Fall 2014

GRIT

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GreenBook
Research Industry Trends Report

+What it all means (commentary by industry leaders)

GRIT

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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.


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Introduction

Leonard F. Murphy
Chief Editor & Principal Consultant

Welcome to the 15th edition of the GreenBook Research Industry Trends Report, using data collected in Q3 2014 and examining the time period of Q1-Q2 of 2014.

In the last report we determined that 2013 was the year that the wave of predicted change finally came to shore. Therefore, it's no surprise that the main theme emerging in 2014 is adaptation to change. Rather than being swamped by the new, our industry is absorbing the change and finding out what works (and what doesn't) in an ever expanding toolbox. However, it's not just tools that are changing; client needs and expectations, required skill sets, and even the view of what market research is are also undergoing a shift.

In this edition, GRIT continues to track trends that it has historically focused on, including the adoption of emerging technologies and methods. GRIT studies drivers of supplier selection, changing ways in how we collect data, and the characteristics of the researcher of the future. For the first time we include a "Hacking MR" section to identify problems and solutions proposed by our respondents.

We keep exploring the frontiers of new formats and question types with the GRIT survey itself. Although we have by no means "nailed" the optimal model (and probably never will), we learn and experiment with every wave. To address issues of length of interview, we adopted a "survey chunking" approach, where large blocks of questions were randomized across the survey. This reduced the average LOI while the bases for each question now vary due to the randomization process. In all data being cited, refer to the question base size.

We also continue with a series of thought-provoking commentaries written by GRIT supporters. These expert opinions provide additional depth and richer context for the report.

A host of global organizations and LinkedIn groups have joined us as sample partners: ACEI, AIM, AMSRS, APRC, ARIA, AVAI, BAQMaR, CASRO, CEIM, Insight Innovation Forum, International Market Research Society, Market Research Field Directors, MRIA, MRII, MRS, MSU MMR, Neuromarketing Group, NewMR, NGMR, NMSBA, NYAMA, QRCA, Research & Results, SAIMO, The Research Club, UTA MMR, and Wisconsin School of Business.

We are also thrilled to have a stellar list of research partners including Bottom-Line Analytics, Dapresy, Decooda, Gen2, GMI, Insites Consulting, Q Research Software, Researchscape and Vision Critical.

All of our 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'll find the report informative, provocative, and useful. Enjoy!

Leonard F. Murphy

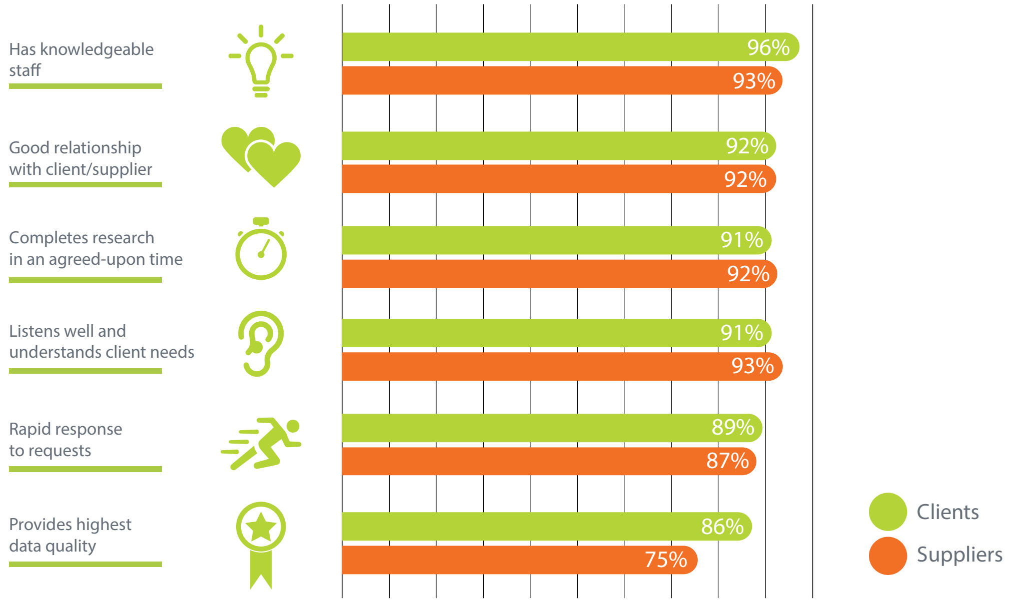
Chief Editor & Principal Consultant | GreenBook

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.

Executive Summary

DRIVERS OF SUPPLIER SELECTION

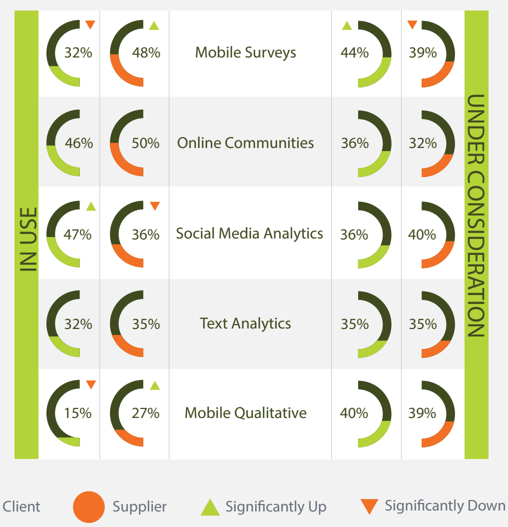
The recipe for earning business is straight out of Business 101: It's all about relationships. Know the client, deliver on their needs and do it with the highest quality.



FUTURE OF RESEARCH

The Paradigm has shifted. Adoption of Communities & Mobile as insight gathering tools and analyzing Text & Social Media in Big Data frameworks are the paths to growth.

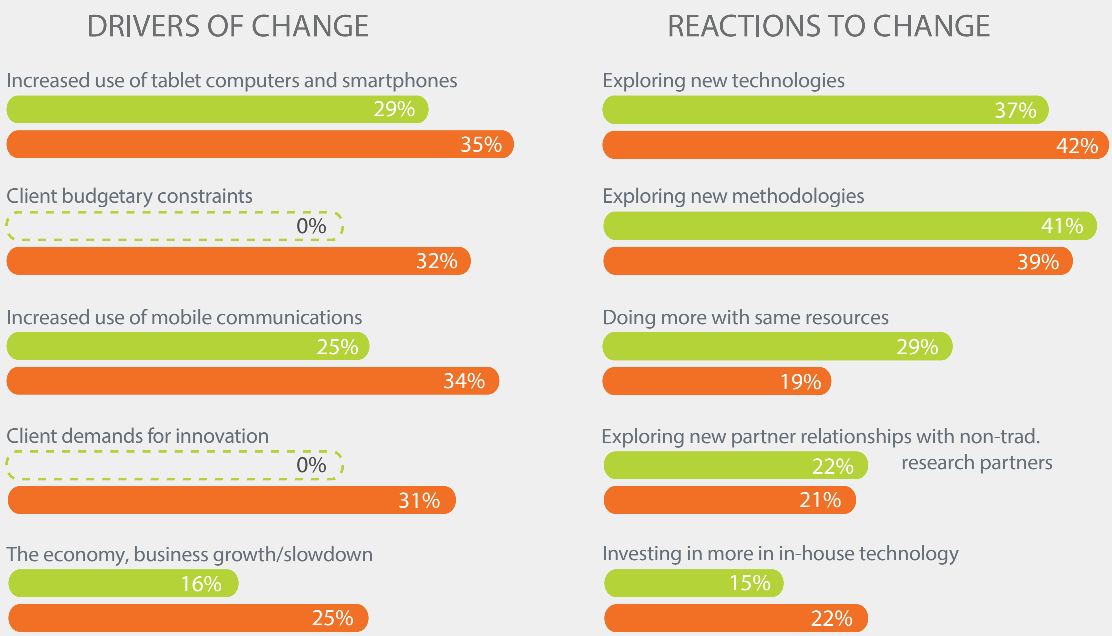
ADOPTION OF NEW RESEARCH METHODS



THE MOST EXCITING THING HAPPENING IN RESEARCH TODAY IS:

THE DYNAMICS OF CHANGE

Shrinking budgets and a rapidly changing technology landscape are driving change. The solution is a combination of rethinking business processes and exploring how to harness new tech and methods to deliver more impact.

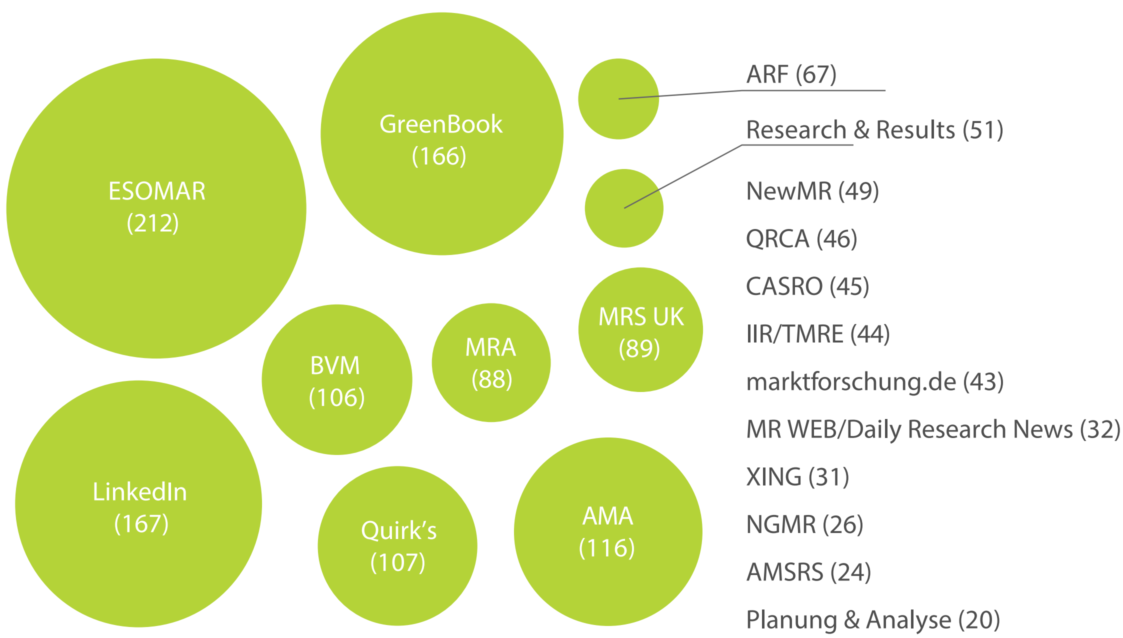


INFLUENTAL ORGANIZATIONS AND INFORMATION CHANNELS

Shrinking budgets and a rapidly changing technology landscape are driving change. The solution is a combination of rethinking business processes and exploring how to harness new tech and methods to deliver more impact.

DATA SHOWN AS
Organization name
(number of mentions)

**please read about sample composition on Page 6*



Visualization by dapresy

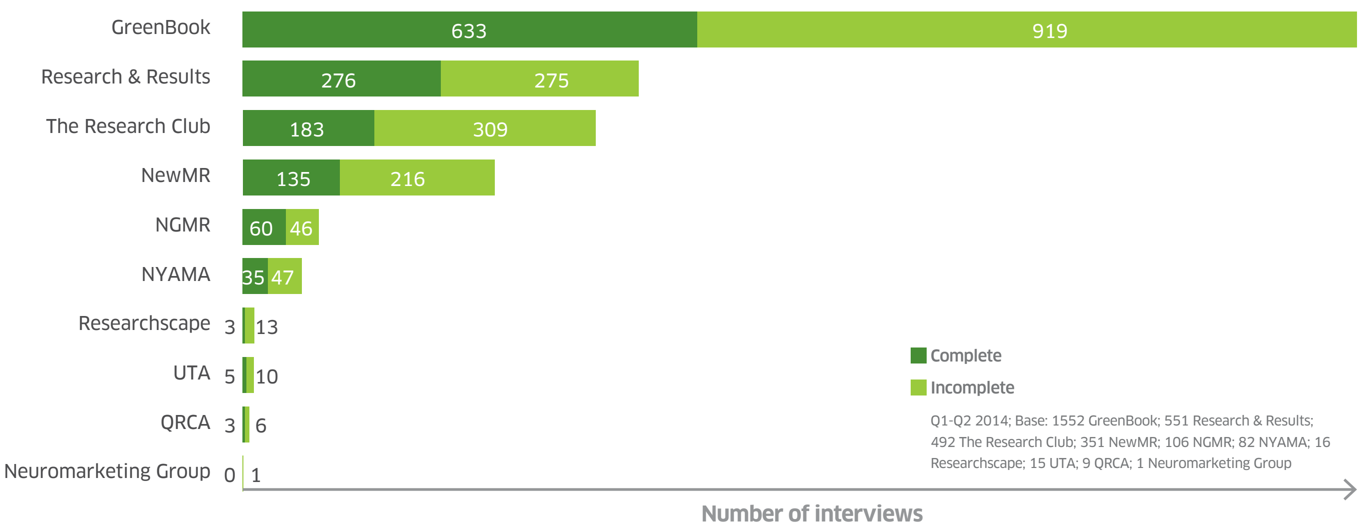
Methodology and Sample

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. For this wave sample contributors were: ACEI, AIM, AMSRS, APRC, ARIA, AVAI, BAQMaR, CASRO, CEIM, Insight Innovation Forum, IMRS, Market Research Field Directors, MRIA, MRII, MRS, MSU MMR, Neuromarketing Group, NewMR, NGMR, NMSBA, NYAMA, QRCA, Research & Results, SAIMO, The Research Club, UTA MMR, and Wisconsin School of Business.

There is certainly significant overlap between these groups, so participants likely had multiple invitations with unique links assigned to each partner.

The percentage of respondents by channel is:

Respondent Status by Sample Source



An important note about base sizes in this edition of GRIT. To address issues of length of interview and drop–outs with previous iterations, in this wave we adopted a "data chunking" approach, where we randomized large blocks of questions across all the survey. We undertook a statistical test of the data from the previous waves of the survey to estimate the minimum number of people who needed to answer each question. This varied from less than 200 to over 1,000 for different questions, but with an estimated 2,000+ participants we had more than enough data. We then divided the survey into 8 survey chunks. The first anchoring chunk contained all the core demographic questions was asked of all participants and then each participant answered 4 out of the remaining 7 chunks in random order. Within each chunk we also placed option caps on each of the individual grid questions within the survey to ensure that each respondent answered no more than 8 options per question.

This chunking process reduced the average length of the survey from 25 minutes in the previous wave down to 13 minutes in this one and we were able to use the data from *every participant* (3,175 total, 1,422 full completes) even if they only completed a short section of the survey.

Now, any survey shortening technique is not without issue. We must make clear that this has not been a perfect process. Despite having carefully planned the chunking process, we failed to properly take account of the requirement to regionally divide the data and so we have fallen short of being able to robustly break down the data by region on certain questions. And because of the misbalance of the data we have not been able to fully weight some of the data. Also because of the widespread randomization used in this study it is difficult to accurately report on sample size for each individual question, and *the base sizes will vary for each question.*

To enhance comparability of results between waves, previous weights have been removed; each sample stands on its own and we look for trends based solely on the composition of the participant population. We recognize that this likely means some skews are present and it is not wholly representative of the industry. However, our belief is that the overall sample size and a wide network of partners reduces the skew and is roughly representative of the composition of the industry as a whole. It certainly is representative of the researchers who are engaged with each sample partner and/or are present online and involved with various online media.

This methodology is in its infancy but we hope to be able to improve the chunking process in the years to come to ensure we keep the survey as short as possible for all participants while optimizing data analysis.

The mix of respondents has varied over the 12 years of the trends study, but within fairly narrow bands. For this edition of GRIT, we saw an increase in client–side representation to 26% of the overall sample.

Clients / Suppliers by GRIT edition [% and completes]

	Q1-Q2 2014	Q3-Q4 2013	Q1-Q2 2013	Q3-Q4 2012
Clients	26%	20%	16%	18%
	497*	443	226	149
Suppliers	74%	80%	84%	82%
	1.422*	1.786	1.148	669

* Composite completes that resulted from "survey chunking"

59% of GRIT participants are at a Director level or above.

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.

This edition of GRIT continues the trend of increased global participation. With increased international participation, for the first time the largest percentage of respondents are from Europe at 48%, North America is 40%, Asia comprises 7%, Latin America makes up 2%, and all other geographies combined comprise less than 4% of the sample. The continual strong engagement from the German research market via our partnership with Research & Results is a major factor in the higher than normal European contribution.

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

Further, the composition of GRIT participants remains relatively senior. 92% are decision makers or influencers on the methods, techniques, and resources deployed within their insights organization.

Participants are also very experienced, with 30% having been in the research space for 20+ years, 21% over 15, and 23% over 10 years. Not surprisingly, 59% of GRIT participants are at a Director level or above.

Those numbers are consistent across the last four waves of the study.

GRIT respondents use or purchase a variety of research approaches with 89% using quant, 82% using qual, 50% secondary research, a surprisingly high 38% deploying social media monitoring and analytics, and 31% utilizing measurement approaches such as passive metering or tracking.

Finally, an interesting view on how supplier participants position themselves – we asked them what their primary engagement positioning looks like:

Engagement structure by Wave

Strategic Insights: MR firm is closely engaged in business, provides expertise on methodologies, recommends new tools	34%
Business Consultant: MR firm receives insights into business as context for design strategy, delivers findings in context	32%
Traditional: Client defines study, MR firm executes and delivers findings	28%

Q1-Q2 2014; 1786

These percentages have remained largely unchanged since we began asking the question in 2012.

On a similar note, we asked participants which "archetype" of research professional most closely aligned with how they self-identified. Participants could make up to three selections, which is why the total percentage is over 100%:

Researcher Style

Researcher Style	%
Consultant	67%
Big Issue thinker	42%
Storyteller	34%
Business Driver	31%
Research Technician	28%
Conceptual Creative	25%
None of these	3%

Q1-Q2 2014; Base: 958

With all of the discussion about researchers needing to adopt a more consultative approach in recent years, it's not surprising that a majority see themselves in that light, even if that is not reflected in their business positioning, as shown above. How well everyone is living up to that vision is another matter entirely and beyond the scope of this study, although anecdotally it seems we have a ways to go to be truly considered consultants.

What is most interesting here is the drive to "move upmarket", with only 28% identifying themselves along a technical spectrum (no more Methodologists?) and instead vying to be identified with a mix of skills more akin to successful strategic consultants or planners.

As we have already seen, there is clearly a bit of an identity crisis in the industry. Maybe we don't know who we want to be when we grow up. In any event, GRIT participants are aspiring to redefine their own role and the role of the insights organization as a whole within the enterprise.

Making Consumer Insights A Company's Best Investment

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Today, consumers are in more control than ever; they want to influence (or even co-create) the products and services they buy, and they expect to have a say in how businesses conduct themselves in the marketplace. Given the enthusiasm consumers have to engage with companies, and the myriad technologies we have at our disposal for doing so, consumer insights *should* represent companies' best investment in the business, not simply a cost of doing business. But this is rarely the case.

Most companies claiming to be "customer-centric" aren't. Research from Bain & Company shows that 80% of companies think they provide a superior customer experience, yet only 8% of customers agree[1]. And The Boston Consulting Group found that 73% of insight personnel believe they consistently answer the question "so what?" about the data they provide, but only 34% of business line personnel agree with them[2].

These studies are not new; they are several years old, in fact. What is troubling is that, as an industry, we have yet to fundamentally change the way we work — with consumers, with business stakeholders, with data, and with the insights we gather.

This assertion is based on evidence. Over the past year, I have talked with more than 50 of our clients about their strategies for transforming consumer insights into business impact[3]. While I heard some amazing success stories, everyone acknowledged that they face significant challenges in using insights to drive results. Everything from the quality — or quantity — of data, to lack of focus, to ineffective storytelling and disengaged business partners can prevent decision-makers from internalizing and acting upon insights.

To realize our potential (to create value and impact), we must adopt an investment mindset rather than think of our work as an additional cost of doing business.

The results in this report suggest we are moving in this direction. Research buyers and suppliers alike identify most strongly with being "consultants" (67%) and "big issue thinkers" (42%), which represent increases from last winter's survey. Only 28% of us identified with being "research technicians," and this number is trending down. What was interesting and surprising to me (based on what I have learned from my interviews), was the relatively less important identifier of "business driver" (31%), which has remained flat. My fear is that our ability to be consultants will remain aspirational unless we also see ourselves — and are seen by those we need to influence — as business drivers. What would our work look like, I wonder, if we truly owned the voice of the customer and used it to propel the business? Our recommendations would be more targeted and relevant. Critical information would land in the right hands. And, rather than focusing on justifying our expense, we would more easily partner with our clients to co-create ROI.

As insight professionals, we must shed our "cost-center" self-perception. When we imagine what influences our clients' decisions regarding choice of data collection method, cost is the number one factor (8.5). Yet when we examine how research buyers answer this question, quality (8.5), impact (8.2), and speed (7.3) outweigh cost (7.2). The idea that the value we bring depends, first and foremost, on being inexpensive moves us away from thinking about how to drive results, and towards a defensive stance that can undercut our ability to become business drivers. By focusing on value, quality, and impact, our work will be seen as an intrinsic investment, and cost will become less of a barrier.

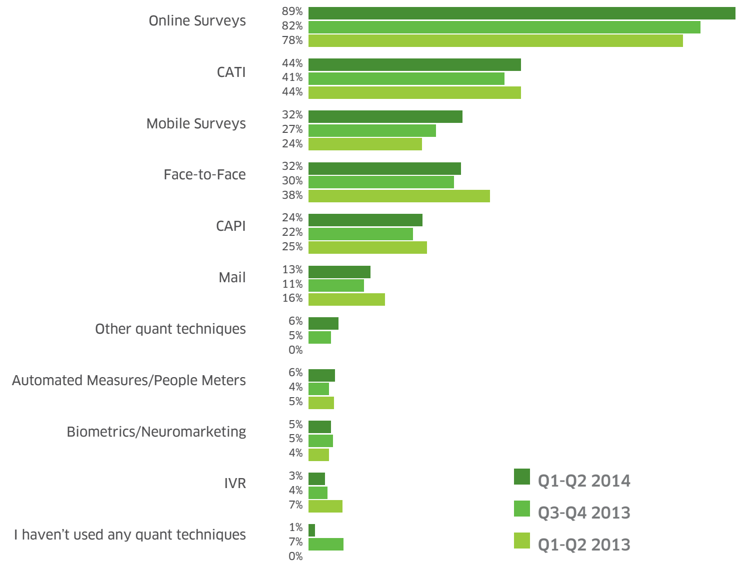
Many of the questions in this report attempt to paint a picture of our industry in the near future. I asked all the clients I interviewed: *How do you think consumer insights will evolve over the next five years?* Many voiced themes similar to what were found in this study: data, technology and mobile, for example, represent both opportunities and challenges. One nuance that emerged from my analysis, however, was that creating business impact requires a fundamental change in how we engage with consumers and company stakeholders.

Today's consumers are actually as much a vital and intrinsic part of our companies as are employees. Yet we remain stuck thinking about consumers as living "outside" of our organizations – as mere respondents or passive feedback givers. One way we, as insight professionals, can stop focusing on cost at the expense of value and quality is to find creative ways to design consumers into businesses to create impact. Rather than being a "gatekeeper" of the consumer's voice, we can be an active facilitator: engaging consumers in innovative ways to uncover remarkable insights, helping stakeholders internalize those insights and, ultimately, integrating the consumer into business design, development, and other key processes to drive growth and the marketplace.

1 http://bain.com/bainweb/pdfs/cms/hotTopics/closingdeliverygap.pdf
2 http://www.bcg.com/documents/file35167.pdf
3 http://vimeo.com/99242508

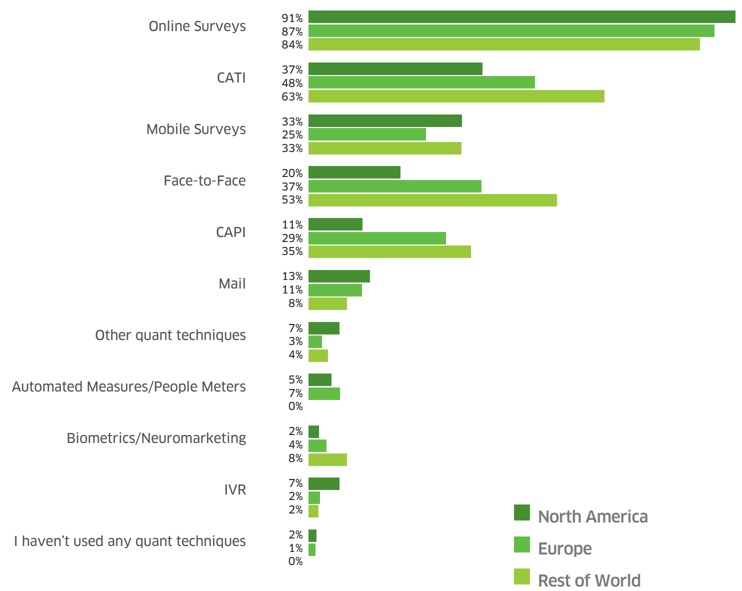
The Basics: Qualitative vs. Quantitative Usage

Quantitative Methods Used: Trend



Q1:2013 to Q2:2014; Base: 817 Q1-Q2 2014; 2229 Q3-Q4 2013; 0 to 1372 Q1-Q2 2013

Quantitative Methods Used: Geography



Q1-Q2 2014; Base: 183 North America; 211 Europe; 49 Rest of World

Quantitative Research

Penetration of online surveys increased further, jumping from 82% to 89% in nine months, after climbing from 78% to 82% a year ago. This climb is surprising given that growth usually slows as penetration approaches 100%. Only mobile surveys showed similar growth, rising from 27% to 32% over the past 9 months.

A number of techniques rebounded slightly to make up for some of their losses last time, including CATI, face-to-face, CAPI, mail, and people meters. Given that this is a convenience sample, with a practical margin of error larger than the 3% margin for a probability sample, a more conservative interpretation would be that usage has held steady for these techniques.

The level of usage of CATI, CAPI, and face-to-face interviewing must surprise the North American researcher, but this is a global sample. Where 11% of North American researchers used CAPI, 35% of researchers in the rest of the world (outside Europe) did so; similarly, for CATI, 37% of North Americans used it, contrasted with 63% of the rest of the world. North Americans were somewhat more likely to use online surveys (91% vs. 87% for Europe vs. 84% for rest of the world) but mobile surveys showed similar levels regardless of region: 33% for North America and the rest of the world outside Europe, and 25% for Europe. This is not surprising, since many regions have seen mobile penetration leap past desktop/laptop penetration.

Usage of these techniques is comparable across client- and supplier-side researchers, with the exception of mobile surveys: only 23% of client researchers have used mobile surveys, compared to 35% of suppliers.

Penetration of online surveys increased further, jumping from 82% to 89% in nine months.

Qualitative Research

In a surprising finding, reported usage of traditional in-person focus groups jumped from 59% to 70% since the last survey, driven by growth across all geographies (59% to 80% in Europe, 59% to 68% in North America, and 61% to 72% rest of world) and for both clients and suppliers. In-person IDIs increased from 46% to 53%.

Mobile qualitative research (e.g., diaries, image capture) grew from 19% to 24%; mobile qual is strongest outside North America and Europe, with 30% of "rest of world" researchers having utilized it, compared to 23% in Europe and just 16% in North America.

In-store shopping observations show a similar pattern to mobile qual: highest in the rest of the world (35%), then Europe (20%), and lowest in North America (18%).

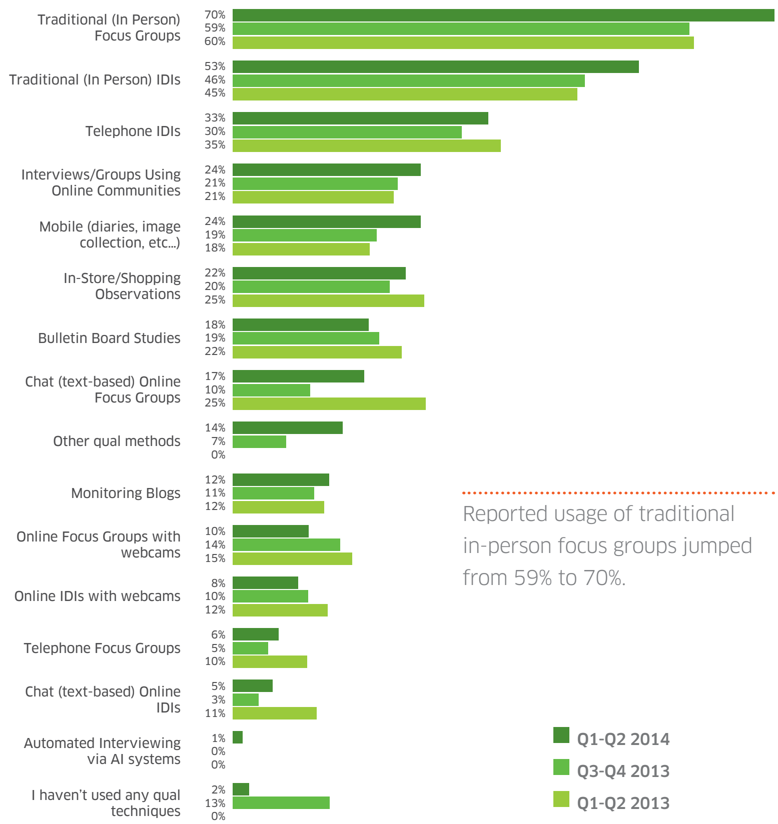
In-person qual such as focus groups and IDIs are most widely used in Europe. Qual techniques that are more widely used in North America center around the telephone and webcam, including telephone IDIs, telephone focus groups, webcam focus groups, webcam IDIs, and bulletin-board studies.

The client/supplier divide is narrow, with similar usage of the techniques, except for in-store/shopping observation (15% usage for clients vs. 25% for suppliers) and online IDIs with webcams (5% for clients vs. 10% for suppliers).

The resurgence of traditional focus groups globally and the lack of uptake on mobile qualitative in North America and Europe at first would seem counter-intuitive. We do not believe these results are sample artifacts since the overall composition of the sample and the partners who contribute the greatest number of participants has remained relatively stable across several waves. In digging in a bit deeper, an explanation does present itself. Anecdotally, through the IIeX Corporate Partner program we are aware of a drive from client-side researchers to get closer to consumers, and qualitative methods support that mission. Also, the existing industry infrastructure on the supplier side has created a pent-up supply, with cost decreases and field efficiencies perhaps making the decision to use more qual palatable.

That same supply glut may be limiting mobile uptake simply because more suppliers are being successful selling traditional approaches. We assume that this trend will reverse in future waves as the same drivers of mobile quant growth start impacting qual in a significant way.

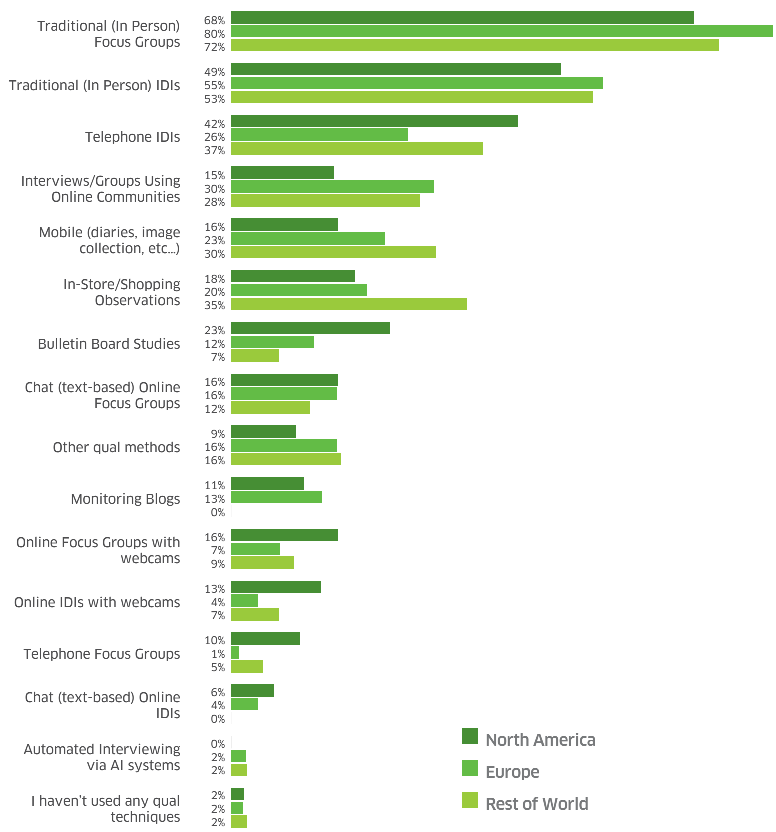
Qualitative Methods Used: Trend



Reported usage of traditional in-person focus groups jumped from 59% to 70%.

Q1:2013 to Q2:2014; Base: 723 Q1-Q2 2014; 0 to 2229 Q3-Q4 2013; 0 to 1372 Q1-Q2 2013

Qualitative Methods Used: Geography



Q1-Q2 2014; Base: 158 North America; 180 Europe; 43 Rest of World

Drivers of Supplier Selection

Suppliers put greater value on the strength of their relationships with their clients.

The top four attributes surfaced again as the highest in importance: “Has knowledgeable staff,” “Good relationship with client/supplier,” “Completes research in an agreed-upon time,” and “Listens well and understands client needs.”

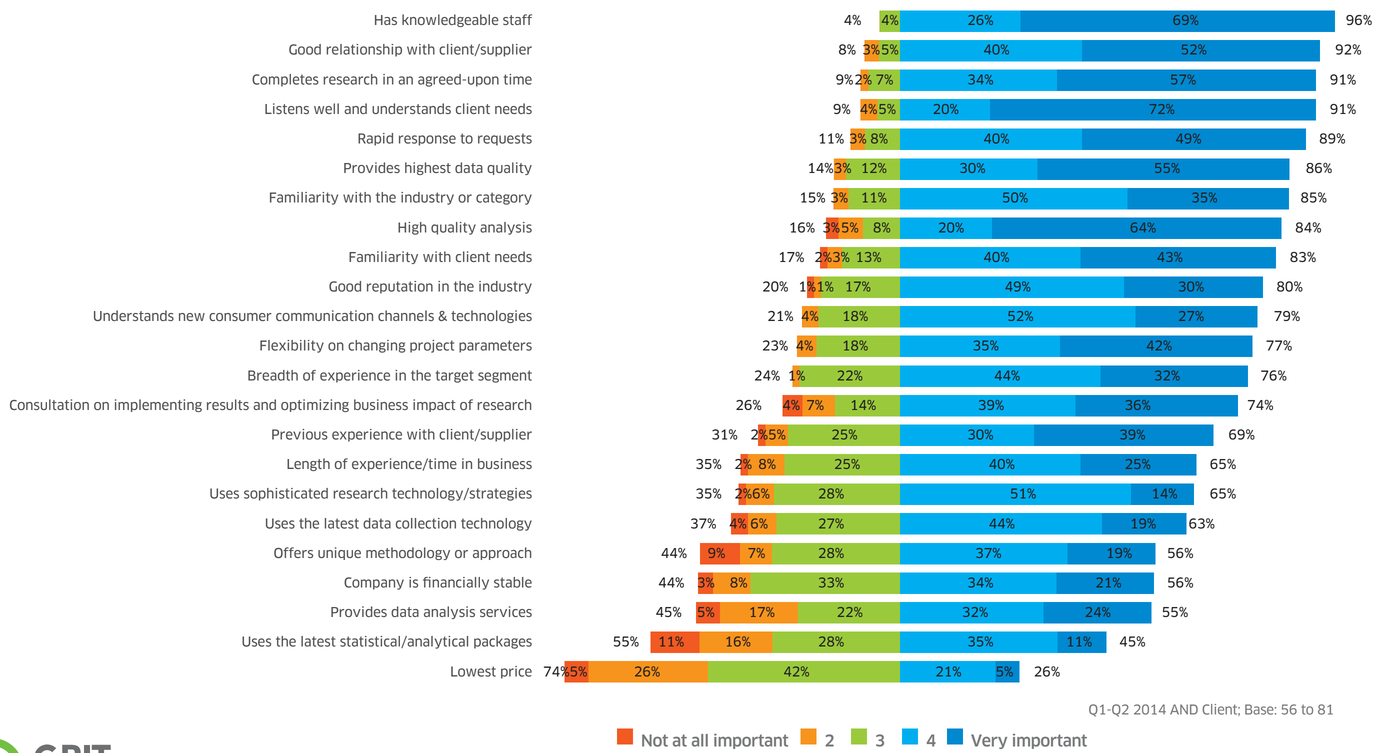
Once again we asked respondents to indicate what was important to clients when they were selecting suppliers for their market research needs. Client respondents simply indicated what was important to them. Supplier respondents provided estimates of the importance they felt their clients would give to the various attributes. The figures below show the importance ratings that clients and suppliers gave to the supplier selection criteria, respectively.

It should be noted that the latest results were relatively consistent with previous years. In fact, for suppliers, there were no significant changes year-to-year in the percent who rated each attribute in the top two boxes. Also, the top four attributes surfaced again as the highest in importance: "*Has knowledgeable staff*", *"Good relationship with client/ supplier", "Completes research in an agreed-upon time"*, and *"Listens well and understands client needs".* For clients, those same four attributes remained at the top of the list in terms of importance, albeit in a slightly different order.

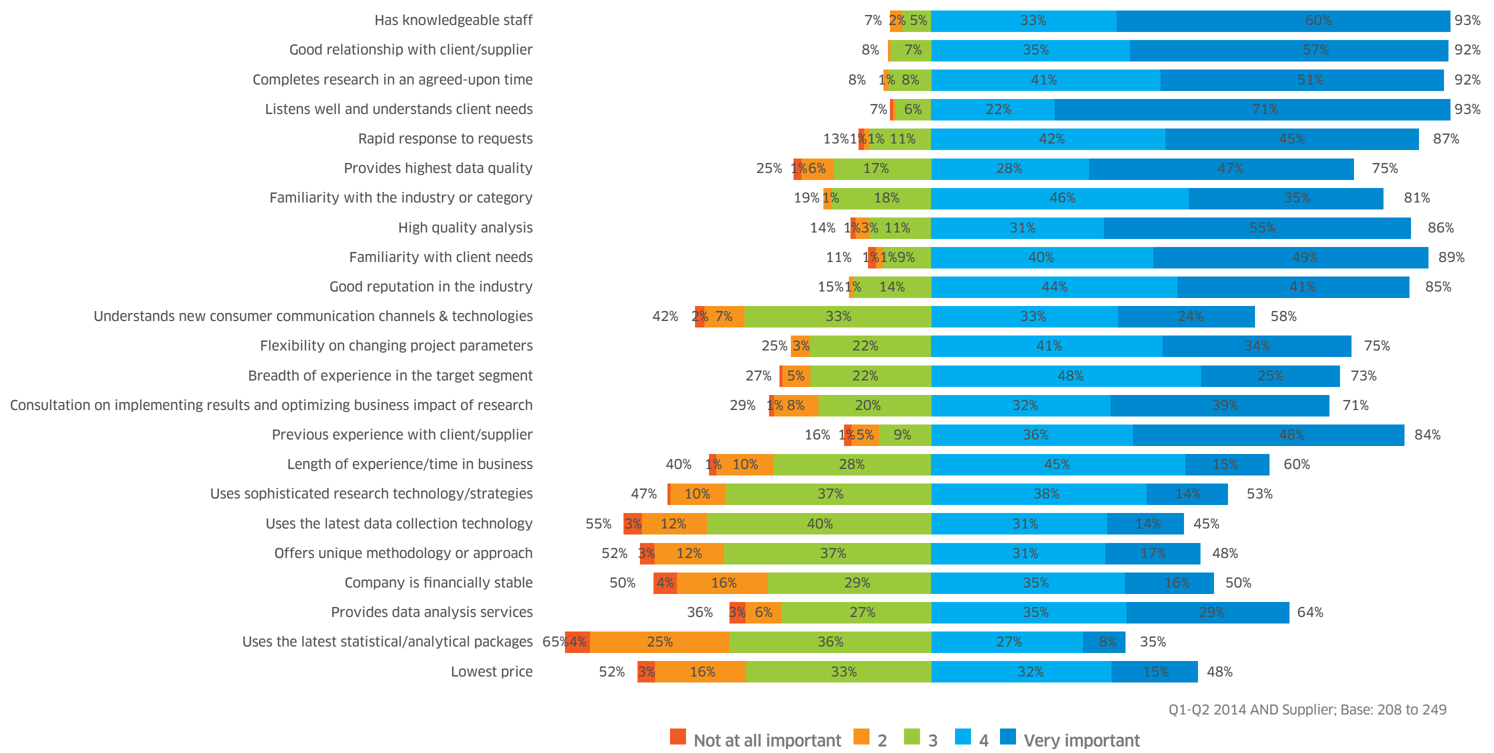
It is noteworthy that suppliers tend to rate “relationship” attributes very high in perceived importance. As the following table indicates, suppliers' mean rating for relationship criteria was 4.45, compared to a mean rating of 4.25 for clients. Suppliers put greater value on the strength of their relationships with their clients, and feel that their clients would rate these attributes higher than they actually do.

The biggest disparity between client and supplier perspectives on relationship issues came in the attribute, “Previous experience with client/supplier,” with top-box scores of 69% and 84%, respectively. One possible explanation for this difference may be in the consideration of competitive vs. non-competitive projects. Incumbent suppliers often find that they are asked to complete new research projects without having to contend with competition, simply because the client was pleased with previous work, and felt that the current project was similar enough to previous work to proceed without the need for a competitive bid. It is unclear whether both groups considered these cases when evaluating the importance of incumbency.

Stated Importance to Clients – Supplier Selection: Q1-Q2 2014



Perceived Importance to Clients – Supplier Selection: Q1-Q2 2014



Suppliers give somewhat lower ratings to attributions classified as "execution" than their client counterparts (3.88 to 3.94, respectively). The largest disparity in the execution ratings was seen in *Provides highest data quality*, suggesting that clients perceive a greater difference in the data quality provided by their various suppliers than suppliers themselves perceive. Much has been written in recent years about the impact of moving to research models largely dependent on large field-service companies providing sample across a swath of research suppliers. It might be interesting to investigate whether the perceived differences in data quality are the result of qualitative vs. quantitative research studies.

Mean importance ratings for the general "capabilities" attributes were quite consistent across suppliers and clients (3.90 and 3.88, respectively). For clients, this was the lowest-rated importance category, implying that, while clients value capabilities and reputation in selecting their suppliers, they really are looking for performance on the job. That is, these capabilities are seen as "table stakes," and supplier choice between contenders who make the short list is a function of other considerations.

	CLIENT VIEWPOINT	SUPPLIER VIEWPOINT
RELATIONSHIP (how they interact)		
Listens well and understands client needs	4.6	4.6
Good relationship with client/supplier	4.3	4.5
Familiarity with client needs	4.2	4.4
Previous experience with client/supplier	3.9	4.3
	4.25	**4.45**
EXECUTION (what they do)		
Provides highest data quality	4.4	4.1
High quality analysis	4.4	4.4
Completes research in an agreed-upon time	4.3	4.4
Rapid response to requests	4.3	4.3
Flexibility on changing project parameters	4.0	4.1
Understands new consumer communication channels & technologies	3.8	3.7
Uses sophisticated collection technology/strategies	3.5	3.6
Uses the latest data collection technology	3.5	3.3
Uses the latest statistical/analytical packages	3.3	3.0
	3.94	**3.88**
CAPABILITIES (what they're known for)		
Has knowledgeable staff	4.5	4.4
Familiarity with the industry or category	4.1	4.1
Breadth of experience in the target segment	4.0	4.0
Consultation on best practices and methodology effectiveness	4.1	4.0
Good reputation in the industry	4.0	4.2
Length of experience/time in business	3.7	3.7
Provides data analysis services	3.6	3.7
Offers unique methodology or approach	3.5	3.6
Company is financially stable	3.4	3.4
	3.88	**3.90**
Lowest price	**3.1**	**3.5**

Is Research Automation the Path to Superior Client Service?

Karyn Hall

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The results from this year's GRIT report show that for clients, customer service is top of mind when selecting a research supplier. Specifically, the data shows that clients need suppliers who are experienced, knowledgeable and committed to on-time delivery, and who are thoughtful listeners willing to invest time in building strong client relationships. To many of us this is not news.

What is interesting is that suppliers are still placing a disproportionate amount of importance on price. On a numerical scale, suppliers placed greater value on having a lower price versus the clients themselves. In my experience, cutting cost runs contrary to the delivery of superior customer service. Experienced, knowledgeable, committed, thoughtful relationship builders don't come cheap.

While it may seem counter-intuitive, the key to providing superior service that addresses client needs (while considering cost) may be found in technology. We don't have to look far to understand why. In fields like accounting, human resources and sales, software-as-a-service has long been used to automate many of the redundant tasks that traditionally require manual support and attention. This is also becoming true in market research. If implemented correctly and by the right people, research automation can also accommodate sophisticated and complex tasks in a timely manner that would otherwise consume the attention of your most experienced and talented personnel.

It's tempting to assume that because automation reduces human touchpoints, it also negatively affects quality of service. In fact, our experience has been the opposite. When developing Instant.ly, our consumer insights platform provided by uSamp, the process began with identifying client needs. This was foundational to our design of an automated platform that provides greater consistency, high-utility value and customization to deliver on those needs.

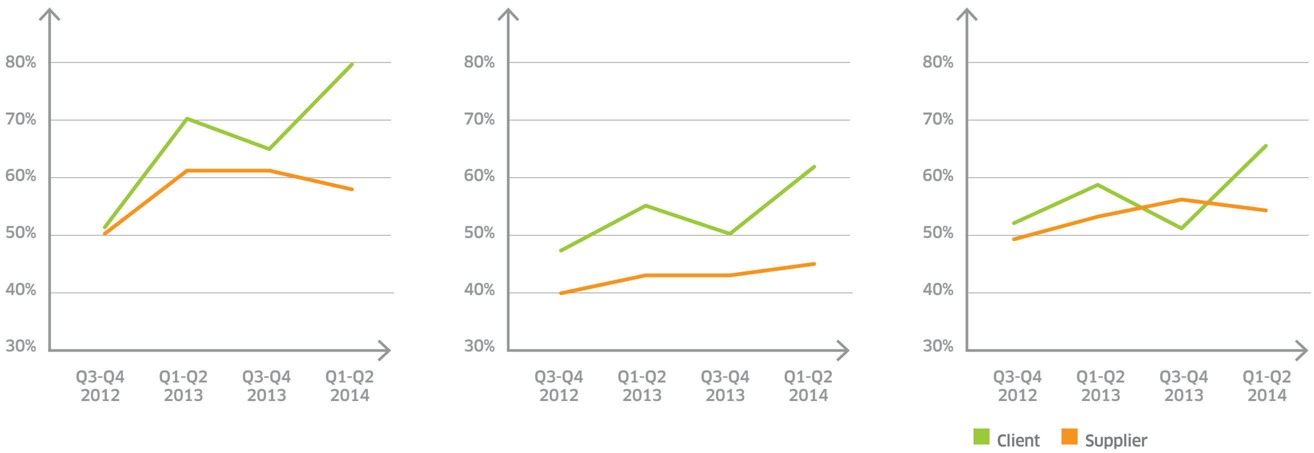
With automation, every client universally benefits from the experience and knowledge of your most thoughtful researchers. These people can anticipate the needs of clients by calling upon their depth of experience and expertise, which is built into the tool itself. The result is a product that not only addresses stated and identified client needs, but that is flexible enough to adapt to changes in consumer behavior. Using technology to streamline as much of the research process as possible enables researchers to concentrate on what they do best—research.

Research automation has the potential to help our industry do more than simply keep the peace between clients and suppliers. Sophisticated tools, and the research models we build, make for vital partners in developing effective research products that meet business needs. More importantly, they enable a higher degree of expertise and support through *anticipating* client needs. Herein lies the path to superior client service, and with it strong, long-lasting client partnerships.

Clients are seeking suppliers with a mastery of modern technology, something that has not been acknowledged by their supplier counterparts.

From a trends perspective, the interesting recent development is evidence that clients are seeking suppliers with a mastery of modern technology, something that has not been acknowledged by their supplier counterparts (see figures below). In 2014, client respondents in the GRIT survey gave significantly higher ratings to the three attributes summarized below, all focused on capabilities with new technologies in research.

Understands new consumer communication channels & technologies | **Uses the latest data collection technology** | **Uses sophisticated research technology/strategies**



Bet the Trifecta: Better, Faster, Cheaper

GutCheck®

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"There is somethin' that I gotta let you know
If you can't move at my speed, you have to go."
- Sean Kingston, "Gotta Move Faster "

While there might not be many readers of the GRIT Report who are fans of hip hop artist Sean Kingston, I think his lyrics in "Gotta Move Faster" are something we can all relate to. Brands must move faster than ever and the ability to drive cheaper and quicker insights is becoming table stakes. The GRIT Report bears this out.

When asked what clients perceive to be the most important factors when choosing a data collection method, time and cost are listed as the top two in decision criteria and each of them are increasing in importance:

- Cost – 8.5 v. 7.9 (scale of 1 to 10) in the last GRIT Report.
- Time – 8.2 v. 8.0 in the last GRIT Report.
- Effectiveness and Impact – 8.0 v. 8.0 in in the last GRIT Report.

So why have things changed so much in the last several years? There are two reasons. The first is simple. Clients are asking for it. I suspect if you asked clients how long they have been pushing for research that is better, faster and cheaper, they would tell you that it seems they have been pushing forever. Finally, technology is available to deliver on that promise, and most of the technological developments in our field have materialized within the last 4 to 5 years. The trend of maintaining or improving productivity with the same or declining resources isn't anything new in most industries. And while market research has not been immune to those pressures in the past, it is palpable today given how quickly brands need to move to maintain or increase their market share.

Those that exploit these pressures can take an advantaged position in the marketplace. Take, for example, another data intensive business like financial services. Before Bloomberg L.P. existed, data and analytics in the financial services industry was largely offline, and processes were manual in nature (e.g., charting financial trends), which made things slow and inefficient. Once Bloomberg digitized information and automated analytics, the industry became truly "real time" and grew at a compounded growth rate of 20 percent over the next 10 years. For their trouble, Bloomberg grew into what is now a $7B company with an equity value of over $20B.

The data reported by GRIT is not a passing fancy. As such, the ageless currencies of time and money aren't going to lose their place in the priority list any time soon. Too many important client organizations like Procter and Gamble, Safeway and Kraft are focused on rapid insights collection, and major suppliers like Millward Brown are increasingly focused on providing offerings which are more agile.

The foundation is set for market research to move the way of the financial data services industry: the technology ecosystem is enabling unprecedented agility with offerings like Google Consumer Surveys, Instant.ly, and GutCheck among others; many service providers are now starting to include these enabling tools in their plans; and most importantly, clients are demanding it.

So will a Bloomberg emerge in the market research industry to disrupt the status quo by providing insights that are better, faster, and cheaper? You can bet on it.

Adoption of New Research Methods

The growth in mobile has been dramatic, climbing to 64% usage, up from 41% in the last survey.

This section looks at the adoption, by clients and suppliers, of new research methods, and the barriers to adopting new approaches. In evaluating the current picture and changes from the previous year it should be noted that two new research methods have been added to the survey this year: Big Data Analytics and Micro-Surveys.

The data suggest that not much has changed over the last 12 months (with one big exception). The same four techniques head up the list, however, within the detail of the information there are some interesting insights, such as the way that clients seem to be adopting Social Media Analytics and Big Data Analytics more widely than suppliers are, and these nuances are explored in this section.

We also look at why approaches are not used. The data reminds us that no approach is right for every situation, and that barriers can range from not understanding a new technology through to finding an older approach too slow and too expensive.

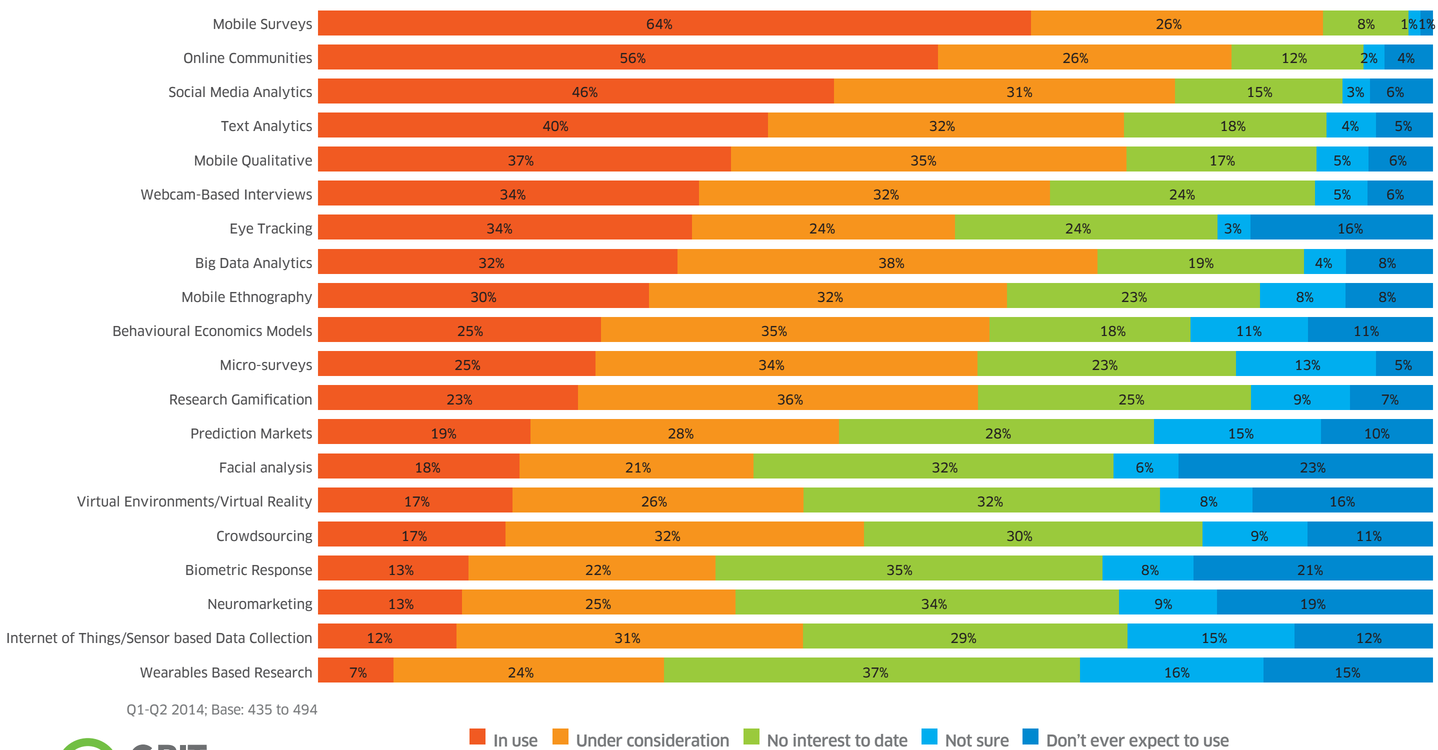
Respondents were shown a list of new (and newish) research approaches and asked to indicate which they were already using and which they were actively considering. Note, selecting 'using' does not mean a technique is necessarily being used heavily. This question provides an insight into what techniques are working their way into toolkits.

It's official: Mobile surveys and market research online communities are no longer emerging techniques; both are used by a majority of researchers:

56% of respondents have used MROCs, up from 49% in the last survey 9 months ago

The growth in mobile has been even more dramatic, climbing to 64% usage, up from 41% in the last survey.

Techniques used/Considered: Q1-Q2 2014



Q1-Q2 2014; Base: 435 to 494

Judging by its momentum, social media analytics will be the next technique to cross over to the mainstream: usage jumped 10 points to 46%.

Client-side researchers are more likely to have used the following than supplier-side researchers: social media analytics (47% to 36%) and Big Data analytics (39% to 29%). These are areas where the traditional market research industry might be losing market share to external firms. What are suppliers more likely than clients to see as the future of the industry? Suppliers have used mobile surveys, mobile qual, mobile ethnography, webcam interviews, microsurveys, gamification, facial analysis, and virtual reality more often than clients have.

Techniques that were added to the survey for the first time, with reported client-side usage, are:

- Behavioral economics models – 25%
- Internet of things/sensor-based data collection – 12%
- Wearables based research – 7%

We'll set an alarm on our Apple Watch for a year from now to see how these techniques are doing.

Techniques Used/Considered: Client/Supplier

Q1:2013 to Q2:2014; Base: 104 to 666 Client; 359 to 2702 Supplier

Trends in Approaches in Use and Under Consideration

The chart below shows the approaches in use and under consideration over the last three waves of GRIT.

Techniques used/Considered: Trend

Q1:2013 to Q2:2014; Base: 435 to 494 Q1-Q2 2014; 0 to 2229 Q3-Q4 2013; 0 to 644 Q1-Q2 2013

In Use Trends

It is clear that 2014 is the year that mobile arrived in a big way.

The big news, but perhaps not surprising news, is that mobile surveys are now the top approach, with about two-thirds saying they are using them. This is a jump of around 50% from the previous waves. It is clear that 2014 is the year that mobile arrived in a big way.

In general, all the numbers are higher in the latest wave, compared with the earlier waves. Given that the approaches are selected because they are believed to be growing, this growth is not surprising. The numbers do not, however, reflect volumes of work.

The rest of the list (other than mobile surveys) can be broadly broken into three categories:

1. Under 20%,
2. 20% to under 40%,
3. 40% to under 60%.

Those techniques which are currently under 20% are clearly niche at the moment. In some cases this may be their long-term position, for others (such as wearables) it may simply reflect their newness.


Digsite
Qualitatively, this is simply smarter.

The 20% to 40% group reflect approaches that are becoming established in toolkits amongst a range of companies, without yet being 'mainstream'. This group ranges from gamification at 23% to mobile qual at 37%. One of the interesting items in this group is Big Data analytics, which is one of the very few approaches that has not noticeably increased since the previous wave. Perhaps big data is proving difficult to integrate for most research companies, or hard to monetize?

The 40% to 60% group represent mainstream approaches that all researchers should be considering and many should be using. Text analytics and social media analytics have grown their scores well since the last wave. Online communities have been the top scorer in this category for a few years, and the number who say they are using them has grown again. Online communities have lost their top spot due to the rapid growth in mobile surveys, not because their growth has plateaued.

Under Consideration Trends

Online communities have lost their top spot due to the rapid growth in mobile surveys, not because their growth has plateaued.

Two phenomena jump out of when comparing in use vs. under consideration.

1. The range is narrow, from 21% considering biometric response to 38% considering big data analytics.
2. A number of the scores for the most recent wave have fallen from the previous wave, e.g. mobile surveys fell from 41% considering to 26% considering.

The scores for the items at the top of the 'In Use' table have fallen in the consideration column because they are beginning to reach natural limits. For example, since 64% said they were using mobile surveys, the number saying they were 'considering' had to fall from 41%. The total of using and considering mobile surveys is now 90%. Presumably, some of those not using or considering mobile surveys will be organizations that do not use surveys, e.g. some qualitative practices.

The two charts (in use and consideration) together confirm the importance of mobile (not just mobile surveys, but also techniques such as qual and ethnography). The tables also suggest that several approaches are (currently) firmly seen as niche, such as virtual reality and neuromarketing, since they are near the bottom of both the in use and considering tables.

Other Emerging Approaches

After asking respondents to rate the list of key techniques and approaches, we asked "Are there any other emerging technologies or new research approaches we have not listed you are considering trying out?"

Open-ended responses that were mentioned fairly often and which were not in the list provided by the questionnaire included:

- Geo/location approaches, such as geofencing, location tracking, GPS etc.,
- Working with text and images in ways other than text analytics and social media analytics, such as semiotics and discourse analysis,
- Variations on 'mobile' going beyond "mobile surveys", "mobile ethnography" and "mobile qual",
- A more generalised expression of passive and observational data and analysis,
- A variety of 'neuro' related approaches that respondents did not feel were captured by the term "Neuromarketing", for example implicit association and voice analytics (which might also be considered 'biometrics').

These responses were not coded nor added to the totals since they would not materially impact the relative rankings and would only marginally change the percentages. Overall, the open-ended "other" response is a good way to "keep our ear to the ground" as it uncovers emerging approaches that we might not be paying sufficient attention to.

A brave new world?

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The GRIT report always provides an opportunity for a moment of reflection and this year is no different. As an industry, we have to understand where we have come from and where the opportunities lie in the future in order to continue the evolutionary process.

I'm delighted to see that last year's disappointing growth and take-up of mobile as a methodology has turned around, both in terms of the number of companies currently using mobile in their studies (64%), as well as those considering the mobile approach. Negligible increases in tablet and smartphone uptake don't seem to be having a significant impact in the swing to mobile as a methodology. It seems that agencies are no longer sitting on the fence about mobile surveys and simply getting on with it which bodes well for the future.

And it's indications about what the future might bring that I found most interesting in this year's report.

The introduction of new quantitative and qualitative methodologies have risen (to 34% in Quant and 38% in Qual) which suggests that we are prepared to take on board new technologies, skills and knowledge as they become available to MR. This is good news for clients who want to shake up the research mix with non-traditional approaches such as behavioural economics, neuro marketing, social media analytics (46% of agencies are currently conducting some text analytics), online communities, and even wearable-based research. However I do still wonder how many clients and agencies are actually prepared to step out of their comfort zone. For example, gamification and text analytics have both been around for a long time but how many agencies are actually adopting it or using it in the research process? There is still too great a focus on 'tried and tested' techniques instead of experimenting with new ideas.

I think that the challenge going forward is absolutely going to be about getting the mix of adoption right. Braver clients are jumping early and exploiting new technologies – especially smaller agencies that are more flexible or customers in the Asia Pacific region have a record for being early adopters. More traditional clients are moving slower but that does not mean that they should be left behind.

If we intend to change over the next five years – and the report found that 32% expect some change and 25% expect a lot of change – we will need to work hard to make it happen.

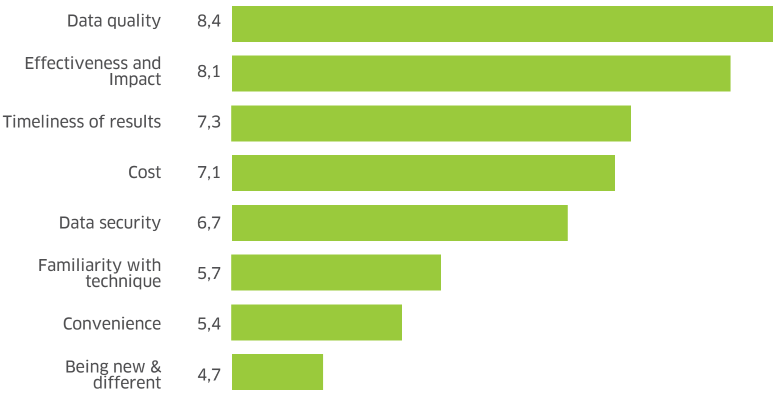
Perhaps the best place to start is to accept that we now operate in a world where marketing and business strategists are working alongside traditional MR professionals, as part of an Insight Division instead of a Research Department. We are increasingly presenting our findings to C-level executives and business analysts, instead of statisticians or data analysts.

The report clearly indicates a significant increase in the mix of people working within MR going forward and specifically mentions a rise in the number of "Designers and Data Visualisation Experts". This suggests that the industry has indeed accepted that it needs to employ different types of people with different skills to do different kinds of work in the future. More importantly, it has realised that making insight more visually representative and easier to understand is now an absolute 'must'.

I think this is the key point. The future of research will increasingly be determined by its approach to reporting. The quality and style of reports will govern how well research engages with business because of the changing nature of the client base. The convergence of MR with Voice of the Customer programmes highlights the demand for actionable insight and this desire to extract real business value from research is only going to continue.

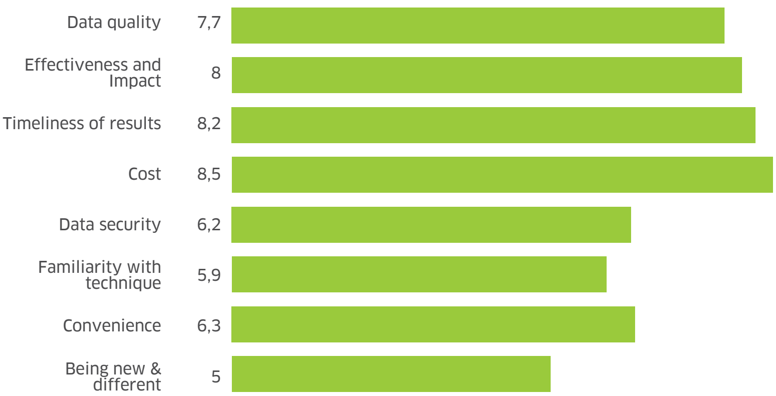
Criteria Importance in Data Collection Methods

Stated Importance of Data Collection Methods: Q1-Q2 2014



Q1-Q2 2014; Base: 675 to 713

Perceived Importance of Data Collection Methods: Q1-Q2 2014



Q1-Q2 2014 AND Supplier; Base: 494 to 543

Suppliers feel that their client counterparts give the highest importance to cost, with timeliness in second place, and quality third.

So now we know what tools from the toolbox are being used, but not why they are being chosen. With that in mind we asked participants what was important when they were selecting data collection methods for their research projects. We asked both suppliers and clients to indicate what they felt was important themselves, and we asked both groups to estimate what their counterparts would say. The figure below shows the importance ratings that the combined groups (clients and suppliers) gave to the data collection criteria.

It is interesting to consider the top factors in the consideration set above. Research professionals often speak about having to choose between "good, fast and cheap." The adage is that one can "pick any two" of these three qualities, implying a trade-off (i.e., that it is not possible to get all three at once). The first two attributes above, *Data quality* and *Effectiveness* and impact fall into the high quality, or "good" class of data collection attributes. Following that is *Timeliness of results,* which reflects "fast," and next we have Cost, a measure of the degree to which one delivers on the "cheap" attribute. So one could argue that the priority of importance in data collection does indeed flow as:

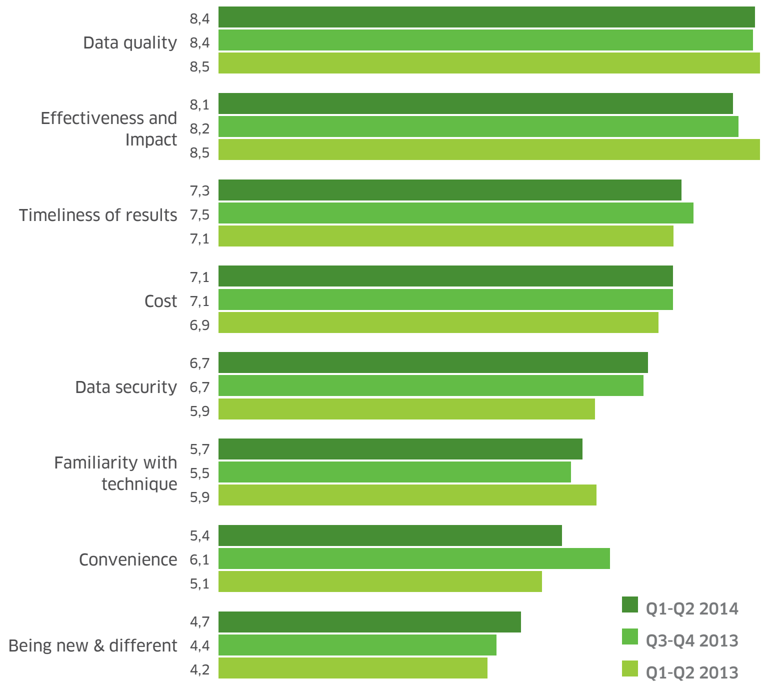
1. Good
2. Fast
3. Cheap

But now look at the *perceived* importance scores given to these attributes, as shown in the figure below. In this figure, we are showing the combined perceptions of clients and suppliers, with clients estimating the importance their supplier counterparts would give, and suppliers doing likewise for their client colleagues.

It is clear that the importance rankings are reversed! Suppliers feel that their client counterparts give the highest importance to cost, with timeliness in second place, and quality third. Now our rank order looks like:

1. Cheap
2. Fast
3. Good

Stated Importance of Data Collection Methods: Trend



Q1:2013 to Q2:2014; Base: 675 to 713 Q1-Q2 2014; 443 Q3-Q4 2013; 807 Q1-Q2 2013

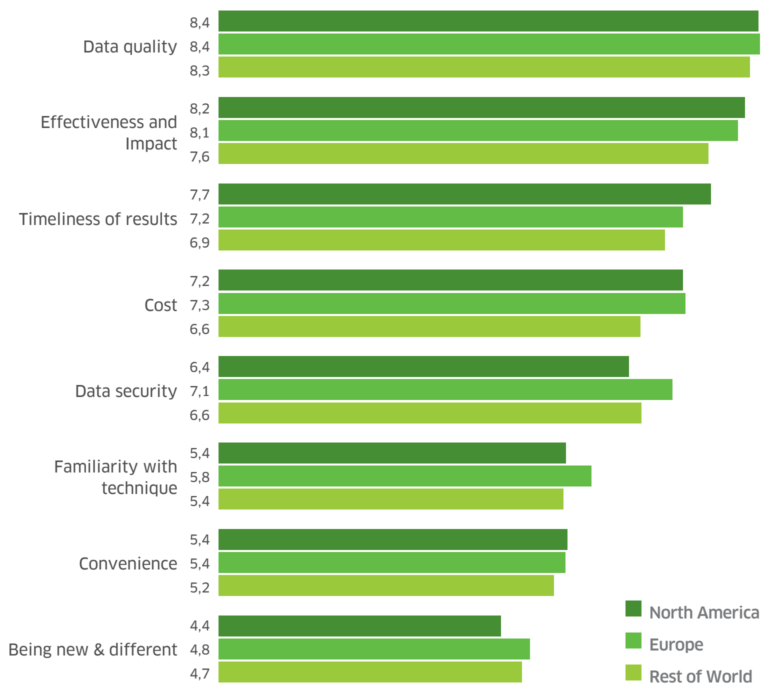
Why would researchers feel that clients assign "overly high" importance to cost? It may be that recent recessionary trends in the marketplace have forced both groups to give special attention to the cost of services, and both buyers and suppliers now strive to be cost-competitive. Or it may be that we are seeing cost (and perhaps timeliness) emerge as a differentiator in the final stages of the purchase process. That is, in early stages, quality is the top consideration, as a long list of contenders is winnowed down to the small set of finalists for the job. At this point, all finalists are considered of sufficient quality. They are "good enough." Then attention is turned to other considerations, such as cost, and the ensuing arduous and lengthy negotiations lead both groups to conclude that their counterpart is focused on this attribute.

We do not have sufficient history of responses in GRIT to conclude one way or the other in this discussion. As can be seen in the figure below, the relative order of importance of the selection criteria for data collection have remained quite consistent over the three time periods in which this issue was explored. With the exception of *Convenience* in Q3-Q4 2013, the stated importance of the criteria has remained constant across the GRIT waves.

We do see one trend of importance in the figure above: the increasing importance is given to *Data security.* This criterion has continued to rise in importance, and now is at a level almost equivalent to *Cost.* Highly publicized security breaches in retail, finance and entertainment industries have likely contributed to this trend. Interestingly, we see that Europeans have exhibited a particularly strong sense of the importance of *Data security,* but this has long been a stalwart of professionals in that geography (see figure below).

Increasing importance is given to Data security.

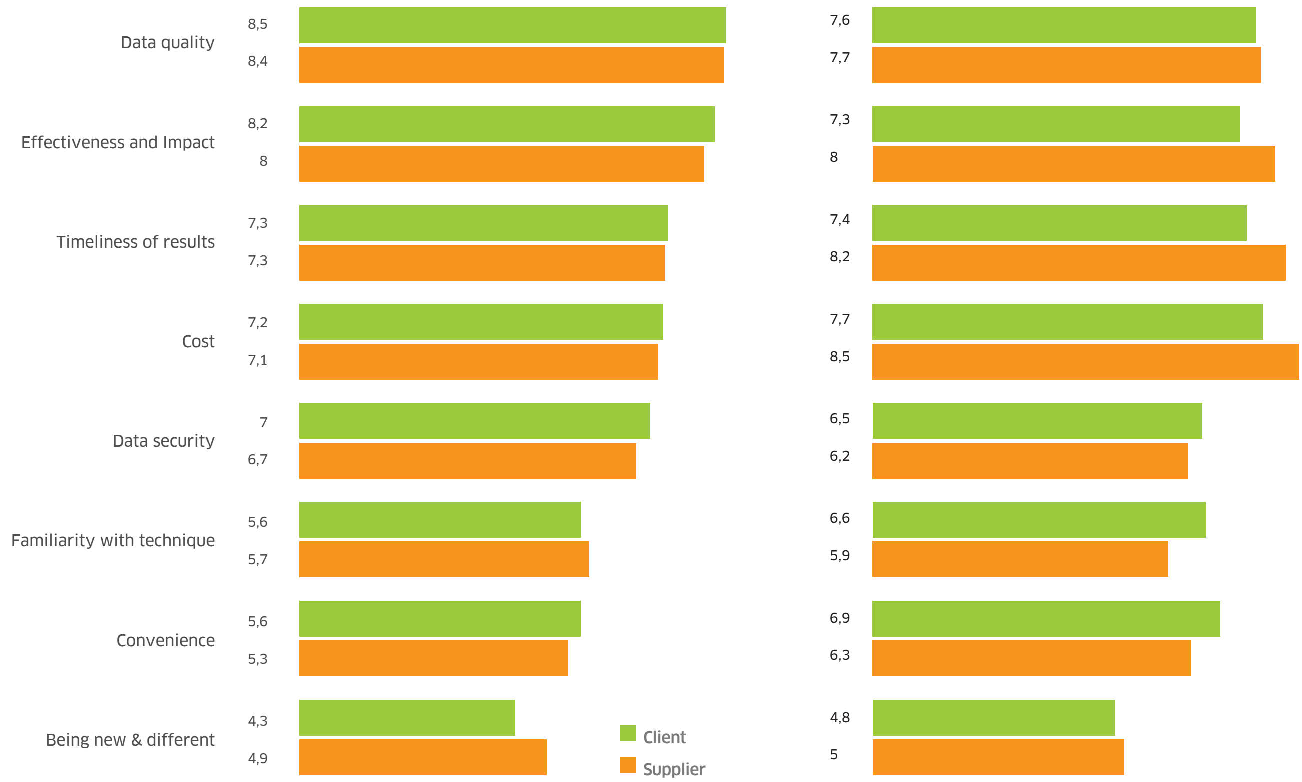
Stated Importance of Data Collection Methods: Geography



Q1-Q2 2014; Base: 138 to 162 North America; 168 to 187 Europe; 46 to 56 Rest of World

Perhaps the best view of the data collection criteria is shown in the figure below, which depicts both stated and perceived importance of clients and suppliers on this issue. One interesting difference that emerges is that clients and suppliers alike feel that their counterparts place greater emphasis on the lower-ranking criteria than they themselves do. Again, this may be reflective of the fact that issues like *Convenience* and *Being new and different* get discussed during project pitches and final negotiations.

Stated vs. Perceived Importance of Data Collection Methods: Client/Supplier



Q1-Q2 2014; Base: 154 to 172 Client; 510 to 548 Supplier

From Buzz to Business: A New Approach to Innovation

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I recently attended a sporting event where the list of items banned from the stadium, along with the usual glass bottles and firearms, included drones. The absence of fans releasing drones programmed to trip athletes on the opposing team or spike their sports drinks was good news, but this was also a reminder of how technologies that just a few years ago inhabited the realm of science fiction are now common enough to be banned.

Likewise, new research innovations that were hailed as revolutionary and transformational just a couple of years ago are now becoming more familiar in our industry, as evidenced by the results of this year's GRIT survey.

The usage of techniques like mobile ethnography, eye tracking, neuromarketing and biometric response has increased since last year. But there's evidence that with more experience we now know that delivering real value to clients with some of these new techniques is not easy; fewer people now include biometrics and neuromarketing on the list of techniques they have used most in the past year. Perhaps because we now understand the practical issues surrounding some innovations and realize the challenges of cost and scale.

This doesn't mean our industry is tired of innovation; those who saw the dizzying display of new approaches at the Greenbook IIEX conference this year know that creativity is thriving in our field. But we are less likely to be entranced, and more likely to be doing the hard work of understanding how, when – and whether – these solutions can be useful. If we are progressing through Gartner's *Hype Cycle for Emerging Technologies* we may be moving from the *Peak of Inflated Expectations* to the *Slope of Enlightenment,* after which, if we follow the model, we can look forward to innovations which reside on the *Plateau of Productivity.*

The focus is increasingly on innovations with real substance, practically applied, battle-tested in the market and proven to have real customer value. Examples are technology platforms that support multi-country research and the respondent's choice of communication device. Researchers need to know that new innovative technologies and applications will grow and scale with them worldwide.

We often talk about being in an era of research transformation, but many of this year's GRIT respondents say that in five years' time research will all be about "data"– which is what researchers have been working with all along.

Therein lies a reason to be optimistic about the future of research. For who understands data better than researchers? "Big data" is a new opportunity which some think will revolutionize everything and cause surveys – and perhaps research – to become a thing of the past. But as we learn and understand more about the opportunities that big data can bring we also learn more about its limitations.

Interestingly, there was no increase reported this year in either the usage of big data analytics, or in the number of people who said they had it under consideration. A recent *New York Times* article speaks of the bottlenecks and need for extensive human "data wrangling" required before big data can yield much value. Even after the data has been successfully "wrangled", it is best at delivering who, what and when. To understand how meaningful the correlations are, and to get at the underlying causations, you need researchers.

GRIT respondents think there will be less need for surveys in five years. And if we're talking about the long, tedious, grid-ridden traditional surveys common today, that's a good thing. The average online survey length we see at SSI is now a depressing 23 minutes – up over 60% from just four years ago. Surveys as they should be – clean, lean and appealing to the people who take them – are the perfect complement to big data. And with the great strides that have been made in panel recruitment and management, we can target high quality respondents more effectively than ever. With big data you get the what, who and when; surveys add the all-important why and what next and the richer, deeper data that is the essential complement to big data.

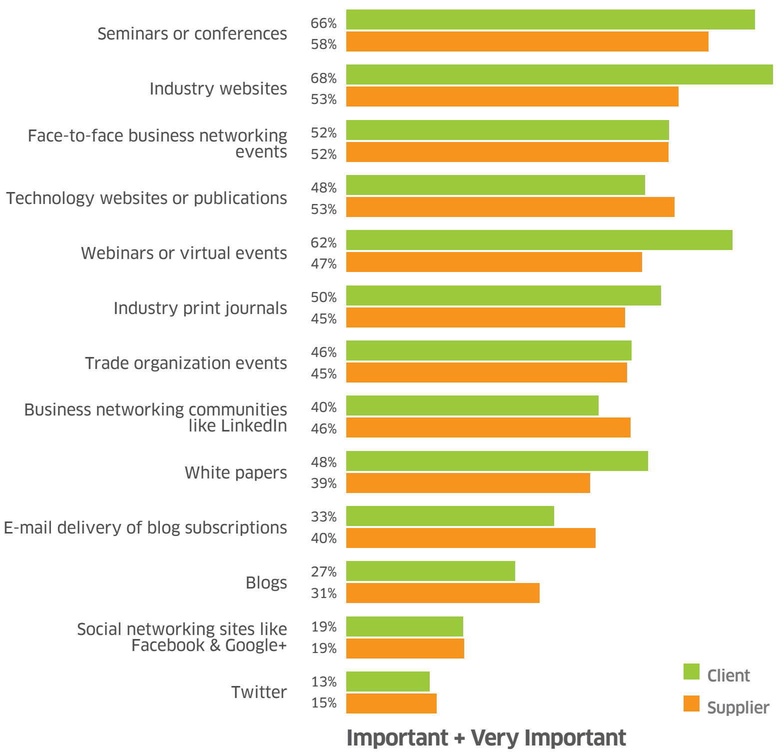
What the industry needs now is more knowledge about how these new tools can deliver insights and meet our clients' goals, more shared learnings and, if not best practices, then at least an understanding of things to avoid.

The GRIT survey results this year show a realistic attitude to the challenges we face with reduced resources and the need to do more with less, an understanding that our industry will be different in five years' time, and a more pragmatic approach to innovation. It looks as though the industry is getting better prepared for what's next.

Keeping Informed and Connected to the Industry

Information Sources: Important (Top 2 Boxes) by Wave	Q1-Q2 2014	Q3-Q4 2013	Q1-Q2 2013
Seminars or conferences	60%	62%	43%
Industry websites	57%	55%	47%
Face-to-face business networking events	52%	*	*
Technology websites or publications	51%	53%	40%
Webinars or virtual events	51%	59%	44%
Industry print journals	46%	40%	30%
Trade organization events	45%	45%	33%
Business networking communities like LinkedIn	44%	51%	49%
White papers	41%	49%	35%
E-mail delivery of blog subscriptions	38%	32%	33%
Blogs	30%	40%	30%
Social networking sites like Facebook & Google+	19%	27%	18%
Twitter	14%	21%	16%

Information Sources: Client/Supplier



Q1-Q2 2014; Base: 113 to 133 Client; 366 to 410 Supplier

We asked respondents to rate the importance of each of the following information sources for staying abreast of developments in research methodologies and the table at right shows the percentage ticking the top two boxes (Important and Very Important).

The two main messages from this data are:

1. Face-to-face (e.g. conferences) and traditional sources (industry websites and print journals) are generally more important than social media (e.g. Twitter and Facebook).
2. The movement seems to be away from the social and virtual to the more traditional.

A key factor to keep in mind when looking at these two findings is that the GRIT sample is generally assumed to be more wired and plugged into social media than the norm. Even among this group, the social options tend not to be as important as the traditional.

The pattern of preferences is quite similar between clients and suppliers, but clients are even more likely to say seminar and conferences are important (66% versus 58% for suppliers) and that Industry websites are important (68% versus 53% for suppliers).

In a changing industry, understanding how professionals keep connected and informed is important both from a commercial standpoint as well as for personal development. All involved in selling, evaluating, buying or using insights-related approaches should factor these channels into their planning.

In the next section we'll look at the organizations involved in delivering these various channels and their level of influence on GRIT participants.

Face-to-face (e.g. conferences) and traditional sources (industry websites and print journals) are generally more important than social media.

Influential Industry Organizations & Information Channels

Organization	Mentions
ESOMAR	212
LinkedIn	167
Greenbook	166
AMA	116
Quirk's	107
BVM	106
MRS UK	89
MRA	88
ARF	67
Research & Results	51
NewMR	49
QRCA	46
CASRO	45
IIR/TMRE	44
marktforschung.de	43
MR WEB/Daily Research News	32
XING	31
NGMR	26
AMSRS	24
Planung & Analyse	20

Let's put it out there: it may be seen as self-serving for an organization like GreenBook to include questions related to our own role within the industry. We do it because we believe it's valuable for researchers to understand how different organizations and information channels contribute to the market research industry and profession, each in their own way. As with all aspects of the GRIT report, the reader should take into account the composition of the participants when interpreting and generalizing the findings. The data is what it is; the interpretation is what you make of it.

We asked GRIT participants a series of verbatim and ranking questions:

1. List the professional and/or trade associations, business event organizers, blogs or professional social network groups relevant to the marketing or marketing research industry you are a member of, pay attention to, or contribute to (up to 7).
2. Which do you consider to be the most influential to your strategic decisions?
3. What is the main factor that makes them stand out for you as influential?
4. Which do you consider to be the second most influential to your strategic decisions?
5. Which do you consider to be the third most influential to your strategic decisions?

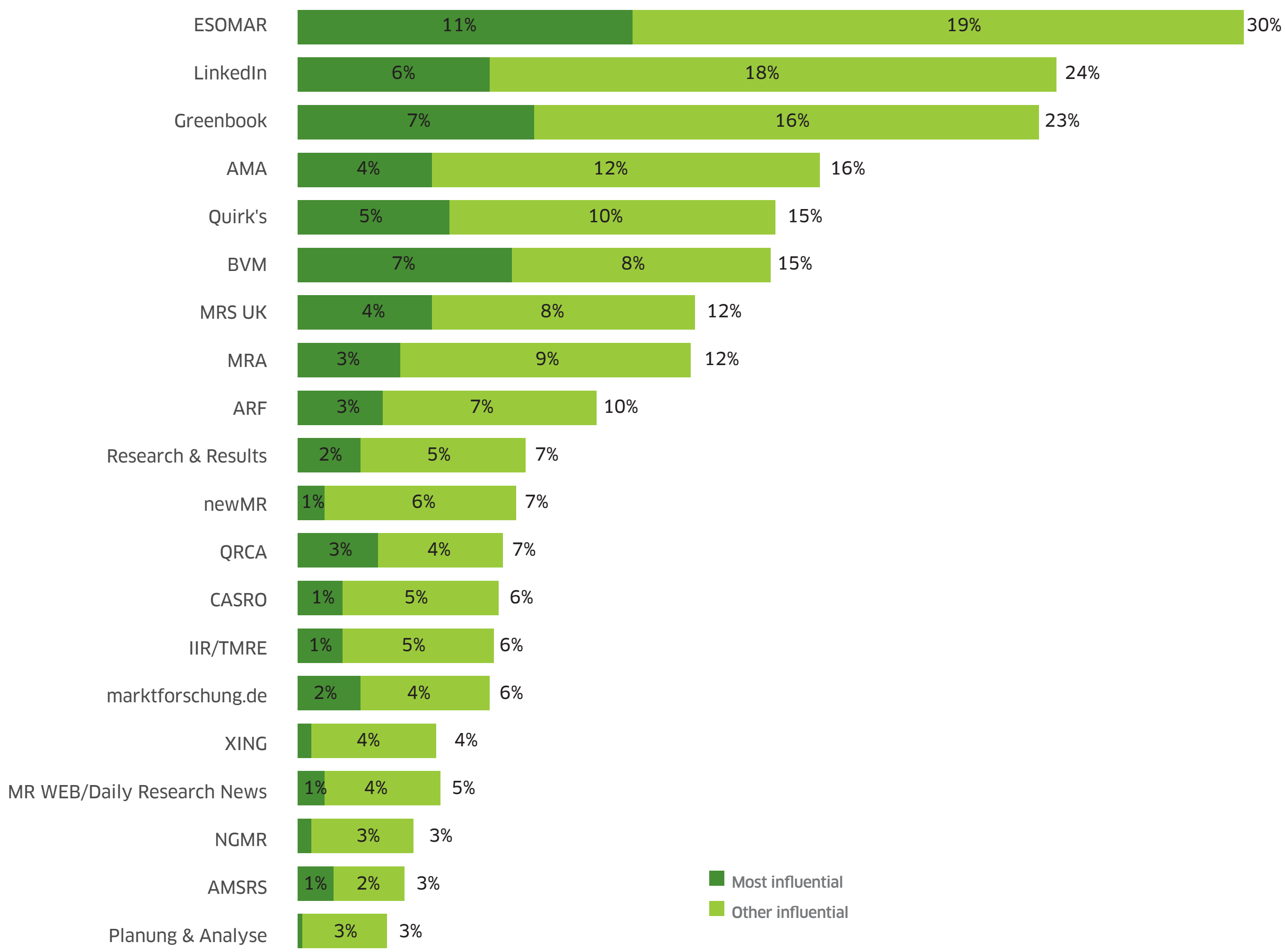
GRIT authorship is a collaborative effort with many participants, but due to the perhaps controversial nature of these findings, specifically the inclusion of GreenBook in the rankings, we feel it's important to identify the analysts and authors here. Data for this section were collected as top of mind responses, and the following analysis was based solely on coded verbatims. Coding was performed by GMI and Bottom Line Analytics. Additional analysis was conducted by Ellen Woods of Gen2 Advisors and Masood Akhtar of Bottom Line Analytics.

With all caveats covered, the table shows the top 20 organizations, in order of their cumulative mentions. Other organizations had fewer than 20 mentions. In total, 129 organizations were mentioned, with a cumulative count of 2,461 distinct mentions. The absolute base size was 713.

The full list of organizations with the number of their corresponding mentions can be accessed via the online dashboard. If you use the Explore mode in the dashboard you can click on any chart and then use the Cells button to select the counts (i.e., n).

Here is how many percent of respondents mentioned each of the twenty organizations:

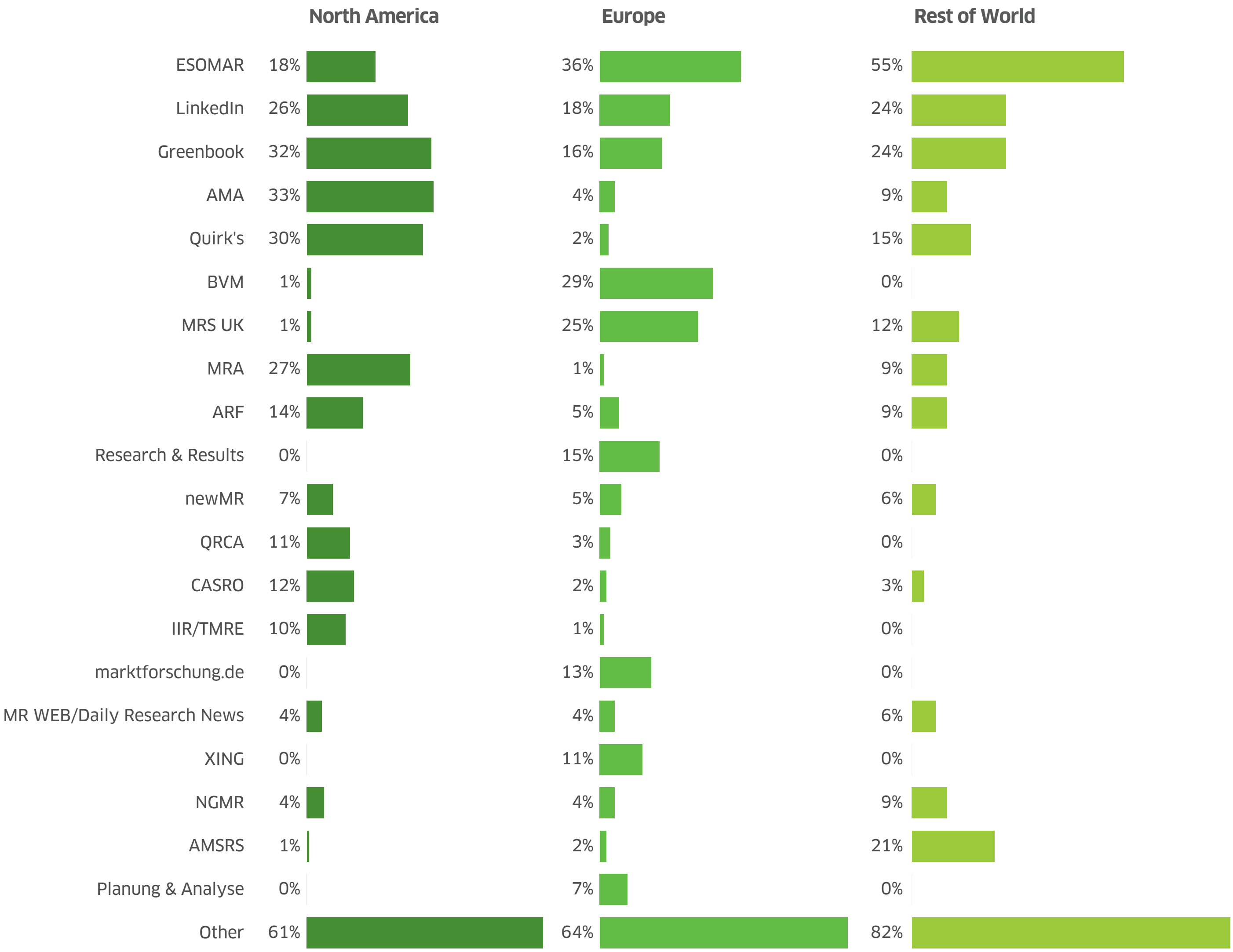
Influential Organizations – Autumn 2014



Q1-Q2 2014; Base: 713

It should be noted that among respondents, 50% came from outside of North America, and for clarity, brands like ESOMAR, MRS, and GreenBook had all sub-entity responses rolled into a singular brand response (examples include Research World Magazine = ESOMAR, Research.live = MRS, IIeX = GreenBook, etc.). Where the response data was related to LinkedIn as a brand, it was counted under "LinkedIn"; where specific LinkedIn groups were referenced, those groups were listed separately and not as a part of the "LinkedIn" response totals.

Influential Organizations – Geography



Q1-Q2 2014; Base: 181 North America; 182 Europe; 33 Rest of World

Unsurprisingly, the top 3 performed relatively well globally. ESOMAR has parlayed their positioning as the de facto global trade body well, and are top of mind in Europe and the rest of the world more than LinkedIn and GreenBook combined (although they lag behind in North America).

What stands out in this ranking is the emergence of LinkedIn as a brand by itself. The platform has evolved from a networking utility to a database-driven repository of content with discussion forums and other tools for extensive knowledge sharing and dissemination. It now very obviously fills a vital niche in the global influencer network. LinkedIn's audience is far broader than just market research professionals, and it offers access to millions of users, groups, and content items from around the world, and in virtually any domain one may think of. GRIT participants found this to be important and useful.

Openness and accessibility of social networking in the business/professional context is something that any organization wishing to develop influence in their respective industry should pay attention to.

What Makes an Organization Influential?

Now, rather than letting this be a popularity contest, we wanted to understand why these organizations were considered influential, and the results are illuminating.

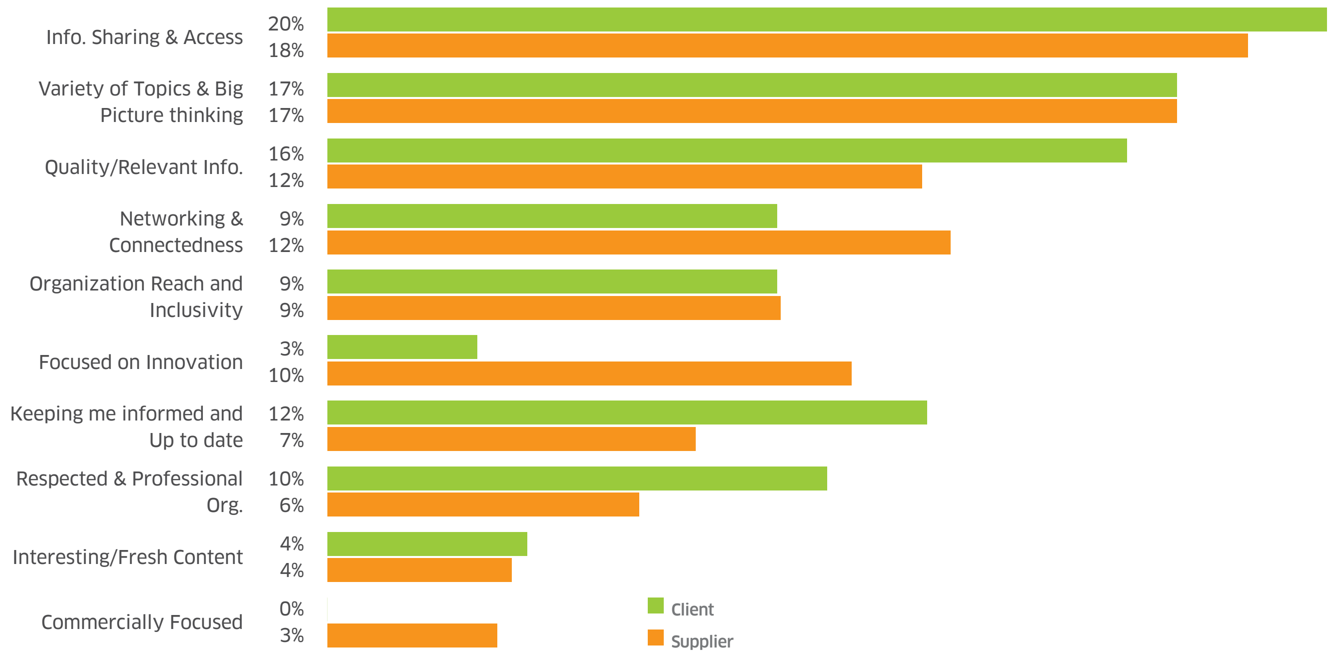
The next table shows the top 20 mentioned organizations by the codes for why they are influential.

ESOMAR performed strongly in all influence categories and is considered the top influencer.

	Info. Sharing & Access	Variety of Topics & Big Picture thinking	Quality/Relevant Info.	Networking & Connectedness	Organization Reach and Inclusivity	Focused on Innovation	Keeping me informed and Up to date	Respected & Professional Org.	Interesting/Fresh Content	Commercially Focused	NET
ESOMAR	24	25	12	16	22	17	7	10	4	6	143
LinkedIn	27	27	9	9	11	11	12	5	3	4	118
Greenbook	29	31	8	14	7	19	10	5	4	2	129
AMA	19	18	16	5	11	5	5	5	1	1	86
Quirk's	22	12	9	9	3	9	4	9	2	0	79
BVM	4	4	2	7	3	2	1	6	4	1	34
MRS UK	15	12	5	6	5	8	6	4	1	4	66
MRA	16	9	12	5	7	5	6	6	0	1	67
ARF	5	6	12	5	1	4	4	3	1	2	43
Research & Results	3	4	0	5	3	1	3	4	0	0	23
newMR	8	9	4	6	2	5	3	2	0	1	40
QRCA	8	7	8	3	2	6	2	0	2	0	38
CASRO	10	6	5	3	3	4	3	4	0	1	39
IIR/TMRE	7	7	3	3	4	5	3	2	0	0	34
marktforschung.de	0	4	2	5	2	0	4	1	1	0	19
MR WEB/Daily Research News	4	4	2	2	0	1	7	3	0	1	24
XING	1	0	0	2	2	2	1	3	2	0	13
NGMR	6	3	1	3	2	2	0	0	1	0	18
AMSRS	1	4	2	4	0	1	1	2	0	1	16
Planung & Analyse	0	1	0	2	1	0	1	2	1	0	8
Other	59	57	42	34	28	28	29	19	11	10	317

Heat map is displays z-Statistics testing the association between the organizations and the drivers. Significant results are shown by an arrow; Q1-Q2 2014; Base: 80 Info. Sharing & Access; 75 Variety of Topics & Big Picture thinking; 53 Quality/Relevant Info.; 47 Networking & Connectedness; 37 Organization Reach and Inclusivity; 39 Focused on Innovation; 37 Keeping me informed and Up to date; 30 Respected & Professional Org.; 13 Interesting/Fresh Content; 11 Commercially Focused

Drivers of Influence – Client/Supplier



Q1-Q2 2014; Base: 100 Client; 353 Supplier

ESOMAR performed strongly in all influence categories and is considered the top influencer. Respondents cited the organization's reach and inclusivity as the strongest differentiator. LinkedIn was similarly strong across almost all drivers with the variety of topics and big picture thinking being their defining characteristic, a trait shared by GreenBook that actually was most highly rated on that, along with information sharing and access. The AMA outshone everyone else on quality and relevance of information.

The top mentions as noted above were *Info sharing & access* and the *Variety of topics and big picture thinking.* One point of interest is the lack of representation for big data and analytics among the top information channels. Many of the responses also pointed toward a stronger affiliation with and rating for multi-channel organizations as evidenced by the performance of ESOMAR, Greenbook, and LinkedIn, who *continually* distribute content through *multiple* channels. This was true even where the content was largely online or presented in interactive discussion formats.

Another point of interest is the relatively weak level of influence given to innovation. This may be due to the fact that a fairly large number of respondents were suppliers, and also to the fact that many of the organizations were not considered to be innovation-focused or were representative of a particular method or technique that is marketed as an innovative approach.

The volume of response related to information-sharing and big picture initiatives indicates a hunger for content and a need for direction. While it has been previously noted that the industry is in a state of transition, the direction often remains unclear. Therefore, it seems likely that influence to a large extent depends on how an organization helps others navigate change, and whether it offers a road map towards the future.

When looking at the breakdown by clients/suppliers, a few interesting findings jump out: Clients and suppliers were generally equally focused on *"information sharing, variety of topics,* and *reach/inclusivity* as being key drivers. Clients also emphasized *quality/relevant information, keeping informed & up to date,* and the *reputation and professionalism* of the organization. Unsurprisingly, suppliers put more stock in *networking, innovation,* and *commercial focus.*

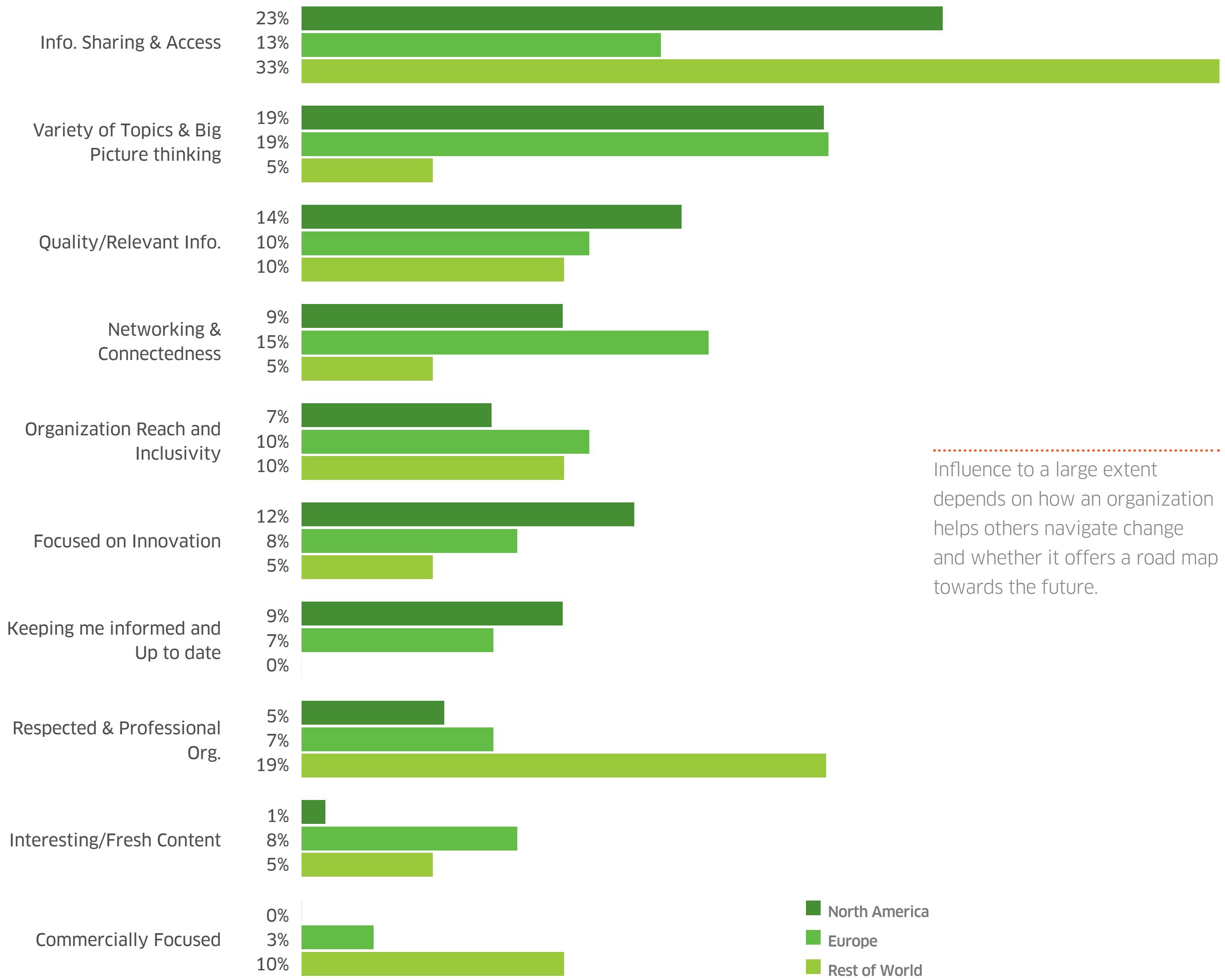
When we look at the geographic breakdown, a few surprising differences emerged as well:

North America	
Info. Sharing & Access	23%
Variety of Topics & Big Picture thinking	19%
Quality/Relevant Info.	14%
Focused on Innovation	12%

Europe	
Variety of Topics & Big Picture thinking	19%
Networking & Connectedness	15%
Info. Sharing & Access	13%
Quality/Relevant Info.	10%
Organization Reach and Inclusivity	10%

Rest of World	
Info. Sharing & Access	33%
Respected & Professional Org.	19%
Quality/Relevant Info.	10%
Organization Reach and Inclusivity	10%
Commercially Focused	10%

Drivers of Influence – Geography



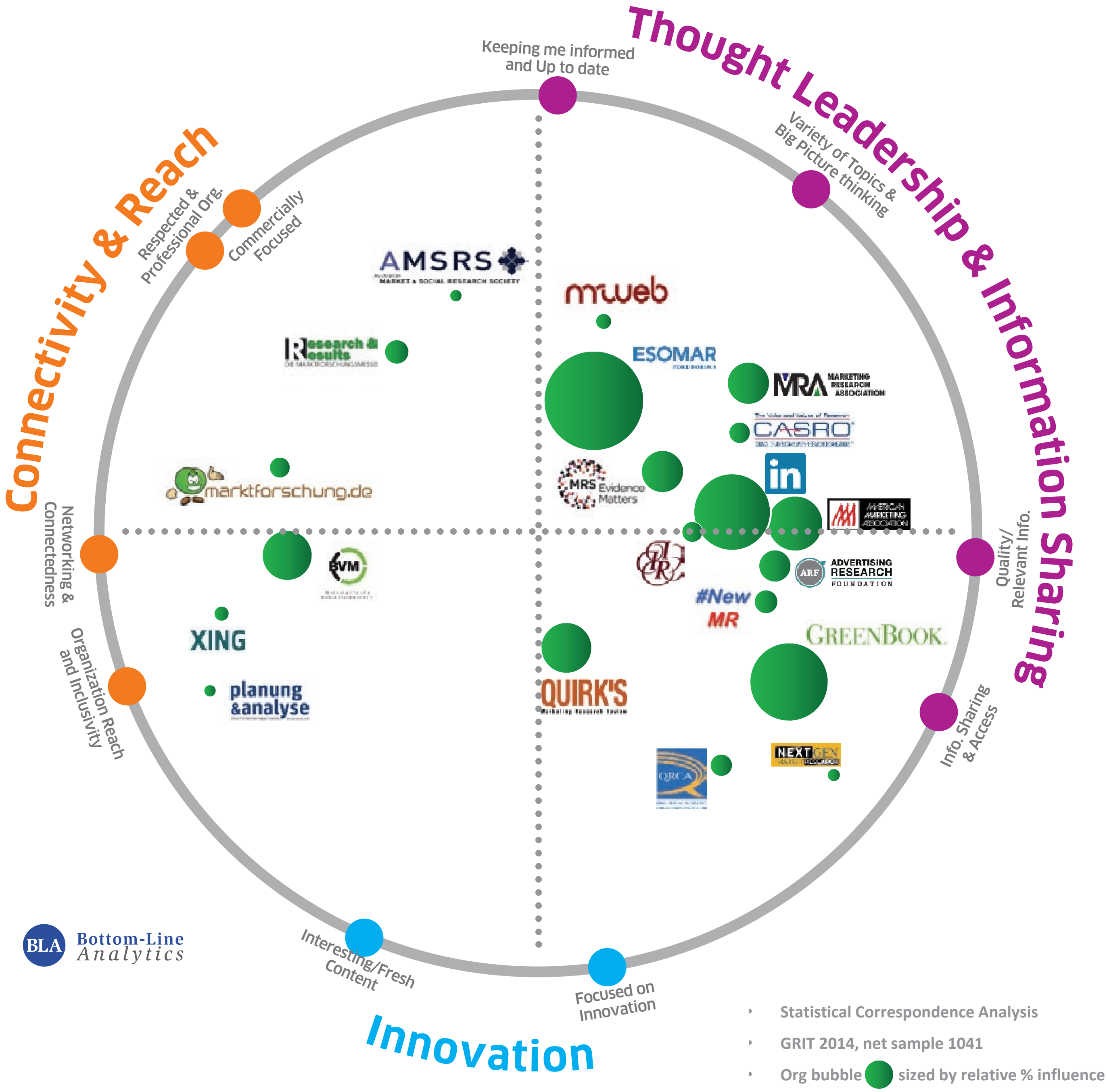
Influence to a large extent depends on how an organization helps others navigate change and whether it offers a road map towards the future.

Q1-Q2 2014; Base: 116 North America; 115 Europe; 21 Rest of World

Top Performers

For this analysis of this study, the concept of influence was divided into three basic areas: *connectivity & reach, thought leadership & information sharing*, and *innovation.* A further assessment was done on the level of influence associated with each entity, which is demonstrated in the size of the dot associated with the entity. The graphic below demonstrates performance within the three analysis areas while the larger circle defines the coded points of differentiation (in no particular order or relevance).

Top 20 Most Influential Organisations and Key Drivers of Influence



- Statistical Correspondence Analysis
- GRIT 2014, net sample 1041
- Org bubble sized by relative % influence
- Central position implies least differentiation

Connecting the dots

Integrated Systems for Research & Innovation

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Innovation, as a buzzword, has become very popular in the last five or so years. The truth is that it's always been critical for businesses. Innovation means new ideas and products, and without innovation, companies die. What do companies need to do to generate an environment that is "innovation" friendly?

Consider Thomas Edison and the invention of the electric lightbulb. The first lightbulbs used platinum wire, and this was not practical for mass usage due to the cost. He needed a cheaper material that would generate light, and systematically tested thousands of materials until determining that a carbonized filament derived from bamboo worked best. He said that, "Genius is one percent inspiration, ninety-nine percent perspiration." For Edison, innovation was *a process.*

Innovation and Market Research

The call for innovation in market research is constant; the response to this is less so. It can be argued that the vast majority of market research is the same as it was 20 years ago. There are still mountains of cross tabulations in market research, although they are generally not printed out now. Survey styles have not changed very much. For the mobile platform, there has had to be some adaptation to the smaller screen format, but it is still possible to see complex grids presented in a mobile browser. These are, of course, totally unusable.

A big opportunity for change is the *end to end* process of research, and integrated software tools can help this. It bears to remember Edison in this context - he saw his genius as having a lot of process: the 99% perspiration.

Agile Innovation

Agile research is a concept that has been discussed recently. The concept of "agile management" is derived from a methodology which has been widely adopted in software development. In the past, software development was usually carried out via what I would term "big design up front" (BDUF). Agile development, on the other hand, emphasizes constant feedback from the user at all stages of the development process and uses this feedback to implement changes to the software.

Applying agile development principles to market research means that research problems or the search for answers can be carried out in a rapid cyclical manner. Constant feedback on the research outcomes means that numerous small projects need to be carried out. The idea that one, large, research project will solve the research problem is replaced by a series of smaller projects, all the time evolving towards a solution.

Eliminate and Innovate

Innovation usually carries the connotation of something being changed, either a process or product. But eliminating a product or process is just as much an innovation as adding something new. Research can be victim to the old advertising saying from John Wanamaker: "Half my advertising is wasted, I just don't know which half." Very often, this is the case with market research. This is where integrated systems can help by allowing all of your survey results to be available within one system. This speeds up the process of comparison and elimination tremendously to enable the experimentation with new methodologies.

Better Mousetraps

There may be twenty new versions of a product to be evaluated. Being able to test each one quickly hastens the emergence of the best version. It may not be feasible to change the management of a research project to use agile principles. However, by using an integrated software platform for data-collection, access, communities, and dashboard - the execution of a research project can become far simpler. The use of panels or communities remains strong, as well as the usage of mobile research.

We've seen how process is needed to foster innovation, and in this respect, integrated research platforms are a great tool. In any creative process, the tool set used has significance. You can have many complex tools, but very often all these do is increase the difficulty of the task at hand - they do not necessarily help innovation.

Conclusions

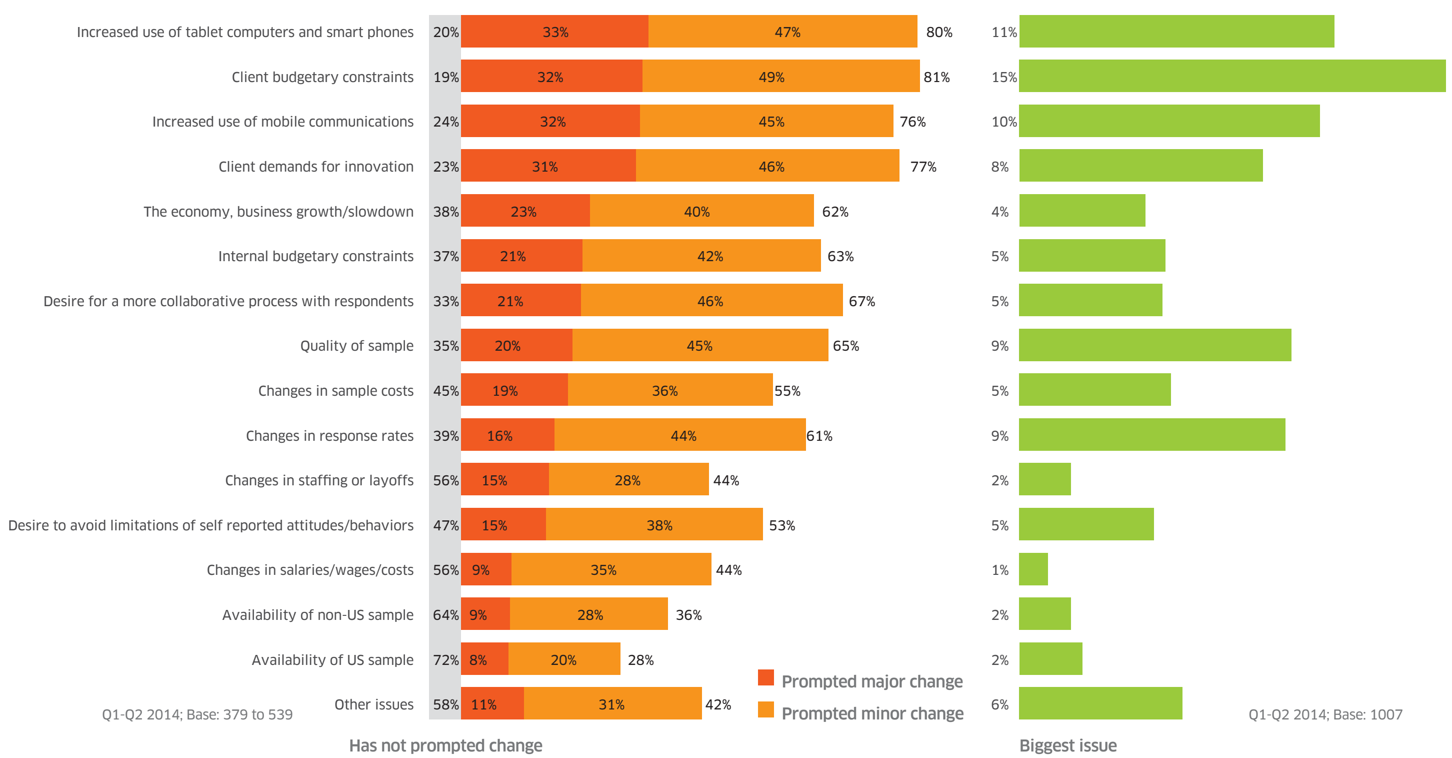
Highly integrated research software systems have the potential to promote innovation in a very concrete way. Firstly, they can be used to implement more iterative approaches to research, which can explore the problem space being investigated more efficiently. The need for complex research specification up front can be mitigated by the flexibility that integrated research software systems provide. Secondly, the ease of use of such systems, which can contain facilities such as panel management, data collection and data analytics in one environment, makes the research process less of a cognitive load on the researcher. The logistics of a research project can be greatly simplified - this is a very significant advantage.

The Drivers of Change in Data Collection

We asked respondents to assess different issues that may have "prompted change in how you collect data" for market research. Clients and suppliers alike first indicated if each of the proposed issues prompted a major change, a minor change, or no change in the last year. They subsequently selected the "one issue that has had the greatest impact" on data collection changes. The figure below shows the summary responses.

80% of GRIT respondents cited use of mobile devices as a factor prompting changes in their data collection methods.

Issues Prompting Change: Q1-Q2 2014



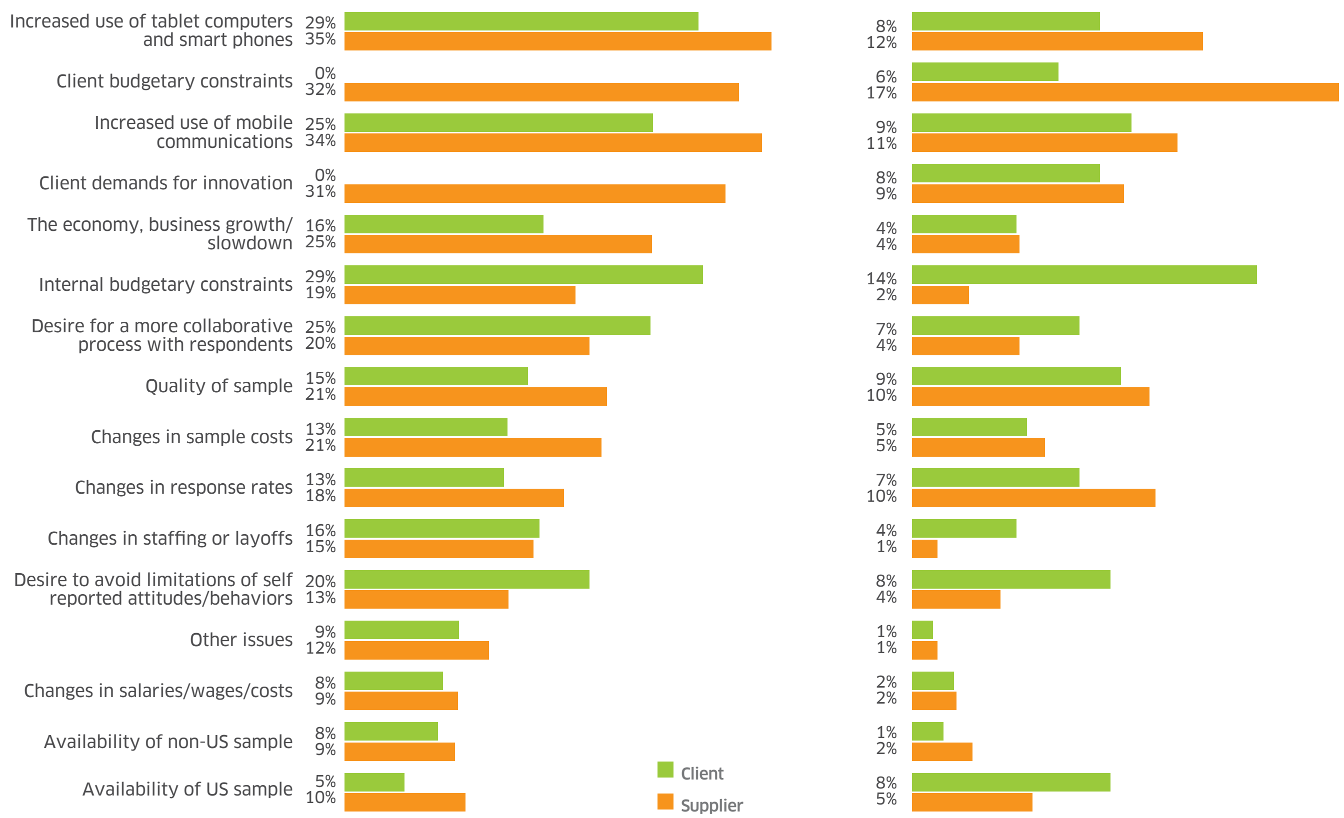
Interestingly, two of the top four issues in the figure above are related to managing the substantial impact of new (mostly mobile) communications devices growing rapidly in popularity/usage. Tablets and smartphones have become ubiquitous, and researchers are finding that they must accommodate these devices if they want to reach highly-valued respondents. In fact, 80% of GRIT respondents cited use of mobile devices as a factor prompting changes in their data collection methods, and nearly as many (77%) cited general increases in mobile communications as a factor.

In order to get a more complete picture of the issues driving changes in data collection, it is instructive to look at the choices respondents made when selecting the one issue that had the "greatest impact," as reflected in the right-hand portion of the figure above. In this "single issue" analysis, we can collapse our issues into categories as shown in the table below.

BIGGEST ISSUES PROMPTING CHANGE IN DATA COLLECTION

Increased use of tablet computers and smartphones	**Devices/Technology**	21%
Increased use of mobile communications		
Client Budgetary constraints	**Resource Pressures**	32%
The economy, business growth/slowdown		
Internal budgetary constraints		
Changes in sample costs		
Changes in staffing or layoffs		
Changes in salaries/wages/costs		
Client Demands for innovation	**Evolving Processes**	27%
Desire for a more collaborative process with respondents		
Changes in response rates		
Desire to avoid limitations of self-reported attitudes/behaviours		
Quality of sample	**Sample Issues**	13%
Availability of non-US sample		
Availability of US sample		

Issues Prompting Change: Client/Supplier



Q1-Q2 2014; Base: 0 to 144 Client; 343 to 399 Supplier

Q1-Q2 2014; Base: 234 Client; 773 Supplier

From the table, it becomes apparent that, while "Devices/ Technology" issues are still important, more GRIT respondents actually selected a "Resource Pressures" or "Evolving Processes" issue as the single most important factor driving changes in data collection. The residual effects of the recession remain as a strong influence on the industry. And perhaps as a result, we see considerable pressures to adapt research methods to be more innovative and responsive.

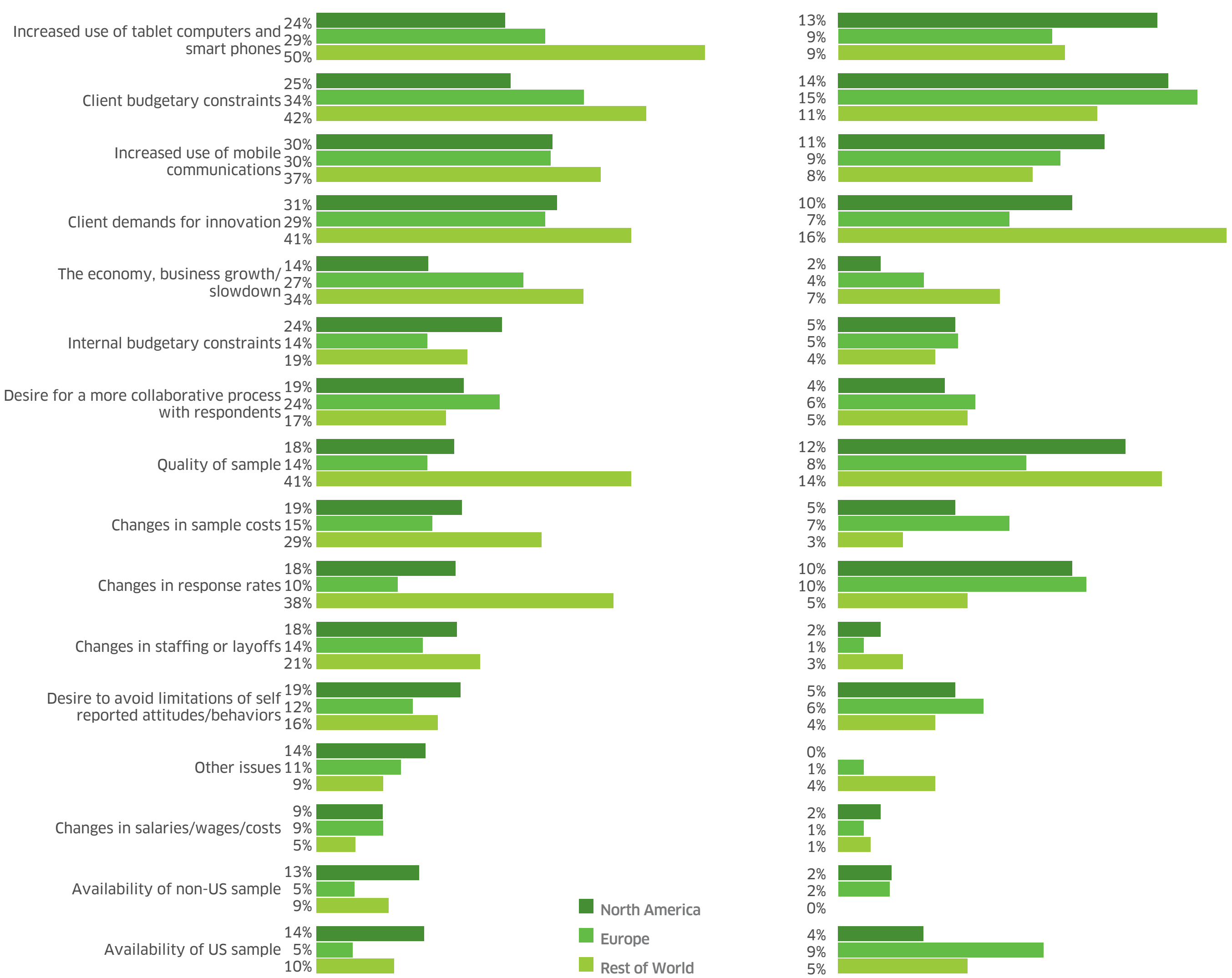
There were some apparent differences in what clients and suppliers cited as important drivers of change in data collection that, in reality, were quite consistent (see figure below). Yes, suppliers were significantly more likely to claim that the *economy, business growth/slowdown* was a major issue. But [new call-out:] clients were more likely to mention *internal budgetary constraints*, while suppliers often cited "Client budgetary constraints." The net result is that both groups recognized that corporate budgets have been under pressure to reduce research expenses.

From a worldwide perspective, we can see that North American and European GRIT respondents were quite similar in their views about issues driving change in data collection, with only one issue showing significant issues between the groups – availability of sample – and this was an issue of relatively low importance. Respondents from the Rest-of-World, however, differed considerably from their North American and European counterparts in several notable areas. They were more likely to note that *quality of sample, changes in response rates,* and *client demands for innovation* were substantial drivers of change.

Suppliers were more likely to claim that the economy, business growth/ slowdown was a major issue.

Clients were more likely to mention internal budgetary constraints.

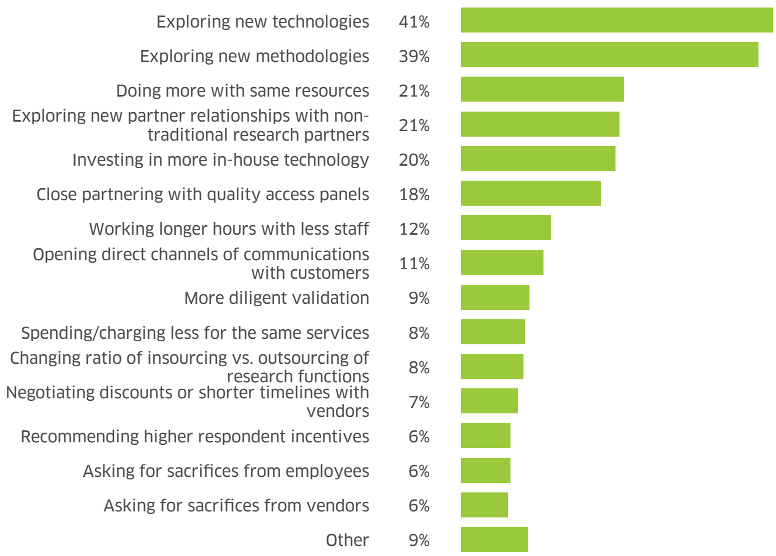
Issues Prompting Change: Geography



Q1-Q2 2014; Base: 71 to 124 North America; 93 to 151 Europe; 32 to 43 Rest of World

Q1-Q2 2014; Base: 225 North America; 280 Europe; 74 Rest of World

Steps Taken: Q1-Q2 2014

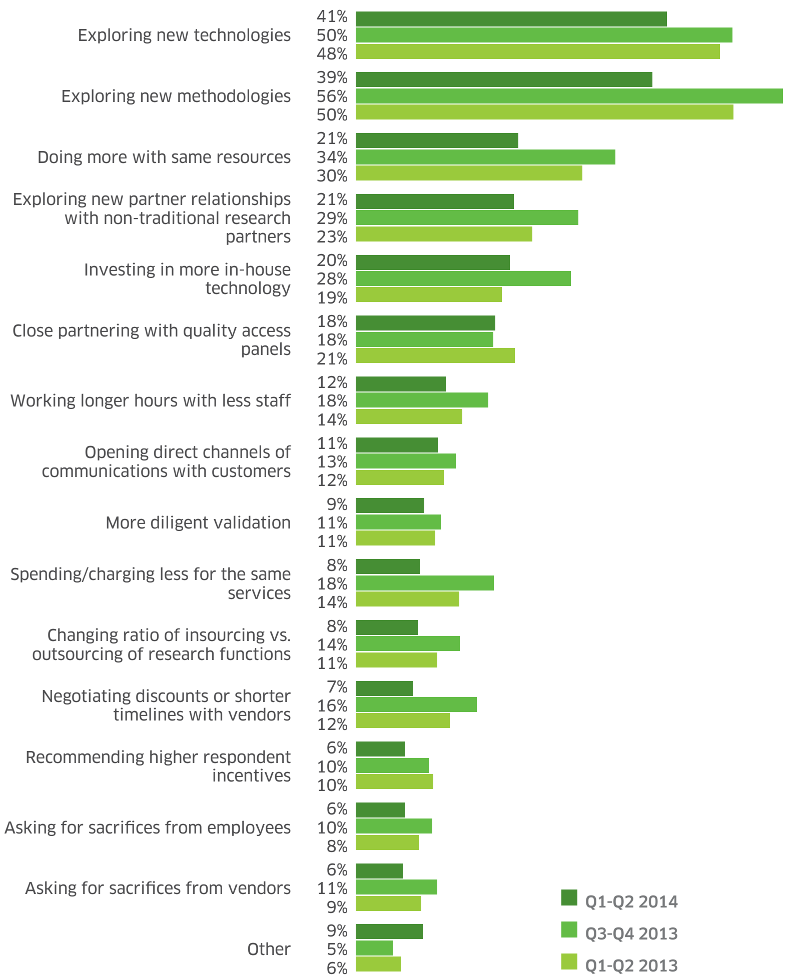


Q1-Q2 2014; Base: 988

What steps have companies taken after facing the issues noted above? The figure below shows that, without question, the response has been to actively explore new, alternative approaches to meet marketplace needs. While some GRIT respondents indicated they were "circling the wagons" by *doing more with the same resources, working longer hours with less staff, or asking for sacrifices* ..., many more reported that they were looking for new, technology-based solutions.

What we see is less activity – a lower rate of reactionary response – around the drivers of change in data collection methods.

Steps Taken: Trend



Q1:2013 to Q2:2014; Base: 988 Q1-Q2 2014; 2188 Q3-Q4 2013; 1370 Q1-Q2 2013

It should be noted, however, that while the propensity to "explore" alternative methodologies dropped significantly in the current wave of GRIT (see below), this drop was commensurate with that same trend across all "steps taken." What we see is simply less activity – a lower rate of reactionary response – around the drivers of change in data collection methods. This implies either that, a) the pressure to adapt to these changes is lessening, or b) companies have begun to complete the changes they are willing to make, and have now settled into more of a routine with the new structures.

Finally, there were several notable differences in the reactions of select respondents to these data collection issues. Clients were more likely than their supplier counterparts to note that they are *doing more with the same resources, opening direct channels of communications with customers,* and *changing the ratio of insourcing vs. outsourcing of research functions.* Suppliers, on the other hand are more likely to be *investing in more in-house technology, partnering closely with quality access panels, and charging less for the same services.* And respondents from outside of Europe and North America were generally more likely to still be "exploring" alternative technologies and methods.

Business-to-Business Participants Ready For New Ways To Share Opinions

Clear Seas RESEARCH Making the complex clear

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As little as five years ago, our clients in building materials/construction, food and beverage, packaging, and manufacturing industries frequently opposed online data collection methods for business-to-business respondents. *"My customers aren't available online". "My customers aren't tech savvy." "My customers can only be reached by mail." "My customers don't use smartphones".* Today we know these business-to-business respondents are online, they do understand mobile and digital technologies, and most importantly they want to share their experiences to help reshape their industries. Not only that, research done online is becoming more effective.

In reviewing the 2014 GRIT report findings I was pleased to find roughly two-in-five researchers are exploring new technologies and new methodologies. These areas of exploration are reportedly driven by increased use of tablet computers/smartphones, increased use of mobile communications, client budgetary limitations, and client demands for innovation. Another valuable reason worth considering is the impact the inclusion of new technologies and data collection methodologies may ultimately have on the respondent's ability to share their opinions, experiences, and industry insights. Providing business-to-business respondents with more engaging data collection approaches, may yield more engaged research participants and therefore, better quality information.

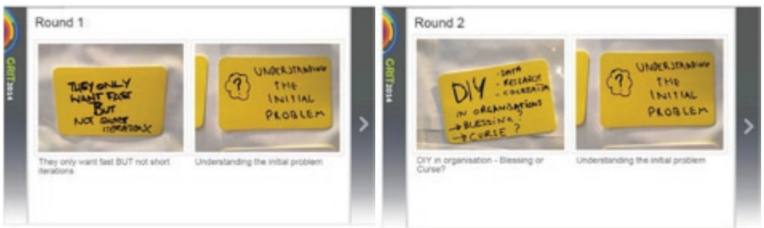
Mobile device usage, acceptance, and technological advancement experienced a strong upward trajectory in recent years, enabling employees to remain connected at all times. While some employees make a conscious choice to disengage upon leaving the office, the new norm appears to allow for your work and personal life to blend. Today we find that offering business professionals an online survey appears to be a welcome distraction.

While traditional data collection methods are often relied upon to achieve industry feedback, it's time for researchers to better assimilate their approach to better reflect how many of today's business professionals communicate on a day-to-day basis; email, instant message, text, Skype, Twitter, Facebook, and LinkedIn to mention just a few. By incorporating some of these communication methods into research experiences respondents will likely become more engaged, as they think about the industry they are passionate about from a different perspective. Our experience shows that many business-to-business professionals are delighted to share their knowledge IF the survey tool is well designed; they believe they have something meaningful to contribute; it's conceivable that the results will be used to drive industry change; and they benefit (topline research findings, individual incentives, charitable contributions on their behalf, etc.).

Historically, concern around the quality and security of information collected online has been at the forefront. How do you know who is completing the survey? How can you ensure they only complete the survey once? How do you protect confidential information from being publically shared? These concerns still resonate with organizations, research suppliers and clients as evidenced in the 2014 GRIT report. While we still must proceed with caution, some of today's online survey platforms do effectively aid researchers in ensuring data quality and data security by verifying and validating survey respondents, providing respondent specific watermarks to discourage printing/downloading/sharing of confidential images, providing pop-ups to discourage speeders, and being able to identify repeat survey participants. With the quality control piece being addressed, researchers can focus their attention on survey experience enhancements such as image/ video incorporation which can be applied to both quantitative and qualitative online methodologies.

The survey platforms and surrounding technologies of today will continue to evolve, enabling high quality data collection in a secure environment. It's up to the research community to take a chance, be creative, be engaging, and provide respondents with the most positive, dynamic, meaningful experiences possible. The fruits of our labor will provide superior data quality and actionable information; which may result in additional information needs and ultimately more market research. It will be interesting to see where our efforts take us in the next five or ten years. Will the market research community focus more on providing creative, strategic, engaging survey experiences that capture unbiased, detailed information for strategic decision making? I know that's where we are headed. Where will your focus be?

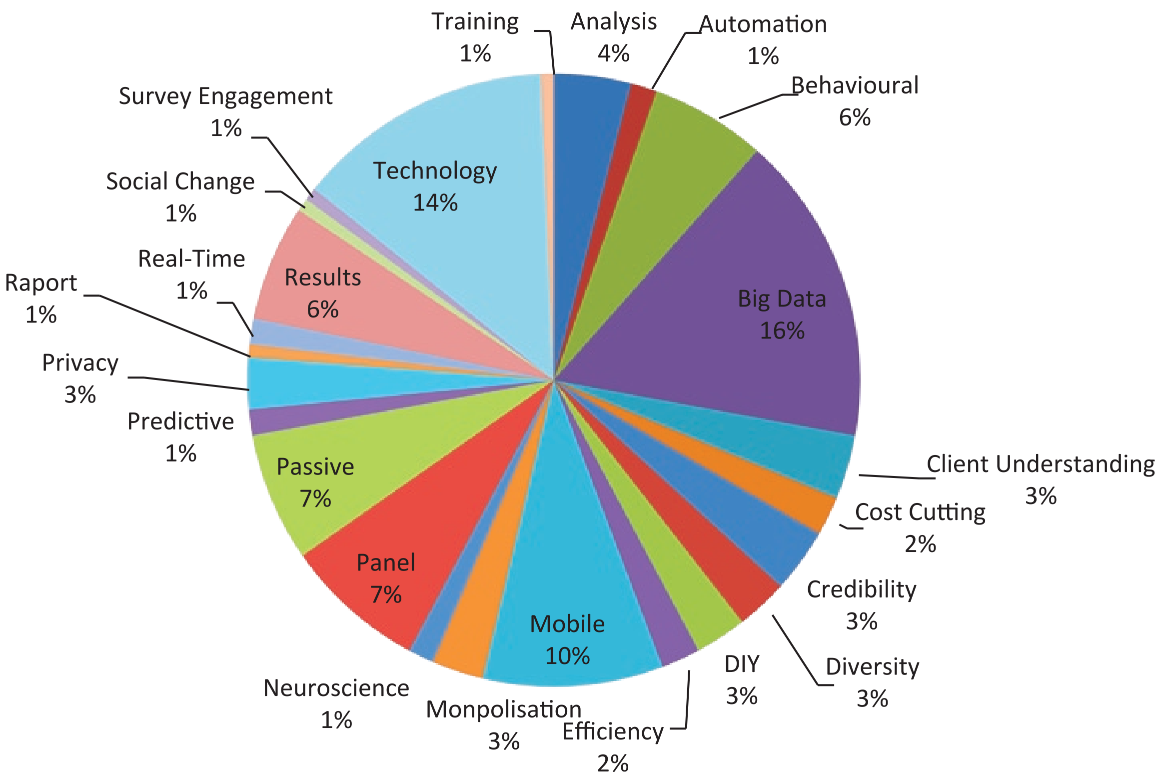
Hacking Market Research



One of the highlights of the 2014 IIeX Event in Amsterdam was a group exercise called "Hacking Market Research". The goal was to have the attendees work together to develop a list of issues impacting the industry and then collaboratively develop creative solutions.

It was such a hit we decided to get as close as possible to that approach in an online medium and incorporate it into GRIT. In this section we'll explore what we uncovered.

As part of this wave of GRIT survey we ask participants to identify the one BIG issue that the research industry is currently facing and put forward ideas on how it should be tackled. There were 1,100 comments and suggestions. This is a summary of some of the main themes that emerged from this feedback.



Q1-Q2 2014; Base 1,100

Making Our Work Count

These were the three most commonly occurring themes expressed by participants in this research and they all center on the thought that we need to do more to make our work count as an industry.

1. The delivery of actionable results
2. Creating research of real strategic value
3. Demonstrate the return on investment that research can deliver.

We need to do more to make our work count as an industry.

There is a general sense that we are not doing a good enough job at creating perceived value from our work. We need to do more to reposition our services to focus on delivering real strategic value and promote what we do more effectively.

These are some typical statements made by participants:

- *"Our ability to understand and sell our true value to the world outside of market research"*
- *"Making an impact on business decisions"*
- *"Getting at the business problem – not just the research problem"*
- *"No real thought put into analysis"*
- *"Charts are not the same as insight"*
- *"Traditional quant/qual fails to deliver really deep insights"*
- *"Dumbing down of methodology due to rise of DIY solutions"*
- *"Need to move away from cost-efficiency based commoditised service"*

Researchers need to become more business focused and consultative in their approach.

The Need for a More Consultative Approach

The main solution proffered was the suggestion that researchers need to become more business focused and consultative in their approach.

"We need to be more consultative" may be a clichè that has echoed around the research industry for decades but this message is perhaps reaching fever pitch. One in ten participants referred directly to the lack of consultation:

- *"We need to steal a few plays from the consultancy industry"*
- *"A need a more consultative approach"*
- *"We need to act and think more like consultants"*

There appear to be three strong underlying factors behind this that were voiced in the feedback:

1. **Recognising the supply shift:** Research companies used to control access to the people needed to undertake research but now there is a more open market supply and clients themselves are gaining better direct access to their own audience.
2. **Anyone can do basic research these days:** To run a research project you once needed a team of people to create the surveys, distribute them, and process the results. All that can be done today by any individual with free or very low cost software. This has led to more DIY approaches that are directly undermining the role of research businesses.
3. **The ways of doing research have proliferated out of all imagination:** Two decades or so ago, in order to copy-test an ad, one was consigned to standing on street corners with a clipboard asking "Do you like this?". Today there are probably over fifty different methods on offer and the most important point to recognize is that many of these new techniques now sit outside the bounds of traditional research companies.

In short, research companies used to control the supply of research participants, provided all the resources needed to undertake research and were the only real companies offering research solutions. Today they don't. The market has opened up. So the role of research companies has to change to take account of this.

What is clear is that the need and desire to do research has not changed, in fact you could argue that it is intensifying rapidly. It's becoming fundamentally cheaper and faster to do the basics, which potentially frees up resources for the thought-end of the process.

Solutions

There was a wide range of solutions put forward to address the problem of how we could become more consultative and improve the impact of our work. However, many of these suggestions could be described as platitudes. It remains to be seen whether they can or will be actively implemented.

Generally there was a sense that we need to start to have higher level conversations with clients about their broader research objectives, think more like advertising agencies do in the way they interact with clients and develop more collaborative relationships with clients – thinking holistically about their needs, focus on the decisions being made.

These are some examples of the solutions proposed:

- *"Be more technique and methodology agnostic"*
- *"Break out of the cycle of cheaper, faster, better"*
- *"Turn to non-traditional sources of data and insight and embrace these into our thinking"*
- *"Positioning ourselves more as strategic thinkers"*
- *"Expanding the skill sets within a research company"*
- *"Educate our professionals to 'think business'"*

There was speculation that bigger MR firms might think about buying up and integrating more consultancy type businesses to help reposition their services.

There is a clear desire for more industry-wide self-promotion to highlight the fundamental impact we have along the lines of organisations like the IPA in the United Kingdom who actively promote the value of advertising.

The Quest for a New Data Scientist

The second big theme was centered on how to make sense of all the eruptions of data to which we now have access to.

This proliferation of data sources from which market insight can be derived is creating a huge industry-wide demand for data analysis skills for a new type of data scientist who can:

1. Mine insights out of totally unstructured data
2. Efficiently handle and merge disparate data sources
3. Synthesize data from a multiple data sources into an interpretable format

Whether we can find these types of resources, or have the ability to undertake these processes efficiently were also issues raised by a many researchers.

Linked to this are a number of big data related warnings and the growth of different data sources:

- *"Big data overload lack of synthesis"*
- *"How to mine big data"*
- *"How to get insightful analysis of unstructured data"*
- *"How to integrate big data with traditional techniques"*
- *"Too much data but not enough insight"*

To many the task looks unsurmountable but here are some of the solutions put forward:

Solutions

- Segment data collection and data analysis – right now the same people try to do both
- Wholesale shift of budgets and time allocation to analysis
- M&A activity: Integrating big data businesses with research businesses
- Invest in more data scientists
- Understanding the drivers for Big Data as a new asset base within companies
- Integrating IT and analytics teams into discussions re: insight vs. just marketing
- Addressing "insight" as a multi-departmental lead.
- Create partnerships

This proliferation of data sources from which market insight can be derived is creating a huge industry-wide demand for data analysis skills.

The Need to Shift Towards Multi-modal Techniques

There is a general recognition that the simple days of "qual" and "quant" research are over.

There is a general recognition that the simple days of "qual" and "quant" research are over. With the diversity of methodologies and ways of gathering data our whole approach to conducting research has to open up and embrace a more multi-modal approach.

This means that the way market research companies are structured needs to change. The idea of silos of specialists working in one field or another has to change – we are all going to have to become polymaths and develop more cross-disciplined teams, think more adventurously about the combination of solutions we offer and develop product offerings that embrace a wider range of techniques.

These are some examples of how researchers voiced these issues:

- *"Integrating new technology into existing methodology"*
- *"Relevant implementation of new technologies to improve insight, to bring something new to the table"*
- *"A significant part of the business is still based on methodologies or practices that are losing their relevance"*
- *"Adopting new technology and leveraging it"*
- *"Making sense of all these new ways of doing research"*
- *"The hybridisation of techniques and methods"*

Suggested Solutions:

- Role of professional organizations and conferences to share and evaluate new methods
- The need for case studies of what progressive companies and progressive teams are doing
- Including more experimental research with standard research
- More experimentation generally & fostering business built around experimentation
- Focus on incorporating new ways to obtain data into our products and services

Budgetary Constraints and the Insourcing of Research

Budget constraints and the general tendency to insource some research processes were identified as another widespread issue.

The cost of analysis has been often absorbed into the cost of data collection, reducing its perceived value.

Budget constraints and the general tendency to insource some research processes were identified as another widespread issue, with remarks such as:

- *"Shrinking budgets"*
- *"Budgets not big enough to do a decent job"*
- *"Cheaper / faster mentality"*
- *"Having access to the best tools with limited budget"*
- *"Lack of funding to do anything innovative"*
- *"Research needing to provide more, for less money"*
- *"Free research tools make it possible for our clients to conduct the research themselves."*
- *"DIY innovation squeezing from the bottom, large corporations cutting costs on the top."*
- *"Clients not willing to pay for proper research"*
- *"The dramatic reduction in cost of data collection has led clients to believe things can be done more cheaply. but human analysis and strategy is hugely important, and those costs are not going down.*
- *"More data but nobody costing for the work involved in properly analysing it"*

The final comment probably sums up the issue most effectively. Just because data is becoming cheaper to collect, this does not mean that the analysis of this data can be done more cheaply too.

To compound this, historically, the cost of analysis has been often absorbed into the cost of data collection, reducing its perceived value.

Suggested Solutions

- Using innovative technologies to reduce costs
- Re-position research as an intrinsic part of the strategic process
- Communicate "value"
- Market consolidation – fewer providers delivering higher impact solutions
- New methodologies and partnership
- Educating clients about the true costs of research

Client/Researcher Relationship Problems

Perhaps some marriage counselling might be in order to patch up the relationship between researchers and their clients as from both sides there were a number of frustrations being voiced. A general sense that it is all the other side's fault...

Summarising the main complaints by research companies, they focus on:

- Clients demanding more consultative solutions but not engaging in the process
- Clients expecting to pay little and then complaining when they don't get what they thought they were getting
- Clients' preconception about what MR is, combined with a lack of understanding around methodologies and validity
- The reliance on procurement departments to set standards of conduct between client and agency
- We are pitched questions that don't answer the problem

Summarising the main complaints of clients:

- Research companies not truly understanding our business
- No real thought put into the analysis – charts are not the same as insights
- Research companies not keeping up with range of new techniques that we see out there or alternatively getting distracted by shiny new unproven methods and not focusing on getting the basics right.

Suggested Solutions

- Be more open about failure from which lessons can be learned
- Read Good to Great by Jim Collins
- Ask more interesting and tougher questions
- More conversations with chief marketing people
- Research companies putting imaginative proposals on the table for a better ways of us working together
- Sit down and chat!

Panel/Respondent Quality Issues

A number of participants focused on the panel quality issue, the declining levels of active participants in surveys and our inability to engage respondents.

- *"Lack of honest panellists/respondents."*
- *"Younger people not participating in research"*
- *"We are losing touch with respondents who have far better things to do these days on their computers and mobile phones than completing a survey"*
- *"Designing surveys that engage respondents and work on any device"*
- *"Consumer/respondent fatigue"*
- *"Extremely long, complex surveys designed to measure every attribute. We are sacrificing data quality and insights at the expense of gathering unnecessary metrics"*
- *"Flooding the world with too many surveys, most just annoying, there will be "surveyphobia" soon"*

Suggested Solutions

- Setting some industry standard maximum survey lengths
- Shorter "in the moment" mobile surveys on a more frequent basis
- Making research more "participant-centric" rather than client-centric so that participants are more engaged and easier to recruit
- Change the pricing strategy – panel companies rewarding research companies that produce shorter and more engaging surveys and those that produce long dull surveys get penalized
- Realizing we are all in this together – poor quality panels result from poor surveys and clients buying mostly on price

Key Observations for MR Industry

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As always, reading the GRIT report provides a sense of the next wave of evolution we're experiencing in our industry. Over the last few years, we've seen 'emerging trends' quickly become commonplace for market researchers. Finally, I'd like to think that market research can start to discard the generalization that our industry is conservative and slow to adopt new approaches.

A few years ago, at the annual CASRO conference, Simon Chadwick opened his presentation with a slide that simply said "Market Research is Dead." Interestingly, quite the opposite has transpired for us – we've adapted. Market Research is certainly not dead; we've seen our industry rise to the occasion, and become expert at identifying new opportunities to leverage new technologies, new forms of data, and provide clients with more complete information.

When we look at areas of growth within this year's GRIT report, we see that Social Media Analytics, Big Data Analytics, Crowdsourcing, Research Gamification, Mobile Qualitative, Prediction Markets, Behavioral Economics Models and more are the market research techniques that we feel will continue to grow in the future. Some of these practices are entirely new disciplines and their emergence suggests that the patient isn't on life support but is experiencing a new lease of life. Furthermore, market research professionals are now looking beyond the traditional quantitative or qualitative approaches to and themselves as "Advanced Analytics," or "Social Media Researchers," embracing new roles, and again, evolving our perception of market research.

When we think about 'Big Data,' we are just beginning to take steps to better leverage available data within our research programs. I believe that market research professionals are well-suited to assume the responsibility for harnessing the potential that 'Big Data' provides, but we have a lot to learn. For many of us, this means that we need to 'change the tires while driving the bus.' In other words, how can we harness the potential of Big Data while simultaneously designing systems and processes that will enable better business decisions? We should be aware that cutting through data paralysis is top of mind for many client-side decision-makers, and the professionals that best accomplish this will have a better seat at the boardrooms around the world.

What is clear is that technology provides the means by which we can work faster, and smarter. We operate in an industry where insight is valued, but cost is a primary driver for decision-making purposes. Technology and DIY are critical as more and more time is to be spent on insight generation, and less and less time, or money, spent on data collection and fieldwork.

After reading the report, I am energized by the opportunity that presents itself. We continue to work in a dynamic, ever-changing environment. Our outlook for 2014 is one of growth, and it seems that market research professions with longstanding careers continue to challenge themselves to adapt to the new world order. I see us evolving our look at market research to adapt to these changes, and this report covering emerging topics such as the internet of things, 3D printing and smart device measurement in the not so distant future.

The Future of Research

Amongst clients, only 22% expect 'A lot' or 'Tremendous' change (compared with 33% for suppliers).

We asked participants "Thinking ahead five years, how much of a change do you expect in the kinds of services and products you deliver?"

Expectations for change over next five years	Fall 2014	2013/ 2014	2012/ 2013
Very little	3%	3%	3%
Some	32%	27%	30%
Quite a bit	33%	33%	31%
A lot	25%	31%	29%
Tremendous	6%	6%	7%
Very little & Some	35%	30%	33%
A lot & Tremendous	31%	37%	36%

Q1-Q2 2014; Base: 924

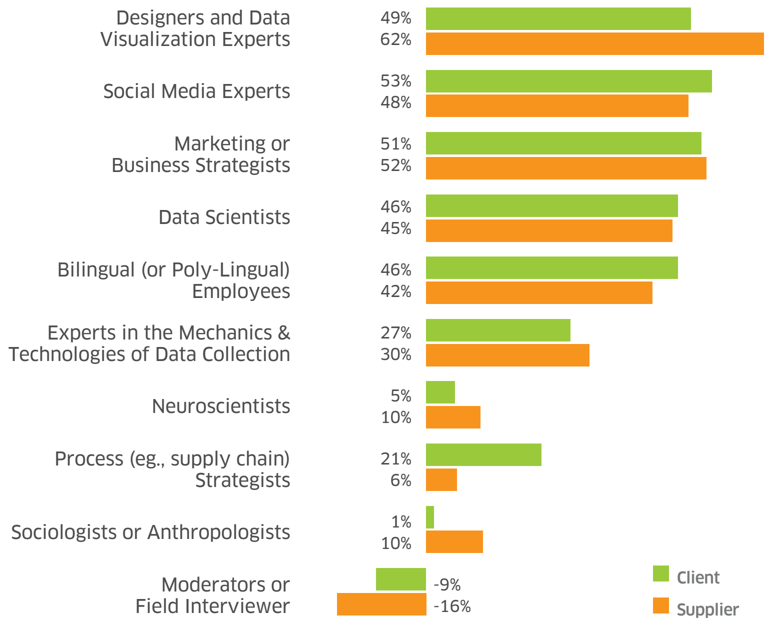
Views about changes in the market research industry divide neatly into three roughly equal groups. One-third expect very little change, one-third expect lots of change, and one-third are in the middle, expecting 'quite a bit' of change over the next five years. There has been a small shift between the last wave and the current wave, with the expectations for change having diminished a little – but the pattern of one-third, one-third, one-third seems to be holding across time.

One interesting exception to the one-third pattern is shown by the views of the clients, who seem to expect less change. Amongst clients, only 22% expect 'A lot' or 'Tremendous' change (compared with 33% for suppliers), and 47% expect 'Very little' or 'Some' (compared with 32% for suppliers).

The Researcher of the Future

Closely behind designers and data visualization experts come strategists, social media experts and data scientists.

Workers of the Future: Client/Supplier



Q1-Q2 2014; Base: 207 Client; 707 Supplier

Faced with the change confronting research there has been a growth in assessing where the recruitment plans of companies and the industries need to be tweaked. A new question for the GRIT study asked about the mix of people working in your organization in the future. For each type of employee, respondents could pick more, the same, or fewer.

The table below shows the net predicted change, i.e. the decreases subtracted from the increases.

The top item in the list relates to the way data is expressed and represented, i.e. the need for designers and data visualization experts. The growth in this item is strongest among suppliers, with nearly two-thirds picking it – but it is also strong among clients.

Closely behind designers and data visualization experts come strategists, social media experts and data scientists. Clients seem a little keener on people with language skills, but there is a strong demand among suppliers too.

Changes are needed in the human capital strategies employed by the industry.

At the bottom of the list are field interviewers, and the consensus seems to be that there will be decline among this group.

The table also shows the perceptions/needs of clients and suppliers sometimes differ. In general, clients and suppliers have similar views, but clients are more bullish on process strategists, and even more doubtful than suppliers about neuroscientists, sociologists, and anthropologists.

In addition the skills listed above, respondents were asked identify a new or emerging skill necessary for the future of market research.

The key words that emerged were:

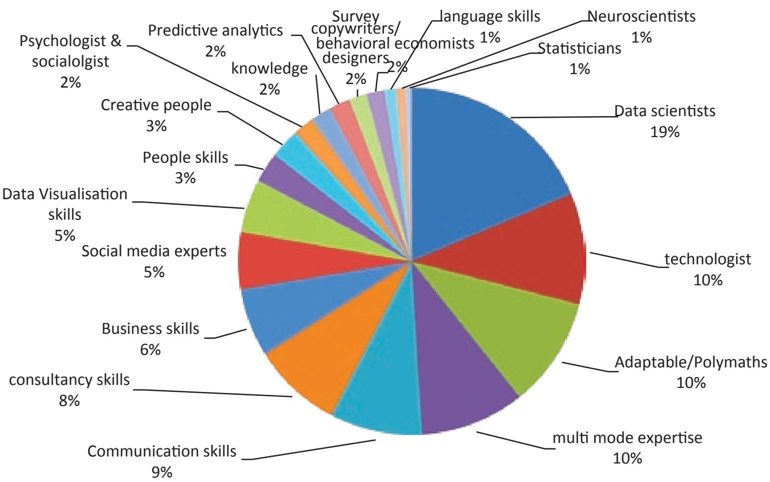
- Analytics
- Storytelling
- Flexibility
- Strategy
- Business

The Skill Gap in Market Research

Educating the Market Researcher of Tomorrow was a topic of a symposium hosted by the Michigan State University Master of Marketing Research program earlier this year. Coming out of this event, one of the suggested next steps was to include a question in this edition of GRIT related to the skills necessary for success in the future: "If you had to identify one new or emerging skill necessary for the researcher of the future what would it be?"

The results are interesting, but not too surprising overall considering how much this topic has been discussed. However, seeing it at this volume of responses (438 unique responses) brought clarity and a level of detail that has been missing so far.

The responses yielded 19 codes that paint a clear picture of the skills GRIT participants think are vital for success in the researcher of the future:



Q1 – Q2 2014; Base 438

All of this indicates that several changes are needed in the human capital strategies employed by the industry, including:

- Making the industry financially attractive to candidates
- Making the industry interesting and exciting to candidates
- Developing clear available career paths
- Engaging with academia
- Developing mentoring & training programs
- Employing early talent identification and nurturing programs
- Changing business models and cultures to reflect the expectations of in-demand workers of the future

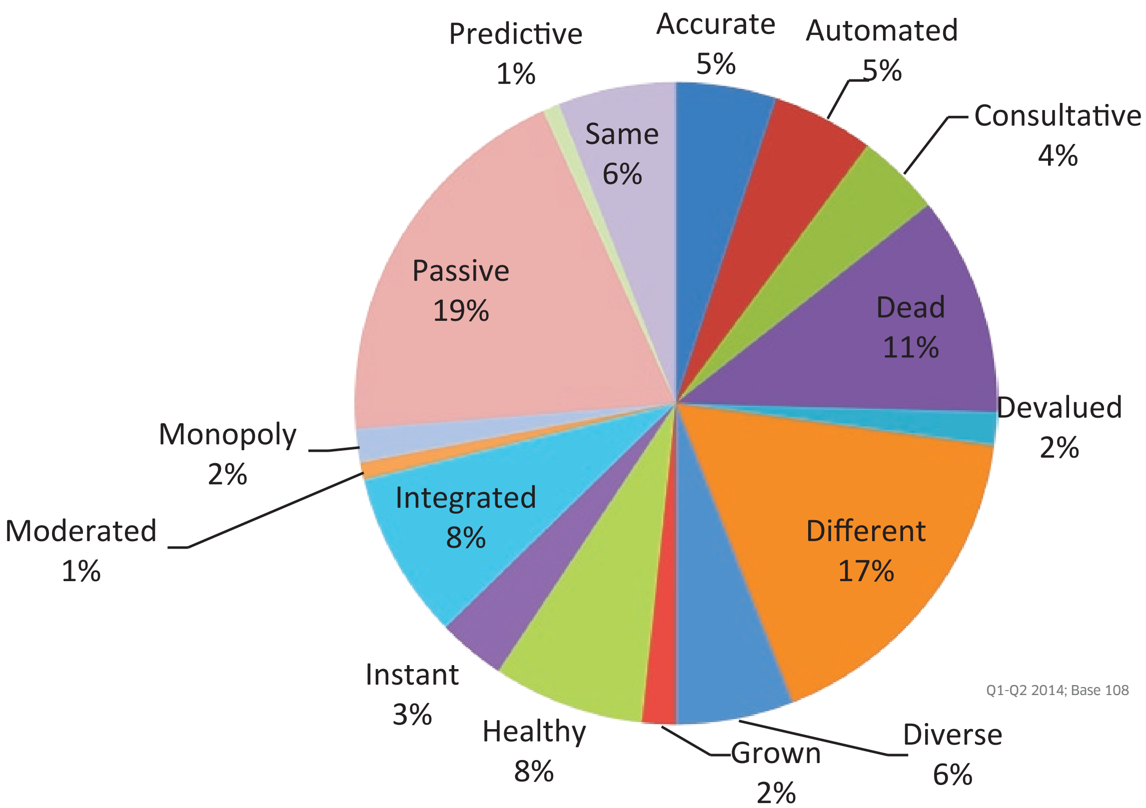
In order to be successful, this effort must be led by all involved, meaning clients, suppliers, trade organizations, educational institutions, and media.

5 Key Questions on the Future of the Industry

A total of 108 GRIT respondents answered the following sentence-completion exercise requesting that they consider the future of the market research industry:

In 30 years, market research will be ...

There were diverse expectations expressed by those who offered their opinions. About a quarter of the group (23%) commented only on the anticipated stability of the industry, with 6% expecting things to be the *Same*, but 17% expecting *Different*. There was also a group predicting basic obsolescence (13%) who expected the industry to be *Dead or Devalued*.



The remainder offered specific expectations for the future, and these could be loosely grouped into two camps. The first camp anticipated a technology-driven view of market research, where much of the activity would be relegated to controlled systems. This group, accounting for 37% of all responses, included those who perceived a future that was *Automated, Instant, Integrated, Passive and/or Monopolistic.*

The second camp of respondents – a total of 26% – perceived a vibrant industry. They predict a market research industry that will be *Predictive, Accurate, Consultative, Diverse, Healthy, and/or Grown* in 30 years.

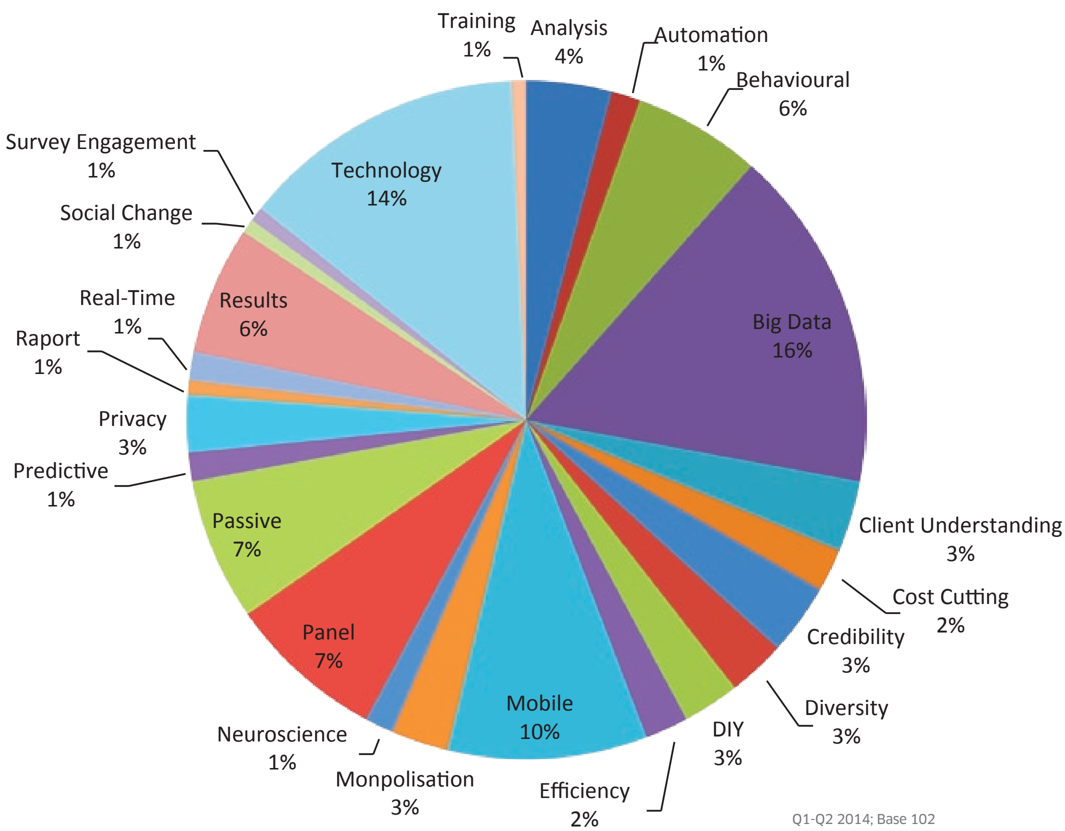
The two views of market research in the future, tech-based and vibrant, are not necessarily exclusive. It is very reasonable to predict a future in which select elements of the MR process have become highly automated, with data collection and analysis algorithms that capture and report on a wide range of human actions and perceptions. At the same time, there could also exist a (vibrant) aspect of market research that is dedicated to uncovering insights that are non-obvious, that are the insights which emerge only when viewed through the lens of complex human interaction. And it is likely to be the case that these insights, mined through innovative theoretical and practical endeavors, will provide the competitive advantage that businesses seek.

The two views of market research in the future, tech-based and vibrant, are not necessarily exclusive.

Another GRIT sentence-completion task asked respondents to consider:

The one thing that will most impact the industry is...

Inspection of the graphic below reveals a clear single conclusion: There is no one single thing that will most impact the market research industry. Answers in this exercise were diverse, but sometimes unique and sometimes overlapping. Only three responses – *Big Data, Mobile and Technology* – garnered double-digit consensus as the thing that will most impact the industry, and each of these cover multiple aspects of the industry at once. *Technology*, of course, is pervasive, and can impact research design, data collection, analysis, and reporting as elements of MR, but can also impact the very things that MR strives to measure. *Big Data* Is both a source of insights and an input to analytics. And Mobile will certainly influence marketing, marketing communications, research methods and research usage.



Q1-Q2 2014; Base 102

There is no one single thing that will most impact the market research industry.

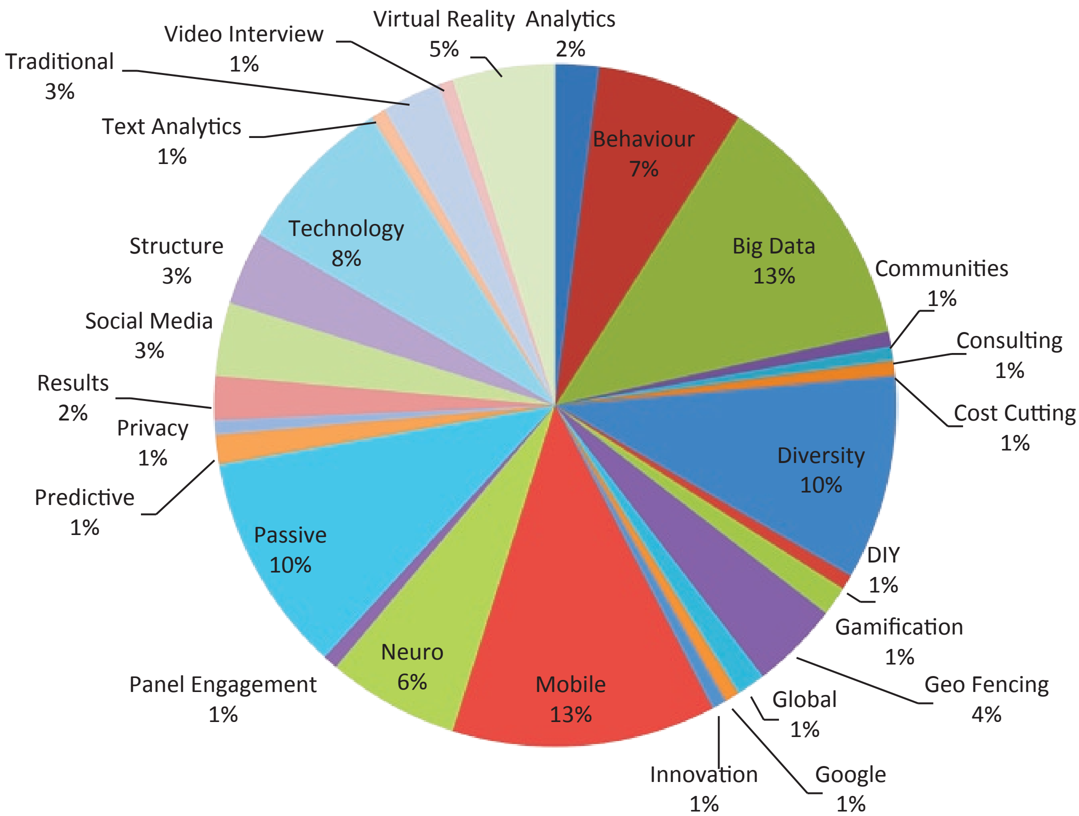
The other suggestions as things which will impact MR are certainly worthy of attention, as well. Issues such as *Behavioral* theoretical models and practice, *DIY, Neuroscience, Panels, Passive* measurement, Privacy and *Real-time* will doubtless impact the industry in real ways. Research practitioners will need to integrate new approaches into their toolboxes that accommodate developments in each of these areas. Research firms will need to continuously adapt, and this means keeping up with developments and making strategic decisions about the investments needed in order to remain competitive.

As was the case when GRIT respondents indicated the "one thing" most likely to impact MR, we again find a very diverse set of responses when completing the sentence:

The most exciting thing emerging now is...

Once again, *Technology, Big Data, and Mobile* were among the list of most common responses with 8%, 13% and 13% of the mentions overall. Other suggestions that were prevalent included *Passive and Diversity.* But beyond this, mentions were varied and for the most part unrelated. New research methods (e.g., *Communities, Gamification, Geo-fencing, Neuro, Passive Social Media, Text Analytics and Virtual Reality*) did show up in abundance, but there was little consensus about which of these was most "exciting."

Advice to the research practitioner and user is: monitor, and invest wisely.

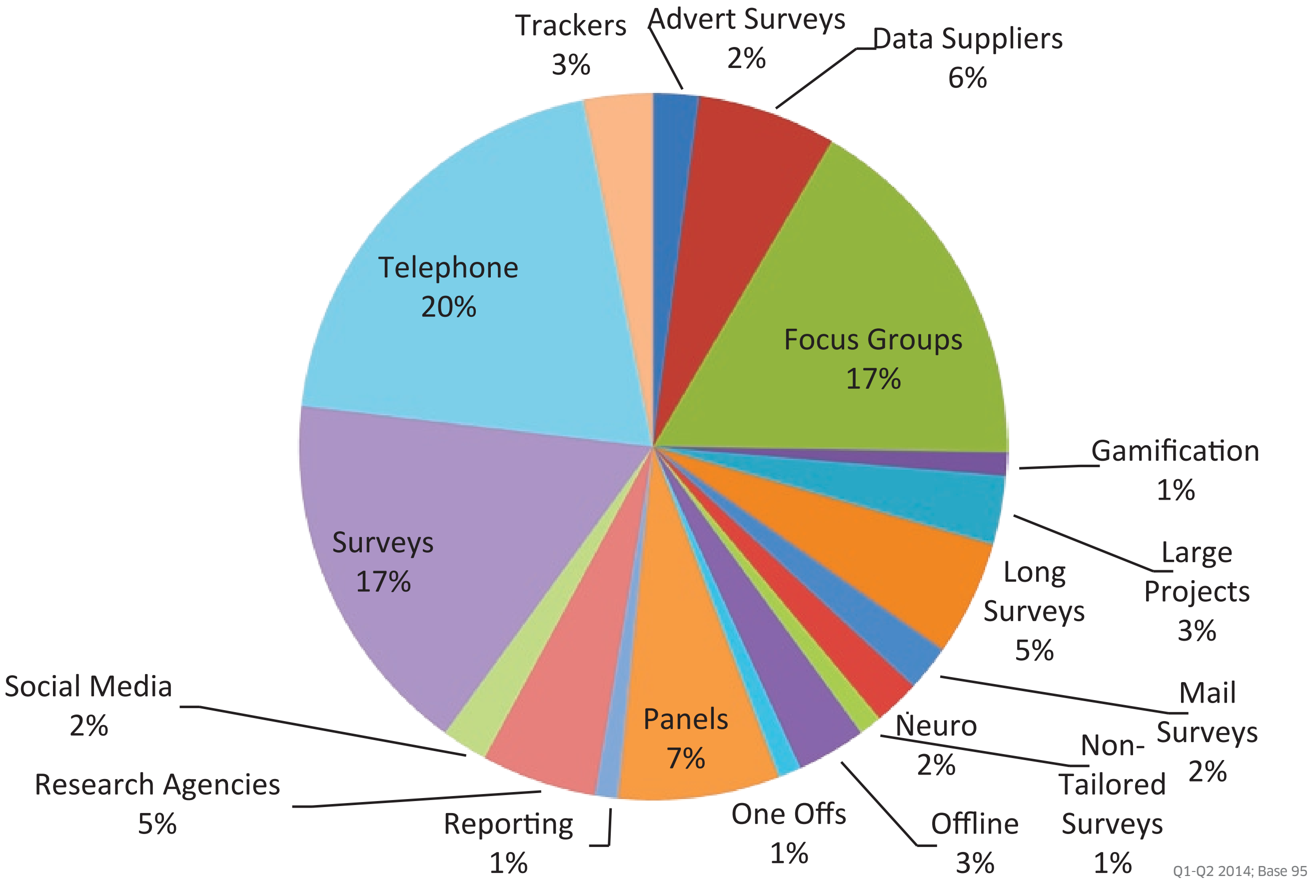


Once again, the potential interpretation of this diverse set of responses could be either encouraging or alarming. One might decide that the industry faces a troubled future, due to the fact that there is no single "thing" on the horizon that will marshal the troops and bring enthusiasm to the industry. Or, one might conclude that there are myriad exciting "things" waiting to be picked up, and that researchers worldwide need only find those of interest in order to prosper. Given the rate of innovation in MR today, it is likely that, while some of these "exciting things" will experience fading interest and largely disappear, others will quickly rise to fill the void. And so the advice to the research practitioner and user is: monitor, and invest wisely.

A total of 95 respondents in the 2014 GRIT survey completed the sentence:

In 5 years I can't see much demand for...

This exercise reflected opinions about waning research practices in MR, and several prominent candidates stood out. Top mention was *Telephone*, with 20% of the votes. It is unclear, however, whether this comment included mobile phones and smartphones. That is, we cannot be sure whether respondents were anticipating only the demise of standard landline telephone surveys, or rather were expecting all verbal remote Q&A to fall from favor, with online and passive filling in.



If we assume that demand for standard telephone surveys will be largely gone in 5 years, then we could conclude that survey research, in general, is losing broad support as a research method. Consider these responses from the chart above:

Telephone	20%
Surveys	17%
Long Surveys	5%
Mail Surveys	2%
Offline	3%
Non-tailored Surveys	1%
Advert Surveys	2%
Trackers	3%
	53%

The combined mentions around traditional survey research account for over half of the responses in this exercise. It would appear that this staple of the research industry is rapidly losing favor, and could disappear altogether if alternative sources of insight prove to be adequate replacements.

THE FUTURE OF SURVEYS –

A Smarter Way to Capture True Consumer Intention

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"In our brave new mobile culture, the idea that a 30+ minute PC-based survey is going to be viable even three years from now is an increasingly absurd belief." (Greg Heist, GreenBook)

Our industry is often caught musing about the future of surveys. Research providers must be willing to meet respondents in the most convenient place if they want them to engage in their spare time – and this is increasingly on their smartphones with shorter surveys optimised across all devices. Such trends are simply mandatories in today's digital landscape, and reflect the 33% of us that told GRIT we triggered mobile surveys in the past year.

Brand expectations of research are becoming increasingly advanced, making the issue of ensuring sample quality and obtaining meaningful insights something that can no longer be ignored. Research approaches must evolve to attract the real people who care about the products and services we are trying to shape.

So if the traditional survey is on the decline, where does this leave us? What is the experience we need to be cultivating to gain true and meaningful insights?

User generated data is exploding and we all recognise the power of volunteered responses to guide our business strategy. Now we must consider how to obtain authentic answers via experiences those consumers actually want to take part in. Ever- increasing budgetary pressures on both the client and the agency mean gathering the right data to understand consumer intent is more important than ever. And here's why:

Not all data is good data. Nor is it real data.

A simple Google search for "get money via online surveys" returns more than 12 million results, including promises to reveal how to earn $200 a day or more. Getting through enough questions to earn this amount can only result in poor-quality responses that are inaccurate and often not reflective of actual intent.

Concerns over respondent quality are not new. But the ways you can tackle them are.

As far back as 2006, bigger brands began to question the integrity of online panel insights. Now, customer engagement solutions are more sophisticated, allowing us to filter out the actors and combine volunteered personal information with social and behavioural data to provide a real-life, real-time snapshot of each respondent.

Not all survey respondents want to be rewarded in the same way.

Were you one of 20 million people who viewed BuzzFeed's *"What city should you actually live in?"* quiz? This viral content encouraged each user to invest time and thought into responding to a survey – simply to gain an insight into themself. In today's digital climate, the currency of information is just as important as hard cash. To gather rich, insightful data it's no longer enough to incentivise survey participation with points, vouchers and financial-based rewards alone. Giving feedback, building individual relationships with customers and showing them their participation makes a difference is equally as valuable.

If you don't care about who's on your panel, why should they care about you?

If someone is only engaged in a one-time "I respond, you reward" interaction they have no reason to care about what happens to their information once they hit submit. It's time to deliver a true value exchange and share the rewards between both the client and the participants.

Technology now enables us to know, not guess, what customers want – but it's our collective challenge to deliver world-class research experiences on a scale so that respondents will remain valuable way beyond the lifecycle of one survey.

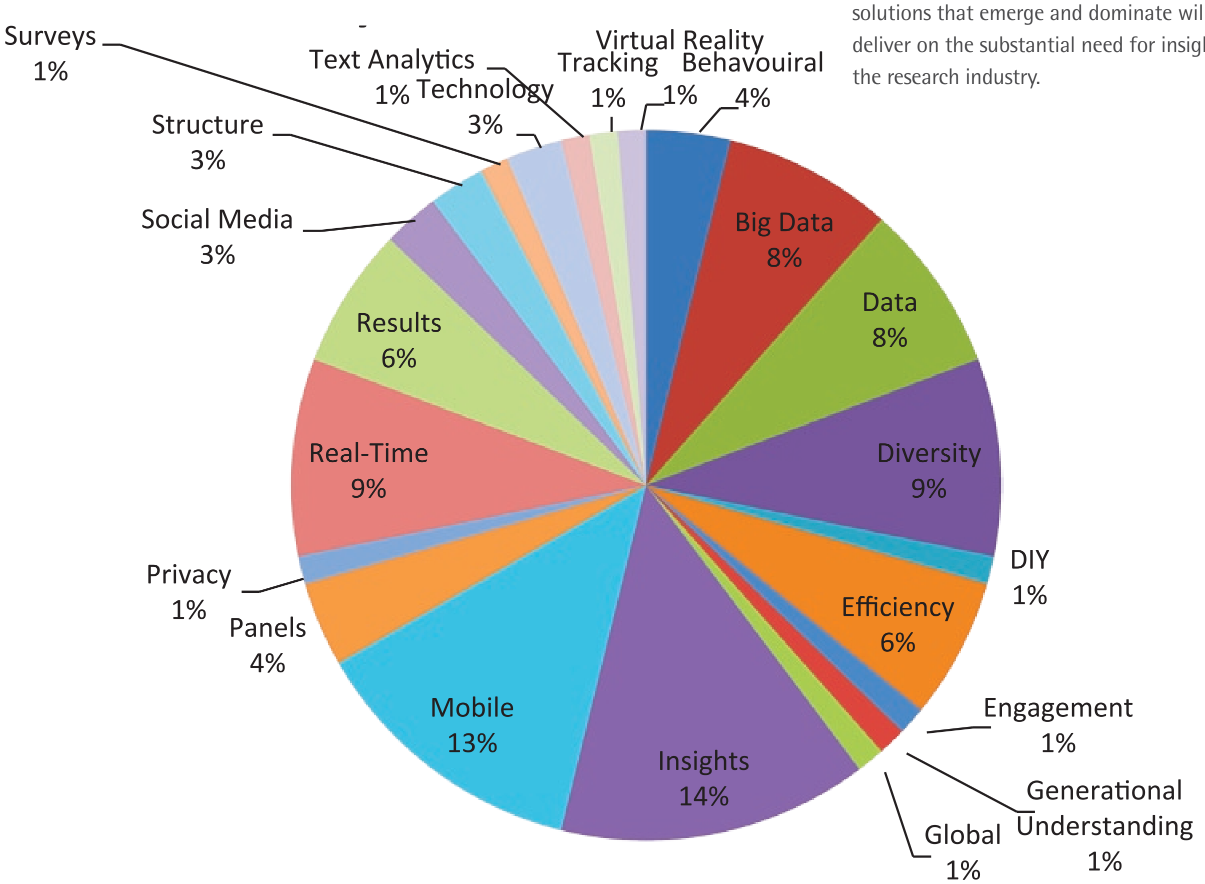
At Pureprofile we see each respondent as a distinct individual, engaging them in an ongoing conversation, and linking their responses to their own unique and genuine profile. Participants need to know their opinions matter. Our longitudinal approach allows brands to follow respondents throughout their decision-making journeys to the point of purchase and beyond.

So how could you respond to this new consumer landscape? We encourage you to invest with your clients in app-like experiences to create real data over time. You'll find this has a multitude of strategic benefits, most of which is high quality, valuable and genuine insights.

GRIT participants were asked to consider one additional question about the future of MR, completing the sentence:

In 5 years it will all be about...

This item received 78 open-end responses in the survey, and many of these reflected topics that had appeared in other future-oriented inquiries. But interestingly, the top response was a newcomer. *Insights*, which received 14% of the mentions, had not appeared in any of the other sentence-completion exercises. One might argue that this finding supports the notion offered earlier, that the direction for the industry is still largely unmapped, but that the future solutions that emerge and dominate will be those that deliver on the substantial need for insights from clients of the research industry.



Q1-Q2 2014; Base 78

What does it all mean?

This wave of GRIT paints a picture of an industry that continues to be in a state of transition while reaching something like equilibrium in some respects (new technology and methods adoption) while still struggling to find its ultimate role in a data rich and disrupted world. The good news is that it's filled with passionate professionals who are asking the right questions, sharing ideas, and leveraging many channels to look for solutions.

All in all, GRIT shows us an optimistic industry with a very bright future ahead and that is the best trend of all.

Special Addendum:
Client Views On MR Impact Study

Niels Schillewaert, PhD, Managing Partner InSites Consulting USA
Katia Pallini, Senior Research Innovation Consultant InSites Consulting

As a special addendum to this wave of GRIT, we wanted to get a deeper understanding of the impact and effectiveness of market research studies from the client side perspective. We partnered with InSites Consulting and Gen2 Advisors on this special "MR Impact Study" addendum. 185 market research users (marketers and insights managers, excluding professional research providers) participated in our survey and reflected about their most recent market research study as well as their ideal study[1].

We share the results of this fascinating study around 3 uncovered facts linked to our profession.

FACT 1
WE ARE NOT AN ADAPTIVE SYSTEM

An adaptive system is a flexible organism that changes its behavior in response to its environment. Such change is often required to improve performance or increase chances of survival. Consumers (our context and most important resource) have changed their behavior significantly over the last years. The surge of social media and mobile has been a major driving force behind consumers gaining power over brands. Accompanying consumer behavior (as a cause and result) such as participation, information contribution and sharing, social networking, brand liking, product reviewing, user collaboration and co-creation… has become the new 'normal' when it comes to consumer behavior. Gradually, we see digital companies, marketers, software providers… move up to collaborate with consumers and achieve goals through them. Gone are the days when we sent out a message and waited for people to respond. Today, marketers need consumers to want to participate in brand activation and market through them, not to them. With 6 in 10 research users indicating they believe in proven and traditional methods, our study indicates that research and the use thereof may not have made that shift to the same extent and has not aligned with contemporary consumer behavior.

While survey research is mainly conducted online, there is a platform gap. Even though 19% of consumers fill out surveys on a mobile device (GRIT study 2014, Greenbook), only 5% of all surveys are actively programmed to be fit for mobile.

While survey research is mainly conducted online, there is a platform gap. Even though 19% of consumers fill out surveys on a mobile device (GRIT study 2014, Greenbook), only 5% of all surveys are actively programmed to be fit for mobile.

1 The study was global with 46% of its participants based in the United Stated, 17% of the sample from Europe and 11% from Asia. The majority of our participants work in a consumer environment and 37% are focusing on only B2B clients. 4 out of 5 participants are active in market research or have a consumer intelligence role for a brand or company, while 19% have a more marketing-oriented function. As for sector spread: 31% were active in professional services; 1 in 4 of the participating professionals came from the financial industry; 22% from CPG / FMCG and 21% in technology.

Qualitative research is mainly conducted offline. 1 in 2 research users still work with traditional focus groups or in-depth interviews. Online research communities are growing as a method, but only 19% of researchers actually uses research communities to learn from and collaborate with consumers.

It is not only the channels or platforms that are lagging but also the techniques and tools. Only 9% of quantitative projects apply creative research techniques – at best, surveys use graphical scales (36%). Despite the fact that gamification has been in vogue for quite a few years, leaderboards, badges, challenges and tasks, feedback systems or social interaction are hardly used in surveys. Still, gameplay, audio-visual or creative techniques allow getting a better and deeper understanding of consumer behavior. Such tactics allow for better engagement with participants which leads to a richer consumer understanding. The latter might explain why the picture is different in qualitative research: 81% of research users feels that qualitative research helps them engage with how consumers really live, while only 1 in 3 believe surveys are capable of bringing consumers to life.

4 in 5 research users stated that the research output was actionable and readily usable for their marketing teams. An overwhelming 92% reported their research projects generate insights worth sharing with their colleagues. Great job, right? Yet only 65% actually share the results of their research internally. So it seems there is a lot of unused potential when it comes to leveraging research internally. In fact, the research we conduct does not seem conducive to telling a good story and it is not the start of a conversation. The majority of researchers use PowerPoint reporting to present the research results: 86%. A mere 22% have an interactive workshop to discuss the research findings and less than 10% use creative reporting formats such as interactive videos or infographics.

Related to our first fact, it would be better if research relied on content-rich methodologies and used creative communication channels to convey research results. All too often, we rely on numbers and text as well as single media. We need to combine video, photos, physical spaces (e.g. exhibitions), (private) social media, quizzes, infographics and apps. It would be so much more enriching to have consumers upload pictures and complete a mini-ethnographic self-description in a survey. Make sure you have the ingredients to tell a good story: use consumers as characters, describe their 'who, what, when, where' and also explain the 'why (not)' of their behavior.

It seems research users are satisfied yet not delighted or overly proud to share the results throughout their organization. So, the time is now to step up our game and create reporting formats that help research users share consumer stories with all internal stakeholders more easily.

FACT 2
WE ARE NOT GOOD STORYTELLERS

Only 65% actually share the results of their research internally.

The first two facts about the status of market research are linked to that fact that our profession is far from adaptive and lacks creativity in the way research projects are conducted; furthermore the (presentation) output is far from inspirational. Nonetheless, our data indicates that research users are quite proud of what they do and consider what they do as being great. Researchers even seem somewhat tenacious: if we had to run a similar project again, only less than 1 in 10 would advise a different approach. 86% of researchers believes their research leads to actionable results and 3 out 4 declare using the information of their study to steer very concrete actions. This is surprising, considering the fact that we admit that our research does not entirely allow us to engage with how consumers really live. Even stronger: we found that 60% (even 71% for surveys) of all research just confirms executives' thinking and less than half of all research studies is perceived to generate surprising results (and for quantitative surveys we only generate surprise about 30% of the time). Only 1 in 2 projects lead to change within an organization.

It is our interpretation that these number are way too low if research wants a seat at the boardroom table. It is about time that we as researchers start to think and self-reflect on that. What service are we providing if we do not make a difference? If we are repeating ourselves continuously, then in the end, what is our value proposition?

FACT 3
WE VALIDATE BUT DON'T DISRUPT

We found that 60% (even 71% for surveys) of all research just confirms executives' thinking and less than half of all research studies is perceived to generate surprising results

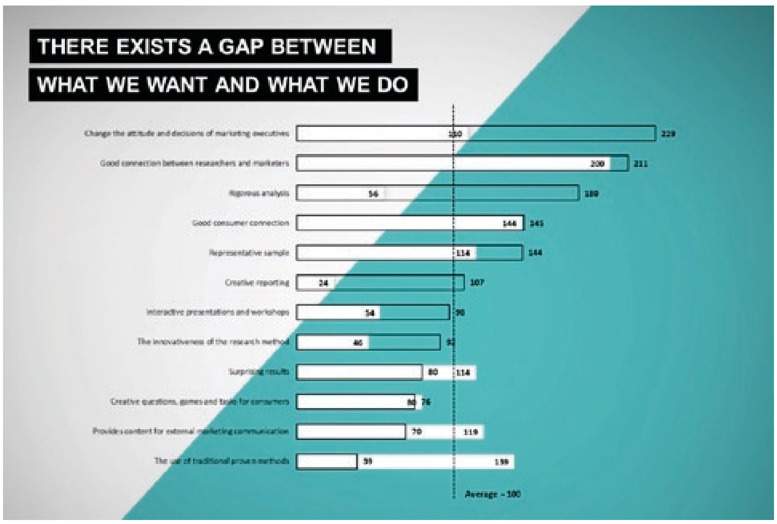
Conclusion: we do not deliver on our own expectations

Based on a MaxDiff analysis we assessed what research users want the most. Choosing from 20 characteristics, research users composed their ideal study. By far the most important element was the research's ability to 'change the attitude and decisions of marketing executives', followed by establishing a 'good connection between researchers and marketers'. Next, 'rigorous analysis' and a 'clear storyline' shared a tied 3rd place in importance. Research as a positive touch-point experience for consumers which provides a 'good consumer connection' and results based on 'a representative sample' completed the top five of a study's most desirable characteristics.

By far the most important element was the research's ability to 'change the attitude and decisions of marketing executives'.

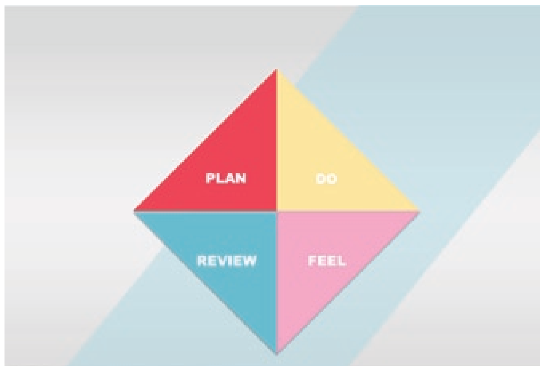
Interestingly, 'low price'" research and the 'use of proven traditional methods' were the least important features of the ideal market research study. The agency's 'reputation' or 'collaboration with third parties' were classified as less important overall – while 'experience with the client' and its 'flexibility' were more important.

But it is apparent there is a gap between what we 'want' and what we 'do'. Contrasting the ideal characteristics of a market research study and our actual practice reveals a number of interesting gaps. First of all we underachieve in making the change happen in executives' minds and actions, we do not provide systematic rigorous analyses, clearly underperform in creatively reporting research results and could do better at using innovative methods.



At best, we are good at delivering findings based on solid methods and representative samples. We should make the presentation of results to be more 'experiential'.

These findings are in line with previously discussed facts and provide clear guidance to researchers as to what to focus on to make a difference. However, we can learn quite a bit from our ultimate clients – the marketeers. It is our firm belief that market research results should be managed along the lines of content marketing (based on "Insight as Content", presented by Niels Schillewaert and Mark Uttley at IIeX 2014 in Atlanta). While research findings are our core product, we do not manage it as a 'product' or 'service'. We are actually bad at marketing it – we do not think about its promotion, distribution and delivery, let alone about the 'experience' marketers go through when utilizing it. At best, we are good at delivering findings based on solid methods and representative samples. We should make the presentation of results to be more 'experiential'. If executives feel consumer realities, experience the findings and co-create the implications, they will feel ownership and we can extend the shelf-life as well as the impact of our work.



There are systematic steps a researcher should take in order to treat insight as content. These include:

1. PLAN – define the goals, develop a strategy and create a calendar.
2. DO – install research methodologies that allow for a structural collaboration with your consumers, but make sure you produce content-rich observations.
3. FEEL – market your findings, as if you launch a product. Because of the very end goal of research, it is best to promote your findings experientially. If executives experience the data, it will amplify the usage and impact of research.
4. REVIEW – analyze and measure the impact of what you are doing.

Installing a virtuous circle of treating insight as content will make your insights go viral in your company and enter the consciousness of your executives.

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www.bottomlineanalytics.com

Full service analytics consultancy offering media mix optimization, brand equity modeling, KPI dashboard development, cutting edge social media analytics and customer segmentation. Our consultants have a total of over 100 years of direct analytics experience with major global blue chip clients.

Dapresy
www.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.

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www.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
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Gen2 Advisors tackle the issues generating the most change, the most exciting opportunities and the greatest traumas for insights organizations. Through reports, advisory services, and consulting, we lay out the new ways of solving marketing problems. At Gen2 Advisors, we concentrate our business on what's happening in insights. Nothing more, nothing less.

GMI
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From intelligent sampling to survey engagement software to sample management and custom reporting, GMI adds value at every stage of the research process. With millions of deeply profiled double opt-in panelists across 40 proprietary panels, GMI offers a wide range of respondent access in a single, trusted partner.

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www.insites-consulting.com

InSites Consulting is the global expert in generating extraordinary consumer insights based on everyday life experiences using award winning community and survey methods. Our approach increases your "return on insight" as we activate executive audiences to think and act differently (e.g. increased innovation, aligned collective thinking …). All our methods are flexibly aligned with your business planning cycles.

InSites Consulting is a true thought leader in Consumer Consulting Boards – aka online research communities – and won the Next Generation Market Research award as disruptive innovator at TMRE..

Q Research Software
www.q-researchsoftware.com

Q is analysis software for market researchers. From basic tables, plotting and mapping to segmentation with latent class and trees. Q is quicker, smarter, better. Report by exporting to PowerPoint or online dashboards.

Researchscape
www.researchscape.com

Researchscape International drives publicity with PR surveys that help organizations build awareness, demonstrate thought leadership, and generate leads. Researchscape professionals write the questionnaire according to research-industry best practices, field it to a representative panel of U.S. consumers, and analyze the results. Researchscape clients benefit from "Do It For You" research at "Do It Yourself" prices similar to the cost of renting survey respondents.

Vision Critical
www.visioncritical.com

At Vision Critical, we power insight communities, online groups of customers and prospects that help you get to the heart of how your customers think, and why they do the things they do. Insight communities can be local or global, targeted or broad, short-term or long-term, and can include hundreds, thousands or even millions of people.

Sample Partners

AMSRS

www.amsrs.com.au

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

BAQMaR

www.baqmar.eu

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

CASRO

www.casro.org

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

Insight Innovation

insightinnovation.org

The Insight Innovation Forum is an actively managed group that enables learning and open discussion of all aspects of market research & insight innovation and of the challenges faced by the market research industry today. Members from both sides of the table share their expertise and offer unique perspectives on a wide variety of issues, both strategic and tactical.

International Market Research Society

www.uniresearch.info

The main focus of the International Market Research Society is on delivering value to the clients, improving productivity throughout the research process, data quality management, and rigorous cost control.

Online Panels in Asia

AIP

www.aip-global.com/EN/

AIP London Ltd. is the European office of AIP Corporation, the leader in online market research data collection across Asia. Our proprietary online panels currently cover 12 key Asian markets: Japan, China, Korea, India, Taiwan, Thailand, Hong Kong, Singapore, Malaysia, Indonesia, the Philippines and Vietnam.

MRIA

www.mria-arim.ca

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

Principles of **Market Research**
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georgiacenter.uga.edu/courses/market-research

University of Georgia & MRII are proud education partners of GRIT. 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 7,000 practitioners have enrolled in the program from 98 countries. New Online Course: Principles of Mobile Market Research: Practices & Applications. This online short course explores emerging mobile technologies and how they can be applied in market research.

MRS

www.mrs.org.uk

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

MICHIGAN STATE UNIVERSITY
Master of Science in Marketing Research
Broad College of Business

MSU MMR

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.

Neuromarketing Group (LinkedIn)

linkedin.com/groups/Neuromarketing-852427/about

A social network of people involved in the fast growing field of neuromarketing / consumer neuroscience and its impact on the market research industry.

NewMR

www.newmr.org

A collaborative endeavour, designed to help co-create the future of market research by combining the best of the old.

NGMR

www.linkedin.com/groups?gid=31804 and www.nextgenmr.com

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

www.nmsba.com

International Association for everyone with a professional interest in Neuromarketing.

NYAMA

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.

QRCA

www.qrca.org

The Qualitative Research Consultants Association is a vibrant global organization of qualitative researchers immersed in the most exciting work being done in the field. QRCA offers opportunities to connect and stay current on the latest in qualitative research.

The Research Club

www.theresearchclub.com

The Research Club organizes free social events for everyone involved in the market research industry. Come along and make new contacts, catch up with former colleagues, and develop new opportunities. We know you'll have a great time!

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.

Wisconsin School of Business

bus.wisc.edu/centers/ac-nielsen-center-for-marketing-research

The Marketing Research MBA offered through the A.C. Nielsen Center, at the Wisconsin School of Business, is the premier full-time marketing research MBA program in the country. Students are given the business acumen to work in cross- functional teams, the research and statistics foundation to successfully manage research projects, and the marketing knowledge to translate results into business programs that impact the bottom line.

APRC

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.

Research & Results

www.research-results.com

Research & Results publishes leading market research media in print, online and mobile: Research & Results magazine, StudioGuide (viewing facilities), IT-Guide, web sites and an email newsletter. The annual Research & Results show in Munich, Germany, is the leading international trade show for market research.

ACEI

www.acei.co

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

AIM

www.aimchile.cl

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

ARIA

www.ariaalliance.org

Americas Research Industry Alliance (ARIA) is an alliance of pan-American research associations established to support and improve the business and integrity of the market, opinion and social research industry. ARIA's mission is to support the growth of the research industry in the Americas, to build client and public confidence in research, and to maintain industry self regulation.

AVAI

www.avai.org.ve

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.

CEIM

www.ceim-argentina.org.ar

CEIM (C·mara de Empresas de InvestigaciÛn 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.

SAIMO

www.saimo.org.ar

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

Commentary Providers

Clear Seas Research

www.clearseasresearch.com

www.myclearopinonpanel.com

Clear Seas Research is a full service business-to- business marketing research supplier offering solutions designed to provide decision-makers in construction, food & beverage, packaging, security, manufacturing, and gaming industries, with the information required for strategic decision making. With unique panel access to industry decision makers via myCLEARopinion, Clear Seas Research is focused on providing brand positioning, new product development, customer experience and marketing effectiveness research solutions.

Communispace

www.communispace.com

Communispace is the consumer collaboration agency uniquely equipped to harness the power and inspiration of consumers to drive business growth. Headquartered in Boston, MA, Communispace has been the fastest-growing consumer insights firm in the US for the last four years, delivering unparalleled consumer engagement and business impact, with more than 700 communities launched to date.

Confirmit

www.confirmit.com

Confirmit is the world's leading SaaS vendor for multichannel Voice of the Customer, Employee Feedback, and Market Research applications. The company targets Global 5000 companies and Market Research agencies worldwide with a wide range of software products for feedback / data collection, panel management, data processing, analysis, and reporting.

GutCheck

www.gutcheckit.com

GutCheck is an on-demand community solution that recruits specific customers in minutes and delivers robust insights in hours. Our software and services provide a real-time, turnkey solution that enables researchers and marketers to deliver the high quality answers of traditional research vehicles at a fraction of the time and cost.

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www.pureprofile.com/business

For over a decade, Pureprofile has facilitated authentic connections between customers and brands. Committing years of groundbreaking software development has made Pureprofile leaders in data driven technology and engagement solutions that are redefining modern relationship marketing.

SSI

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.

Survey Analytics

www.surveyanalytics.com

Survey Analytics helps companies listen, improve and grow. We provide a seamless experience between online and mobile channels for surveys, community management and employee engagement. Our integrated solution makes it easier than ever to take action and close the feedback loop. Get the Survey Analytics Edge with dedicated support from industry experts, integration options and high levels of security to keep your data safe.

Toluna

www.toluna-group.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.

uSamp

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uSamp is the technology leader in sample and insights solutions providing automation, mobile and global solutions for marketers. Based in Los Angeles, with five offices in the United States, Europe and Asia, uSamp has been recognized in Inc.'s 500|5000 exclusive ranking of the nation's fastest-growing private companies.

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www.2020research.com

20|20 is a global leader in online qualitative research software and services, aiding research firms worldwide, since 1986. Leading innovation, easy-to-use software and unmatched service make 20|20 the world leader in online qualitative research. Contact us at advice@20|20research.com or 1.800.737.2020

Aha!

www.ahaonlineresearch.com

Our intuitive online marketing research platform was developed to enable companies, research consultants, and agencies to easily create fully customizable and engaging studies, uncover deeper in-the-moment insights, and share amazing human stories. The mobile and social-friendly qualitative platform features a suite of highly intuitive and interactive activities, drag and drop technology, and experienced training and support from researchers who know how to use the technology to maximize the learning.

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www.decipherinc.com

A marketing research services provider, Decipher specializes in online survey programming, sampling, data collection and data reporting. Utilizing proprietary Web-based applications, Decipher integrates state-of-the-art technology with traditional research techniques. Decipher is all about uncovering opportunities in whatever territory is explored with clients. As a true partner, Decipher isn't interested in just data, but also about what that data represents for each client. The company focuses on technology and research systems that bring data to life, and in doing so, helps reveal how even seemingly small discoveries can yield meaningful insights.

Digsite

digsite.com

Digsite social insight communities give marketers, product managers, & researchers a flexible, easy way to get great insights about their audiences. Digsite is the first truly social platform for getting feedback on products and concepts. With Digsite, you can open up discussions with customers and communicate with them for a week or over the course of a year. By sharing product or marketing ideas as they are created, you can get customers' ideas to improve your current or new products, websites, and even marketing campaigns.

dub

www.dubishere.com

With over 600 communities hosted on IdeaStream™ in 2012 alone, it's easy to see why agencies and brands the world over say it's their platform of choice on which to engage consumers for insight, ideas and collaborative innovation. IdeaStream™ is an intuitive web-based platform that fits with your needs, be they short or long term.

eCGlobal Solutions

www.ecglobalsolutions.com

eCGlobal Solutions is a innovative solutions provider that facilitates the gathering and understanding of consumer insights, expressions and knowledge, by combining state-of-the-art technologies, tools and continuous dialogues between brands and consumers. Our solutions include the development of online communities, social and mobile applications that enable brands to ask, observe, co-create and interact with consumers in real-time, anytime, anywhere.

Gongos

gongos.com

Gongos' approach to consumer intelligence supports decision-making for Global 1000 companies. The company offers clients multiple levels of engagement to address their ongoing business challenges: custom research, data integration and insight curation. O_2 Integrated, its decision sciences practice, harmonizes enterprise and research knowledge through consultative retainerships.

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www.hyperwallet.com

hyperWALLET delivers secure, global-grade payment technologies to organizations that require a simplified way to access or leverage the global financial network. Since 2000 we have become a leading provider of online and mobile payment, international payments, card products and financial technology solutions to enterprise-level customers in Canada, the U.S. and internationally.

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www.sismarketresearch.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.

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Virtual Incentives is the leading provider of Visa® virtual accounts and Physical Visa® Reward Cards serving the incentives market. We can help you create flexible, cost-effective rewards programs with digital delivery and tools to help maximize the impact of the incentive. Deliver incentives in real time and let recipients choose how they'd prefer to be rewarded.


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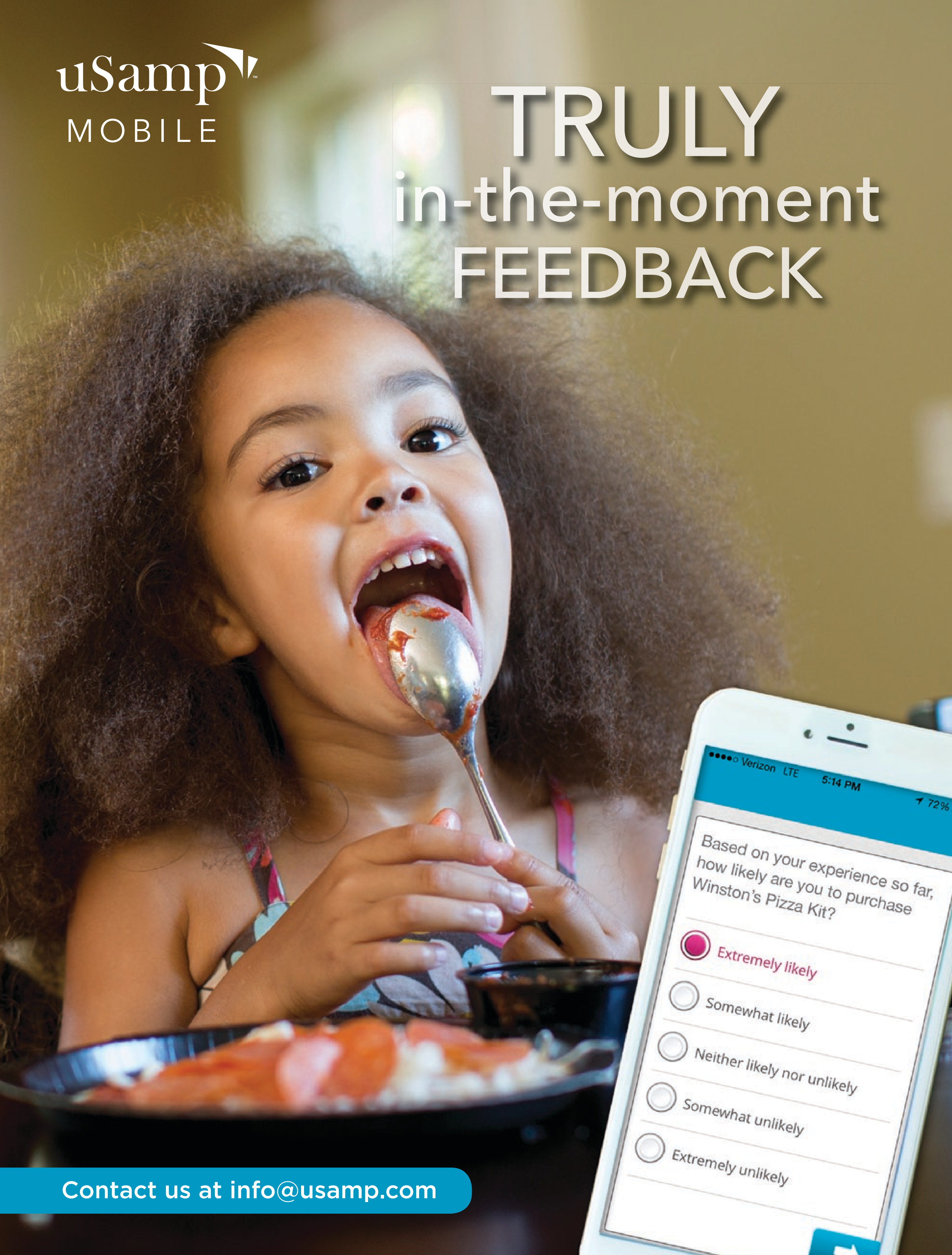
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