retail** – Only one retailer: Lowe's. Note that Lowe's performance was particularly strong given its North American focus and the global nature of the responses – quite possibly a result of Lowe's track record at speaking at and being involved in international MR events.

Missing?

Major buyers of research who did not make the top 20 include:

- Media
- Auto
- Finance
- Pharma
- Consumer durables

Does this mean those sectors are not innovating as it relates to research? Of course not. But it does indicate that they are not talking as much about it or are not as engaged in the industry as a whole. Arguably, this lack of recognition for their efforts to innovate could impact them by limiting the number of innovative new suppliers who reach out to them, thus impacting their own ability to effectively implement an innovative insights program.



DRIVING FEATURES OF INNOVATION

After respondents ranked the companies, they were then asked to explain why they perceive the first company to be most innovative. Again using advanced text analysis technology, we conducted an exploratory analysis on the responses to this question to uncover the features of these companies that caused them to be perceived as innovative. Our analysis revealed that the uniting features that these clients share are:

- Using novel technologies, methodologies and techniques
- Delivering impressive products, services, or deliverables
- Being cutting-edge and taking calculated risks

Novel Technologies, Methodologies, and Techniques

The most prevalent feature of innovative clients in this analysis is their resolve to use the latest technologies, the most experimental research designs, and the most creative techniques in their business. Respondents said that innovative companies are those who are driven to move away from traditional approaches and try new things in order to push the envelope. They stay abreast of technology and science because they know that these domains are always changing, and they believe that the only way to stay at the head of the crowd is to constantly adapt and embrace these new tools and methodologies. For instance:

[This company is] using innovative suppliers and methodologies. They are not only using neuro and non-conscious techniques, but in some cases training their internal employees on these techniques. – In reference to Procter & Gamble

Are developing new techniques, but mostly are creating products that we didn't know we even needed or wanted. They are successfully combining product innovation with new ways of living. – In reference to Google

[They] understand the need, dos and don'ts behind MR, while constantly pushing for new ways of doing things better and smarter. They realized that it's best to use best-in-class providers for each step of the research chain, rather than stick with one or two big suppliers. – In reference to Coca Cola

They have significant "R&D" funds set out to try (and ok to fail) new techniques and new technologies. Actively looking to push the envelope. proactive rather than reactive. – In reference to Intel

Impressive products, services, and deliverables

Many companies who made the list were recognized for their excellent products, high standard of customer service, or the high quality of their deliverables. Products, services, and deliverables were thought to be of high quality when they met a specific customer need, provide unique or novel insights, or synthesize data from multiple sources in a streamlined and efficient way.

The development of no 7 lipsticks that are recommended based on skin tone seemed to respond to a real consumer need that resonates with customers, which suggests highly insights driven innovative product development. – In reference to Boots No 7.

Heard an anecdote that they seek alternatives from standard concept testing, such as launching a product on home shopping networks and rating the concept/messaging according to the ebbs and peaks of people calling in to buy the product. – In reference to Kimberly Clark

(1) laser focus on their consumers' needs / wants (2) continual innovation (both product / service / experience-based) (3) leadership in their given category. – In reference to Starbucks

The most prevalent feature of innovative clients is their resolve to use the latest technologies, the most experimental research designs, and the most creative techniques



Companies perceived as being cutting-edge, pushing the envelope, and taking big risks were highly likely to make the top 50 list



P&G was perceived as being innovative because of its effective and useful methodologies, their cutting-edge research, and their future-thinking mindset



Cutting-edge risk takers

Companies perceived as being cutting-edge, pushing the envelope, and taking big risks were highly likely to make the top 50 list. Respondents value companies who have made risky decisions to disrupt the marketplace and ultimately usher forth a new and better way of doing things.

The VR lab is very impressive, and the new initiatives they are rolling out are quite forward-thinking. – In reference to Lowes

Always pushing the envelope, not satisfied with “just doing the normal thing”. – In reference to MTV

They are constantly thinking of new ways and approaches, setting the stage and inspiring others to try the same thing. They are willing to take risks and try something new for the benefit of improving the marketplace. – In reference to Charles Schwab

Key Features of the Top 5 Most Innovative Clients

In this section, we shine a spotlight on the top 5 clients and unveil the reasons why these clients were considered to be the most innovative of all the client-side companies in the GRIT Top 50 Clients.

Procter and Gamble

P&G was perceived as being innovative because of its effective and useful methodologies, their cutting-edge research, and their future-thinking mindset. Specifically, P&G was acknowledged for focusing on human emotion and its correlates to behavior (which is a notoriously difficult discipline in MR), learning new methodologies for analyzing qualitative data instead of relying heavily on quantitative data, and for hosting webinars and conferences in order to share their methodologies and insights with others.

Coca-Cola

Coke was recognized for its commitment to staying at the forefront of technology, techniques, and methodology. Respondents applauded Coke for its innovative ways of understanding consumers at a deeply emotional level and the ability to engage with them at that level. They also admired Coke for its willingness to take big risks that pay off in the long run. For instance, it was highly risky to release

the “America the Beautiful” spot at the Super Bowl, but despite the detractors, the spot was still a big success. Respondents were impressed that Coke made a risky move in order to do something that they believed in – which was engaging personally with Americans on a very cultural level.

Unilever

Unilever was recognized for its smart, fast, and effective methodologies, use of novel technologies and techniques, and cutting-edge work. Unilever was applauded for being the first to make significant discoveries, and for then sharing their discoveries with others in a collaborative way. Respondents mentioned that Unilever also has a unique and special ability to challenge their business partners. That is, Unilever is forward-thinking and holds high expectations, which causes them to have high expectations for those that work with them.

Google

Google was lauded at being one of the most cutting-edge companies in the country. Respondents reported that Google is so ahead of the game that they are able to give answers to problems before anyone even realizes there is a problem. “First to market” was an expression that was commonly used in reference to Google. This indicates that respondents view Google as an industry leader that ushers forth new ideas that are often rapidly adopted by other companies.

General Mills

General Mills received the unique distinction as being a company that not only utilizes new technologies and techniques, but that also helps to establish the benchmarks that need to be in place for other companies to use those techniques and technologies successfully. They were also applauded for being bold and risky in their approach, which most respondents reported as being an important facet of innovation.

These companies are sound examples of how client-side organizations are driving the conversation (and implementation) of innovation in market research.

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*Source: 2015 Annual Survey of Market Research Professionals. (MarketResearchCareers.com)



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CHALLENGES IN THE MARKET RESEARCH INDUSTRY

We continue to explore how the research industry views both Challenges and Opportunities, and so we employed numerous open-ended questions on the topic. To further develop and advance our knowledge, we used a combination of automated probing during the survey as well as text analytics during analysis to delve deeper into respondent answers.

The 3 biggest challenges researchers feel are facing the industry include:

- **Impactful reporting:** The ability to provide or receive consultative reports, to tell a cohesive story, and account for all the pieces of the puzzle in the client's world,
- **Technology:** Its introduction, use, and reliability to answer business questions in more efficient or creative ways, and
- **Data Management:** How businesses gather, handle and integrate the vast amounts of data—from both primary and alternative research resources to make sense of all the data points.

Client-side researchers place the most emphasis **(40%)** on getting **actionable reports** that relate directly to their business needs, followed closely by the **management of data (37%)**—specifically the marrying of Big Data and all of the information about their consumers into relevant business processes and systems.

Being able to successfully develop behavior models or provide a forecast for the business based on the data that is available (and cheaply procured) will prove to be the most fruitful for this group. Until then, they are relying on their suppliers to provide better forecasting and recommendations that speak clearly to them and their stakeholders. When done effectively, these researchers feel the research is;

“Connecting the dots – bringing together all of the insights we have to have clear, thorough, and actionable insights, which are brought to the stakeholders in a way that is easy for them to understand both the insight and what action should be taken by us.”

Conversely, suppliers are placing the greatest focus on **technology (45%)**, not only as a means for embracing newer trends and to enhance differentiation, but also as a way to deal with the ever-shrinking timelines and budgets that impact the quality and delivery of their research.

They understand that there are great benefits when technology is used well, but there are also costs associated with its proliferation.

“The rapid change in technology. Everyone wants to be doing the new stuff yesterday and much of the new stuff becomes obsolete very quickly. Mobile devices have created both exciting positives and nasty negatives for the industry. The way we deliver findings to clients is becoming challenging too. Taking on or considering new software. Changing some of our processes.”

Client-side researchers place the most emphasis (40%) on getting actionable reports that relate directly to their business needs



Suppliers are placing the greatest focus on technology (45%)



TOP 10 THEMES IN RESPONSE TO THE QUESTION, “WHAT DO YOU FEEL IS THE BIGGEST CHALLENGE FACING MARKET RESEARCH IN 2015?”

There was an immense amount of richness in these responses, so although in the preceding section we delivered a comprehensive summary of the overall responses, we also thought it would be instructive to dive deeper using advanced text analytics to explore some of these themes more fully.

Methodology

56% of respondents mentioned the methodologies of market research as one of the biggest challenges they face.

Using social media for data collection and analysis

- Data is clunky, messy, and full of garbage
- The “now what” factor: What are you supposed to do with social media insights?
- There is no way to quantify the qualitative insights
- No one in the organization is trained to do the interpretation of the data (i.e., there are tools that quantify SM data, but there aren't enough researchers who are skilled at teasing out the useful information and making decisions based on that information)
- Researchers generally get push-back from organizations that are resistant to change and skeptical of social media

Response rates:

- Generally low response rates, waning participation
- Difficulty getting respondents to be cognitively engaged: There is a sense that consumers have lots to say about products and services, but they are so bored by surveys that they won't participate
- Lack of representativeness: we're only sampling the kinds of people who are likely to be interested in taking surveys, participating in panels, etc.
- Consumers are bombarded with too many surveys; don't take any of them seriously

Too many competing techniques

- Researchers are often juggling various tools that their company is testing out
- Don't receive enough training to become proficient at any of these tools
- These tools often provide vastly different results on the same data set, rendering interpretation challenging and actionable insights difficult to find

Privacy and security issues

- Getting data is difficult because of government regulations about privacy
- Modern consumers are becoming increasingly more private and more suspicious of research organizations asking them questions about their thoughts/feelings/behaviors. This causes them to opt out of surveys, panels, interviews, etc.

Researchers generally get push-back from organizations that are skeptical of social media



Consumers are becoming increasingly more private and more suspicious of research organizations



Big companies have trained customers to expect insights quickly



Clients want market researchers to find ways to replicate the expensive, high-tech solutions in a low-cost, scalable way



Big data has become a buzzword and every client wants market researchers to do something with it



Clientele

29% of respondents mentioned that one of their biggest challenges is dealing with their customers and clients. This topic often co-occurred with other topics in this report, meaning that when respondents talked about clientele, they were often likely to talk about one or more of the other topics in this document.

Customers expect insights far too quickly

- Big companies have trained customers to expect insights quickly. Researchers who are interested in precision over speed cannot compete

Customers have dwindling budgets for Market Research

- This leads customers to prefer low-cost, low-quality insights that don't benefit them
- Customers feel that they can save money by interpreting the data themselves

"Insight schizophrenia"

- Customers have constantly changing needs and are always chasing the next shiny object
- They are seduced by high-tech solutions that are expensive and not scalable
- Clients want market researchers to find ways to replicate the expensive, high-tech solutions in a low-cost, scalable way
- Customers cannot articulate what they want/need, and when they finally do articulate their wants and needs, those wants and needs change quickly. Market research feels like a constant game of catch-up with a non-focused customer

Customers need to be re-educated but are resistant

- Need to learn that expensive, accurate data is indeed more valuable than inexpensive, shoddy data
- Due to the conflation of (1) low budgets and (2) customers' perception that they are skilled enough to interpret their own insights, customers are resistant to re-educating themselves

Outcomes

25% of respondents mentioned that poor market research outcomes are the biggest challenge in 2015. The top themes in this category were:

Lack of actionable insights

- Insights are sparse, disparate, and difficult to interpret (e.g., *"the ability to turn research into valuable and actionable insights. Much of research is not used because it is difficult to make actual decisions based on the outcome of the research"*)
- There is the perception that suppliers and customers are often at odds when it comes to interpreting the data. Market researchers perceive that they are seeking the "truth," while their customers are seeking confirmation of what they want to believe about their company, brand, product, etc. Making good decisions based on the data is challenging if there is utter disagreement

Lack of timeliness

- Businesses are moving too fast and need their insights immediately. Data scientists and market researchers cannot keep up with the demand
- Even tools that promise to speed the data collection and interpretation process cannot meet the high-paced standards of businesses today

Lack of honest/integrity by data insights providers

- Businesses feel that many market research data providers promise great insights but usually fail to deliver (e.g., *"Most companies talk a good game, but are not able to execute on the analysis of big and small data."*)

Technologies

22% of respondents mentioned that their biggest challenge is the new technologies used in market research. The biggest issues relevant to technologies were:

Big data

- Big data has become a buzzword and every client wants market researchers to do something with it. However, many market researchers are beginning to perceive that no one really knows how to best handle big data
- Big question: Does big data actually gather a better, more comprehensive picture of who the consumer is? Or is it just one more data point that causes confusion?

Mobile technologies

- Computer-delivered surveys and data collection methodologies are on the way out. They are clunky and static.
- Tomorrow's research design involves mobile, dynamic methods for data collection that gather real-time, in-situ information

Social Media – See Section 1a

Differentiation

21% of respondents mentioned that the biggest challenge they face is trying to differentiate themselves from a sea of competitors.

Demonstrating unique value

- So much information is available that it's difficult for a market researcher to show that there is unique value and novel contribution in his/her approach to MR
- Customers are inundated with so much information that it is difficult to tease out the signal from the noise

Staying relevant in changing times

- There is always the new up-and-comer that is sexier than you
- You must become a jack of all trades and a master of none

Avoiding commoditization

- Market researchers are concerned about becoming "just another seat at the table"
- Market researchers perceive that market research is somehow simultaneously sexy and yawn-worthy: New technologies and exploratory methodologies make the field exciting and new, but because supply is so high, market research is viewed as a commodity and therefore is less interesting
- In light of that, how to keep your sex appeal?

Quality

14% of respondents mentioned the quality of data, quality of respondents, and quality of insights as their biggest challenge to market research:

Samples are not representative

- Researchers mentioned that they often use suppliers to bring representative samples to them, but feel that these suppliers do not follow through
- There is confusion around how to get a truly representative sample that contains a cross-section of all demographic segments

Respondents are dishonest or unthoughtful

- Data quality is poor because respondents are bored and disengaged
- Respondents are over-inundated with surveys
- Leads to incomplete, careless, and dubious responses

Statistical assurances are not provided:

Probability sampling is not used and the margin of error is not reported which interferes with interpretability

Can't afford the good data:

Researchers perceive that high quality data is out there, but their organization cannot (and will not) allocate budget toward gaining that data. Shoddy data at a cheaper price is of higher value than expensive but excellent data

21% of respondents mentioned that the biggest challenge is to differentiate themselves from a sea of competitors



14% of respondents mentioned the quality of data, quality of respondents, and quality of insights as their biggest challenge to market research



Clients feel that they are proficient at interpreting their own data and prefer to save money this way



There is a dichotomy of thought in the marketplace about “old methods”



Many respondents admitted that the way forward is a blend of old and new



Internal Talent

8% of respondents said that internal talent is one of the biggest issues or challenges to market research in 2015:

Lack of experience and expertise

- Young market researchers haven't been trained in the kind of rigor that more experienced researchers have
- A general lack of academic training in statistics, research methods, etc.
- This is the generation of SurveyMonkey; young researchers seem to think that SurveyMonkey is the only way to collect data and disrespect methodologies like interviews, panels, etc.
- Why are there no experts? (e.g., *“It seems so obvious to anyone that a heart surgery requires expertise. If the market research industry cannot convince the market that there is a similar obvious need for expertise then there are a lot of good reasons why this industry should shrink in the future.”*)

Lack of critical thinking

- New market researchers are perceived as being unwilling to think deeper about their findings
- It's the day of the “obvious findings”: If an insight doesn't jump right off the page – but, rather, requires some mental acuity and creative or critical thinking, new researchers will say that the data is bad or useless

A transition from quality to quantity

- Time-honored, rigorous techniques are losing respect
- What is valued now is the ability to gather data/ insights quickly and at high volumes, regardless of accuracy
- E.g., *“I think this is the year when veteran researchers become the minority and disciplined research becomes rarer. Experienced research professionals who understand multiple modes of data collection and sample frames will be supplanted by newer researchers who can gather a lot of data quickly but may not have enough rigor in their background to know what bias they include”*

Customers don't value MR expertise and insights

- Researchers feel that they cannot convince their customers that there is value in expert MR insights
- Clients feel that they are proficient at interpreting their own data and prefer to save money this way

Old and New Methods

6% of respondents mentioned the challenge of old methodologies in market research. It was discovered that there is a dichotomy of thought in the marketplace about “old methods”. Some believe that old methods are tried and true, and therefore are to be trusted, while others believe that it's time to put aside the old methods and try more innovative techniques.

It's not “Old vs. New”, it's “Traditional vs. Innovative”

- Some market researchers reported that there is a tension even within their own organizations about old versus new approaches. They reported that the research veterans seem to perceive that the new, younger generation of market researchers are trying to eliminate methods that are useful just because they are “so two years ago!”
- The younger crowd of market researchers feels that older researchers intentionally put barriers to innovation in place because they don't want to learn new methodologies, try new approaches, or learn from youngsters who lack the experience that veterans have

Traditional methodologies don't meet client's needs

- Panels, interviews, transcribing and coding responses, etc. take too long and are no longer effective. By the time all the work is done, the marketplace has shifted and the findings are irrelevant
- Must rely heavily on aggregated quantitative data and almost completely suppress the rich qualitative data. Under the old approach, qualitative data is not used to its full potential



WHY SIZE DOESN'T MATTER

“Giants are not what we think they are. The same qualities that appear to give them strength are often the sources of great weakness.”

— Malcolm Gladwell, *David and Goliath: Underdogs, Misfits, and the Art of Battling Giants*

Matt Warta

CEO & Co-founder, GutCheck

Twitter: @mwarta | Website: www.gutcheckit.com

Clients often lament that they don't have the budget or the time required to gather consumer feedback. In the most recent GRIT survey, budget and speed were brought forth as two of the most mentioned challenges facing the market research industry in 2015. Evidence of this limitation is abundant. As an example, Harvard Business Review reported that consumer feedback is used in just 11% of consumer-based decisions in the F2000. Certainly, then, the barriers to gathering consumer feedback 89% of the time must be rooted in high costs and long timelines, right?

Time is money

Wrong. The cost of research is declining and will continue to drop as technology-driven automation continues to be applied to the research process. And with automation on the rise, the cycle times required to conduct research will continue to be compressed. For example, GutCheck has created a technology that automates the recruitment process for both quantitative and qualitative studies, reducing the time required to recruit respondents for studies to a matter of minutes versus the days or weeks associated with more traditional methods of recruiting. As a result of this automation, costs also decrease. There are numerous other firms such as Google Consumer Surveys and Survey Monkey, who are providing emerging methodologies fulfilling on this economic inevitability. And there will certainly be more following in their footsteps.

Sail away from the safe harbor

So why are budget and speed still considered barriers with all of this innovation occurring? As Gladwell points out, you can be too big and too successful. Historical success can lead to inflexibility and hold companies back, while power can manifest itself as something much less gigantic and much more nimble. Ongoing success comes from thoughtfully breaking the rules around the traditional way of doing things. In this case, it's leaving behind size and habit and substituting them with speed and flexibility. While it is easy to get complacent with how things are working today, if we challenge ourselves to adopt new and more innovative ways of tackling the way we conduct research, the possibilities are limitless.

Stop playing defense

While changing for the sake of change isn't all that compelling, changing because of more nimble and more aggressive competition should certainly stir the David in any Goliath. Jeanine Bassett, VP Global Consumer Insights at General Mills, Inc., told a compelling story at a recent conference of how smaller firms (<\$2B in revenue) have out-innovated larger firms (>\$2B in revenue) by an order of magnitude over the last four decades. Why? They aren't in a defensive crouch trying to preserve what they have. They are on their toes and adopting new thinking and new methods to out-innovate their larger competitors.

Think of Fairlife who has rethought milk and built a category around nutrient-rich, ultra-filtered milk products. How many large dairy companies saw that coming? And it isn't always the upstart company who has the audacity to shake things up. For example, Safeway has changed the game with their private label business. By leveraging design-thinking and adopting innovative new tools in their innovation process, they've been able to create a significant pipeline of new products for their private label business.

Challenges and opportunities— one in the same

Ironically, the biggest challenges for the market research industry mentioned in this year's GRIT report are perhaps its biggest opportunity. Technology is changing the economics of the research industry as it relates to time and cost, just as it has in so many other industries. This structural change in the supply curve of consumer feedback will allow market research to be leveraged more often, and in non-traditional ways. Those that reap the rewards won't necessarily be today's Goliaths. Firms that rise to the top will bring forth their most innovative, flexible David.

Respondents would provide really interesting insights if they weren't so bored during data collection



Innovative methodologies are confusing and unfocused

- No one knows how to properly use the new technologies and methodologies of today in order to achieve their full potential
- There are too many new methods that all paint a different picture of the same data
- No one is an “expert” of any of these methodologies

The real answer is that both are needed

- Although many respondents sided with either the traditional side or the innovative side, many more respondents admitted that the way forward is a blend of old and new
- Capitalize on the rigor of traditional methods AND the expediency, innovation, and sex appeal of new methods

Big Companies

4% of respondents mentioned issues related to big companies, with the largest proportion of these conversations about *competing with big companies*:

More funding

- Bigger companies have more funding and can afford expensive, high quality respondents and data analysis
- Smaller companies can't compete

Looser standards

- Big companies are perceived to have lower standards for data quality and prefer speed over accuracy. They have created an industry standard for quick turn-around deliverables. Smaller companies that focus on accuracy cannot compete because – although their insights might be better – it takes longer to do the analysis and customers aren't interested in waiting when a bigger company could do it faster
- No one is regulating the conclusions at which customers arrive. Customers see what they want to see, but what they see might not be accurate

Communication

3% of respondents mentioned that communication with real consumers is the biggest challenge to market research in 2015:

What to do with consumer insights

- Consumers seem to want to share their opinions and to be engaged with on a personalized, individualized level. However, market researchers feel that they are uncertain of the best ways to prompt consumers' opinions
- How to prompt in real time?
- How to prompt in a way that will elicit natural, authentic, and unbiased responses?

Lack of engagement from consumers/respondents

- This was a central theme throughout the GRIT report. Market researchers perceive that respondents *would* provide really interesting insights if they weren't so bored during data collection
- Market researchers are hungry for methodologies that interest, intrigue, and engage consumers so that they will be enthusiastic about responding to market research endeavors



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OPPORTUNITIES IN THE MARKET RESEARCH INDUSTRY

"Big data" is at the center of the growing opportunities within MR



Researchers are open to the idea of expanding and continuing to explore new methodologies



1 out of 7 researchers state they "don't know" or are "unsure" when prompted to identify opportunities in the industry



"Big data" is at the center of the growing opportunities within MR, as is the methodology or process by which it is gathered. Client-side researchers anticipate using more data points/resources, while also attempting to blend them with primary research. The problem is this will require new ways of analyzing, and possibly more work for all involved, as illustrated with the quote below.

"Market Research needs to remain relevant by providing consultative resources and also helping to answer 'why' when big data seems to be revealing hard to understand insights, as it will. There will be strange and hard to explain findings revealed when numerous data sets are mashed together. It will become more and more important for the MR professional to jump in and help to explain [these] findings."

Ultimately, firms that equip themselves, either with expert consultation by explaining 'Big Data,' or combining consultation with new technology metrics/applications, will consequently better meet the needs of the client-side researcher. Both **Consultation (33% Client/35% Supplier)** and **Technology (28% Client/34% Supplier)** are at the

heart of leveraging current MR opportunities.

As a side note, along with 'Big Data' comes the notion of 'Big Brother'. Client-side researchers believe in being more proactive in keeping the public informed about industry practices – which is designed to rehabilitate industry perceptions and to increase the level of engagement with the everyday consumer.

All researchers are open to the idea of expanding and continuing to explore new methodologies, both researchers alike, though those on the client-side feel they must be prepared to sell the new approaches internally with a demonstrated ROI or differentiation that provides value to their firm. However, suppliers feel the need to have multiple approaches/methodologies in their toolboxes to provide a custom solution for each project they may encounter. This creates more complexity for the supplier, especially given shorter turnarounds and tighter budgets.

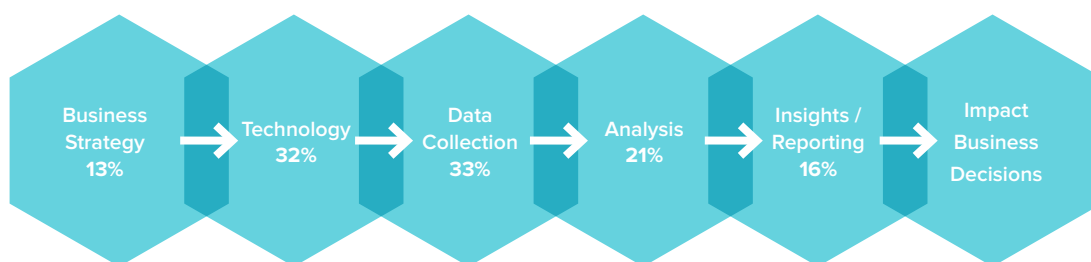
"Powerful presentations will give insight into the benefits of tools for clients. Giving clients enough data about new technologies and/or methodologies for them to understand what the benefit of using them/investing in them will be."

Lastly, a small level of uncertainty exists about trends for the future. Roughly, 1 out of 7 researchers state they "don't know" or are "unsure" when prompted to identify opportunities in the industry.

DEALING WITH MARKET RESEARCH OPPORTUNITIES

Ideally, researchers would like to extract trends, consumer behaviors, and predictive metrics from consumers in real-time because this would give the truest emotions at the point in time where consumer decisions are being made.

Industry professionals also discuss ways of championing the stated opportunities in a variety of ways. The following diagram outlines the steps in the process where researchers mention applying techniques to improve research– with the inferred end-result ultimately being the ability to impact the company’s decisions.



The business strategy is primarily fueled by suppliers, who are looking for new ways of engaging consumers and fostering an “innovative” approach to research. “Flexibility” is also considered a key to success.

“EXPERIMENT. Traditional [companies] are slowly coming around to new ways of research – maybe this will be the year of more change and fresh perspectives.”

Technology and data collection are mentioned in tandem with one another, and account for the greatest amount of focus from researchers across the industry. Opportunities on the horizon include looking to more actively engage consumers along their decision path, while also more passively collecting behavioral data, which can better predict market trends. Mobile phones and social media are primary targets for innovation or integration of reporting.

“Technology, especially mobile, and new efficient ways to reach the consumer. Also make presentations more visually interesting. It is happening slowly but can be much faster.”

“Everything is becoming integrated and interconnected. We have opportunities to learn all around us, 24/7. Everyone is connected all the time online, and via the internet enabled gadgets. More opportunities.”

Finally, researchers call attention to the ability to tell a more complete story around the consumer in a very targeted, or actionable way. True “insights” are expected when the researcher gets to know the client more intimately, and this should be achievable with Behavioral Economics and refining tools to effectively analyze social and media data.

“Aligning market research to key business questions to make it more actionable. It’s completely within our control and won’t request changes in technology or respondent behavior.”

Technology and data collection are mentioned in tandem with one another, and account for the greatest amount of focus from researchers



True “insights” are expected when the researcher gets to know the client more intimately



TOP 10 THEMES IN RESPONSE TO THE QUESTION, “HOW DO YOU FEEL THIS CHALLENGE SHOULD BE DEALT WITH?”

Again using advanced text analytics, we wanted to dive a bit deeper to explore solutions to the challenges GRIT respondents had outlined. Responses to this question were very diverse, which made identifying the high-level themes somewhat challenging. However, there were five themes that emerged at a high volume in response to this question:

Methodology

Using social media for data collection and analysis

- Need to be able to track social media, longitudinally, more efficiently
- Use social media as a tool in the toolbox, not as the ONLY tool (e.g., “*need to combine multiple methods like MROC + FGs + Social Media training*”)
- Need better text analytics platforms that can make social media data more meaningful, easier to interpret, and less filled with garbage data (such as irrelevant posts, ads, promos, etc)

Response rates:

- Need to determine what incentivizes consumers so that they will want to engage in data collection and give useful, meaningful responses
- Need to educate individuals at all levels of the organization (client and supplier) that questionnaire design has a significant impact on response rates, engagement, and data quality, so that changes can be made to the traditional design of these measures
- Need to create a “real life” experience for consumers while they complete surveys. That is, a need to embed the data collection process in a real life scenario

- Automated questionnaire design that gives the feeling of an actual conversation occurring is needed, rather than a computerized moderator spitting out auto-generated questions. Consumers can tell when questions are being auto-generated based on their response (especially since these auto-generated questions are often ungrammatical and contain bizarre sentence structure), and this is off-putting and disengaging

Too many competing techniques

- Market researchers should dedicate hours, budget, and resources to investigating new techniques, sniffing out the good ones, and becoming experts of those techniques
- Focus needs to shift away from PC-based techniques and focus instead on mobile techniques like tablets, cell phones, etc.
- There needs to be an organization that specializes in validating new techniques and publishing the results. Specifically, they should compare new techniques and methodologies to older and proven methodologies and show the value added (e.g., “*more validation of techniques by research companies that can afford to do them. If facial coding is a technique being utilized, perhaps a big name research company could run tests on facial coding vs. another proven method and see how the results compare and publish them.*”)
- Establish not only the validation of techniques, but the empirical soundness of those techniques (e.g., “*use the science that is available to us to make sure we are using methodologies that are empirically sound. A lot of the techniques used in qualitative research come from a psychodynamic orientation that is not empirically based. Lots of quallies don’t even know the difference between an empirically based technique and pseudo science techniques.*”)

Researchers should dedicate hours, budget, and resources to investigating new techniques



Clientele

More customer/supplier interfacing is needed

- There should be more conferences and research forums where customers and suppliers can meet together to discuss actual business needs (rather than it being an opportunity for sales pitches)
- Market researchers feel that they don't really understand the needs of their customers. They feel that many current market research techniques can provide *interesting* or *sexy* results, but they may or may not be relevant to consumers' actual experiences and therefore are not useful for helping customers achieve their goals
- E.g., *"Increased collaboration between suppliers and client-side counterparts. Clients are often, understandably, hesitant to share certain key strategic information that would be very valuable for the supplier to know so they can more meaningfully present relevant results and patterns"*

MARKET RESEARCHERS' view of the customer/supplier relationship

- Clients are too closed-minded and not willing to listen to the insights/suggestions that market researchers give them. Their view is that clients need to be educated on the value of market research insights and begin to trust them
- Clients belittle the value of their own data. They need to be educated that ALL data is valuable – even the weak signals – because they too can be enormously valuable and informative with the right tools
- Clients need to change their attitudes about the cost of data. Value is more important than the cost (e.g., *Clients need to push back on the "accounting" pressures of saving money in the short run using DIY techniques. Research suppliers need to do a better job of justifying the value of their services. Research organizations such as CASRO, MRA, GRIT, etc., need to emphasize the professionalism and status of the industry. Explain the benefits of using expert researchers or of using independent unbiased researchers."*)

CUSTOMERS' view of the customer/supplier relationship

- Suppliers need to tie their findings back to meaningful actions. It's great to uncover interesting findings, but if there not a feasible action item associated with those findings that will drive sales, engagement, etc., then they are not highly valuable
- Suppliers don't show any kind of identifiable "value added" to the customer. Value added, in the eyes of the customer, means turning data insights into valuable and practical ideas

Outcomes

Insights, not data

- A recurrent theme in all texts within this corpus is the frustration associated with market research outcomes. Deliverables should highlight insights, not merely a compilation of data
- E.g., *"Less is more. Quantitative research might not net the best insights – quality will be required to get the real why and opportunities. It will be the "nuance" and reasons why that will net the best insights, not just the behavioral answer".*

Do less studies, do more with the data

- Customers feel that market researchers constantly crank out studies but don't do the requisite amount of dig-down analysis on those studies. Many clients stated that they would prefer to see market researchers do less studies – potentially even shorten their surveys/questionnaires – and do more, deeper, and richer analysis on what data they do collect
- E.g., *"We should be doing fewer research studies but doing more with the results. Analyze to determine the 'why' and the 'what do I do about it', rather than just readout results monthly. Tie insights from various studies and internal/external metrics into one cohesive story/picture."*

The "why should I care?" factor

- Customers expressed that the best way to improve outcomes/deliverables is for market researchers to focus less on the details of the findings, but focus more on the overall story that the findings tell

There should be more forums where customers and suppliers can meet together to discuss actual business needs



Clients would prefer to see market researchers do less studies and do more, deeper, and richer analysis on what data they do collect



Resource allocation

- Market researchers believe that more resources (personnel, time, money) should be devoted to the development of the story the data is telling. Researchers feel that they are under constant pressure to get the results out the door, which means that they don't have time to deeply contemplate the insights and tie them to actionable next steps.
- E.g., *"More budget needs to be allocated to research and insight, as it is the foundation to decision making ability to design a robust methodology, ensuring all information needs are met. And a collaborative stage to develop key insights and the story."*

Technologies

Big data

- Need more education on what big data is, how it is used, and what the strength and weaknesses are
- Researchers believe that too much emphasis is put on big data—largely because they recognize that there are many weaknesses associated with it. They recommend that researchers continue to rely on traditional approaches for uncovering the actionable insights, and using big data as a way to get deeper insights into the "why" of consumer experiences

Mobile technologies

- There is a need for an organization that organizes carefully constructed and representative panels that are contacted and communicated purely through mobile. Researchers feel that this is the most comprehensive and real-time approach for communicating with consumers and ensuring a representative sample
- "Mobile ethnographies" are needed: We need to learn methods for reconstructing the whole experience of the consumer using their mobile data

Social Media

- Need to use social media as a historical tool to better understand the passions, interests, motivations, and needs of respondents to surveys. Social media might not be useful on its own (this is the view of some clients and

suppliers), but it can be helpful to gaining additional insights into the person behind the survey response

- Need to understand how to analyze social media data in real time. Social media data has a short half-life because consumers' interests are constantly changing. Need to be able track consumers in real-time in order to see how their life experiences correlate with their feelings, attitudes, and behaviors
- Customers and suppliers need to be educated on the strengths and weaknesses of using social media data, including when it is beneficial to use it and when it is not

Creating Expertise

Where are the experts?

- Market researchers and clients feel that there aren't enough people who have achieved expertise at handling social media, mobile, and other types of big data in a valid and reliable way
- There needs to be an organization (or group of organizations) that focus on training individuals to become experts on the latest technologies, methodologies, and techniques for analyzing the large volumes of big data that companies and brands now have access to

No experts, no reason to trust the insights

- Clients are aware that there are few experts in this area, and therefore find most of their results to be untrustworthy
- They recommend there being some sort of a credentialing system where market researchers can become credentialed in big data collection and analysis. Credentialed researchers could be trusted because they will have been trained in:
 - Reliable data collection techniques
 - The importance of representative sampling
 - Statistical techniques for handling error
 - Statistical approaches for assuring accuracy
 - Insightful interpretation of findings

Market researchers and clients feel that there aren't enough people who have achieved expertise at handling social media, mobile, and other types of big data



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LOOKING AHEAD

Finally, we asked GRIT participants to select a few voluntary questions to answer pertaining to their views on the short and long-term changes in the

industry, as well as some basic financial performance questions to understand how the business outlook may relate to overall views on the future.

73% of research firms expect research-based revenue to increase in 2015 compared to 2014, even as only 37% of client firms see an increase in research spending



Clients are less optimistic about the upcoming year than they were 12 months ago



THE FINANCIAL OUTLOOK REMAINS MIXED

The great news for the research industry is that the vast majority (73%) of research firms expect research-based revenue to increase in 2015 compared to 2014, even as only 37% of client firms see an increase in research spending. How to explain the discrepancy in expectations?

- Research firms may be seeing significant growth from a few key clients, who are spreading their business across a portfolio of firms.
- Firms may be expanding the market for research, reaching buyers not part of the traditional industry and therefore not covered by the survey.
- Research firms may be overly optimistic, while clients may be overly pessimistic.
- Changes in research buyers' budgets may not yet have trickled down to research firms, who are working on currently booked projects and forecasting continued growth.

To the latter point, clients are less optimistic about the upcoming year than they were 12 months ago, when 43% expected the coming year to show growth (vs. 37%). Research firms are more excited (73% vs. 63%).

PROJECTED RESEARCH-BASED EARNINGS

Increase over previous year	73%
No change from previous year	21%
Decrease from previous year	5%
NET	100%

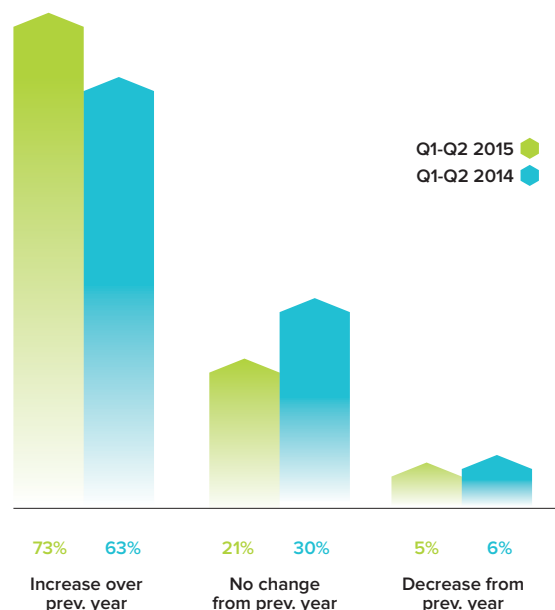
Filter: Q1-Q2 2015 AND Q1-Q2 2014; Unweighted; base n = 1489; total n = 1858; 369 missing; 81% filtered out; Q33. How will research-based revenue for your organization in 2015 compare to 2014. Multiple comparison correction: None (p = 0.05)

PROJECTED RESEARCH-BASED SPENDING

Increase over previous year	37%
No change from previous year	43%
Decrease from previous year	19%
NET	100%

Filter: Q1-Q2 2015; Unweighted; base n = 367; total n = 1858; 1491 missing; 81% filtered out; Q32. How will your projected spending on research in 2015 compare to 2014? Multiple comparison correction: None (p = 0.05)

PROJECTED RESEARCH-BASED EARNINGS OVER TIME



Filter: 2014 to 2015; Unweighted; base n = 2230; total n = 5196; 2966 missing; 46% filtered out; Q33. How will research-based revenue for your organization in 2015 compare to 2014; Some empty rows or columns have been removed
Multiple comparison correction: None (p = 0.05)

points). Perceptions are most closely aligned in Asia/Australasia, but even in this region, sellers are 19 points more optimistic than buyers.



There is more reliance upon big data/analytics and shift away from fieldwork



Traditional market research firms are losing share to new techniques and not adapting quickly enough



Those respondents who expected a decline were asked to elaborate. Common responses (respondents' typos have been slightly amended):

Decline in research budget reflects decline across the board

- "Company's in a death spiral."
- "Universal budget cuts across company."
- "Sales are not as high so market research budgets get cut."
- "Cost cutting in the healthcare industry will ultimately result in a decrease of all budgets in our organization, including Market Research. There is a 'do more with less' mentality in our organization at this time."
- "My entire company is cutting back, so market research funds will accordingly need to decline as well."
- "Sales continue to struggle and leadership changes are making for a rough ride in '15."
- "Our budget was reduced ~10% in late 2014 (due to industry price wars and impact on revenue/profits)."
- "Overall decrease in budgets."

Data collection being disintermediated

- "Research isn't just one thing anymore – it's data coming from a lot of sources that are often organic – clients will spend more on specific projects but less overall."
- "There is more reliance upon big data/analytics and shift away from fieldwork."
- "Budgets are tight and for some reason companies are focusing on customer data to build insights. It doesn't work."
- "Market is price squeezing, making data collection not always feasible."
- "They are using the professional panels."
- "No budget requirements since it is possible to do desk research for free."

Traditional research firms are not adapting

- "Changing landscape, trackers not being renewed going forward as companies change their approaches to research."
- "Companies aren't spending as much on 'traditional' research/research firms. They're looking for smaller more nimble innovators that partner with them on solutions – off or on the shelf solutions."
- "Traditional market research firms are losing share to new techniques and not adapting quickly enough."

Research firms being replaced by technology

- "Budgets seem to be shrinking and technology is sold under the premise that no analytics by humans is needed anymore."
- "Switch from traditional to digital methodologies."
- "We are a brick and mortar facility and we foresee the application of new research technologies will decrease the use of in-person research."
- "Many clients are adopting self managed research tools in the belief of saving money."
- "Automation."

Continued economic crisis in Europe

- "Deep economic crisis in Russia."
- "Crisis in Spain, not emerging."
- "Budgets have been under pressure by economic crisis."

Growth in 2014 was not sustainable

- "2014 was an atypically high-earning year."
- "2014 was an unusually successful year."
- "2014 was too good to be true."

"Overall marketing budgets still under pressure from the client-side. [That] all research providers [are] under pressure to maintain revenues leads to increased competition and pressure on costs. Companies that previously worked in definite type of research try to expand out of their core field to compensate [for] the loss of revenues on their former specialty, increasing competition across research market segments (consultancy firms or web analyzers doing quantitative research...)"

Dismantle all decision-making processes based on survey-based market research and design new internal processes that fit the new ways of generating insights



To help organizations learn from their customers, researchers must keep learning



- “Reshape researchers profile to deal with a totally new environment where traditional MR will become just an ingredient of Big Data. Need for new analytical skills as well as more proactive competencies to face the need of a consultancy role and reach higher level of relationship within client organizations.”

Some respondents want researchers to move beyond the survey.

- “Stop thinking like market researchers and start thinking about understanding.... stop thinking that changing a survey to mobile is an invention.....or stalking consumers activities is an invention.....just to really understand and adapt.”
- “Help dismantle all decision-making processes based on survey-based market research and design new internal processes that fit the new ways of generating insights (experimental design and Big Data analytics).”
- “Stop doing research using panels and surveys. Engage in a natural dialogue with people (not respondents or consumers even). Stop saying we can predict the future. We cannot. But we can give you the most plausible future scenarios instead. In thirty years, we can tell what people really think, believe, trust and what drives behaviour. Only to find out there are still many unknowns that have an impact to the future which we cannot control nor predict. In that sense, innovation will never stop in our profession!”
- “Training new researchers to ASK QUESTIONS. That includes asking clients questions to get to the bottom of what’s REALLY important. Not just survey questions; REAL questions.”
Others want researchers to improve surveys.
- “Becoming data agnostic, that is, aggregating information from multiple sources if appropriate to get the whole story. Perhaps related, designing surveys that can be crossed and combined from different respondents so that no one respondent has a survey more than 5-10 minutes, or only has

surveys that are interactive and probably verbal.”

- “Figuring out how to reduce survey length to under 10/15 minutes and available via mobile devices. With this, we need to identify sources of available data that can fill in the blanks that were cut from the longer survey. Taking disparate data points and bringing them together to answer the same questions one longer survey could answer.”
 - “Coming up with new ways to engage the consumer and get more accurate survey results. This includes utilizing virtual reality, incorporating games into surveys, and being able to optimize surveys for the mobile experience.”
 - “Reinvent the way they source consumer data, look to turn more passive rather than survey driven, or at the very least keep survey questions minimal and augment respondent provided feedback with passive, interconnected, Big Data elements.”
- To help organizations learn from their customers, researchers must keep learning.
- “Move to Big Data and combine predictive modelling with understanding the voice of the customer. Furthermore, MR is a constant search for inspiration, a continuous learning cycle owned by the whole company. How you present the inspiration is at least as important as what you share.”
 - “LEARNING!! I’m finding the new researchers of today aren’t learning the basics of marketing research, specifically good sampling and best quality practices. It seems that price and speed are the only drivers in many of today’s companies and I’m very concerned about where that will lead the industry in the future. IF we provide only bad data driven by poor initial decisions, leaders of tomorrow will look to researchers as providing a disservice and stop utilizing research altogether (which I have already seen happen in 2 companies in the past 2 years).”
 - “Learning to be about more than data and research. Be well read. Have other interests. Develop a knowledge about non-research business-related issues (e.g. finance or branding).

Understand how the world works. Know how to communicate. Research may become so specialized (e.g. calling the biometrics expert) that 'general' researchers have to know how to select and interpret methodologies and studies far more than they will have to know how to conduct them."

Technology is inescapable and opens up new avenues for insight.

- "Pay attention to advances in technology that monitor health, behavior and emotion. Wearables and other devices and the data they provide will be a valuable resource for insights that influence marketing decisions."
- "Market researchers need to learn how the current wave of technology will radically change our ability to predict people and market behavior. Contextual 'web' based purchasing,

mobile and wearable computers coupled with machine learning and AI and cognitive science/psychology will integrate and accelerate until we have an entirely different ability to predict people's intentions."

- "Embrace new technologies without being scared of them. Understanding what they can or *cannot* do for market research. Develop clear ideas how we can use technology without forgetting what we do best -- work with data."
- "Don't lose the foundational methodologies of today and yesterday (understanding how to do a paper survey or CATI is still important), but look for ways technology and enhanced techniques can improve upon those foundations."
- "All about technology. Everything about data -- whether quant or qual. Using, apps. Plus, knowing how to talk to the consumers. Plus knowing how to turn a mountain of data into an actionable 1-page report for clients."

The current wave of technology will radically change our ability to predict people and market behavior



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THE ONE THING THAT WILL MOST IMPACT THE INDUSTRY IS...

Data analytics is helping raise the profile of research as a game changer



Some GRIT respondents expect the growth of bad surveys to negatively impact the industry



Representative answers to: The one thing that will most impact the industry is...

- “**Sensors** will become much more prevalent in data collection and data accuracy. Paired with (transactional and social media) Big Data, predictive markets, and neuroscience, it’ll be progressively more accurate and reliable than self-reported methods.”
- “Miniaturization of **wearable** technology, getting to a point where it can be embedded into all things around consumers, reading patterns of behavior and emotion.”
- “**Text analytics** that can handle large amounts of unstructured text such as interview transcripts or focus group transcripts. Such a tool would greatly simplify analysis, and potentially add a lot of value.”
- “**Data analytics** is helping raise the profile of research as a game changer. Helping businesses to understand that this can really help the business when the data is in the right hands.”
- “**Consolidation** – market research will evolve, but the market for traditional market research will shrink as technological innovations will automate and drive out costs of expensive research that isn’t scalable or timely.”
- “The growth of Internet-type technology (allowing anyone with little or no research knowledge or training) easily and cheaply to set up **instant feedback surveys** will massively increase the number of surveys and interviews carried out.”
- “Sample problems – the impossibility of generating a sample of the population – and therefore the piece-meal questionable practices of today will become ‘concrete’ – and statistical ‘failures’ in research will be revealed through data-mining richer data-set (i.e. ‘Big Data’).”
- “Data overload and automation will push the boundaries of the industry to much more sophisticated analysis and interpretation levels that would be required to navigate clients. Few players and professionals will survive.”
- “Big Data – market researchers’ myopia and continued attacks on the veracity of Big Data completely misses the point. The demand for market research will decline, because speed, flexibility, scalability and low cost of technology means that marketers can experiment and iterate many times over and at dramatically lower costs versus having everything buttoned up going through a formal market research process and/or methodology.”

Some GRIT respondents expect the growth of bad surveys to negatively impact the industry.

What is the one thing that will have the most negative impact on the industry? 23% of respondents referenced “Data”:

- “The ease of collecting data and disseminating it. Makes it too easy to spread bad information. The industry needs more control or involvement in what the public and organizations see and use in decision-making.”
- “Telemarketers and lead generation firms masking their efforts as surveys, which gives our industry a bad name.”
- “The growth of internet-type technology (allowing anyone with little or no research knowledge or training) easily and cheaply to set up instant feedback surveys will massively undermine the technical quality, precision and reliability of most surveys carried out (in economics, Gresham’s Law says that ‘bad money drives out good’; in this case ‘bad research drives out good’).”
- “Cost deflation and declining cost expectations. With so many people using SurveyMonkey – the apparent value of years of expertise has diminished. Client think that research can be done for a song – and yet expectations of insight provision has gone up.”

“ME WANTS THE DATA”

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Corporate decision makers are hungry for data. And like the cookie monster, they want consumable data. Data they can use to fuel decisions—multi-million and billion dollar decisions about their brand, products, marketing, and pricing. And decisions that affect their revenue, profit margins, and investments. Each year those decisions get more complicated and require better data. As we look ahead at what the next few years will bring to researchers, the most succinct answer is *better access to deeper, more integrated data that will enable informed decision-making across a wider set of questions.*

Research spend

The GRIT Report highlights these trends in the findings. The first trend observed is around revenue predictions. GRIT asked buyers to predict their research spend and sellers to predict their revenue. More than two-thirds of sellers are expecting higher revenue while only one-third of buyers are expecting project level spending to increase. One of the potential reasons for this difference is that buyers are spreading their research dollars across a wider range of project types, and are investing in different types of data. An example of this is seen from a participant who stated that, *“Research isn’t just one thing anymore – it’s data coming from a lot of sources that are often organic.”*

Less questions, more answers

A second trend that was observed involves shorter (or non-existent) surveys. Surveys are evolving, allowing for less questions and more answers. Researchers are taking seriously the challenge to **“Observe More... Ask Less”** and to retain data they have asked previously so they don’t need to ask it again. Imagine a traditional twenty-minute survey reduced to seven or ten minutes by relying on previous answers to known demographics, appending attitudinal and profile data, integrating purchase data from the client, attaching passive data about geographic and search behaviors, and only asking the “Why” behind their choices?

Integrated data

This blending of demographic, attitudinal, profile, purchase, passive and survey data is often referred to as “integrated data” and is seen as the highest form of data for insights. Many have stated that budget and investment dollars are beginning to shift to this vision across the industry. Investments are being made to support the data platforms, the analytic automation, the visualization requirements, and the new talent needs.

Integrated data requires a very different operational model. And GRIT participants recognize that fact. The third trend reflects this need for more technology, and the importance of automated analytics. Sensors, meters, and wearables have the potential to further reduce screen sizes and shorten questions and surveys, but increase our ability to watch and observe.

Survival of the data savvy

Our success as an industry and as individual companies to enable integrated data is predicated on our ability to engage research participants and gain their trust (permission) as we collect data. Once we have those types of relationships, it’s about our ability to bring data together and create a transformational data set that can be analyzed, visualized, and interpreted quickly and accurately. That’s no small feat. But the winners over the next five years will be the companies that succeed in this area. As one participant put it, *“Data overload and automation will push the boundaries ...to much more sophisticated analysis and interpretation levels... Few players and professionals will survive.”*

As you think about where you want your company to be five years from now, keep in mind that Marketing Officers have an insatiable appetite for data. Consumable data. Accessible data. Data that fuels great decisions. Companies that survive will be the ones that engage research participants in meaningful, relevant and permission-based ways... and use those relationships to deliver fast, accurate, and predictive data to marketing officers who are starving for it.

An unwillingness or slowness to change is what some see as the biggest negative



- “Survey oversaturation. Are there receipts w/o an invitation any more?”
- “Survey research will lose. If it is not its importance in general, at least the margins will go away.”

Lack of quality will kill market research, according to many respondents.

- “Bad data being produced due to lack of quality processes or companies carrying out research that don’t understand the implications of their processes.”
- “Over-saturation of research panels / facility databases leading to lower quality data.”
- “Quality of fieldwork/ respondent/ responses/ project management (inexperienced staff).”
- “Lack of transparency or quality approaches to data collection (including river sampling.)”
- “If we continue discounting our industry and down-grading the quality of research.”
- “The further decline in the reliability of results due to poor quality respondents.”
- “If researchers lose sight of the importance of quality in their quest for Big Data and in their embrace of new technologies.”
- “The belief, that huge amount of data will compensate poor quality.”

Technology is seen as a large threat.

- “Changing technology, which is disintermediating market research companies.”
- “Technology again. It will obviously become easier for clients to conduct research without third party suppliers.”
- “Assuming technology provides the answer to everything, leading to the incorrect elimination of some traditional approaches which will still be the best option in certain circumstances.”
- “TECHNOLOGY: standardization and automation used without knowledge undermine research value.”
- “Technology (as has been the case in the past 30 years). The rate at which we improve our capacity to ‘collect’ data is faster than the rate at which we improve our ability to make sense of and use of it.”
- insights, that is.”

An unwillingness or slowness to change is what some see as the biggest negative.

- “*L’absence de volonté de changement.*”
- “Heritage. Resistance to change and to stop using current portfolio.”
- “Same old, same old – no change.”
- “Companies that are unwilling to change and adapt and continue to push the old approaches to research. This is not the research tools, but how and what type of information is disseminated to the business.”
- “Personal communication technologies (changes so fast that MR will almost always be in a chase position).”
- “Failure for the industry to fully embrace digital and relegate archaic methods that have barely changed over the past 30/50 years...”
- “Fear of change, old thinking.”

Respondents will be the death of us all! Well, according to some of our—ahem—respondents.

- “Resistance to accommodating mobile survey respondents.”
- “Data protection legislation – can threaten our ability to tap into our key source – respondents.”
- “Participation of respondents.”
- “Continuing to expect respondent to take surveys via PCs.”
- “Online Qualitative Research through automated respondent selection.”
- “Long questionnaires and panels that aren’t representative of the real world.”
- “Tedious debates about panels.”
- “Lack of panel management. As more research is done using the same panels or sharing sample, we need to make sure we aren’t all interviewing the same small percentage of the population.”
- “Finding out that access panels don’t have very good representation.”

“THE MOST EXCITING THING EMERGING NOW IS...”

GRIT respondents are excited about a great many things, mostly of which are centered around the combination of new technologies, new models

of human understanding, emerging shifts in how brands understand, engage, and activate relationships, and how all of this will profoundly transform the industry.



SNAPSHOT OF RESPONSES FROM “THE MOST EXCITING THING EMERGING NOW IS...”

Word	Count	Quote
data	63	"We are a few steps from literally implanting a chip in a consumer, to generate ongoing real time behavior coupled with thoughts and brainwave data as to voluntary/involuntary responses."
big	30	"Big data – ability to link social data, mobile data, purchase data and behavior with qual and quant – 360 view of a customer or a consumer."
mobile	21	"Geo positioning via mobile device to trigger real-time/in the moment surveys."
technology	19	"Today's market research industry is full of luddites who are contributing to their own demise by refusing to adopt and understand new technologies. When I see market researchers attacking social media analytics, text analytics and other technology-assisted platforms that do provide valuable insights...it's the sign of a dying industry."
social	18	"Social media analysis through a qualitative lens. Not relying on algorithms to code and bucket themes, but using the researcher to reverse engineer hypotheses."
virtual	14	"The use of virtual reality in market research applications."
consumer	14	"Ways of connecting with the consumer- social media is much talked about and with the penetration of internet & computers/laptops/mobile phones increasing, this area is bound to get more exciting."
wearable	14	"Wearables and the information that will be recorded over the next few years."
Internet	12	"The internet of things. How to make everything we do available and how to use that data to improve the quality of life for people (wearable technology and health), smart homes, predicting needs and behaviours based on past data."
neuroscience	10	"Applying neuroscience techniques to marketing/research."
behavioral	6	"Behavioral economics and subconscious drivers."

THE LEAST UNDERSTOOD THING EMERGING NOW IS...

Conversely, GRIT participants think we still have a long way to go to fully understand both the implementation and implications of many of the changes taking place now and coming down the road.

Representative answers to: *The least understood thing emerging now is...*

- “Biometrics/neuroscience. Little common understanding of what works and what doesn’t (both general approaches such as facial analysis vs. galvanic skin response, and specifically how to do each of these properly), what’s snake oil and what’s valid, and what actually translates to usable findings that work in the real world.”
- “How to merge Big Data (web behavior) with ‘small data’ (self reported data) to gain a robust understanding of WHO people actually are, how they interact online and how it aligns with their values. When understood this empowers decision making with holistic knowledge.”
- “Mobile research! There are so many possibilities in this area and no one has really figured out the full capacity of what we can do. I think we have a lot to learn in this area still and those possibilities are very exciting.”
- “...is how to successfully understand and incorporate new technology into research studies and budgets. It really requires a sound foundation in research in a good understand of technologies capabilities and limitations.”
- “Technology – an understanding of coding, data mining, data science, analytics, digital and the other technology-assisted approaches deriving insights for marketers while in the ‘flow’ of everyday business. Extracting, transforming and loading data into useable forms for real-time analytics, sensing and adapting to rapidly changing conditions is what marketers need in a real-time world where everything is transactional (i.e., sensors, purchases, etc.) and insights are generated in real-time...and foresight is predicting what will happen in the next few minutes...not years into the future. Today’s market research was built for a time when a massive upfront investment was needed to effectively understand, reach and sell to a mass market (the classic funnel). Tomorrow’s market research needs to adapt to the one-to-one, real-time transactional nature of business (real-time understanding of the consumer journey and path to purchase).”
- “We are moving from parent to child push marketing to adult to adult conversational marketing. Identifying and implementing social or environmental corporate purpose is the biggest trend that will influence marketing (and MR) going forward. The global eco-system which is the holding company for people and all business – is under stress and beginning to fight back (climate change, species die-off). It is going to get worse before it gets better.”
- “The ease with which companies can archive all of their research assets, and invite the organization to leverage that data to make better decisions. This used to be very difficult, and thus only available to a small number of people in an organization. That doesn’t have to be the case anymore.”

GRIT participants think we still have a long way to go to fully understand both the implementation and implications of many of the changes taking place now



IN 5 YEARS' TIME I CAN'T SEE MUCH DEMAND FOR...

If GRIT respondents are prognosticators, then woe unto the survey (especially trackers!) and many traditional methods. There isn't much optimism that current dominate methods will remain dominate five years from now. Of course, the pace of change

is never easy to predict (as we well know!) but we can confidently say there is an increasing awareness that traditional models will become increasingly niche while emerging models take center stage (and budget share).



SNAPSHOT OF RESPONSES FROM “IN 5 YEARS TIME I CAN’T SEE MUCH DEMAND FOR...”

Word	Count	Quote
survey	78	"Market research surveys. It's too slow. Everything will be online with lots of in the moment snapshots."
traditional	41	"Traditional awareness, trial and usage studies. They simply can't deliver the insights that marketers demand..."
telephone	29	"Telephone based interviewing."
focus	28	"Focus groups conducted in a facility, given the costs to do so, the time pressures of travel it puts on respondents, and the readily-accessible web-based tools that enable online groups."
Long	21	"Long PowerPoint reports, boring presentations."
tracking	20	"Big tracking studies. We will need micro-segmentation and more dynamic studies."



“ALWAYS CLOUDY THE FUTURE IS” — YODA

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As I read over the preliminary GRIT results this year, I tried to keep in mind Yoda's dictum about trying to see the future. GRIT results are no different than other survey data. They tell us about where people are, what they fear and what their intentions are... all very useful data. But they have the same limitations as other survey data:

- Actual behavior never perfectly aligns with stated intentions.
- Market forces are unpredictable and can alter future behavior in unintended ways.
- Technological development is even more unpredictable.

Change as a constant

I've often spoken about our industry's unwillingness to embrace change. While many may not like it, I think we have now reached a point where people are accepting that change is a way of life. I think we got here for a number of reasons. First, 20 years of upheaval. Second, the GRIT Report (hard to refute research) and events like IIX put the issue front and center. Third, and perhaps most important, I think there is a realization that nothing can replace the expertise that we as researchers have. New methods, tools and sources of data are wonderful things, but only in the right hands.

Pace of change

If anything, I think too many people are expecting change that comes quickly and is transformational. In my view, neither is likely. Think about this—the obituary of telephone surveys was written in the mid '90s and yet there are still plenty being done. At the time I disagreed with those saying phone would be dead within 5 years, but I have to say even I've been surprised by how slow a death it is experiencing. Still, there is no question the industry was transformed. Since the advent of the web there have been many other predicted transformations... remember CRM? More recently neuroscience was going to do it, but it is mentioned less and less in the GRIT surveys.

Now it is 'big data'; why do surveys when you already know the answer? I have little doubt that big data will replace some research that is being done (it might well be the final nail in the coffin of big tracking studies), but I am highly skeptical that it will replace it all.

Adaptability requires curiosity

So, does that mean we can just sit tight? Of course not! Change is a constant and if the research industry wants to thrive we need to be aware of the new ideas and technologies that are out there, open to the benefits they offer and willing to actually use them when they are better than what we do today. It is worth noting that better doesn't mean that they offer a lower margin of error or higher representativeness. Better simply means that they help a client make better decisions. This often might mean nothing more than the ability to provide answers in time to be relevant.

To that end, the open ended responses to the question "If researchers want to be successful in 30 years, the one thing they should be doing right now is..." reflect a range of opinions from big data to wearables and text analytics to being data agnostic. Are any of these transformative? We will see. But, the great thing is, the industry is curious and trying to find ways to use these and other tools to drive better results.

Divergent industry sentiments

The most intriguing result in the GRIT survey is the relative optimism of agencies and pessimism on the client side. No doubt this can reflect many things—from agencies being delusional to client-side researchers being frustrated by staff reductions and budget cuts. I'm hopeful that it might also mean clients are pessimistic that agencies can step up and deliver on the more complex needs they have while agencies' embrace of change means they know otherwise.

IN 5 YEARS IT WILL ALL BE ABOUT...

If traditional methods have a limited shelf life, what will replace them? Here is what our participants thought:

Representative answers to: *In 5 years it will all be about...*

- “How to combine global data across cultures/ industries given the variation in possible methodologies across varying countries/cultures (i.e. using the same relevant methodology in established industries/countries and developing countries) to provide meaningful global business insight.”
- “Fast and cheap. The world is already going that way, I am afraid. Whatever we learned 20 years ago about the importance of probability sampling has given way to quick and dirty sampling. The fact that Google Surveys -- with their appalling willingness to infer data -- has been so successful tells you where we are going.”
- “Mobile, internet, social media and unmediated responses. But in 10 years time there will be another model which looks much more like the research of today. Just as Travel and Newspapers have gone through an unmediated, ‘Everyones opinion is equal’ phase, superseded by acceptance that editorial control has an important role, so market research will follow the same curve. We are just in the ‘let everyone speak’ phase for a year or two.”
- “Hard-hitting business-focused consulting that is agnostic with respect to whether primary research is part of the engagement or not. We’ll be in the business of helping organizations make great consumer-minded decisions using a wide array of capabilities to synthesize and socialize insights from disparate data streams (enterprise, primary consumer data, past learnings, etc)”
- “Delivery. We’re in brand shake-out land. If the brand doesn’t delivery fair value it will be trounced by white label and lower-cost imports.

Customers talking to each other is more powerful than mere advertising. Retail is turning non-branded. Customers are turning off or getting annoyed at the constant messaging. Marketing has to focus on things that work and that they can prove work.”

- “Market research as a subset of something else – a broader category. the divisions between qual and quant won’t exist and the language currently in place will be gone – but the inquiries will remain even as the trends change. Namely, what has relevance, why, what prompts purchase, behavior, action, in what context and how can it be activated? Legitimately new streams of input will emerge, as was the case with Big Data, Text Analytics, etc. and well positioned newly titled introductions of things like intimate chats among small selections of specific individuals will become all the rage. New and thrilling ways of talking about these intimate chats, through fresh lenses like ‘spontaneous play’ or ‘intuitive response’ and the mandate for fully present participants unable and unwilling to multi-task will serve as an industry rallying cry. Ilex 2020 will offer tote bags that proclaim in bolded font ‘engage BIG, or go home!’”
- “The consumer and his/her environment including people as well as places and things on an interwoven basis, with the ability to aggregate and disaggregate for analytic purposes with data coming from what is experienced (with zero selection of self selection of what is important or unimportant), what is reported by the consumer and what is reported by observers and what is provided by third party tools that will capture given experiences end to end (advanced versions of wearable cameras, wearable clothing with embedded sensors, cameras on site capturing actions and interactions (physical, verbal and with heat sensors, etc.)”

We'll be in the business of helping organizations to synthesize and socialize insights from disparate data streams



FINAL THOUGHTS

The latest round of GRIT continues to paint a picture of an industry in the throes of massive and fast-paced change due to a variety of global factors: technology, competition, economic, culture and legal pressures are forcing both clients and suppliers to look at their role and businesses in new ways. Overall, that is generating a sense of cautious optimism.

However, systemically, the industry is still largely wedded to legacy tools and models that don't easily support the vision of the emerging future. This tension remains largely unresolved and although many recognize the issue, the demands of daily business often slow down the ability to strategically get ahead of the curve.

The very good news is that just a few short years ago, many GRIT respondents seemed to not recognize the amount of change in play, and that is not the case today. Most of the industry seems to have opened its eyes to a much larger world of progressive and proactive change, where we are working to find answers to essential, existential questions such as, "Who are we and what is our role in the world?"

Disruption *can* be successfully navigated, and the GRIT 2015 Q1-Q2 Report offers much hope that market research will be one of the industries that achieves this feat. From our perspective, that is the single most important implication of our findings, and we hope it offers a contextual framework for all readers to use as they absorb the report as well.

Systemically, the industry is still largely wedded to legacy tools and models that don't easily support the vision of the emerging future





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Dapresy

<http://dapresy.com/>

Dapresy specializes in providing a business intelligence tool specifically designed for professional market researchers who want to analyze, present and distribute dynamic results from their research studies. Through innovative design and customized InfoGraphics, Dapresy provides visually engaging, easy to use dashboards that deliver comprehensive solutions.



Decooda

<http://decooda.com/>

Decooda's SaaS enables brands to analyze big data in real-time to identify the emotions and drivers of behavior that brands can use to predict and shape consumer behavior. Our actionable intelligence supports the entire product lifecycle, from brand development to in-market performance. Decooda delivers business results based on evidence, not conjecture and speculation.



Gen2 Advisors

<http://gen2advisors.com/>

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

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Keen as Mustard Marketing

<http://www.mustardmarketing.com/>

The only full-service marketing agency for market researchers. We offer marketing and positioning strategy, branding, design, digital marketing, PR and content services to the market research and insights industry. We are thrilled to be design consultants to GRIT for the new look report.



Lightspeed GMI

<http://www.lightspeedgmi.com/>

Quality-seeking researchers, marketers and brands choose Lightspeed GMI as their trusted global partner for digital data collection. Our innovative technology, proven sampling methodologies and operational excellence facilitate a deep understanding of consumer opinions and behavior. From award-winning survey engagement to fieldwork management, we add value at every stage of the research process. Focusing on local market knowledge, Lightspeed GMI's proprietary panels deliver access to more than four million online research respondents with unparalleled quality, capacity and targeting. Our comprehensive product suite offers the tools and services needed to generate dependable research results across the consumer, B2B, financial and healthcare business segments. With office locations throughout the Americas, Europe, and Asia Pacific staffed with experienced local talent, we understand the nuances of each market.



NewMR

<http://newmr.org/>

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



Q Research Software Limited

<http://www.q-researchsoftware.com/>

Q Research Software is for market researchers to analyze quantitative data. Q greatly enhances the productivity and quality of analysis and reporting by combining intuitive interfaces with the latest in advanced methods.



Quester

<http://www.quester.com/>

Seamlessly integrating quantitative and qualitative designs into a single survey allows researchers to gather data and consumer language from every single respondent. Researchers can guide more and better decisions from just one study. Quester is home to the industry's only software-based moderator, backed by artificial intelligence that probes open-ended language in one-on-one online surveys. Thinking beyond quant and qual: Quester.



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

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ACEI

www.acei.co

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



AIM

<http://www.aimchile.cl/>

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



AIP

<http://www.aip-global.com/EN/>

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



AMAI

<http://www.amai.org/>

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



ARIA

<http://www.ariaalliance.org/>

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



ASIA
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RESEARCH
COMMITTEE

Asia Pacific Research Committee (APRC)

<http://aprc-research.com/>

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

The Asia Pacific Research Committee (APRC) was setup in April 2009 as a result of common interests among the national marketing research associations in Australia, China, Japan and Korea. It has since grown to a committee of twelve marketing research associations.



Australian Market & Social Research Society

<http://www.amsrs.com.au/>

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



AVAI

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



BAQMAR

<http://www.baqmar.eu/>

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



BVA

<http://www.bva.fr/en/home/>

BVA provides expert advice thanks to sharp knowledge of the sector and methodological innovations. As a pioneer in many areas (behavioral, non verbal, digital,...), BVA offers quantitative and qualitative solutions in all business sectors that can untangle consumer's mind and lead to actionable and strategic recommendations. The group is specialized in 4 major expertises: in-store activation, customer experience, data sciences and behavioral change. With a turnover of 91M€ in 2014, BVA employs over 5000 staff members. BVA provides expert advice thanks to sharp knowledge of the sector and methodological innovations.



CASRO

<https://www.casro.org/>

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



CEIM

<http://www.ceim-argentina.org.ar/index.php>

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



ESTIME

<http://www.estimate-neurobiomarketing.com/en/>

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



feedBACK

<http://fb.com.co/>

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



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GIM Gesellschaft für Innovative Marktforschung

<http://www.g-i-m.com/>

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



Insight Innovation

<http://insightinnovation.org/>

IleX is singularly focused on advancing the business value of insights. Our worldwide event platform showcases the very best from inside and outside of the market research realm with a focus on technology innovation, thought leadership, collaboration and networking.



LYNX Research

<http://www.lynxresearch.biz/>

Choosing a marketing research partner is hardly simple. Almost every firm promises tested methods and an efficient team to help you achieve your objectives. The BIG problem with this is that they often miss the personal care and attention that will turn a solid project into something that is the envy

of your clients and colleagues. And this individual commitment is the distinction between the research-craftsmen at Lynx and everyone else.



MRIA

<http://mria-arim.ca/>

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



MROC Japan Inc.

<http://mrocjapan.com/>

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



MRS

<https://www.mrs.org.uk/>

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

MICHIGAN STATE UNIVERSITY

Master of Science in Marketing Research
Broad College of Business

MSU MMR

<http://marketing.broad.msu.edu/msmr/>

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



NGMR

<https://www.linkedin.com/grp/home?gid=31804>

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



NMSBA

<http://www.nmsba.com/>

International Association for everyone with a professional interest in Neuromarketing.



NYAMA

<http://www.nyama.org/>

NYAMA raises the profile of marketing and marketers. It prepares marketers to thrive in new roles, develop expertise and grow new capabilities. NYAMA inspires, supports and celebrates brilliance in marketing.



OdinText

<http://www.andersonanalytics.com/odintext/>

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



PROVOKERS

<http://www.provokersite.com/>

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

We enjoy working WITH our clients; we are Professionals with proven experience that combine market research with brand & business consulting.

We do not start without information, and we do not end without a concrete, realistic and actionable plan. Provokers is a brand positioning & consumer understanding challenger. We nurture ideas, thoughts and processes to provoke a difference that really makes the difference.



Qualitative Research Consultants Association (QRCA)

<http://www.qrca.org/>

QRCA is dedicated to fostering strong education and shaping the industry with innovative techniques and tools. QRCA members are involved in the design, implementation and analysis of qualitative research around the globe. Our goal is to promote excellence in the field of qualitative research by pooling experience and expertise to create a shared base of knowledge. QRCA's thought leaders focus on promoting best practices in qualitative research and providing education through monthly Qcast webinars, a quarterly VIEWS magazine, qualitative tracks at industry events and an Annual Conference.



SAIMO

<http://www.saimo.org.ar/>

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



Sands Research

<http://www.sandsresearch.com/>

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



The Research Club

<https://www.theresearchclub.com/>

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



Toluna

<https://us.toluna.com/>

A pioneer in the dynamic world of market research, data collection, reporting and visualisation, Toluna brings together people and brands in the world's largest social voting community. As a leading all-in-one global source for actionable insights, we help market researchers, insights professionals and companies anywhere in the world make clearer and better business decisions that drive better business results. Our social voting community of more than six million members spans more than 41 countries, enabling our clients to develop a deeper understanding of anyone, anywhere, anytime they need it.



University of Georgia | MRII

<http://www.georgiacenter.uga.edu/mrii>

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

research. GreenBook is a proud supporter of the Principles programs, presented by the UGA and MRII.



UTA

www.uta.edu/msmr

The MSMR Alumni Association (MAA) is a nonprofit association for graduates of the Masters of Science in Marketing Research (MSMR) program from the University of Texas at Arlington. MSMR is a practical, hands-on program designed to prepare students for careers in marketing research. Students learn how to meld logic with creativity, quantitative data with qualitative insights, and intelligence with intuition to solve marketing problems and create business opportunities.



A.C. NIELSEN CENTER for
MARKETING RESEARCH

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

<https://bus.wisc.edu/>

The A.C. Nielsen Center at the University of Wisconsin-Madison was established in 1990 and is built on the legacy and funding of the Arthur C. Nielsen Jr. family, pioneers in the field of marketing research. It was created to train students in the specialized ideas, issues, and techniques of marketing research, as well as to help discover and disseminate new marketing research knowledge. Learn more at <http://bus.wisc.edu/centers/ac-nielsen-center-for-marketing-research>

COMMENTARY PROVIDERS



GutCheck

<http://www.gutcheckit.com/>

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



L&E Research

<http://www.leresearch.com/>

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



Lieberman Research Worldwide

LRW

<http://www.lrwonline.com/>

Lieberman Research Worldwide (LRW) is a full-service, custom market research consultancy known for its ability to turn insight into impact for its clients. LRW employs a unique "so what?" research-based consulting model, leveraging its industry-leading Marketing Science team and Pragmatic Brain Science Institute® to help clients improve their business performance. LRW conducts research in over 80 countries around the globe, addressing a range of issues, including market segmentation, brand strategy, marketing effectiveness, customer experience and new product development. We are honored to work for some of the biggest and best brands in the world.



Passenger

<http://www.thinkpassenger.com/>

Passenger helps companies engage with customers in private online communities so they can make better decisions and grow revenue. With Passenger's SaaS-based FUEL community platform, the world's leading brands can engage with current and future customers and stakeholders to drive insights, innovation, and advocacy. Passenger's software platform is available in a Self Service and Full Service offering.



Research Now

<http://www.researchnow.com/>

Research Now is a digital data collection company specializing in engaging people around the world to provide data and opinions that inform business decisions. Our mission is to help the world's business create better products and services one decision at a time.



SSI

<http://www.surveysampling.com/>

SSI is the premier global provider of sampling, data collection and data analytic solutions for survey research, reaching respondents in 86 countries via Internet, telephone, mobile/wireless and mixed-access offerings.

SSI staff operates from 25 offices in 18 countries, offering sample across every mode, online and CATI data collection, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's 3,300 employees serve more than 3,000 clients worldwide. SSI is the premier global provider of sampling, data collection and data analytic solutions for survey research, reaching respondents in 86 countries via Internet, telephone, mobile/wireless and mixed-access offerings.



TRC Market Research

<http://www.trchome.com/>

TRC, a Philadelphia based market research firm, has guided hundreds of clients through innovation challenges over the years and have learned from our own innovations along the way. Our market research experts are experienced and passionate, and collectively approach every assignment "all in" – no matter the size or complexity. Whether it's new product research or audience segmentation, pricing research or messaging strategies, concept analysis or service optimization. We know the innovation journey can feel uncertain. So let us help you make more informed decisions. Even help you uncover ideas you may not have considered. Most importantly, let us give you the insights you need to innovate successfully.

ADVERTISERS



Aha!

<http://ahaonlineresearch.com/>

The Next Gen Online Qual Platform

This next generation online qual research platform enables clients, marketing research consultants, and ad agencies to easily create engaging online consumer studies with amazing response rates. The customizable platform features a comprehensive suite of social and mobile-friendly activities including storytelling, collage building and community tools such as pin boards, wishing walls and bulletin boards. Drag and drop technology, the dashboard navigation, and analytic tools are state of the art. And you get hands-on support from experienced researchers throughout the process.



C+R Research

<http://crresearch.com/>

At C+R Research, a full-service marketing insights agency, we've been helping brands grow for over 50 years by delivering great research, deep perspective and committed client service. We're known for best-in-class methodologies, high-quality analytical insights and delivering senior-level attention throughout every phase of our clients' projects. We offer an array of customizable techniques for both qualitative and quantitative research, and have focused areas of knowledge and expertise in youth and family, Latinos and Shopper Insights. Our goal is to equip our clients with the insights they need to confidently develop successful brand strategies and grow their business.



eCGlobal Solutions

eCGlobal Solutions

<http://www.ecglobalsolutions.com/>

eCGlobal Solutions is a leading provider of cloud-based marketing technology solutions for Fortune 500 companies and global market research firms. We build technology with a view of the business generated from our extensive experience in marketing, advertising, media and market research. Our proprietary solutions integrate mobile and social technologies with market research and big data analytics, supporting consumer insights and brand engagement programs in innovative ways, with a focus on improving the results and competitive advantage to our customers.



FocusVision

<https://www.focusvision.com/>

FocusVision is the leading global provider of qualitative and quantitative technology solutions to the market research industry, providing an online survey platform, research facility video streaming, webcam focus groups, ethnography streaming and mobile device usability studies. Our services allow research professionals to engage with respondents in any place, at any time. FocusVision has over 300 employees and offices in the US, the UK, Bulgaria, Singapore and Brazil.



Instant.ly

<https://www.instant.ly/>

Instantly™ is the world's largest audience and insights platform, providing researchers and marketers with immediate access to consumers and automated insights tools to make faster, better decisions. Instantly is based in Los Angeles, with offices in the United States, Europe and Asia.



iModerate

<http://www.imoderate.com/>

We are a consumer insights firm that helps our clients become fluent in their audience through a deeper understanding of consumers' motivations, needs, and language. While most companies are employing some combination of listening, asking, and observing to gain intelligence, they are left with incomplete information, forcing them to remain stagnant or act on risky assumptions. Our cognitive approach facilitates thoughtful, compelling engagements with consumers and allows us to derive meaning and relevance from their feedback. We give clients the ability to know their consumers inside and out, empowering them to make smarter decisions that improve their customer relationships and bottom line.

M3 GLOBAL RESEARCH

M3 Global Research

<http://research.m3.com/>

M3 Global Research provides the most comprehensive and highest quality market research recruitment and support services available to the global healthcare industry with relationships with over 2.5 million physicians in more than 70 countries worldwide. M3 Global Research operates an ISO 26362 certified panel with the highest quality data collection and project management capabilities that cover the spectrum of quantitative and qualitative techniques utilized today.



RealityCheck Consultants

<http://realitycheckinc.com/>

RealityCheck is more than a qualitative consumer research firm. We're a global partnership of experienced creative facilitators, human-to-brand translators, strategic conceptual analysts, and storytellers. Our brand experience allows us to provide the kind of insightful clarity and strategic direction that can transform a business. From moderation and recruitment, to field management and analysis, RealityCheck uses cutting edge techniques and technology to humanize market research.



Schlesinger Associates

<http://www.schlesingerassociates.com/>

Schlesinger Associates is the leading data collection company offering a broad range of qualitative and quantitative research solutions. Working in partnership with you, we provide reliable recruitment for any methodology your study may require, including online surveys, online communities, webcam focus groups, traditional focus groups, telephone interviews, ethnographies, quantitative, and in-depth interviews. With a lifetime of experience and an uncompromising commitment to your success, we are your global research partner, anywhere, anytime.



SIS International Research

<https://www.sisinternational.com/>

SIS International Research is a leading global market research and strategic intelligence firm. Founded in 1984, the company provides full-service custom market research services, competitive intelligence, on-demand intelligence answering services, emerging markets research, consulting services and global research media. SIS International continuously conducts ad hoc custom research in over 120 countries for over 50 industries.



Toluna

<https://us.toluna.com/>

Toluna is a pioneer in the dynamic world of marketing research, data collection, reporting and visualization. Toluna pioneered world's largest social voting community where people have fun and feel valued while expressing their views. For brands, this leads to deeper, richer insights that inform the important decisions they make to strengthen their businesses.

Reach your audience. Get qualified leads. Go where the buyers go.

GreenBook brings innovative resources to market researchers on both sides of the table, and offers effective marketing opportunities in a variety of targeted media. Our publications and events provide stimulating, practical, and timely perspective on topics and issues relevant to the industry.



The **GreenBook Directory** connects buyers with suppliers of market research services by providing detailed information on research firms and by supporting client-supplier interaction with new online tools.



With our **Content Marketing Program**, we help market research companies better demonstrate their strengths and capabilities, position themselves as experts, and generate more qualified leads.



Insight Innovation eXchange events offer a window into the future of the industry with emphasis on using innovation in solving real business challenges through better insights.

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Presented by GreenBook, **Insight Innovation eXchange** is a global event series focused on advancing the business value of insights through innovation. We pull together the most promising and most important new ideas in market research.

We work with our Corporate Partners (companies like Coca-Cola, Citi, eBay, Ericsson, Johnson & Johnson, Merck, Procter & Gamble, and Unilever) to develop an agenda that provides tangible solutions to real business needs. Then, we identify the right innovators and thought leaders to get up on stage, share and demo creative solutions, and kickstart conversations that create real business impact.

Watch videos from past events and learn more about our upcoming events by visiting us at **InsightInnovation.org**





Where would you like to go?



Survey Tool

Easily create & launch professional surveys for free



Concept Test

Rapid consumer feedback on your product idea



Product Watch

Track new products the moment they hit shelves



Automated Sample

Our quality sample on an automated, cost-effective platform

Connecting thousands of market research firms and Fortune 500 brands to quality audiences and insights tools