GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT

WWW.GREENBOOK.ORG/GRIT

2017 Q1–Q2

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COMMENTARY

OUR PARTNERS...

WELCOME

Welcome to the 21st edition of the **GreenBook Research Industry Trends Report**, using data collected in Q1 & Q2 of 2017.

Now that we're 21, it's time to have a party, and this edition is worth celebrating! It features the "GRIT Top 50" rankings of research suppliers and buyers perceived to be most innovative. We keep looking into issues surrounding automation, sample, and research budgets. The report also dives into the skills and resources needed for educating the researcher of the future.

Last but not least, we are unveiling the GRIT Benchmark, designed to give research organizations a set of comparison points against which they can measure their development and performance. In June, we'll release an interactive online tool using these benchmarking data, so stay tuned for that!

This GRIT Report is based on the biggest sample ever, with 2,637 completed interviews globally. Although the sample sizes are still not robust enough outside of North America and Europe, overall - and in relative balance with market sizes - we are at a point where GRIT may already be more on the "representative" side than just "largely directional". However, we won't claim representability yet so treat the findings as VERY "largely directional". In keeping with the spirit of transparency and collaboration, we are making all GRIT data available to everyone for further exploration.

As a research effort, GRIT allows us to "walk the talk" and, as always, we do better in some ways than in others. We feel the same pain that many clients and suppliers do in trying to migrate to new modes or incorporate best practices in mobile-friendly designs. For those who participate in the survey, we appreciate your contribution as we continue to fine tune the study.

And our objective? A report that goes deeper to explore the key drivers of our industry, offers better guidance, and helps chart the future as a strategic planning tool. We hope the GRIT Report is a touchstone for you and your team to understand what is happening, what it all means, and what you should do about it.

GRIT is a community effort and our authors, commentary providers, sample partners, advertisers, and most especially research partners make this all possible. Special thanks go out to the organizations who helped with data collection and analysis, including Ascribe, AYTM, Bakamo Social, G3 Translate, Gen2 Advisors, Lightspeed, mTAB, Multivariate Solutions, NewMR, OdinText, OfficeReports, Research Now, Researchscape International & Stakeholder Advisory Services.

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

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Go to
www.GreenBook.org/GRIT
to read the GRIT Report
online and to access all
GRIT data and charts

Infographic by aytm

EXECUTIVE SUMMARY

GRIT INSIGHTS IMPACT BENCHMARK

THE IDEAL PROJECT
Generates measurable ROI
Clear **storyline**
Delivering consultative **recommendations**

TECHNOLOGY STRATEGY
Has robust, multi-approach and evolving technology strategy

BEST PRACTICES APPLICATION
Interacts regularly with **senior stakeholders**
Focuses on future **growth strategy**
Ensures all research aligned with **business objectives**
Uses multiple sources to address business issues

PROJECT PRIORITIZATION FACTORS
Prioritizes quality of insights over speed, cost & innovation

GRIT Insights Impact Benchmark

What does the most high-performing research organization look like? Well, based on these data we can say that successful companies do a few things consistently.

ADOPTION OF AUTOMATION

What can be automated, will be automated and the research industry continues to be no exception. Clients and suppliers are largely aligned in prioritizing the areas they are actively exploring: the mechanics of research execution. There is much room for additional growth around all aspects of automation in the future.

	SUPPLIERS	BUYERS
ANALYSIS OF SURVEY DATA	57%	53%
CHARTING AND INFOGRAPHICS	57%	51%
ANALYSIS OF TEXT DATA	53%	53%
ANALYSIS OF SOCIAL MEDIA	42%	59%
SAMPLING	45%	34%

Top 2 Box, In use/Under Consideration

FINANCIAL OUTLOOK

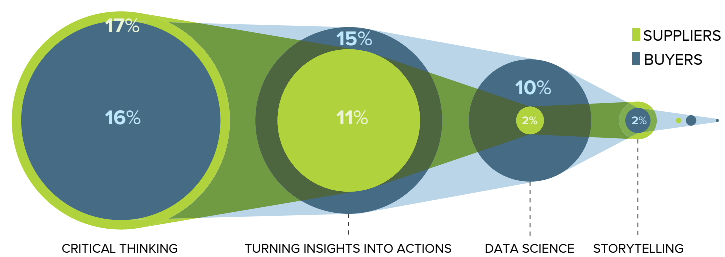
Optimism abounds among both clients and suppliers, although as always there does seem to be a disconnect on how much. Seems as if that client budget pie may be cut into some very small slices.

SAMPLE PROVIDERS SHOULD...

While clients, suppliers, and sample companies are becoming more aligned on issues around quality, **substantial differences** remain around **cost** and the **role** of sample companies.

	BUYERS	FULL SERVICE	SAMPLE PROVIDERS
charge more for fielding mobile-unfriendly surveys	18%	27%	65%
forbid fielding mobile-unfriendly surveys (with some exceptions)	55%	47%	54%
restrict access to "mobile only" respondents if surveys are not mobile-friendly	62%	65%	63%
consult with clients on questionnaire design	63%	53%	81%
enforce length of interview limits	68%	63%	68%
advise on whether their samples are representative of a target population	88%	90%	74%

EDUCATING THE RESEARCHER OF THE FUTURE



Clients & suppliers picked critical thinking and turning insights into action as the most important skills for success for graduates of post-secondary programs. However, there was a big departure on data science with clients making it a third top skill but suppliers barely registering it as important, opting instead for storytelling as their third choice. Is this a sign of the impact of big data and automation within client organizations?

Top 50 Suppliers and GRIT Top 25 Clients remain relatively stable overall, but shifts in order are present. The companies on these two lists are the clear leaders in defining the future of insights.

GRIT 10 MOST INNOVATIVE CLIENTS

1. Unilever (1)
2. Google (1)
3. Coca-Cola (1)
4. facebook (4)
5. PEPSICO (1)
6. P&G (5)
7. Apple (2)
8. amazon (1)
9. Nestlé
10. Microsoft (1)

GRIT 10 MOST INNOVATIVE SUPPLIERS

1. System1 Group
2. Ipsos
3. nielsen (1)
4. ODINTEXT (32)
5. InSites Consulting taking research forward (2)
6. research now (9)
7. GfK (2)
8. KANTAR (8)
9. Zappi Store (2)
10. LRW (2)

METHODOLOGY AND SAMPLE

GRIT respondents are recruited by email and social media channels via GreenBook and GRIT partners. These lists are comprised of both research providers and clients. The sample size for this latest wave is significantly larger than previous waves so some variances should be expected in certain findings based on sample artifacts.

As has been true for the past several waves, more of the respondents come directly through GreenBook email invitations than all other sources combined. However, many partners, particularly regionally, contribute significantly to the sample via direct emails to their own networks or via social media sharing.

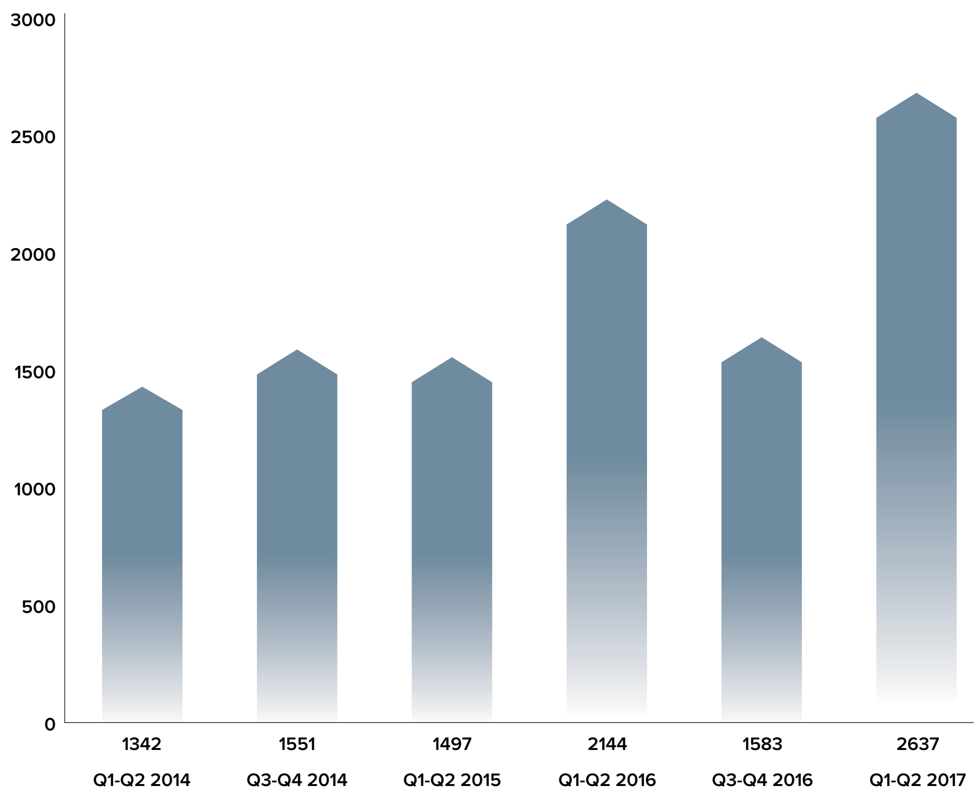
For this report, the analysis is based on 2,637 completed interviews, although for some questions, base sizes may be lower due to skip patterns, rotations, routing, and other factors. Unless otherwise noted, all analyses should be assumed to be based on the total sample.

A note on naming conventions for all trending data: GRIT waves are described by the time period the study is published, and field dates are picked generally in order to encompass and take a snap shot of the 2 preceding quarters. This edition is Q1-Q2 2017 because it is being published in Q2 and data collection occurred in April of 2017.

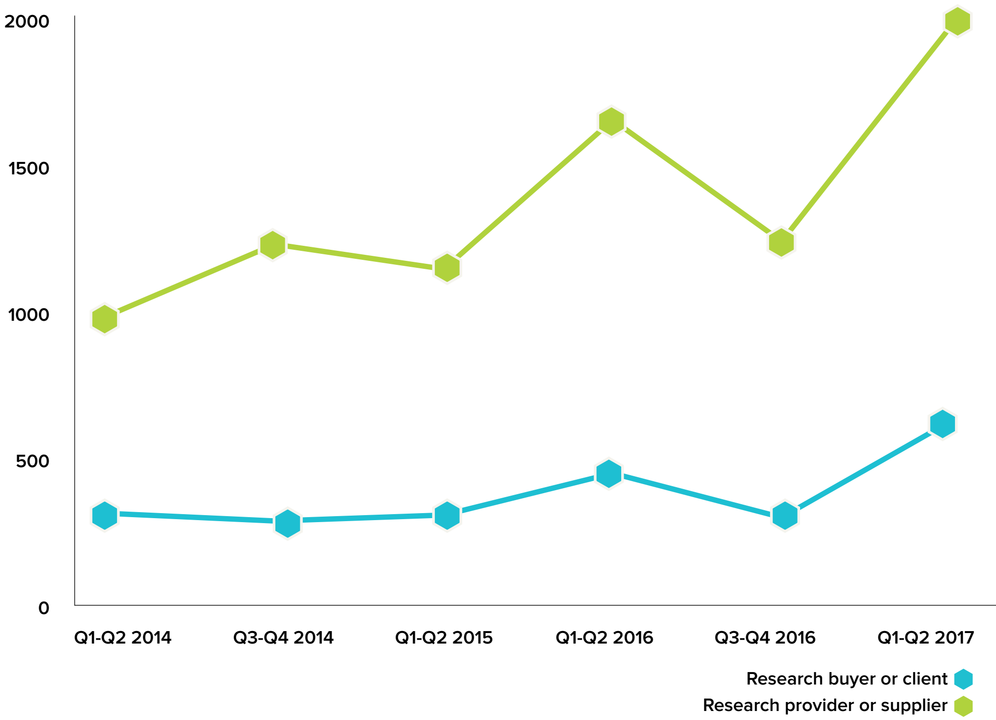
Here is a comparison of sample size of the most recent GRIT editions:

For this report, the analysis is based on 2,637 completed interviews

GRIT SAMPLE SIZE TREND



BUYERS VS SUPPLIERS TREND

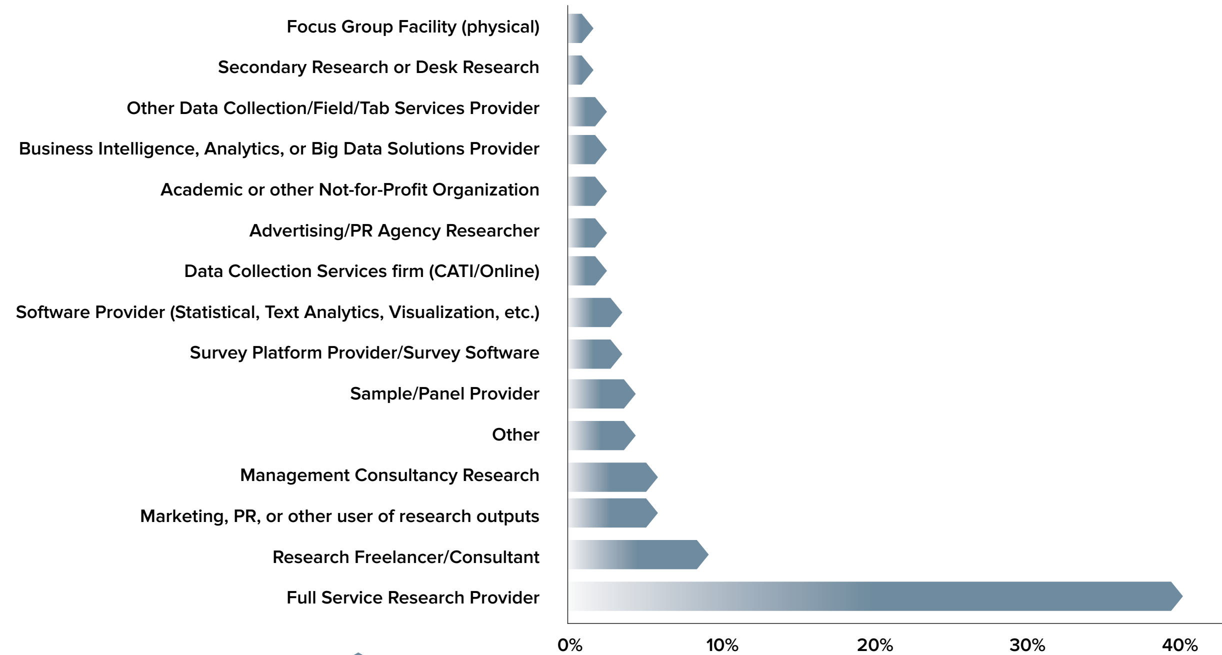


The mix of respondents has varied over the years of this study, but within fairly narrow bands. However, this wave not only increased in total sample size, but also in the distribution of clients vs. suppliers with Buyers being 24.5% (n=647) and Suppliers at 75.4% (n=1990).

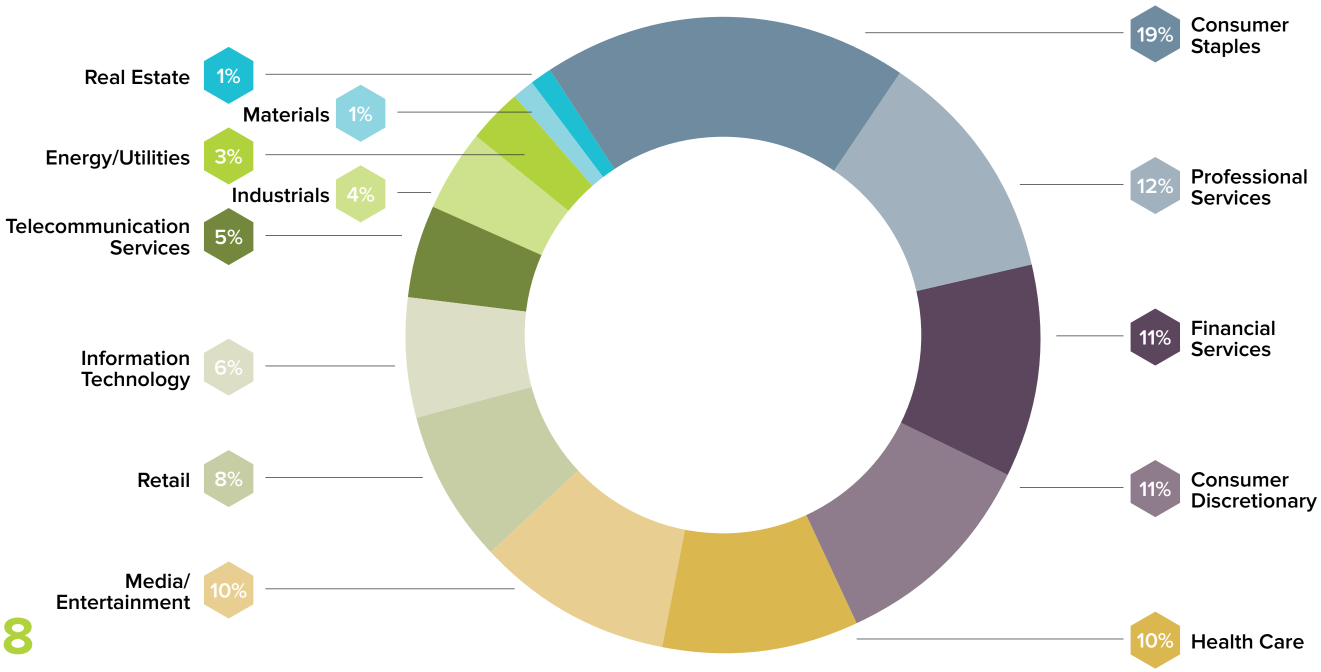
On the supplier side, we have achieved a robust cross-section of the various sectors of the industry, even if a strong plurality of respondents describe themselves as working within full-service agencies. Proportionally, representation from all industry sectors has remained relatively constant across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

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

GRIT SUPPLIER TYPE



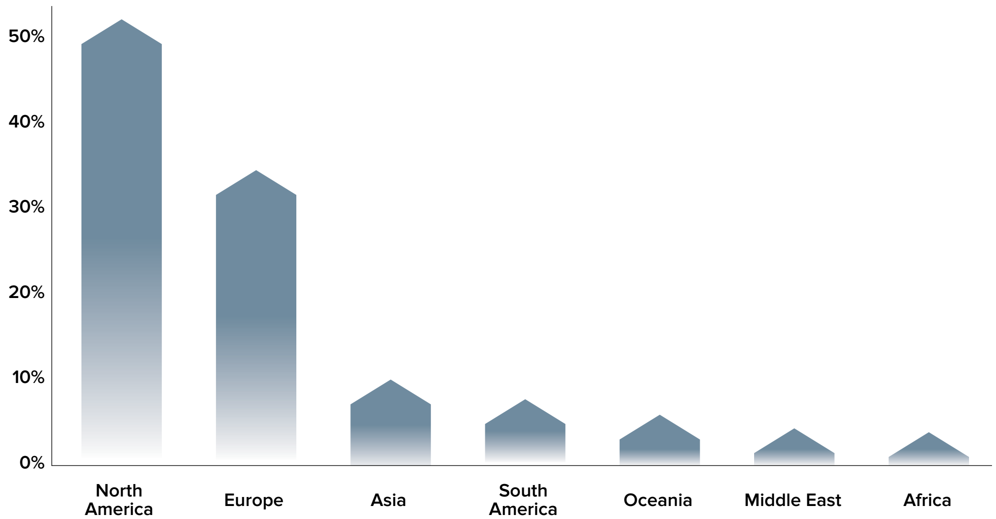
GRIT CLIENT RESPONDENTS BY VERTICAL



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

GRIT data is close to representative of the makeup of the industry as a whole

GRIT PARTICIPATION BY REGION



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

74 different countries are represented within the sample

HOW BRAND MARKETERS CAN DEVELOP A HUMAN INSIGHTS LISTENING CULTURE

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If a human insight falls in a consumer forest and nobody is listening… did it really happen?

Simply put, listening for human insight that can help a brand make a difference in someone's life is different than listening for consumer insight that comes out of someone's experience with a product or a brand.

As a marketing research and insights strategist, this hit me like a ton of bricks a few different times over the past year. Our brand marketing clients have begun expressing more of an interest in learning how to listen for human insights. Several are excited about gaining the listening skills we believe are important in a marketing world where humanizing brands is becoming more and more important. For brands that are more interested in human insights it's more important to listen beyond what people are saying to what they're really talking about. They are seeing the results in their business.

And then, of course, there was the election. This was not marketing research's finest hour… chiefly because we did a terrible job of listening. We listened for issues and opinions instead of listening for human insights. Much of the "listening" issue within the election had to do with most of us — me included — letting our feelings about how we wanted the election to come out influence what we thought was going on. This caused most of us to miss the big, transformative human insight.

Many brand marketers, agencies and insight strategists tend to make this same mistake in our day-to-day projects. We are so immersed in our corporate listening cultures and ideologies that we can miss transformative insights for our brands.

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GRIT COMMENTARY

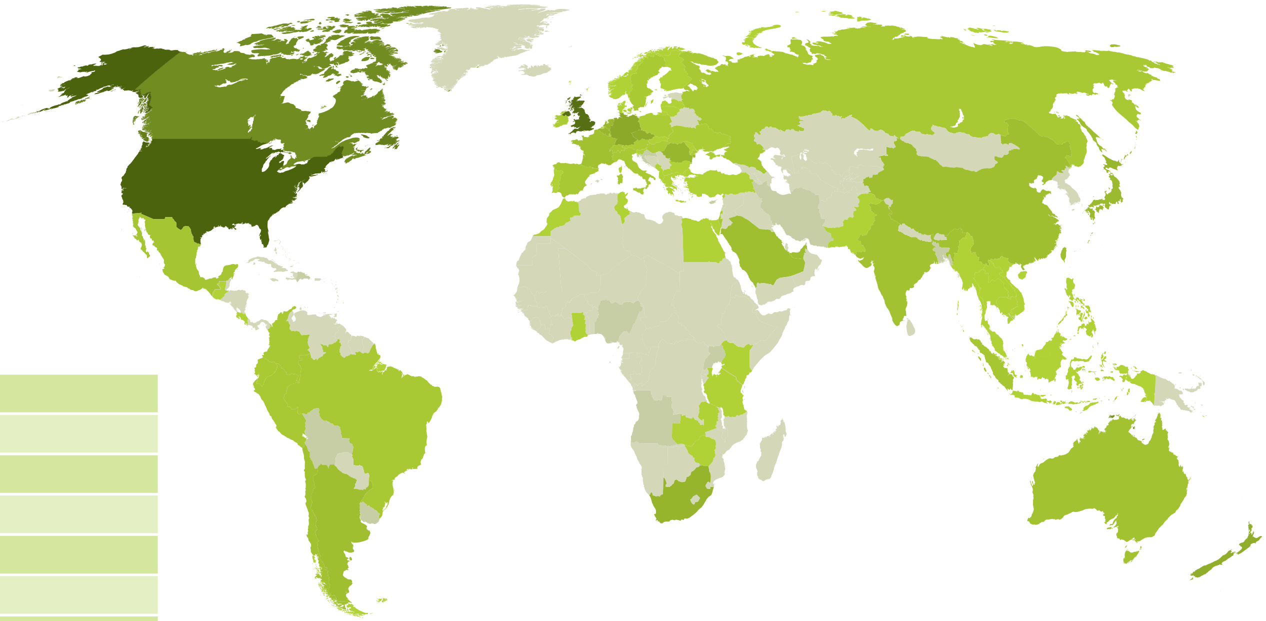
Yes… I believe all brands have a "listening culture" that develops over time. I've seen this over the years… sometimes in a more overt way (a fashion brand that didn't listen to people that weren't good looking), or recently in a more subtle way (a large, well-known food company that has signs in their building about the "voice of the consumer" but all the pictures and quotes relate to their brands — not people's — lives). Most of us — either unknowingly or knowingly — practice a form of affirmation-seeking, self-serving listening. The listening culture in our organization often forms an invisible barrier to growth because it's more focused on us than the very real people out there who might buy from us.

A good starting point would be to make an Emotional Listening Plan for each insights project. This will help make sure that brand, client and insight strategists are on the same page and can collaborate in a more meaningful way to elevate the insight into something that can truly transform a brand… and have everyone feel a deeper sense of ownership. We agree to a screener, discussion guide and stimulus… maybe we should also agree to an emotional listening plan.

It's possible to go all out and make your listening culture more human-centered. Don't be satisfied with thinking that you are "consumer-centric" when real growth comes from being "human-centered." Do this consciously. Don't just hope it happens. Talk about what you want to learn about people as people. Put research participants in a position where they're telling stories about their lives instead of offering opinions on your product. Those stories will tell you more than you've ever heard before but you have to learn how to listen to them emotionally and with empathy.

In total, 74 different countries are represented within the sample, with respondent density shown in the map on right.

GRIT COUNTRIES



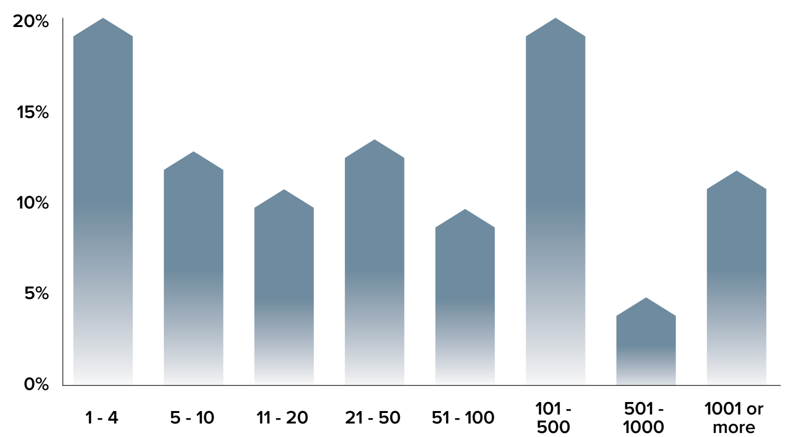
In total the top ten largest contributors to GRIT by country and percentage of completes were:

United States	45%
United Kingdom	12%
Canada	8%
Germany	5%
Romania	3%
Belgium	3%
Netherlands	3%
Japan	2%
France	2%
India	2%

In short, GRIT is a truly global study, giving a wide and deep view of the industry around the world.

GRIT respondents generally fall into 2 camps, with roughly two-thirds being from either small (under 11 people) organizations or larger (over 100 people), with the rest making up the middle. This has remained broadly consistent over the last several waves as well and, despite the larger sample size in this wave, remained in line with past trends. We believe this distribution is largely consistent with the makeup of research organizations in the industry.

GRIT RESPONDENT BY ORGANIZATIONAL SIZE



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

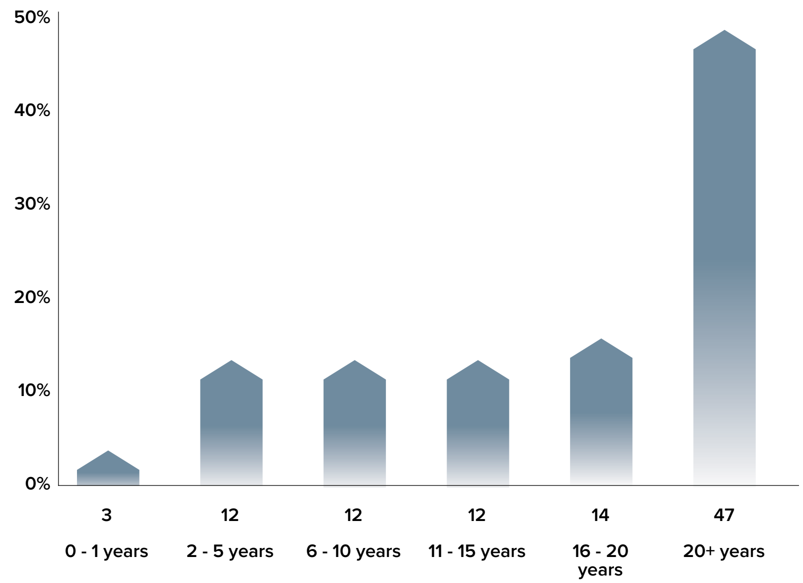
In looking at other firmographic questions, the GRIT sample is comprised of largely senior-level research professionals. Almost half of respondents have worked in the industry for over 20 years.

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

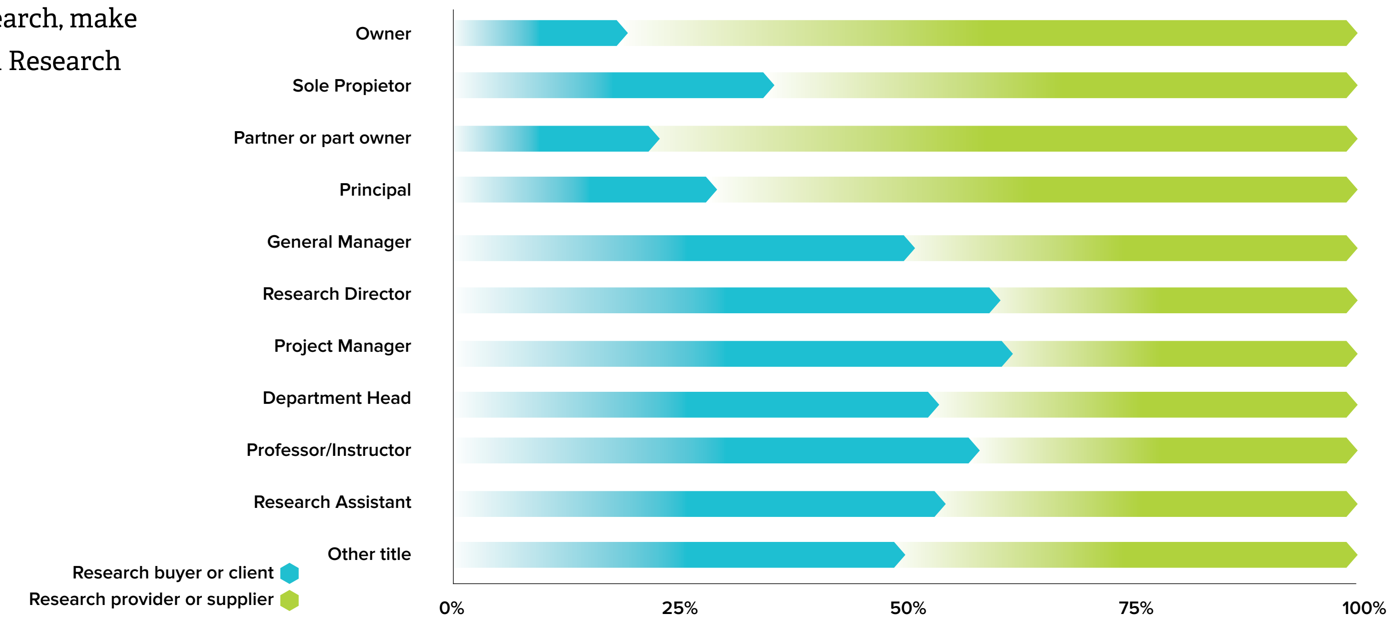
The combination of the large sample size globally, the increasingly single source recruiting method (GreenBook email lists), the diverse professional affiliation, and the deeply experienced nature of our participants continues to make the GRIT Report particularly impactful and worthy of careful reading by the industry as a whole.

To explore consumer perspective on market research, make sure to read the GRIT Consumer Participation in Research addendum later in this report.

GRIT RESPONDENT TENURE



GRIT RESPONDENT TITLES BY BUYERS VS SUPPLIERS



MOST INNOVATIVE SUPPLIERS – A GLIMPSE INTO A COLLABORATIVE FUTURE?

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The Market Research industry – or as it is increasingly being referred to, the insight industry – has had a tough few years. There are plenty of reasons for this situation, some more valid than others, but there is, I believe, broad agreement that innovation is core to moving forward and reinventing the world of Market Research.

Innovation, of course, takes many forms. Whether we're talking about the automation of redundant or administrative activities to simplify the research process, or leveraging new techniques and data science approaches to deliver deeper insight, a drive towards innovation is key to the future of our industry. Which brings us to the GRIT report.

What I think is most striking about the list of the 50 most innovative research suppliers in the latest GRIT report is the sheer range of companies represented there. It's not just traditional research agencies. But neither is it all young, nimble, boutique agencies who are rolling out new methodologies quickly. In fact, it's a fascinating mix of large and small agencies, large and small technology providers, consultants and social media behemoths.

This begs the question – what is Market Research these days?

20 years ago, in fact, probably 10 years ago, few would have predicted Facebook and Google listed alongside GfK and Research Now in a list of MR suppliers. So how did we get here?

In all honesty, I think we had to come to this point. We know that Market Research has to change and disruptions

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like those we're seeing now is how this change takes place. Users of research – or insight if you prefer – need to help their companies to connect with customers and potential customers in order to succeed. Over the long evolution of the MR industry, we've reached a stage where no one provider, whether a technology vendor or a full-service agency, can deliver everything that a client needs to do that. So a combination of approaches and partners is required.

Market Researchers are intermediaries, so how do we add value to businesses who are trying to get closer than ever to their customers?

Collaboration is a term that's been thrown around for a long time now, but we're only just reaching a stage where it's becoming a reality. And that's what is driving the list generated by the GRIT report's respondents. MR businesses, particularly those who are focused on becoming strategic business partners, can combine traditional techniques with modern data collection, social media analytics, and emerging technologies by partnering with best-in-class providers to deliver new depths of insight. In doing so, they are fostering greater collaboration between producer and consumer that will lead to products and services that better meet emerging market needs.

The move away from traditional Market Research and towards a truly collaborative "Insight Industry" much more accurately reflects the role that researchers will play in the decades ahead. The insight researchers will put clients back in control, bringing them closer to their customers, closer to the nuances of their business, and giving them more targeted information for decision making. This list of 50 innovative suppliers gives us a glimpse, not of single companies who will achieve this, but of a set of potential partners whose offerings will be combined by savvy firms looking to lead that future.

TOP 50 MOST INNOVATIVE SUPPLIERS

Over the past seven years, the GRIT Top 50 ranking has become one of the key metrics many companies use to understand their position in the marketplace. At its core, it is a brand tracker using the attribute of "innovation" as the key metric. Each year we measure how market research suppliers and clients are leveraging this brand element through a simple question series:

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

We're often asked how companies can "get on the list", and our response is always the same: effective marketing. Because of the nature of the question, there is no option but for a company to build organic awareness among the global industry audience in connection with the notion of being "innovative". Regardless of the channels used, every company on the list has managed to "break through" to become top of mind for many in the industry when they are thinking of innovative companies. That is a result of marketing efforts in some form or fashion.

The success of those marketing efforts is what we measure in the GRIT Top 50 rankings. We also believe the rankings are a good proxy for business growth, based on other sources that detail financial performance, including funding rounds, of the companies listed.

For this wave, using the aggregate of total mentions, we developed a list of over 2,000 unique companies from 6,902 total responses. From that list, we have narrowed it down to the Top 50 (actually 54 for suppliers due to ties in mentions) for additional analysis.

Only brands that received 18 or more mentions made it on to the list, which is a higher threshold than in the past. This is a reflection of the vast number of companies mentioned – companies vying to be identified with the "innovative" brand attribute and competing with each other.

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

1. We normalize all alternative or erroneous spellings (ex: Nielson, Nealson, Nelson, Nielsen, etc..)

We're often asked how companies can "get on the list", and our response is always the same: effective marketing.

2. If a company has changed its name, we recode to the new name (ex: BrainJuicer to System 1 Research)
3. If a company bought another company and rolled them in as a *division or product*, we recode to the acquiring company (ex: FocusVision and Decipher, 20/20 and iModerate)
4. If it is a *product or division* of a parent company, we recode to the parent company (ex: Nielsen BASES becomes Nielsen, Ipsos Neuro becomes Ipsos)
5. If two companies have the same name, we default to the larger company as what was intended
6. If a company has split, we count both (ex: Vision Critical & Maru)
7. Gobbledygook, comments such as "I don't know", "there are none", etc. we code as "none"

In previous waves, due to issues around consolidation and multiple individual companies within a single larger entity (for instance Kantar with Millward Brown, TNS, Added Value, etc.) we presented the Top 50 in two ways: *without* brand rollups, which is based solely on the number of times a company was mentioned with no consideration given to parent company ownership or affiliation, and *with* brand rollups, where we have consolidated all appropriate business entities under the parent brand.

While recognizing all of the rules we applied above, we have always considered "without rollups" as the definitive ranking so in this wave we decided to simplify things and only report one way: *without rollups*. This only impacts Kantar companies since every other scenario that we know of was covered in our previously established rules. We also recognize that Kantar is in the process of consolidating all of their companies under one universal "Kantar" brand but, based on these data, the individual operating brands still have a strong hold on industry awareness. However, if we were to count the Kantar operating brands as one, the order of the rankings would change slightly at the very top levels. We trust that you will be able to do that math from the chart if you are so inclined.

Lastly, we are ignoring "ties" (companies with the same number of mentions) for the sake of simplicity; it is not a factor in the Top 10 at all, but it does make the Top 50 actually the Top 54 due to ties at the lower end of the spectrum.

Now, having properly clarified the context and rules, without further ado, here is the current ranking as well as comparison to the last wave from one year ago:

System 1 Research (formerly BrainJuicer) maintains their position as the most innovative agency

RANKING OF THE TOP 50 MOST INNOVATIVE SUPPLIERS

Company	Mentions	2017 Rank	2016 Rank	Change
System 1 Research (formerly BrainJuicer)	441	**1**	1	0
Ipsos	364	**2**	2	0
Nielsen	253	**3**	4	1
OdinText	248	**4**	36	32
Insites Consulting	202	**5**	3	(2)
Research Now	165	**6**	15	9
GfK	160	**7**	5	(2)
Kantar Group	155	**8**	16	8
ZappiStore	151	**9**	11	2
LRW	135	**10**	8	(2)
SSI	126	**11**	13	2
Google	124	**12**	10	(2)
Millward Brown	116	**13**	9	(4)
Qualtrics	111	**14**	12	(2)
TNS	107	**16**	6	(10)
Hotspex	105	**16**	18	2
20/20 Research Technology	79	**17**	20	3
Vision Critical	78	**18**	7	(11)
Luc.id	68	**19**	47	28
FocusVision	54	**20**	21	1
Itracks	54	**21**	DEBUT	DEBUT
Toluna	51	**22**	17	(5)
Macromill	47	**23**	24	1
Cint	45	**24**	31	7
Lightspeed	43	**25**	23	(2)
Voxpopme	42	**26**	50	24
Discuss.io	41	**27**	44	17
SKIM	41	**28**	DEBUT	DEBUT
GutCheck	34	**29**	14	(15)
Intage	34	**30**	22	(8)
AYTM	30	**31**	43	12
Confirmit	30	**32**	DEBUT	DEBUT
SurveyMonkey	29	**33**	26	(7)
RIWI Corp.	27	**34**	19	(15)
Burke	26	**35**	DEBUT	DEBUT
Facebook	26	**36**	39	3
Remesh	25	**37**	DEBUT	DEBUT
mFour	24	**38**	DEBUT	DEBUT
YouGov	23	**39**	34	(5)
Flamingo	22	**40**	28	(12)
IBM	22	**41**	37	(4)
Join the Dots	22	**42**	46	4
MadPow	22	**43**	DEBUT	DEBUT
Sentient Decision Science	22	**44**	33	(11)
Sawtooth Software	21	**45**	DEBUT	DEBUT
MARU Group	20	**46**	DEBUT	DEBUT
Happy Thinking People	20	**47**	32	(15)
InfoScout	19	**48**	35	(13)
InsightsNow	19	**49**	DEBUT	DEBUT
Hall & Partners	18	**50**	40	(10)
Schlesinger Associates	18	**51**	DEBUT	DEBUT
Buzzback	18	**52**	DEBUT	DEBUT
Dig Insights	18	**53**	DEBUT	DEBUT
GetFeedback	18	**54**	DEBUT	DEBUT

System 1 Research (formerly BrainJuicer) maintains their position as the most innovative agency, and with a very large lead over every other agency. What is truly remarkable about that achievement is that they did it while in the middle of a re-branding; taken separately BrainJuicer would have still been number one and System 1 Research would have ranked in the top 20 as well, a true testament to the marketing power of the company. While many companies are working hard to unseat them, their dominance in the minds of the industry as the most innovative supplier should serve as a lesson on how to create and maintain such a strong brand perception.

A second acknowledgment should be given to Ipsos and Nielsen. Ipsos remained in the second position while Nielsen moved up one spot from 2016 to number three. Both have been in the top 5 since the inception of the GRIT 50. Based on a steady stream of new product and service launches combined with their extensive reach and overall credibility, the industry is obviously paying attention.

There are other big changes in the Top 10 as well, including the re-emergence of OdinText in the upper ranks in fourth place (a jump of 32 places, the largest change in this year's list). Tom H. C. Anderson, CEO of OdinText, is a skilled marketer with extraordinary commitment to content marketing. For the past year, and especially in the last 6-9 months, he has been a veritable content machine, using the OdinText platform to do inspired and provocative research and using the results as the foundation for blog posts, memes, ads, social media posts, etc. The lesson here is that there are many ways to achieve marketing success from big budget omnipresence to low(er)-budget content-driven techniques.

Insites Consulting rounds out the top 5 at number five, down slightly from number three last year. Here's another company that is masterful at using thought leadership across media channels combined with a distinct style more evocative of an ad agency than a research company. Insites Consulting continues to register strongly as a leader in innovation in the industry.

In the rest of the top 10, Research Now gained by 9 points to take the 6th spot, GfK declined slightly by 2 to number 7, Kantar bounced back from 2016 with a gain of 8 spots to assume the 8th position, ZappiStore continued their strong upper trajectory to move up 2 points and into the top 10 for the first time at number 9, and LRW declined slightly by 2 but still maintained a lock within the top 10.

We could loosely group the top 10 companies into 3 buckets:

1. Next Generation Consultancies (System 1, Insites, LRW)
2. Tech Players (OdinText, Research Now, ZappiStore)
3. Behemoths (Ipsos, Nielsen, GfK, Kantar)

This basic categorization runs throughout the remainder of the list, with more of the first two dominating as we move past the top 20.

Outside of the top ten there are some bigger moves. A record-setting fourteen companies made their debuts into the GRIT 50 this year with an interesting mix of newer tech-based companies and more established players that have been making great strides in repositioning their businesses by embracing new techniques, technology and overall thinking.

These are certainly companies to watch as they build on their brand awareness momentum:

COMPANIES ENTERING THE GRIT TOP 50 THIS YEAR

Company	Rank
Itracks	21
SKIM	28
Confirmit	32
Burke	35
Remesh	37
mFour	38
MadPow	43
Sawtooth Software	45
MARU Group	46
InsightsNow	49
Schlesinger Associates	51
Buzzback	52
Dig Insights	53
GetFeedback	54

These are certainly companies to watch as they build on their br There were also seventeen companies that moved up, some quite significantly. We already mentioned OdinText earlier, but Luc.id, Voxpopme, Discuss.io and AYTM all made impressive leaps of over 10 spots between 2016 and 2017, and others continued steady upward gains in brand perception.

A record-setting fourteen companies made their debuts into the GRIT 50 this year

This group is almost entirely made up of technology driven companies with the exception of Kantar and Nielsen, and arguably their continual investment in rolling out new tech-driven products gives them some connection to the tech cohort as well. and awareness momentum:

COMPANIES MOVING UP IN THE GRIT TOP 50 RANKINGS

Company	2017 Rank	Change
OdinText	4	32
Luc.id	19	28
Voxpopme	26	24
Discuss.io	27	17
AYTM	31	12
Research Now	6	9
Kantar Group	8	8
Cint	24	7
Join the Dots	42	4
20/20 Research Technology	17	3
Facebook	36	3
ZappiStore	9	2
SSI	11	2
Hotspex	16	2
Nielsen	3	1
FocusVision	20	1
Macromill	23	1

WHY ARE SUPPLIERS CONSIDERED INNOVATIVE?

In terms of why these companies are perceived as innovative (beyond the use of words like 'new' and 'innovative'), we looked only at the verbatims from client-side researchers to get an understanding of what was driving interest from a commercial perspective. We cleaned out the generic "innovation/innovative" and other non-specific words to get a better outline of the perception drivers. Not surprisingly, based on the composition of the GRIT 50, the key drivers of perceived innovativeness are around technology that reduces cost while increases speed, delivering actionable insights, and overall quality. There is also a strong undercurrent of behavioral science, perhaps unsurprising considering the dominance of System 1 Research in the rankings.

A few verbatims from client-side GRIT respondents underline the broad themes we have identified:

- "Willing to try new approaches but well versed in tried-and-true techniques."
- "Bringing new and relevant ideas into the industry."
- "A quick and cost-effective solution that allows rapid research to answer business questions, meaning we can research when historically timelines wouldn't have allowed us to."
- "Agile research practices, speed, technology."
- "Collaboration, Partnerships, Technology, Methodology, Talent."

Not surprisingly, the key drivers of perceived innovativeness are around technology that reduces cost while increases speed, delivering actionable insights, and overall quality.

It's perhaps important to underscore a point we made in last year's analysis:

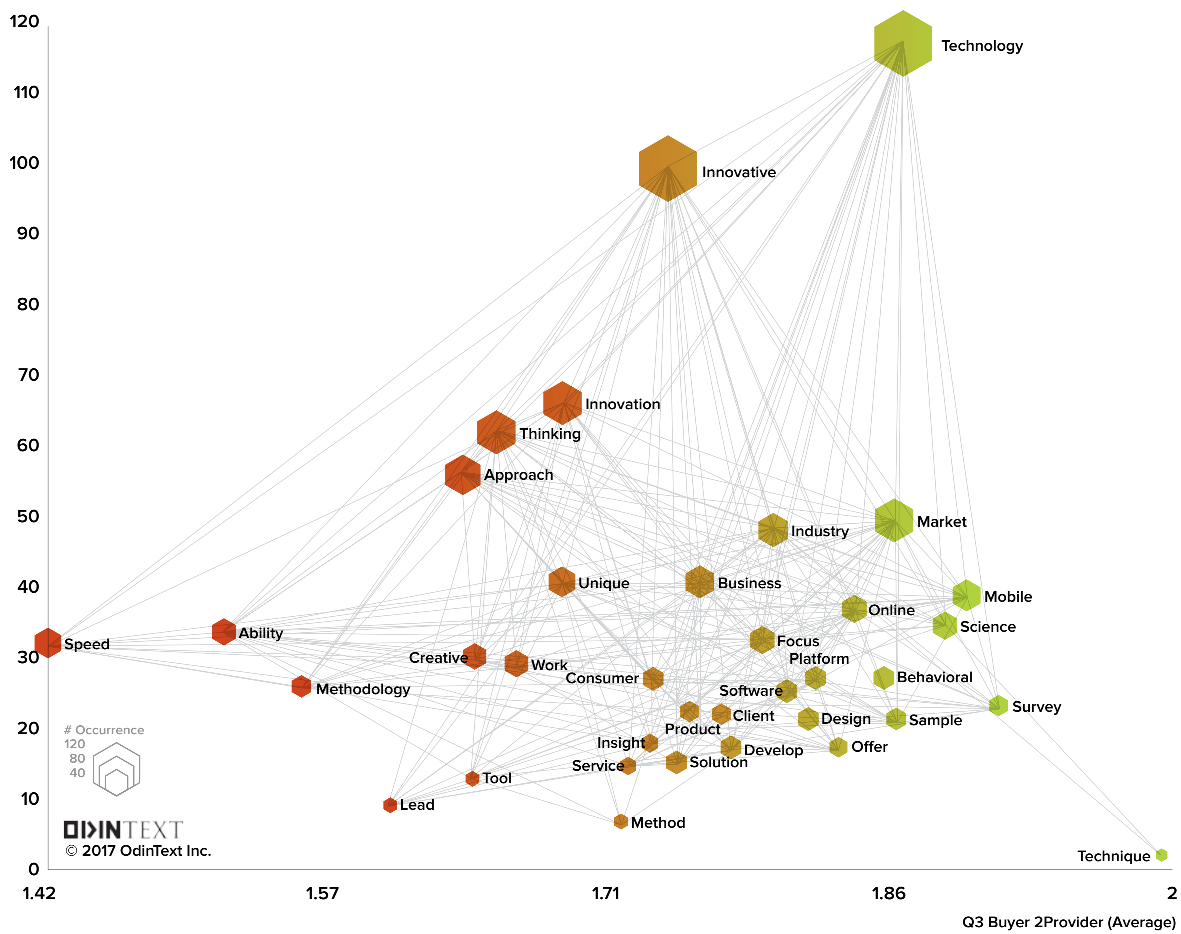
"This finding flies in the face of the people who say real innovation is about people, storytelling, and co-creation. In order to score well on Innovation, having good, new and innovative tech is a key part of the picture. Terms like 'people', 'data collection', 'leadership', 'virtual' and 'quality' were only used occasionally."

Yes, good business practices such as service, strong and dependable teams, experience, etc. are necessary for success but in the insights category, as in so many others, technology and its impact on process and cost is a fundamental driver of the industry.

We looked for connected concepts in the verbatims of why companies are perceived as innovative. The analysis is telling:

TOP REASONS WHY SUPPLIERS ARE CONSIDERED INNOVATIVE

By Respondent Type (Red – Client Side, Green – Supplier Side Comment)



Speed and ability are key considerations for clients, while broader usage of technology to impact the process are the key considerations for suppliers (and rightfully so, we think). Both groups meet in the middle with concepts around innovation as a whole, new thinking, unique offerings, etc. Organizations that embrace innovation from both sides (perspectives) do appear to be making a real impact in the industry.

The core takeaway is that clients are now unabashedly looking for the "Holy Trinity" – cheaper, faster, better – and expect suppliers to deliver just that.

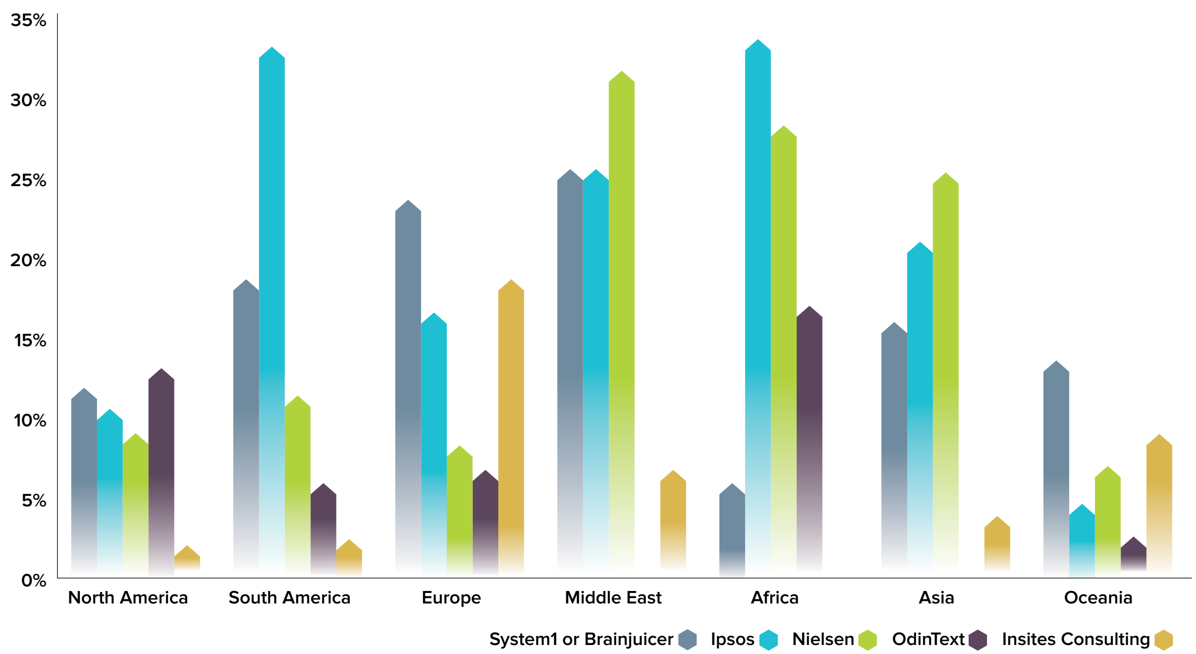
DIFFERENCES BY REGION, COMPANY SIZE, AND ROLE

Looking at differences in among the Top 5 companies using a few other variables yields interesting insights into what works from a marketing and branding perspective globally and across segments.

First, System 1 Research does relatively well globally, but leads in Europe and Oceania and maintains relative parity with the others in North America. Ipsos dominates in Latin America while Nielsen is the leader among Asian respondents. OdinText marginally beats out all in North America and Insites Consulting does very well in Europe. A hypothesis here is that in emerging markets the large global players dominate due to their ability to scale effectively. Europe and Oceania have a strong predisposition towards emerging methods combined with strong consultancy models, while technology is being embraced more strongly in North America than elsewhere. Asia seems to be a bit of a mix of the other three.

For suppliers wishing to achieve solid brand recognition in these markets, the Top 5 are useful examples to compare their efforts against.

GRIT TOP 5 BY REGION



Technology is being embraced more strongly in North America than elsewhere

Similarly, when looking at rankings by company size, a few interesting observations come to the fore. First, in larger organizations (500 or more) Ipsos and Nielsen, large organizations themselves, are generally top of mind. Considering much of their business is comprised of selling to these organizations, perhaps it's not surprising that they maintain top-of-mind positions on respondents from those companies.

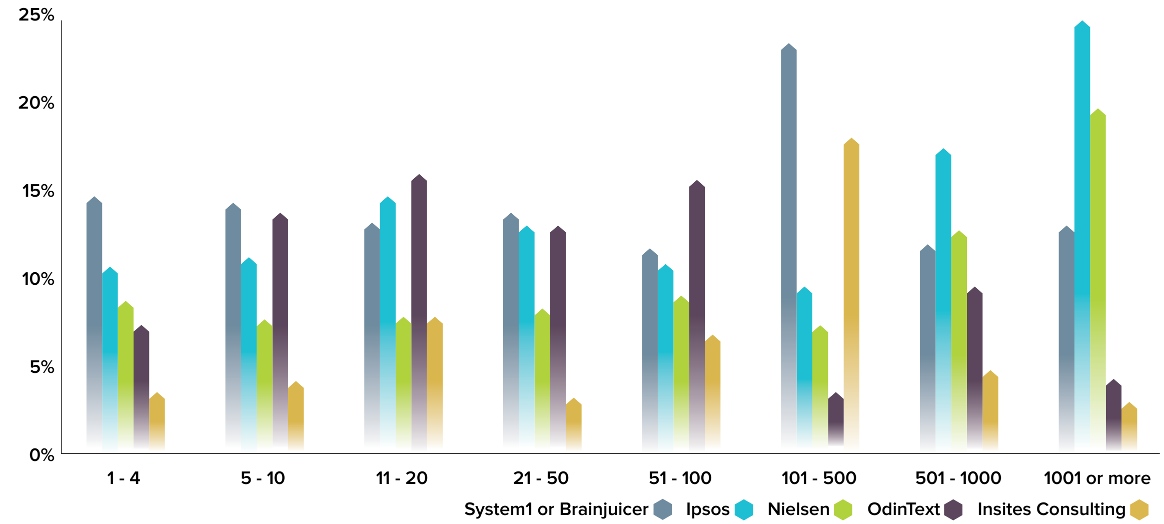
System 1 Research leads in small organizations (under 10) as well as mid-size (101 – 500). Mid-size is also where InSites Consulting has the strongest brand presence. OdinText plays well across the board generally, but has significant brand strength in small to mid-size organizations.

Again, the lesson here is that we can assume these companies target their marketing efforts to an extent around company size and here we see where those efforts are paying off.

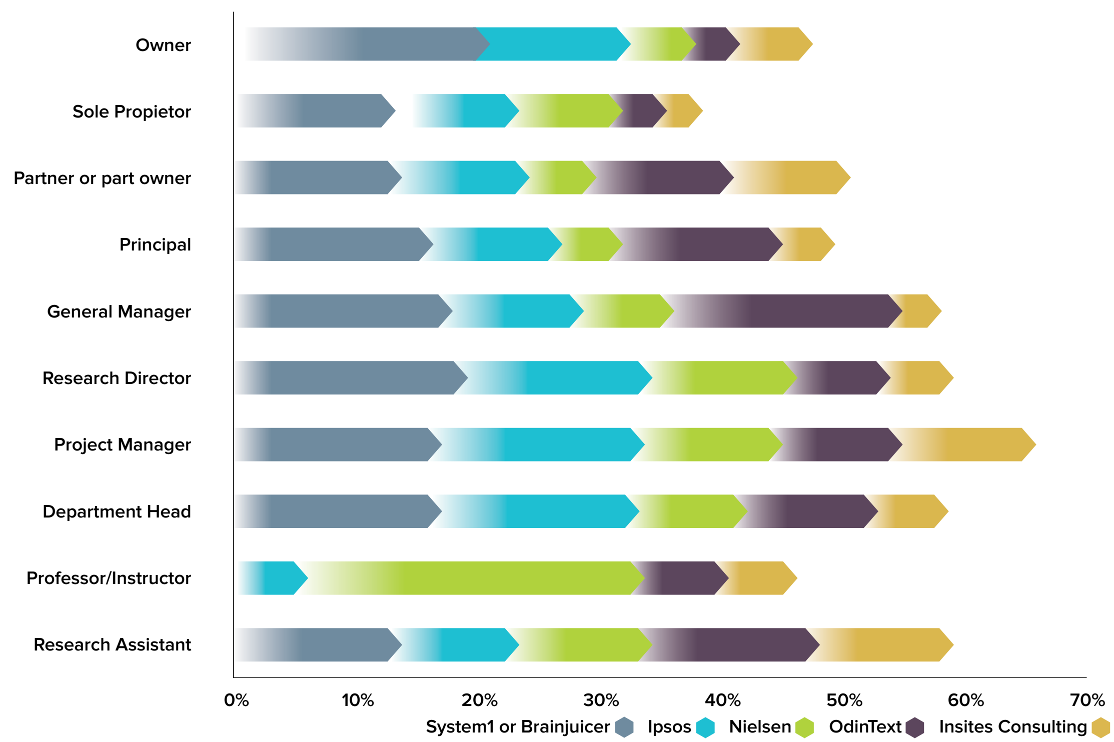
Finally, we looked at performance by job title to see if the messaging of the Top 5 brands resonates more strongly at some levels than others. A few observations emerge:

System 1 Research is considered more innovative than any other firm across all roles, but has particular strength among senior-level researchers. Similarly, OdinText performs well across all levels but does exceptionally well among General Managers. InSites Consulting has a strong base among researchers directly involved with operations.

GRIT TOP 5 BY COMPANY SIZE



GRIT RESPONDENT ROLE



THREE LESSONS FROM CLIENT RESEARCH INNOVATORS

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As always, there is much to learn from innovative researchers. Whether research methods are used to drive differentiation in mature industries or totally disrupt dynamic markets, it is clear that companies are using research to seek out the new, avoid repeating the past, and seize the initiative in playing offense, rather than defense, in a market.

Agile Research Strategies

Agile research strategies leverage new techniques and technologies to make market knowledge more accessible, accurate and affordable. They enable brands to engage with specifically targeted consumers in real time through their digital vehicle of choice. Agile research is helping companies gain in-the-moment insights and quickly optimize a variety of concepts. It is helping research innovators ensure the voice of the customer is in everything they do.

One common theme among innovators is their use of agile research practices that bring together data from a variety of sources. This approach allows them to push into new research methods that dig deeper into consumers; in areas that include emotions and non-rational explanations of behavior.

Automation

Research done right can influence decisions at every level of the business. Whether it is a major product launch in a new market or the placement of a purchase button on the website, data can give executives confidence that their initiatives will succeed. Automated research allows marketers to more easily test new concepts. It also enables them to speed up the decision-making process and expand the number of decisions that are evidence based, helping to fuel growth at the business.

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Research innovators are leveraging automation to obtain competitive advantage by tapping into consumer sentiment, and coupling available information in nearly real-time. The readiness of the data means that the decision-makers at these companies no longer have to spend a great deal of time waiting on insight to make its way through various channels before it reaches them. This is where the messages can often become distorted whereas with automation, this issue is avoided.

Innovators are the ones pushing the frontiers of automation. In the past, automation was mostly operational; it involved scripting the surveys and collecting the data. Today, it extends to research methodology automation to incorporate accepted methodologies into digital platforms.

Quick Turn Insights

Another approach that separates innovators from the rest of the research pack is their ability to achieve quick-turn insights, which make it easier for them to react to findings. This can be especially valuable in managing complex consumer studies.

To gain quick-turn insights, brands are automating their processes with solutions that create questionnaire and programming templates which allow for faster study design and launch. This method can cut survey launch time from days to hours, which can be critical for brands that need feedback faster than possible from traditional techniques.

Innovation leaders are also tapping data visualization and analytics so that they can more easily glean insights and react to findings while a study is still in field. This shortens the pathway between a brand's problem and finding the solution, meaning companies can create and execute campaigns when they matter the most, at the right time and to the right audience.

Key Learning from Innovators

Looking at the lessons from the most innovative companies shows market research is a vibrant discipline with new and better ways constantly emerging to gain and leverage customer intelligence and insight. That's a lesson all companies can benefit from learning.

THE BIG PICTURE

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

That being said, innovation is a never-ending and dynamic process and we see companies move up and down in the GRIT Top 50 rankings as new approaches, thinking, and market forces come into play. By attempting to somehow describe and measure the perception of innovation, we hope to help the supplier community assess the impact of their marketing efforts and offer guidance and inspiration for their future efforts.

The GRIT Top 50 rankings and analysis create a positive competitive framework for established firms as well as new entrants to guide themselves in a rapidly changing industry.

Plus, it's fun! Everyone loves to look at "league tables" and we're grateful that the industry has embraced the GRIT Top 50 as one of the few comparative measurement standards we have. After all, without something to measure ourselves against, how do we know what we can do to get better? At least as it relates to being perceived as innovative, the GRIT Top 50 points the way.

EVOLVING WITH THE TIMES: TAKING QUALITATIVE RESEARCH INTO THE MODERN AGE

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We're living in an on-demand world. With the "Uberization" of technology, we have all grown used to instant gratification. While traditional methods of conducting market research at focus group facilities have worked well in the past, they can't keep up with brands' demands for agile market research today. When brands value innovation, software providers are encouraged to create technologies that enable brands to build and market better products.

What does a qualitative market research solution look like in the modern age? In order for brands to conduct agile market research and extract insights faster, qualitative solutions in the modern age have to be online, automated, and on-demand.

By harnessing the power of modern technologies, brands are now able to can gather powerful insights faster, at lower costs, through a flexible and iterative process. Leveraging ubiquitous technologies, like Internet browsers, webcams, insight communities, audio/video streaming, VoIP, and natural language processing, brands can still form human connections and gather rich insights, but with less friction in the research process.

In order to reduce the learning curve and increase adoption, new solutions have to be driven by simplicity. By automating parts of the research process, we can remove a lot of the friction that has made conducting research so complicated, frustrating, and inefficient to execute in the past. According to the GRIT Survey, about 10-30% of research buyers/suppliers have already adopted automation in quant, with roughly the same percentage of brands exploring it as a possibility for the future. Many parts of the qualitative

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process can be automated, including: recruiting/screening, tech checks, ensuring participant attendance, incentives, among others. Because automation speeds up the research process, it can enable qualitative solutions and gathering insights to become on-demand. Traditionally, qualitative projects have taken a long time to execute, leading many to forego it altogether. This should be startling for us as an industry.

At Discuss.io, we're fortunate that our customers encourage and challenge us to be innovative. From the very beginning, Unilever has been a key partner in helping us push the market research industry forward. Working closely with Unilever, we understand their desire to connect with their consumers globally. Increasingly, marketing and insights teams, at Unilever and at many of the other top 25 brands named in the GRIT Survey, are launching empathy-building "consumer connection" programs. With the speed of modern technologies, these connections can happen on-demand and are able to humanize the consumer in a way that is missing from quantitative market research.

Consumer-centricity is a core value at Unilever and, as a multinational organization, understanding a global consumer base can be a challenge. In one such example, Unilever wished to gain a deeper understanding of consumers across Africa. Because of their openness to using innovative approaches, they were able to connect with consumers who would have otherwise been inaccessible to them through real-time conversations online. Furthermore, by connecting online and eliminating the need for travel, they were able to reduce costs and time spent by 50%, while simultaneously reducing their environmental impact.

Online, automated, on-demand solutions will drive qualitative market research into the modern age. When brands, like Unilever, are open to experimentation, software providers are able to drive innovation by developing technologies that allow them to build better products, create successful marketing campaigns, and have the voice of the consumer at their fingertips. Together, we have a responsibility to bring market research into the modern age.

TOP 25 MOST INNOVATIVE CLIENT COMPANIES

To accompany our review of the most innovative suppliers, we asked researchers who the most innovative clients are (and why). This data was collected in exactly the same way as the for the innovative suppliers list.

In the past, we reported the Top 50 most innovative client companies. However, beyond the top 25, number of mentions became very small and companies were often "tied" we thought it made more sense to limit this year's ranking to the Top 25.

The list on right shows the top 25, as determined by participants in the GRIT survey, and shows the ranking in 2016 and 2015. In total, 1877 researchers expressed a view, offering 4682 mentions of brands between them.

The first point of note is that there is relatively little change at the top of the table. All of this year's top 11 were also in the top 12 last year. It is interesting to see that P&G dropped from number 1 to number 6, and General Mills fell from 10th to 20th. But, the overall pattern at the top of the table is one of stability. This stability is in contrast with 2015 to 2016, where there were a number of changes. For example, in 2016 Facebook and Amazon entered the top ten, from 19th and 31st respectively.

Change	2017 Rank	2016 Rank	2015 Rank	Brand	Mentions	Country	Category
1	**1**	2	3	**Unilever**	308	UK/Netherlands	CPG
1	**2**	3	4	**Google**	204	USA	Online
1	**3**	4	2	**Coca-Cola**	172	USA	Soft Drink
4	**4**	8	19	**Facebook**	118	USA	Online
1	**5**	6	10	**Pepsico**	106	USA	Soft Drink
-5	**6**	1	1	**P&G**	92	USA	CPG
-2	**7**	5	6	**Apple**	91	USA	Technology
-1	**8**	7	31	**Amazon**	87	USA	Online
0	**9**	9	11	**Nestle**	50	Switzerland	CPG
1	**10**	11	7	**Microsoft**	35	USA	Technology
1	**11**	12	18	**Heineken**	34	Netherlands	Beer
DEBUT	**12**	*	*	**Netflix**	32	USA	Online
DEBUT	**13**	*	*	**Bai**	29	USA	Soft Drink
2	**14**	16	24	**Disney**	29	USA	Entertainment
5	**15**	20	9	**Johnson & Johnson**	28	USA	Pharma / CPG
21	**16**	37	*	**Tesla**	26	USA	Auto
33	**17**	50	*	**Pfizer**	25	USA	Pharma
-5	**18**	13	15	**Samsung**	24	Korea	Technology
-1	**19**	18	17	**Intel**	23	USA	Technology
-10	**20**	10	5	**General Mills**	22	USA	CPG
-7	**21**	14	43	**Nike**	20	USA	Sports
3	**22**	25	20	**Danone**	20	France	CPG
DEBUT	**23**	*	*	**Ford**	20	USA	Auto
DEBUT	**24**	*	*	**Merck**	19	USA	Pharma
15	**24**	39	*	**Uber**	19	USA	Transport
0	**24**	24	52	**Clorox**	19	USA	CPG

Outside of the top nine, the absolute number of mentions for each brand is relatively small (e.g. Microsoft at number 10 has 35 mentions). So, readers should not pay too much attention to specific rank positions in the top 25. The key message is about who is in the top 25 and who is not, and the performance of different business sectors.

The strongest sectors, by this measure, are CPG, soft drinks, online and technology. Unilever and P&G, Google and Facebook, and Coke and Pepsi typify the concept of an innovative client. These companies are not satisfied with the status quo, they are seeking to gain competitive advantages by trying new things and investing in results.

The top 25 showed four debut brands:

- Netflix, an interesting development that reflects the way they have been mining information and using it to make big bets.
- Bai, a new face on the scene. This innovative company was only launched in 2009, and like brands such as Red Bull, it has adopted agile and innovative approaches.
- Ford's entry into the top 25 means that along with Tesla there are two auto companies in the top 25, one trading on the benefits of new, one seeking to utilize innovation to recapture former heights.
- Merck's entry to the top 25 means there are now two pharma brands. The rise of branded generics has been a major disruption in the pharma world, requiring brands to master many skills that were previously seen as the domain of consumer research.

It's also interesting to see how client-side respondents view their peers. The chart on page 29 shows the percentage of mentions of the Top 10 brands by client-side respondents by their category.

Google is held in high esteem almost universally, perhaps indicating the awareness of how technology and data abundance can be leveraged for business impact. In fact, they are the only brand mentioned across all categories. Unilever and Coke are next in terms of ubiquity of (but not quite universal) top of mind awareness and of course Unilever overall ranks as the number one mentioned brand. With their support of innovation via Unilever Ventures and public advocacy of new thinking and approaches, they are perhaps the best overall example of a brand "walking the talk" on the topic of innovation. Other client-side insights organizations across categories are paying attention to Unilever's activities.

Unilever and P&G, Google and Facebook, and Coke and Pepsi typify the concept of an innovative client

Unilever overall ranks as the number one mentioned brand

Who is not on the list?

In many ways, the key message coming of out this data relates to those sectors that did not make the Top 25 list. There are no media companies (other than Disney and Netflix, whose interests include media), no finance companies, no retailers (other than Amazon), no fast-food chains, no toys, no telecoms, and no management consultancies. Many of these sectors are spending billions of dollars on research, often through approaches such as brand and ad trackers, customer satisfaction, and the all-pervasive NPS.

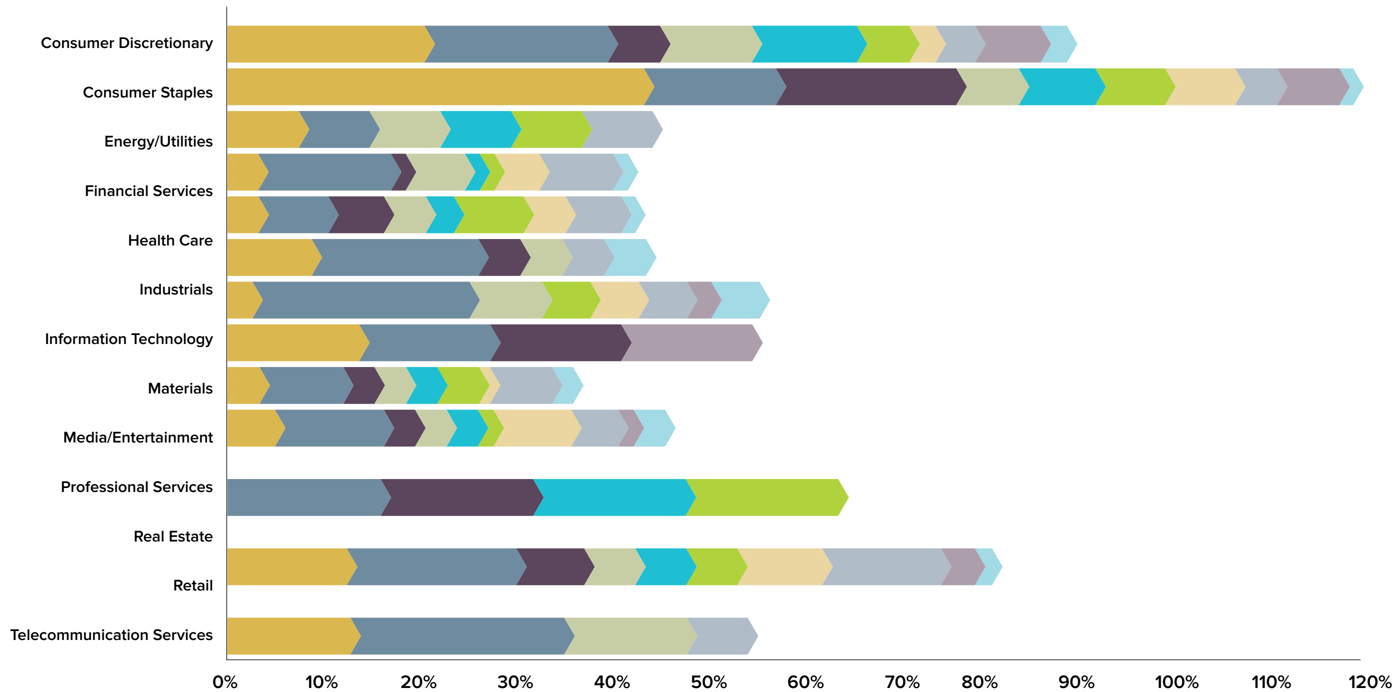
Link between innovative research and value?

The top five brands on Forbes 2016 list of the most valuable brands were all brands that came in the top ten of our list of innovative research buyers:

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

TOP 25 MOST INNOVATIVE CLIENT COMPANIES

HOW CLIENTS VIEW THE TOP 10 MOST INNOVATIVE CLIENTS



	Consumer Discretionary	Consumer Staples	Energy/Utilities	Financial Services	Health Care	Industrials	Information Technology	Materials	Media/Entertainment	Professional Services	Real Estate	Retail	Telecommunication Services
Unilever	21.43%	45.45%	7.69%	3.23%	3.03%	9.09%	2.63%	14.29%	3.41%	5.08%	0%	12.96%	13.33%
Google	20%	14.39%	7.69%	14.52%	7.58%	18.18%	23.68%	14.29%	9.09%	11.86%	16.67%	18.52%	23.33%
Coca-Cola	5.71%	19.70%	0%	1.61%	6.06%	4.55%	0%	14.29%	3.41%	3.39%	16.67%	7.41%	0%
Facebook	10%	6.82%	7.69%	6.45%	4.55%	4.55%	7.89%	0%	3.41%	3.39%	0%	5.56%	13.33%
Pepsi	11.43%	8.33%	7.69%	1.61%	3.03%	0%	0%	0%	3.41%	3.39%	16.67%	5.56%	0%
PG	5.71%	7.58%	7.69%	1.61%	7.58%	0%	5.26%	0%	4.55%	1.69%	16.67%	5.56%	0%
Apple	2.86%	7.58%	0%	4.84%	4.55%	0%	5.26%	0%	1.14%	8.47%	0%	9.26%	0%
Amazon or AWS	4.29%	4.55%	7.69%	8.06%	6.06%	4.55%	5.26%	0%	6.82%	5.08%	0%	12.96%	6.67%
Nestle	7.14%	6.82%	0%	0%	0%	0%	2.63%	14.29%	0%	1.69%	0%	3.70%	0%
Netflix	2.86%	1.52%	0%	1.61%	1.52%	4.55%	5.26%	0%	2.27%	3.39%	0%	1.85%	0%

WHY ARE CLIENTS CONSIDERED INNOVATIVE?

Looking at the open-ended statements, there seem to be two key themes among the hundreds of different reasons quoted:

1. Pushing for new research methods that dig deeper, particularly into emotions and non-rational explanations of behavior. These companies tend to be the CPG type companies, mature companies, in mature markets, with few tangible differences between them and their competitors.
2. Seeking to use data and insights to disrupt markets. This is particularly true of the innovative online and technology companies.

Some innovative companies embody both of these themes, some focus more on one or the other. Both approaches require brands to seek out better and more actionable insights through innovation, and are based on an aggressive posture rather than a defensive one (for example, how do we grow the market and ourselves, how do we disrupt the market, as opposed to how do we best manage our assets).

The GRIT Top 25 Most Innovative Client Companies rankings will continue to help push the industry forward by showcasing the brands using innovation to improve the process, impact, and value of insights in their organizations.

Innovative clients often push for new research methods that dig into emotions and non-rational explanations of behavior.

DOES INNOVATION IN MARKET RESEARCH MATTER?

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In this wave of the GRIT report, respondents were asked, unaided, which companies they thought were most innovative. The answer to the question, "Does innovation matter?" can be measured, at least at a cursory level. The results provide compelling motivation for researchers to continue innovating.

Method

We took the top 25 most innovative companies, as determined by GRIT report respondents, and compared their 2016 growth relative to their industry's two-year compound annual growth rate (CAGR). Making comparisons to industry performance is important, because performance is relative to trends within an industry. For instance, media companies face significant secular challenges that pharmaceutical companies don't face.

Financial data comes from publicly available financial reports such as annual filings and other investor reports.

There are limitations to this approach, including the fact that industry growth rates are based solely on Fortune 500 companies. Revenue growth isn't the only way to measure value, and some companies, like Uber, are growing rapidly independent of their innovative insights practices. However, the results should lead us to consider the value of innovation in research methods.

Results

In six of eight industries represented, companies in the Top 25 Most Innovative Suppliers outperformed Fortune 500 companies in their sector (see table on next page). Noted outliers include the transportation industry, whose sole presence in the Top 25 is Uber.

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So What? Innovate Toward Customer Intimacy

At Fuel Cycle, we are major proponents of the Strategic Values Discipline model developed by Michael Treacy and Fred Wieserma in the mid-1990s. The Value Discipline model states that for companies to thrive, they need to excel in one of three areas: operational excellence, product leadership and customer intimacy. The market research role is to help organizations deepen customer intimacy, which is defined by Treacy and Wieserma as “segmenting and targeting markets precisely and then tailoring offerings to match exactly the demands of those niches.”

Innovation towards customer intimacy presents itself in different ways. For instance, one of the more common reasons companies were rated as innovative was because of their desire to understand customers at a deep level, perhaps by understanding emotions or non-rational behavior. Or in other cases, market research is becoming more real-time, completely integrated into business decision making and dictating outcomes within minutes, rather than months.

Innovation in research, at least at a surface level, appears to be correlated with competitive performance and should be pursued by organizations new and mature. But, innovating for innovation’s sake is not enough. To be successful, innovation should always be tied to improving customer intimacy.

Industry	# Companies in GRIT Most Innovative	GRIT Innovative Companies Avg. Growth Rate (2016)	Industry CAGR 2014-16	GRIT Company performance vs. Industry Performance
CPG	6	0%	1.40%	Underperform
Food & Beverage	4	-1%	-1.40%	Outperform
Auto	2	37%	0.20%	Outperform
Transport	1	200%	1.80%	Outperform
Tech	8	15%	6.30%	Outperform
Media	1	6%	0%	Outperform
Pharma	3	3%	4.90%	Underperform
Apparel	1	6%	0.30%	Outperform

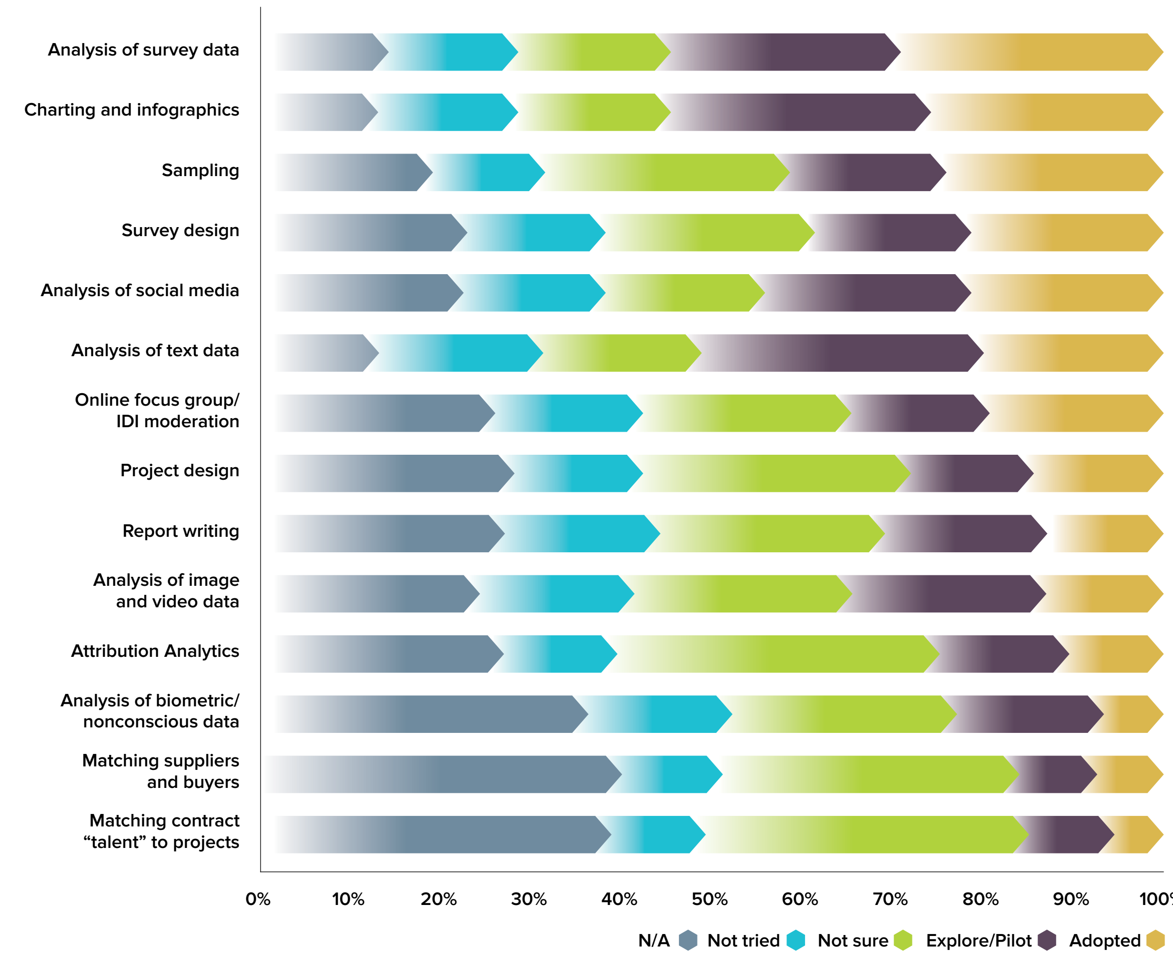
ADOPTION AND CONSIDERATION OF AUTOMATION PLATFORMS

Automation continues to be one of the key topics of conversation in market research. In 2016, we explored the adoption of automation platforms. We found that in many areas of market research, such as 'Analysis of survey data' and 'Charting and infographics', automation was already in widespread use. We have returned to this topic this year, with a slightly modified questionnaire, to take a better look at automation and the changes it embodies.

The big picture is that many organizations have adopted automation platforms, and this is especially true in the area of quantitative research. This widespread adoption is illustrated in the chart on right. The dark green sections show where automation platforms are in use, and the light green shows where they are being explored or piloted.

As with 2016, there is evidence that large numbers of organizations are utilizing automation, and that many others are exploring / piloting the use of platforms. In terms of adoption, the top four categories are all quantitative – an area where automation has a long history.
The next two categories (analyzing social media and analyzing text data) both represent an area where researchers would like to tackle data that has traditionally been handled qualitatively in a more quantitative way.

ADOPTION OF AUTOMATION APPROACHES



If you run your eye down the chart and look at the shape of the combined green sections (i.e. Adopted and Explore/Pilot), you will see two breaks in the general pattern of the data. These two breaks are: Analysis of Text Data and, to a lesser extent, Analysis of Images/Videos. These two categories have more people exploring/piloting them than would be expected by their position in the table. These two are clearly high priorities for automation.

There is a large amount of mirror symmetry between the adoption rate and the number of people who said that this type of work was not applicable to their organization. Visually this refers to the dark green section (Adoption) and the grey section (Not applicable to my organization).

On average, the sum of Not Applicable and Adopted is close to 42%, with most categories only varying up or down by a few percentage points. For example, the bottom three categories in the list (matching contracts and analyzing biometric/nonconscious data) have combined Not Applicable and Adopted totals of 45%, 46%, & 43%. The top three categories in the list (survey analysis, charting & sampling) have combined totals of 43%, 39%, and 43%.

The data suggests that, at the moment, the key driver of automation adoption has been the number of people who see the category as applicable to their organization. Presumably, money and time has been invested most in those tasks that most people have to tackle, leading to this mirror symmetry between Adopted and Not Applicable.

Comparison with 2016

Using the learnings from 2016, we have redesigned the questionnaire to distinguish between people who do a task but have not automated it, and those who have not automated a task because they do not do it. For example, if you do not conduct surveys (because you are entirely qual) you won't be using automation for survey data analysis. This means the individual scores from this year are not directly comparable with the data from 2016.

However, we did review the changes between the two years and the results suggest that little has changed over the last year. In terms of ranking, the top two were the same, the bottom item was the same, and nothing moved by more than two places. In terms of the raw scores, the r-squared between the two years was 95% - confirming that little had changed in the last year, other than the specific values generated by the questionnaire change.

Role of game-changing automation

The chart shows that the key driver, in terms of adoption of automation platforms, has been how many organizations need to address a specific category. But, the challenge for people automating market research is to create situations where automation leads to a change in the way research is done.

A good example of the potential to create a game-changing situation is the matching of talent with projects. At present only 6% of organizations say they are using automation for this task, and only 10% are investigating it. A whopping 38% say it is not applicable to their organization. If the new platforms that are coming on-stream in this area are to be truly disruptive, they not only need to grow the adoption rate, they will need to reduce the number stating Not Applicable.

Many organizations have adopted automation platforms, and this is especially true in the area of quantitative research

Analysis of Text Data and Analysis of Images/Videos are clearly high priorities for automation

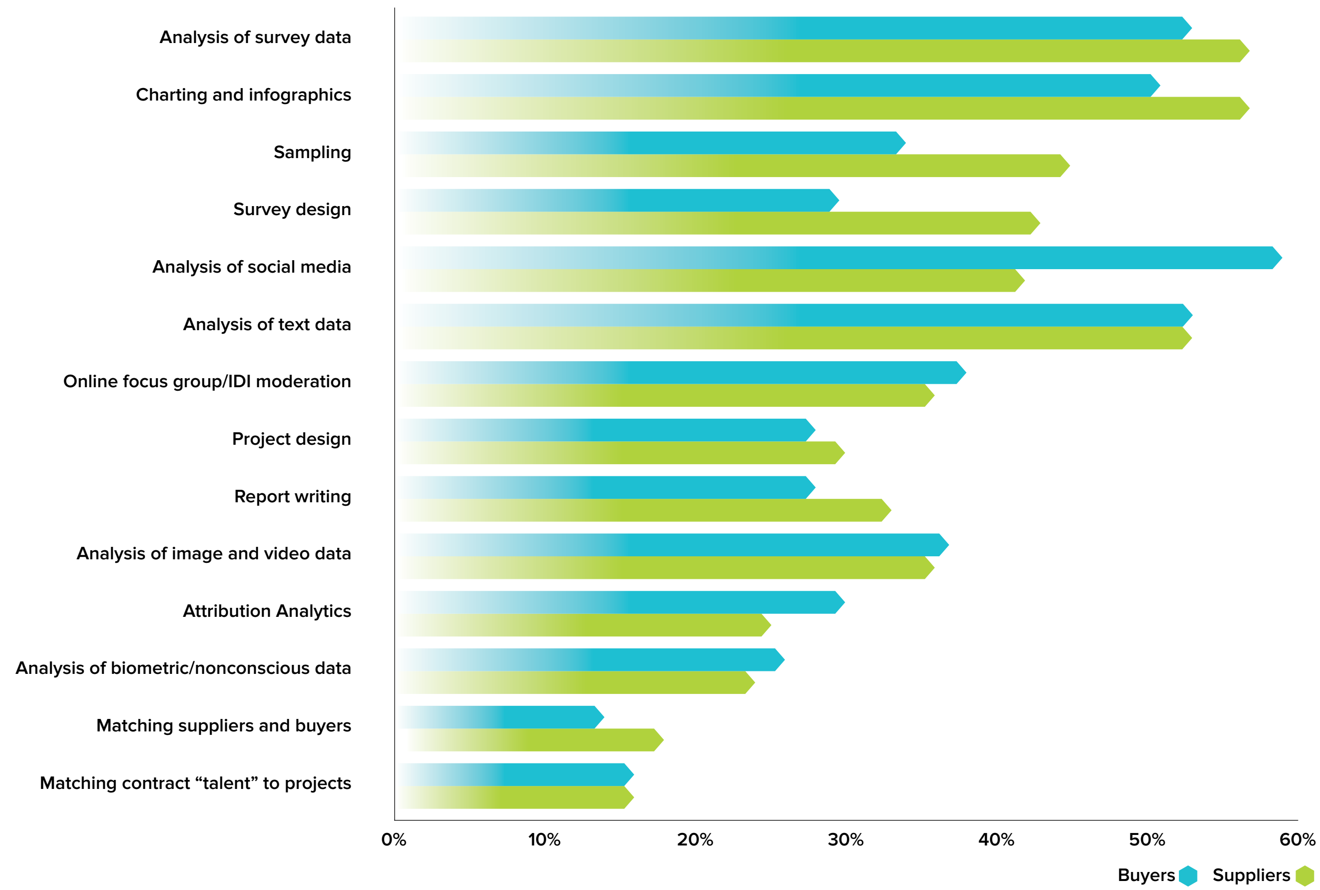
The challenge for people automating market research is to create situations where automation leads to a change in the way research is done

ADOPTION AND CONSIDERATION: CLIENTS VS. SUPPLIERS

As the chart on right shows, the overall pattern of adoption of automation between clients and suppliers is similar.

However, the chart does show a few interesting differences, and these are consistent with 2016. Suppliers are slightly more likely to have adopted (or be actively exploring) the top four (mostly quantitative) categories – especially sampling and survey design. Clients are much more likely to be using automation for Analysis of Social Media, which is consistent with 2016 and consistent with other GRIT findings that the proportion of clients researching via social media is higher than the number of agencies offering this service.

PLATFORM ADOPTION & EXPLORE/PILOT %

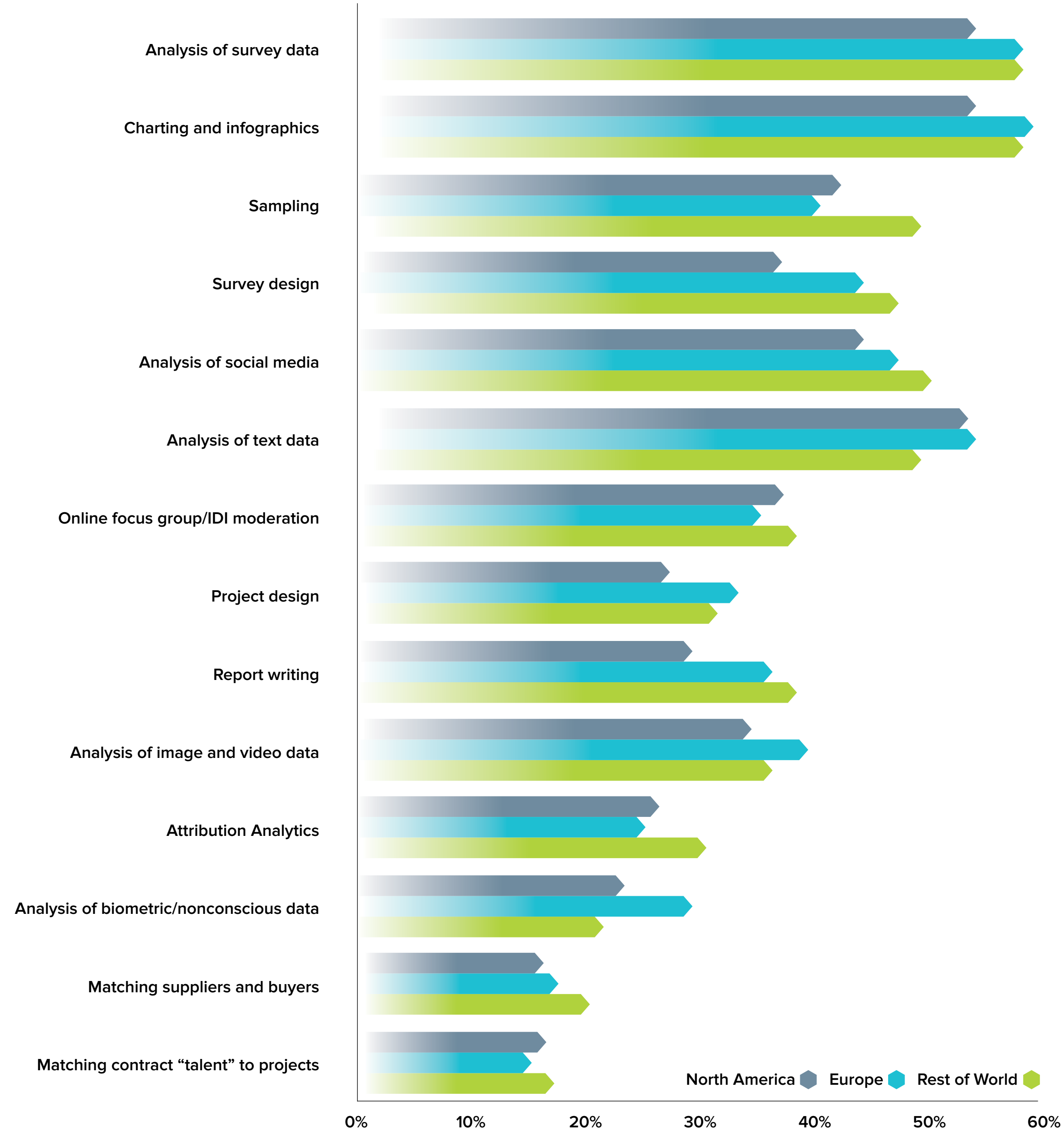


The overall pattern of adoption of automation between clients and suppliers is similar

WHO IS AUTOMATING MORE / LESS?

The two standard analyses that GRIT runs as a starting point with GRIT data are to compare clients and suppliers, and to compare the regions against each other. The previous section looks at clients and suppliers, but the analysis of regions found very few differences, and none that were large. The "Rest of the World" tend to be slightly more likely to use automation platforms compared to Europe and North America, but the differences are modest.

AUTOMATION UPTAKE REGIONALLY



WHO IS AUTOMATING THE MOST / THE LEAST

Question	Break	High %	Medium %	Low %	Total %	Base	High - Low	% of Total Sample
Total	All	24	51	25	100	2637	-2	100
Your professional/ organisational situation	Survey Platform Provider/Survey Software	47	43	10	100	81	37	3
Number employees	501 – 1000	42	44	13	100	126	29	5
Research Spending 2017 v 2016	Decrease	38	49	14	100	168	24	6
Which vertical in?	Consumer Staples	42	38	20	100	132	21	5
Number employees	1001 or more	35	48	17	100	293	18	11
Will sample get better or worse?	Better	34	47	19	100	680	15	26
Less than 15% points different or small cell size								
Research Revenue 2017 v 2016	No Change	18	48	33	100	349	-15	13
Research Revenue 2017 v 2016	DK	18	50	33	100	233	-15	9
Research Spending 2017 v 2016	No change	12	59	28	100	186	-16	7
Research Revenue 2017 v 2016	Decrease	17	49	34	100	144	-17	5
Will sample get better or worse?	Not sure	16	51	34	100	288	-18	11
Your professional/ organizational situation	Research Freelancer / Consultant	21	39	41	100	236	-20	9
Number employees	5 – 10	13	52	35	100	277	-21	11
How many years has your company been in business?	0 - 1 years	10	55	35	100	49	-24	2
How would you describe your position in your organization?	Sole proprietor	18	39	43	100	88	-25	3
Research Spending 2017 v 2016	DK	13	48	39	100	62	-26	2
Number employees	1 – 4	10	47	43	100	478	-32	18
How would you describe your position in your organization?	Owner	13	42	45	100	213	-32	8

This analysis enabled us to identify the sorts of organizations who were automating most and those were automating the least

Row percentages indicate questions where there is a clear difference in terms of whether the people in the break are more or less involved in Automation. “More involved” are those scores in the top 24% for having adopted or piloted automation. “Less involved” are those in the bottom 25% for adopting automation. So, amongst 81 Survey Software providers, 47% are in the high group, and just 10% are in the low group. The Survey Software providers are 3% of the total sample, so although they skew heavily to automation, they do not impact the total picture greatly.

Since analysis by region does not show differences, and the client versus supplier analysis only showed modest differences, we decided to dig deeper. We divided the sample into the 25% who said they were Automating the most, the 25% who said they were doing it the least and the 50% who were in the middle. This was done on the basis of the five point rating scales across all 14 categories.
This analysis enabled us to identify the sorts of organizations who were automating most and those were automating the least. These differences are described on right.

Who is automating the most?

- The survey platforms and survey software companies
- Companies with more than 500 employees
- Clients who will be spending less in 2017 than 2016
- Clients in the Consumer Staples category
- Companies who think sample quality will improve

Who is automating the least?

- Small companies (10 or fewer people), companies formed in the last year, sole traders, freelancers, and people who own the company
- Clients who think their research spending in 2017 will be the same as 2016 (and those who said Don't Know)
- Suppliers who said their research revenues in 2017 would Fall, Stay the Same, or answered Don't Know.

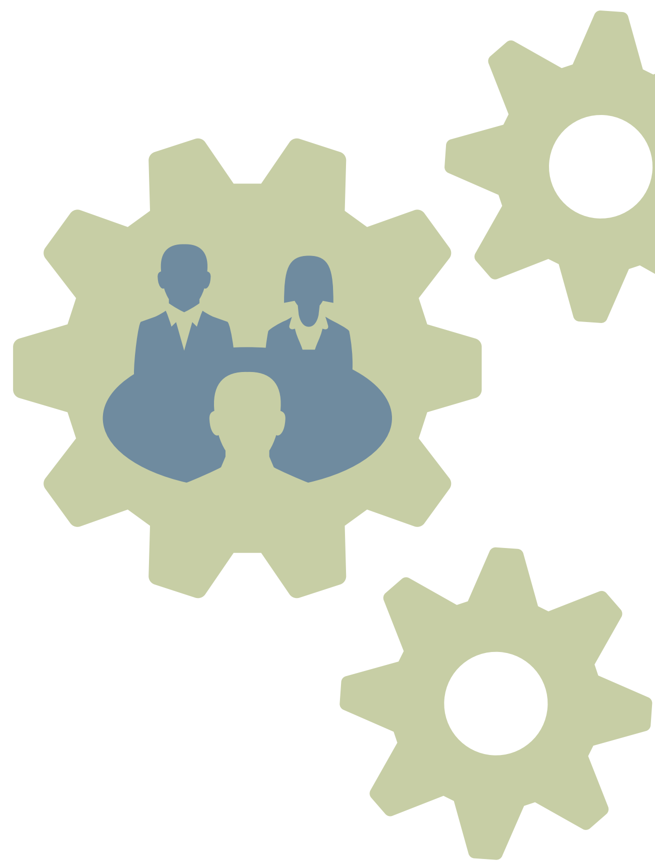
THE BIG PICTURE

Automation is here to stay and many organizations are implementing a wide range of automation projects. The three key groups driving this process at the moment appear to be:

- Companies who believe the future is automated (e.g. sample will get better, surveys will be automated) etc.
- Clients looking to get more results and spend less money.
- Suppliers who are growing (and tend to be larger)

However, the data suggest that many other groups are missing an opportunity to expand their capacity. Even if your research budget is not threatened, why not make it go further? If your research revenues are unclear or falling, surely you need to protect you margins by reducing costs? And, automation can allow small companies to tackle projects that in the past only large clients could tackle.

Automation can allow small companies to tackle projects that in the past only large clients could tackle



THE RACE TO AUTOMATE

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Market research has traditionally served as the voice of the customer in business decisions. However, in recent years, we've seen the businesses we serve and their marketing teams forced into a position where moving fast is essential to remaining competitive. Often leaving little time or budgets to conduct research with rigor.

With the advent of automation, those who have invested in technology are seeing higher quality data collection, lower costs, and faster turnaround times. The role of the researcher is moving away from detail oriented project management to storytelling and client success. Not only is this process more efficient, we're also able to get more research done with less.

By guiding learning journeys throughout our client's development processes with iterative research projects instead of just one, we can dramatically improve the business impact rates of creative development or product innovation. I believe that by asking for consumer input earlier and more often, we will all become more productive in our approach to the market.

According to a new McKinsey's report, recent developments in artificial intelligence, and machine learning have put us on the cusp of a new automation age. Based on their scenario modelling, automation is estimated to raise annual productivity growth globally by 0.8 to 1.4%.

In this latest edition of the GRIT survey we can see automation in full swing across multiple facets of market research. 55% of respondents are exploring use cases or have already adopted automation in their analysis of survey and text data, social media data and in their charting and infographics.

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However, the rate of adoption is not universal across all planes of research. Many respondents are still unsure of whether survey design and sampling could be automated, despite many panel providers today offering advanced technical access. While it may be challenging to automate the creation of a custom survey, it certainly is possible to standardise those for specific use cases with the thinking behind some of the greatest research agencies.

Even as the head of a company focused on automating research, it's important to mention that we should only automate tasks where the benefits clearly triumph the costs and setup time needed to invest in automation.

I also understand and appreciate this is not everyone's cup of tea! Not everyone wants to work towards or in a scaled up operation with an ever-larger number of clients and using the service in a more programmatic manner. Some people want to work closely with a small number of clients. The fact still remains they want to be paid well and respected for their work.

These professionals will therefore need to hone skills and build expertise which are unlikely to be automated in the foreseeable future. They should be masters of "mixology" blending the use of automated tools with their 'bespoke' creativity, interpretation and storytelling. It's only when we embrace this that automation can fully empower us to maximize our potential.

THE FUTURE OF SAMPLING

GRIT participants' responses across a range of measures indicate a need for more cooperation and transparency between insights buyers, research providers, sample providers, and even panel members and online survey participants. The clear takeaway is that there should be more collaboration on survey mobile design, member engagement, survey design, sample sourcing, representativeness, and pricing. Participants are certain that there are issues to be solved, and that no one group can solve them alone.

Representativeness is still king and is where the strongest agreement exists - providers should advise on the representativeness of the sample. There is also alignment by roughly two-thirds of all groups that sample providers should enforce length of interview limits, and restrict access to mobile only participants if the survey is not mobile friendly.

Alignment diverges on two key measures. Sample providers want a much larger role in consulting in survey design (81%), where more insights buyers (63%) than research providers (53%) agree that survey design consulting is part of the sample provider role. The largest differences is not surprisingly about price, where nearly two-thirds of sample providers believe that price should be impacted based on survey mobile design, while only 27% of research providers and 18% of insights buyers agree.

The question is, if representativeness matters to everyone, and mobile device use and engaging survey design matters to survey participants, can there be a successful partnership and collaboration with such wide disagreement on consulting and cost? If engaging and retaining consumers is key to representativeness, but that cost is impacted by participant experience, isn't it imperative that buyers, researchers and sample providers are aligned on these points? When comparing these results to 2016, there is little change, indicating this divide isn't really narrowing.

Here's what a GRIT participant has to say:

"Surveys HAVE to be device agnostic. We are getting to the point where we can't get rep samples because people are using mobile devices and we simply don't have mobile friendly surveys."

"In order to make sure we get quality sample and results, we should be very mindful of questionnaire design and be willing to pay the prices that facilitate a higher sample quality."

RESPONSE TO SAMPLE PROVIDER ACTION IDEAS

	Insights buyer or client	Full service research provider	Sample / Panel provider
Sample providers should charge more for sample when surveys are not mobile friendly	18%	27%	65%
Sample providers should restrict to ONLY allow device agnostic/mobile optimized surveys unless specific device features are part of the study design	55%	47%	54%
Sample providers should restrict access to "mobile only" respondents if surveys are not mobile friendly	62%	65%	63%
Sample providers should consult with their clients on questionnaire desigwn	63%	53%	81%
Sample providers should enforce length of interview limits	68%	63%	68%
Sample providers should advise on whether their samples are representative of a target population	88%	90%	74%

Insights buyers and research providers are equally pessimistic about the future of sample quality, with far more believing that quality will erode in the next three years. Sample/Panel providers are far more optimistic, with more than half believing it will get better, a reversed perspective from the buyers of sample. This was a similar finding to last year. The high degree of optimism among Sample/Panel providers that quality will get better (55% vs. 47% of insights buyers) indicates knowledge and experience that clients/buyers might want to tap into. This continues to reinforce the consultative partnership GRIT participants are suggesting.

Some participants seem to understand that there is a disconnect between sample providers and buyers, both in collaboration and in transparency:

- “Sampling is a problem in the vertical of research, not just for sample providers. Sample providers should be brought to the table for conversations and not situated at the bottom of the ladder.”
- “Being forthcoming on all the sources a sample comes from. Without this, the industry will constantly sustain black eyes.”
- “The way the industry treats respondents is not improving so I am not sure why we would expect the quality of response / engagement to improve.”

Buyers are also very worried about fraud and bot technology, and want a solution for verified participants and secure survey platforms, as well as for companies to invest in broader, more representative reach:

- “Ability to catch bots on online surveys”
- “Staying ahead of the hacker curve”
- “Verification of panelists”
- “Developing panels that represent the population”
- “Return to first principles of sample -to -universe representation, more candid disclosure, verifiability”

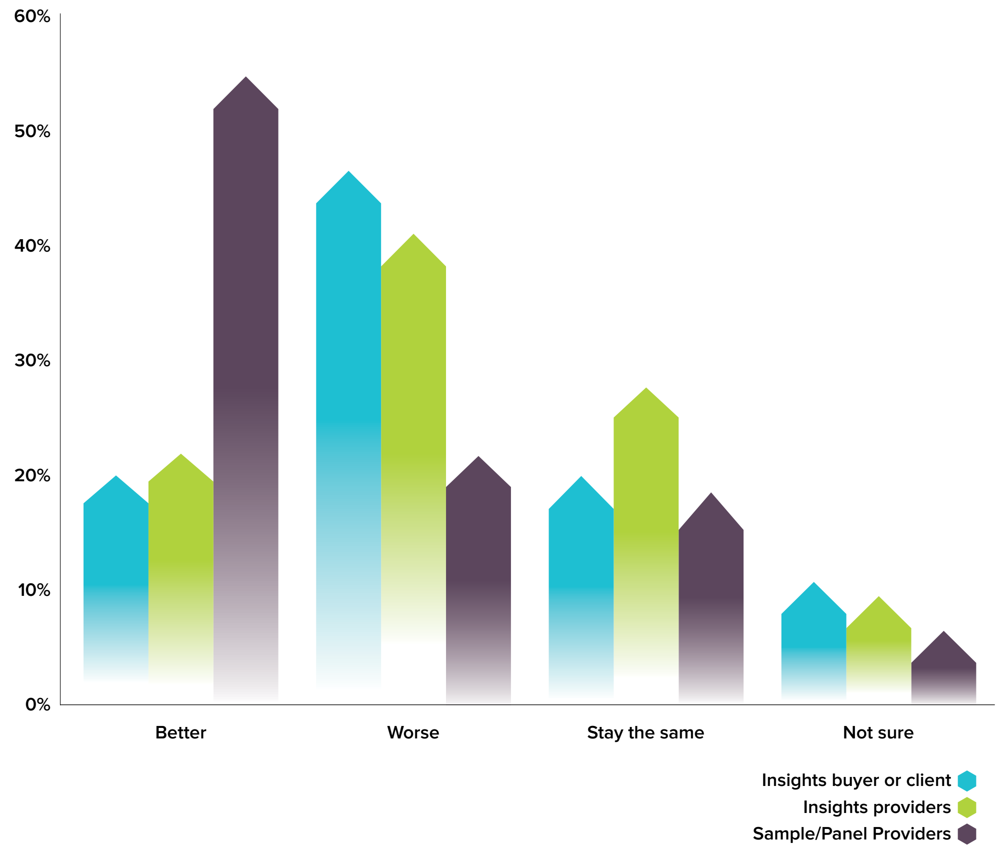
This indicates a need for our industry to better educate buyers about participant quality practices, as outlined by groups such as ESOMAR, MRIA and others as well as about quality initiatives that panel owners put into place and are continuously upgrading.

The consensus seems to be that there is an understanding of the problem, but disagreement on how to solve it, and an unwillingness to enforce standards.

- “Someone is always willing to field a bad survey (e.g. too long, not mobile friendly, etc.) so it perpetuates the situation. If everyone would stop fielding bad surveys we could greatly improve the respondent experience.”
- “There needs to be a group effort to make this (improved quality) happen industry wide.”
- “Shared responsibility - clients, research providers and sample providers all have to do their part.”

The sample conundrum is the age-old tension between the three elements of service: speed, quality and price. Quality always requires investment, and that investment often impacts speed and price. But price is a primary decision driver. And the stakeholders aren’t talking openly about what sacrifices are being made to achieve the price points, and how to work together on solutions. GRIT participants seem to believe that until they do, and standards are enforced and rewarded, that the future of sampling will be unpredictable.

IS SAMPLE QUALITY GETING BETTER, WORSE, OR STAYING THE SAME?



The consensus seems to be that there is an understanding of the problem, but disagreement on how to solve it, and an unwillingness to enforce standards

REVISITING AUTOMATION: EFFICIENCY, TRANSFORMATION, AND THE PATH TO SMARTER RESEARCH

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Every GRIT report for the past several years has chronicled both the promise of and the uncertainty about automation. This report continues the trend, showing tentative usage across the various areas categorized as "automation." The results demonstrate that, while it's reasonable to conclude that although we've come a long way, we've still got a long way to go.

Part of the challenge is the broad range of things that fit under the automation umbrella. Currently, the discussion spans from visualizations to machine learning, to name just two key components, extending from the obvious to the truly experimental. The question we are all left with is how to determine where to invest time and resources in automation?

One way to frame automation is to view it from the benefits perspective. Said simply, what problems do the various approaches to automation solve? What impact will they have? One way to parse out trends in automation that can help us realize immediate opportunities and future potential is to look at automation as the genesis of both efficiency and transformation.

The GRIT report illustrates that the primary interest – and traction – around automation focuses on the **efficiencies** that can be realized. From concept tests to trackers, whether you standardize the entire research study or just a portion of it, you can increase your productivity, reduce the likelihood of errors, and streamline execution and collection of data. The flexibility of having standard templates that can be customized, as well as having modular versions that address the most common kinds of testing – such as customer satisfaction, brand, and share of wallet – supports speed and low cost for iterative data-gathering.

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GRIT COMMENTARY

Efficiencies of automation can also be realized in other parts of the research process, from sample selection to real-time analysis within dashboards, that enable the researcher to interact with and visualize study results. The ability to conduct real-time "what if" analysis and to show and interpret survey results among different sample segments on the fly means that researchers are investing their time in decision-oriented, rather than task-oriented, activities. Increasing speed to insights and making more time available for strategic-level problem-solving – while reducing spend when compared to traditional approaches – adds up to significant competitive advantage.

Things get interesting when we think about the **transformational** side of automation. New approaches to research, often built atop efficient technology-driven platforms, are enabling us to dig deeper into participant behaviors and motivations. They are allowing us to ask fewer questions – or ask them differently – while simultaneously increasing the depth of the data collected. As researchers become more comfortable with automation, they will seek out more ways to use it. The result is a process that balances simplicity with improved participant engagement and responsiveness.

An exciting corner of automation, although one in which we are just beginning to crack the code, is artificial intelligence. Natural language processing, for example, is a technology that has great potential and is beginning to be used to fundamentally change the survey process. It can be applied in multiple ways, from powering conversational surveys to auto-generating reports across both structured and unstructured data.

While there may be some uncertainty and even hesitation around automation, the benefits are ours to realize. Do we want to spend our time collecting data or interpreting it? Framing the question or answering it? Executing studies or delivering results? Automation can provide a means to that end, making us more efficient and smarter while ultimately driving better business decisions.

EDUCATING THE RESEARCHER OF THE FUTURE

New to this wave, GRIT went beyond its traditional look at research training and education to focus specifically on the Masters of Marketing Research (MMR) programs in the United States.

Before diving into the analysis of the US post-secondary programs we wanted to ensure our read of the marketplace was correct: that globally the US programs were dominant. We asked respondents "When thinking of post graduate education programs for market research, what organizations, colleges or universities come to mind? Please list up to eight organization names that first come to mind."

The results did indeed verify our suppositions.

FAMILIARITY WITH MMR PROGRAMS IN UNITED STATES

The US programs, specifically the University of Georgia MMR program and Michigan State MSMR program were by far most mentioned overall, with the University of Texas-Arlington and University of Wisconsin – Nielsen next. The UGA MMR program was three times as frequently mentioned as all others combined. There were many smaller programs mentioned as well, but generally they were between 1 – 5 mentions out of a total of 2,637 responses. This same trend continued when looking at results by Buyers vs. Suppliers or regionally, although in Asia Pac Harvard came up often as a fifth top of mind mention.

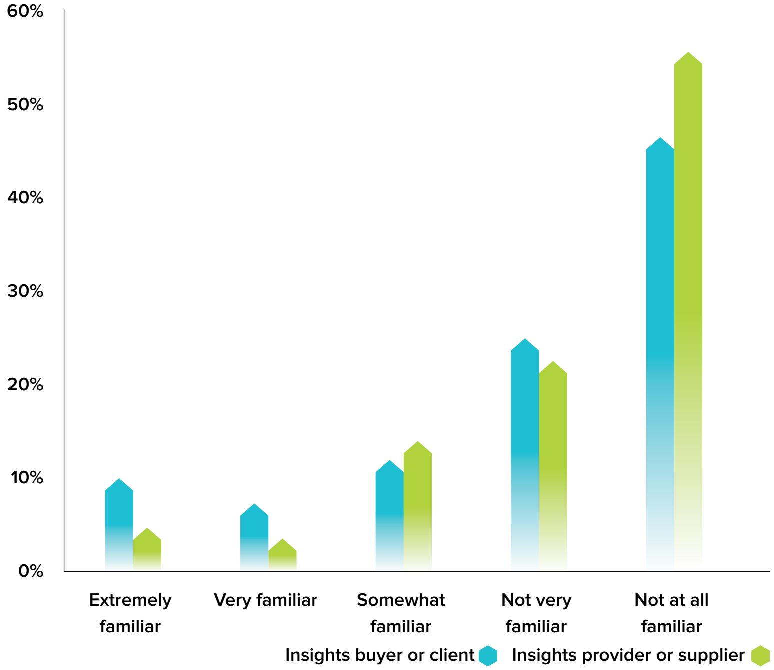
Although there we roughly 800 unique responses out of 2,637 the four major programs in the U.S. mostly accounted for the balance. Clearly, the U.S. MMR programs lead the world in terms of brand awareness, with smaller or less well known programs only being relevant on a regional or even local level.

We also asked an open-ended question "What do you feel is the most important characteristic of a successful Market Research post-graduate educational program?" to understand the critical success factors GRIT participants equate with post-secondary education.

The U.S. Master of Marketing Research programs lead the world in terms of brand awareness

The majority (53%) of respondents stated that they are not at all familiar with MMR programs

FAMILIARITY WITH US POST-SECONDARY PROGRAMS



Themes like "experience, application, understanding, practical, data" come to the fore indicating (and rightfully so) that the outcome of an investment in an educational program should go beyond an academic foundation but focus more on applying the skills and knowledge gained to real-world business situations.

Next, we wanted to understand specifically what GRIT participants thought about the U.S. programs, but first we wanted to ensure they felt they could answer with confidence. We asked "Now thinking just about programs in the U.S., how familiar are you with any Master of Marketing Research programs around the U.S.?". Surprisingly, the majority (53%) of respondents stated that they are not at all familiar with MMR programs. In fact, only one out of ten are very or extremely familiar with such programs.

In an unaided awareness test, 39% of the small subset of 166 respondents who could venture an opinion on the strongest MMR program named UGA the strongest U.S. program, while 11% named the University of Wisconsin strongest, 9% named the University of Texas, and 7% named Michigan State University.

Respondents were then asked to rank seven established Master of Marketing Research programs, based on their own perceptions. A plurality (44%) of respondents said that the University of Georgia has the number one MMR program. Michigan State and the University of Wisconsin at Madison were also highly regarded: ranked number one by 18% and 14% of respondents, respectively.

AWARENESS RANKING OF US MMR PROGRAMS

	Overall Rank	#1	#2	#3	#4	#5-#7
University of Georgia	1	44%	16%	7%	7%	25%
Michigan State University	2	18%	22%	19%	15%	26%
University of Wisconsin - Madison (MBA-MR)	3	14%	25%	21%	14%	26%
University of Texas - Arlington	4	9%	12%	18%	20%	41%
Rutgers University	5	6%	11%	14%	17%	52%
Southern Illinois University - Edwardsville	6	4%	8%	11%	17%	60%
Hofstra University	7	5%	6%	9%	11%	70%

CRITICAL SKILLS FOR MMR PROGRAM GRADUATES

Critical thinking is the most important skill required from MMR program graduates, being rated very important by 73% of respondents, with six out of ten (61%) rating insight development skills as very important, and nearly as many (59%) rating writing/communication skills as very important.

RATING OF CRITICAL SKILLS FOR GRADUATES

	Overall Rank	Very unim-portant	Somewhat unimpor-tant	Neither un-important or impor-tant	Some-what im-portant	Very im-portant
Critical thinking skills	1	3%	2%	7%	15%	73%
Insight development skills	2	3%	3%	8%	26%	61%
Writing communication skills	3	3%	3%	8%	28%	59%
Verbal and presentation skills	4	3%	3%	8%	30%	57%
Storytelling skills	5	3%	4%	11%	30%	52%
Consultative skills	6	2%	4%	12%	33%	49%
Tools and analytic software skills	7	3%	6%	16%	41%	34%
Mathematic skills	8	2%	8%	21%	44%	25%

Some comments on **critical thinking:**

- “Teach writing, which helps with critical thinking. The quality of writing--and critical thinking--in much of the business world is appalling. That’s why you see so many PowerPoint reports, which I consider lazy and lacking in real insight and analysis. It has become ‘all about the graphics’ because graphics are easy. Writing is hard.”
- “The ability to train strong critical thinking with enough real-world case study training so that researchers can hit the ground running when joining a firm.”
- “Reinforce critical thinking of research and develop capability in data utilization.”

Others went further on the need for strong **writing** as part of the skillset, discussing not just report writing but questionnaire design as well:

- “Writing. Everything else can be taught, but writing has to be practiced.”
- “Teach basic skills and work hard on writing ability.”
- “Mentoring and focus on statistics and writing skills.”
- “Liberal arts skills of communication, understanding influencing, writing, leadership. Not just tech stuff.”
- “That students conduct an independent research project, doing interviews, analyzing data, writing a report.”
- “Ensuring graduates know the basics of research, basic survey design, survey writing, analysis, report generation and report writing. Also, a basic knowledge how business works, how data is used.”
- “Lots and lots of applied training - survey writing, coding, cross tabulation, analysis, and...writing up the insights. All are important. Too little time spent on each.”

While the lack of storytelling and consultative skills are frequently lamented in the pages of research blogs and from the stages of research conferences, only about half considered each skill to be very important for MMR graduates (52% and 49%, respectively). Some of the comments on **storytelling:**

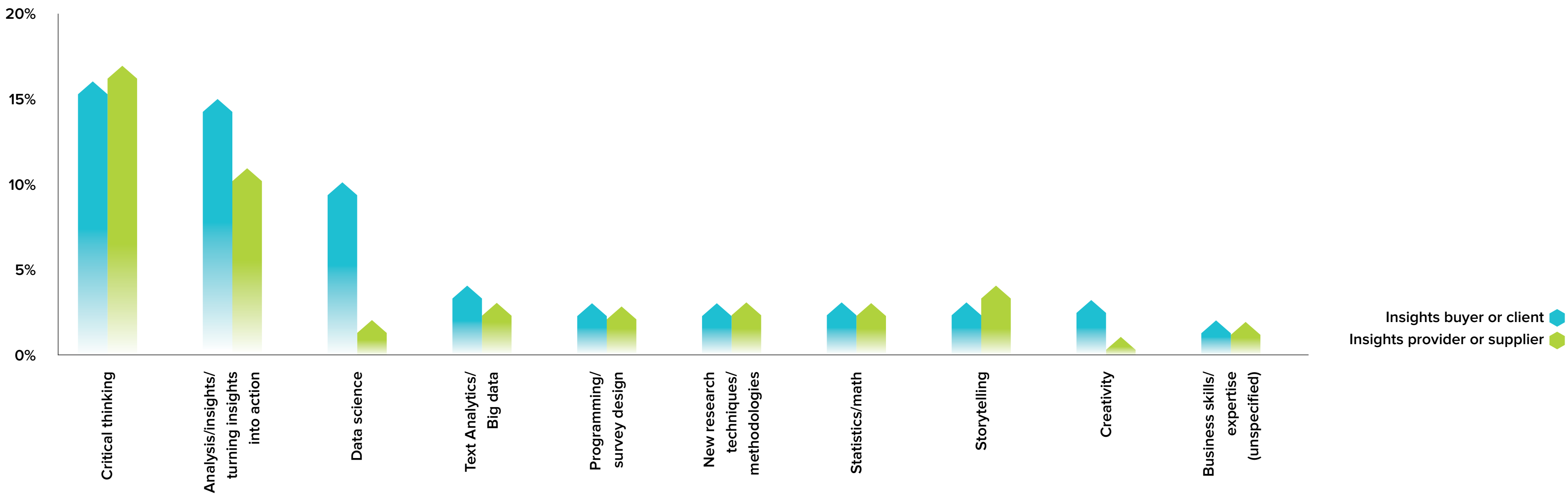
- “Thinking big-picture and teaching students how to ‘see the story’ in data, and how that relates to real-world problems and issues.”
- “Understanding your audience and being able to tell a story with the data in a digestible manner that will lead to business decisions.”
- “Generation of insights and storytelling. Data is useless unless we can tell a story with it.”
- “Getting people to think analytically and create a story out of their work/research.”
- “Analytics and data visualization - be able to tell the story and what the client should do with the results.”
- “Learning to distill information into brief story.”
- “Teaching how to tell the story from large data sets.”
- “Data analysis and story writing.”

On **consultative skills:**

- “Teaching how to apply appropriate research methodologies and interpret results with a consultative approach.”
- “Reinforcing the need to think as a consultant.”
- “Learning the consulting role.”
- “Grounding professionals in market research principles, methodology, and consultative skills.”
- “Creating consultative thinkers who can also manage multiple projects.”

Critical thinking is the most important skill required from MMR program graduates

TOP 10 SKILLS FOR GRADUATES BY CLIENTS/SUPPLIERS



Mathematical skills were the least important, rated very important by only a quarter of respondents. Interestingly, given the reliance by even those with math skills on analytics tools, skill with those tools were only very important to a third of respondents (34%).

There were also some surprising differences between clients and suppliers: While both groups listed critical thinking (suppliers slightly more than clients) and turning insights into action (clients somewhat more than suppliers) as most important, there was a big departure on data science with clients making it a third top skill but suppliers barely registering it as important, opting instead for storytelling as their third choice.

Perhaps these differences make sense in light of the traditional role of the two groups, but this apparent disconnect is concerning. Clients seem to be saying "Give us the data and the tools to use it and we'll rely on great business acumen to deliver impact." This could be a signal of the rise of automation and DIY as prompting clients to develop the skills and resources internally they have traditionally relied on suppliers to deliver. Conversely, it may be that suppliers recognize the same trend and are working hard to become "data agnostic" themselves and move into the "trusted advisor / consultant" role.

Mathematical skills were the least important, rated very important by only a quarter of respondents

THE BIG PICTURE

Clearly the U.S. programs have achieved brand visibility globally, although it may be cursory awareness only since most respondents didn't feel they had a good enough knowledge base to rate them. This is an opportunity for both their leaders and the many other educational providers out there to achieve deeper brand awareness and engagement through not just marketing, but greater engagement in delivering content, thought leadership, and program information to the industry as a whole.

It's also apparent that the curriculum of these programs need to evolve. A basic understanding of the principles of market research including best practices, techniques, methods and tools are certainly required but, as we have heard throughout the years in GRIT as we investigated aspects of training and education, a broader focus on business skills that may traditionally be associated with MBA programs is equally needed. As the process of research becomes more and more automated and driven by technology, the role and value of researchers is shifting more to "soft skills" that heretofore were the realm of strategy consultants or executive management than researchers.

A focus on business skills that may traditionally be associated with MBA programs is equally needed

KEEPING HUMANS AT THE HEART OF RESEARCH

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One of the major themes that runs throughout this edition of GRIT is the advent of automation, machine learning, artificial intelligence, and other methods of applying technology to take the human out of research. We're all for creating efficiency and positive business impact through innovation, but perhaps it's worthwhile to consider that our future may not be wholly defined by robotics and automation, but by the melding of human and technology focused on purposeful innovation.

Over and over again in GRIT we see the warning signs that our embrace of tech has limits. A few examples:

- In the questions around the future of sampling, the dominant theme in the verbatim questions are about quality and respondent experience.
- In the questions around automation we see lower uptake on attempts to automate many aspects of research that are human led.
- In the section on the skills post-secondary graduates should have, the very human-centric skills of storytelling, critical thinking, and business acumen stand out.
- In the Benchmarking section the need to influence, leverage, and create organizational impact stand out as the hallmarks of success.

Our industry has an uneasy relationship with technology right now and we would argue rightfully so.

As more and more of the process of conducting research, especially quantitative research and analytics, is shifted to tech-based solutions to answer the "who, what, when, where, and how" of business questions, our view is that researchers will be always be the ones who answer the "why and now what?"

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GRIT COMMENTARY

In the realm of qualitative research, which is a major part of our business, this is even more apparent. Recruiting, moderation, facility experience, project management and deliverables may all be enhanced by technology, but we cannot see a path where humans are not the primary drivers of the client and participant experience.

Purposeful innovation that leverages the real efficiencies technology can create on process, combined with a focus on ensuring the human-centered service necessary to deliver a good experience to research participants, clients, and internal teams should be the cornerstone of the evolving industry. This critical differentiator may be what ultimately separates research from being absorbed into the tech-led business intelligence sector and finally delivers the much-talked about “seat at the table” that researchers are aiming for.

The integration of humans and technology in research is unavoidable, but as long as we stay focused on the importance of the human element as the driver of real value and impact the research industry will continue to thrive.

INDUSTRY BENCHMARKING

Over the years, GRIT has emerged and served as a strategic planning aid with many readers telling us it is central to their evaluation of where they are and where they need to go as an organization. While flattering, we also recognized that GRIT had to do more to better fill that role – in a more practical, directly applicable and actionable way. At the same time, we've been regularly asked for real benchmarking data, specifically by client-side research organizations, to measure themselves against. Although there are a few sources for such data out there, accessing them for any in-depth view is costly.

With this in mind, we decided with this wave of GRIT to begin a gradual process of developing true benchmarking datasets for both client and supplier organizations. This section is going to explore what we did, what it means, and what's next.

The framework

In the development of a benchmarking component we wanted to be cognizant of the following:

1. What exists elsewhere
2. What is relevant to GRIT and fits within our purview
3. The respondent experience (most benchmarking questionnaires are hideously long!)

We created four question sets that - when combined with budget/revenue projections - are highly correlated to organizational success. The end-result is a data-driven representation of the activities and processes that successful, growing, effective research organizations employ.

The question sets centered on these topics:

1. The Ideal Project (MaxDiff exercise)
2. Best Practices Application
3. Technology Strategy
4. Project Prioritization Factors

Using regression analysis, we were able to develop a series of indices that can be used to measure your organization against others.

The end-result of GRIT industry benchmarking is a data-driven representation of the activities and processes that successful, growing, effective research organizations employ

What are the pillars of a research project's success? Insights buyers and providers agree that delivering consultative recommendations and clear storylines are the most important

In this report, we are only going to look at high-level findings, but we will be releasing an interactive tool soon so you can review the data in multiple ways and have an opportunity to deploy a version of the benchmark questions internally in your own organization and compare it against your competitive set.

We're truly excited to bring this resource to our industry and we hope you find the new GRIT Insights Impact Benchmark useful and interesting!

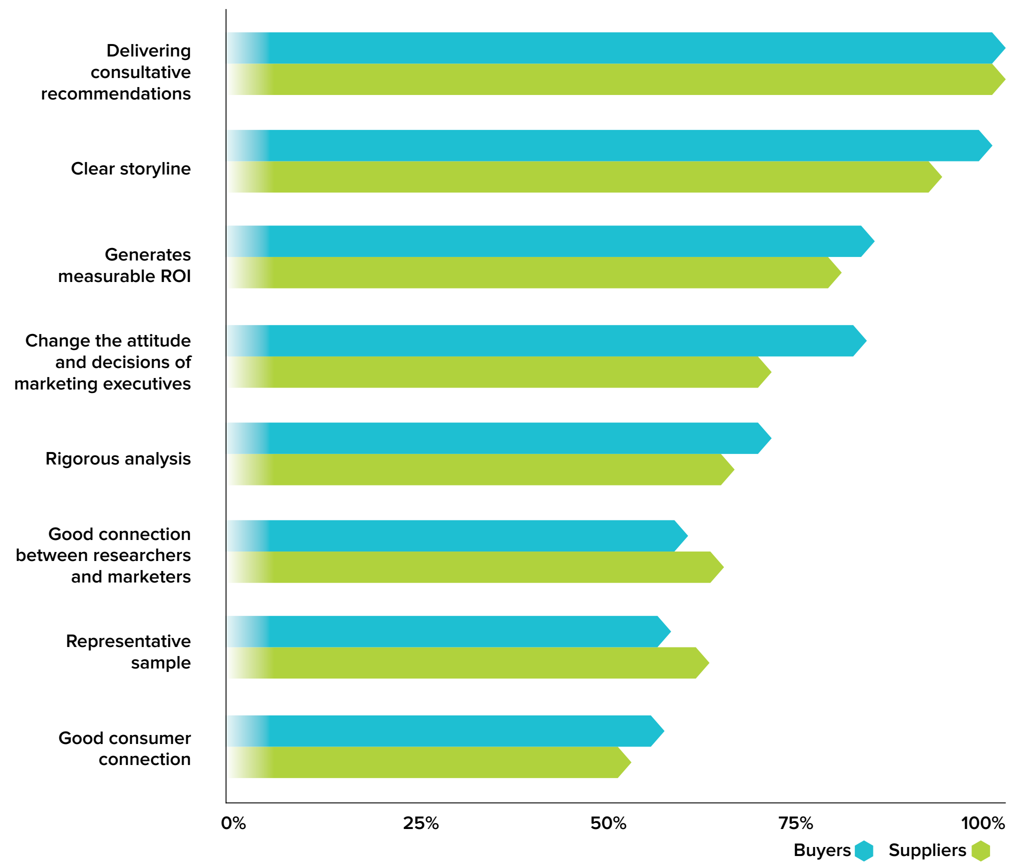
For insights buyers, changing the attitudes and decisions of marketing executives stands out

THE IDEAL PROJECT

Insights buyers from leading firms have long been vocal about the elements of a successful research project. And it now seems that insights buyers and providers are beginning to speak with a more unified voice on the issue of research success. In this edition of GRIT, a modified MaxDiff exercise was used to understand the relative impact of twenty-one factors relating to the execution and delivery of research. What are the pillars of a research project's success? Insights buyers and providers agree that delivering consultative recommendations is top of the list. Clear storylines follow closely behind, as an important element of consultative prowess.

These two elements are inextricably linked, and insights buyers and providers recognize this one-two punch. Several additional factors are also evident in importance, including rigorous analysis and the importance of a productive relationship between the research team and marketers.

ELEMENTS IMPACTING RESEARCH SUCCESS – SUCCESS PILLARS



For insights buyers, however, changing the attitudes and decisions of marketing executives stands out. What better demonstration of impact and value is there than changing a decision?

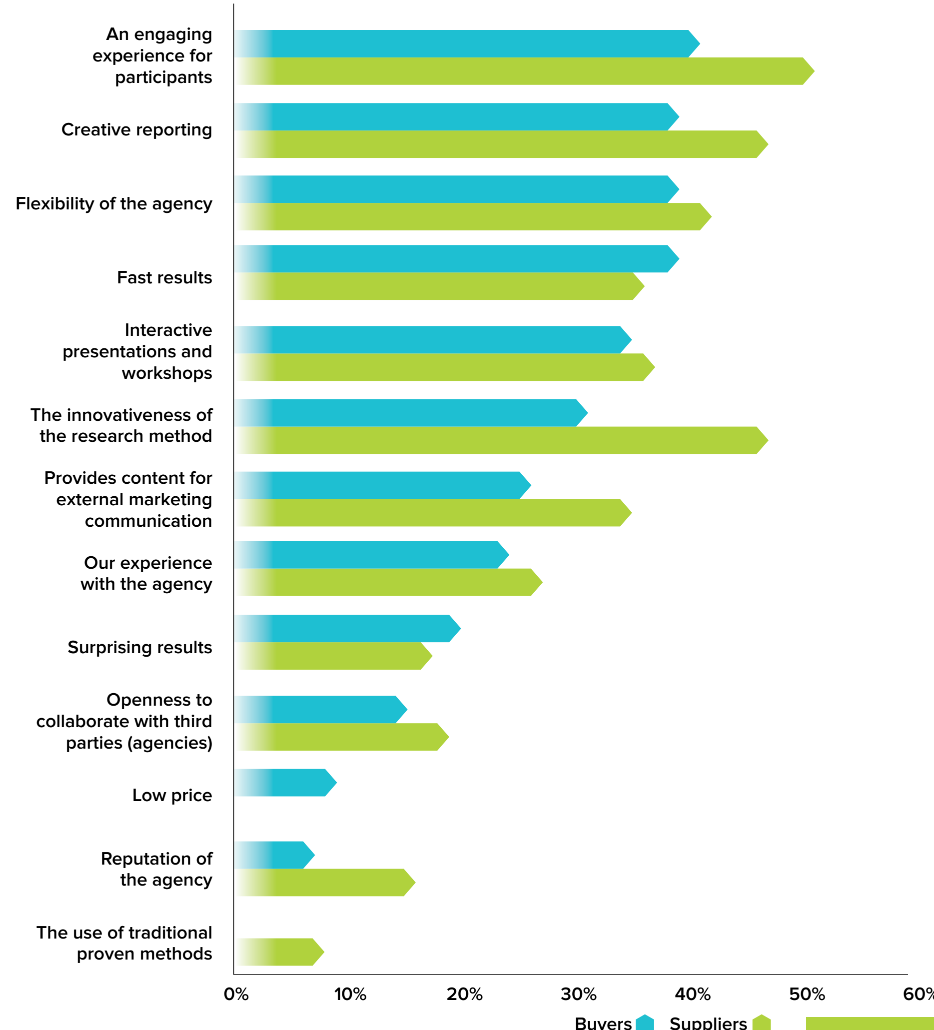
What is also interesting is what falls to lower levels of importance. At the bottom of the list are low prices, reputation of the agency and the use of traditionally proven methods.

The key take away here is:

- Price must be considered within the context of value provided. While segments of our industry are clearly experiencing pricing pressure, this data strongly argues that low price is not a requirement for success.
- A strong reputation is terrific, however insights buyers and providers alike care less about which firm does the work and much more about the outcome and impact of the study.
- While buyers and providers alike agree that an orientation toward traditional proven methods has little impact on the success of a research project, innovativeness of research methods also falls toward the middle of the list. In fact, insight providers place a much higher value on "innovativeness of research method" than do buyers.

Finally, there are some interesting subgroup differences. In North America, there is a greater focus on the representativeness of the sample (index of 48 versus Europe 37 and All Other Regions 39) but less of a focus on interactive

ELEMENTS IMPACTING RESEARCH SUCCESS – LESS IMPACT



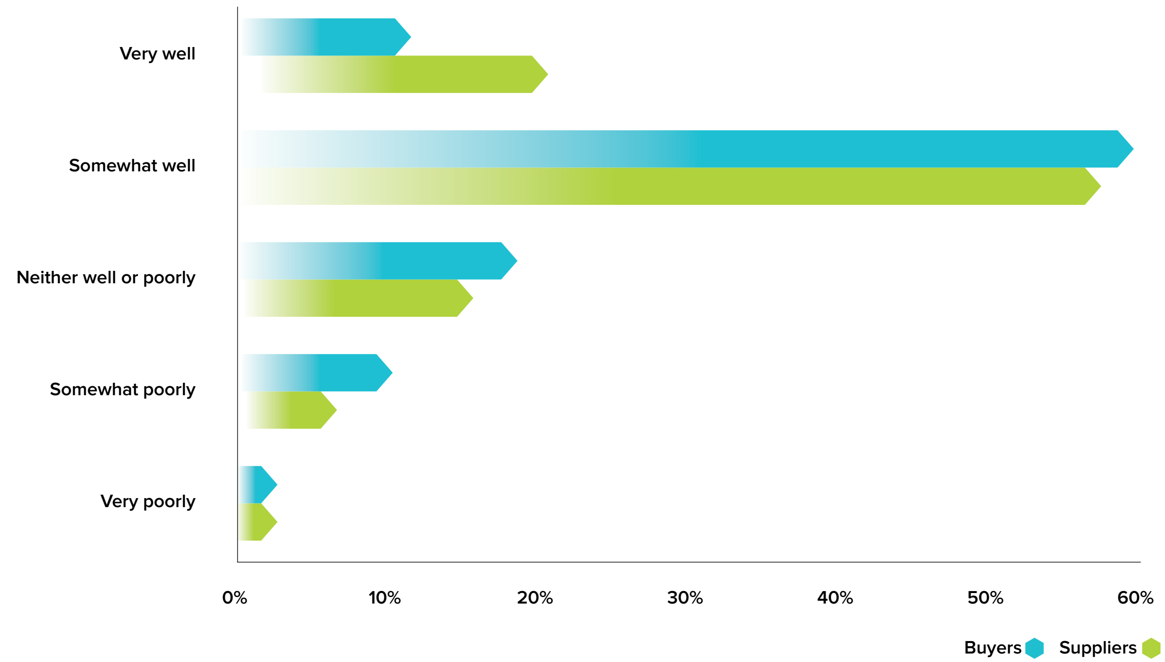
Price must be considered within the context of value provided presentations and workshops (index of 28 versus Europe 36 and 35 in the remainder of the world). Additionally, insight providers who say they are expecting growth (research-based revenue increasing over 2016) index 'generating a measurable ROI' higher than those not expecting growth in 2017. This should not be a surprise. If an agency can demonstrate the ROI of its activities, the 'sell' is much easier. We will share more information on the drivers of growth later in this section of the report.

Now that we have access to the wisdom of professionals in our industry, the next question is "How well do we follow our own advice?" The answer is roughly the equivalent of the response to a question about how well we are following a diet to lose weight – no one is perfect, but the attempt and right intentions are clearly there.

Only about one in ten insight buyers say their projects compare 'very well' to their ideal project contemplated during the MaxDiff exercise.

Although insights suppliers have a more positive outlook on their efforts, still only two in ten say their average research project compares 'very well' to the ideal they constructed. Worth noting – insights buyers and providers expecting growth in 2017 are more likely than their 'no growth' counterparts to say their average project comes close to mirroring the ideal.

HOW WELL DOES THE 'AVERAGE' RESEARCH PROJECT REFLECT THE IDEAL CONSTRUCTED?



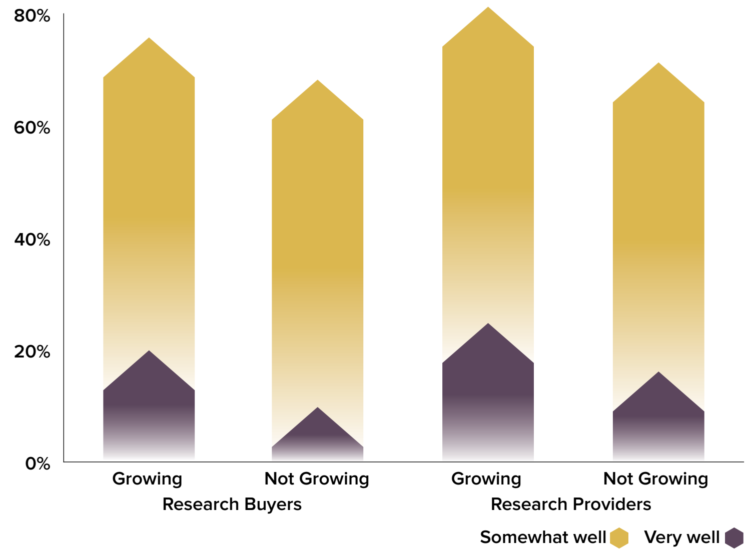
Only about one in ten insight buyers say their projects compare 'very well' to their ideal project contemplated during the MaxDiff exercise

So, what impact should this ideal study make on an organization? It's ideal when it does everything. Before we go to explain this statement, here is a description of the methodology:

GRIT asked respondents to allocate 10 points between three constructs for the outcome of the ideal study. Those constructs were **knowledge leverage** (allows better data and generates richer knowledge), **internal leverage** (leads to change within the organization by impacting the hearts, minds and actions of executives and employees), and **external leverage** (leads to increased external visibility and has an impact on our sales and business). Based on the means, those three outcomes were nearly identical - meaning that the ideal study would meet all three of those objectives equally. And it seems clear that this would be ideal!

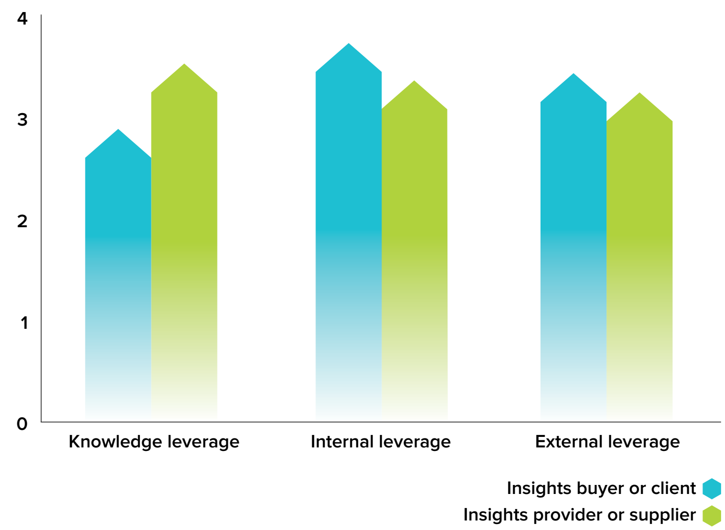
There were some minor differences when looking at subgroups. One stood out. Suppliers allocated more points to knowledge leverage than buyers. Buyers are a little more focused on internal and external leverage. There is an opportunity for suppliers who take note of their clients' focus on internal and external leverage.

HOW WELL DOES THE 'AVERAGE' RESEARCH PROJECT REFLECT THE IDEAL CONSTRUCTED? BY GROWING / NOT GROWING



insights buyers and providers expecting growth in 2017 are more likely than their 'no growth' counterparts to say their average project comes close to the ideal.

RANKING OF LEVERAGE PRIORITIES



There is an opportunity for suppliers who take note of their clients' focus on internal and external leverage

INDUSTRY BENCHMARKING: SUCCESS FACTORS OF THE PERFECT STUDY

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"Show me business changing insights, I don't care how you do it"

The GRIT report contains countless insights into how our industry thinks about itself, from how we value innovation and education to how we measure sample quality to the role of automation in our workflows. However, one of the most interesting, if not outright paradoxical datasets in the report relates to the ranking of success factors in the "perfect" research study. When we were asked to "imagine the most ideal and impactful market research study" and told to prioritize among over 20 elements that are the biggest keys to success, these were the top three attributes:

1. Delivering consultative recommendations
2. Clear storyline
3. Generates Measurable ROI

There is a clear and undeniable consistency in our top ranked-attributes: **it's all about the business impact.** It's a simple message. As researchers, our lot in life is to move the needle for the businesses we serve, to help our clients grow by providing them the insights and direction they need to drive their businesses forward.

However, did you notice any mention of "innovative methodology", "agency reputation" or "low price"? Neither did I. In fact, you won't find any of those attributes listed in the top ten. Yet, pick up any trade publication or attend almost any conference, and it seems all we ever want to talk about is the latest research gizmo, the newest cost-cutting shortcut, or the cool new approach that has everyone buzzing.

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I've spent a lot of time thinking about this paradox, trying to wrap my head around how we seem to obsess over the tools of the trade and gravitate to the bells and whistles, all the while realizing they are not core to what truly defines the success of a project. I've come up with at least one hypothesis – that perhaps we need to rethink the type of relationships we strike between researcher and client.

Suppliers vs. Partners

My hypothesis is this: A good percentage of the insight work done today has been commoditized. It was the cheapest proposal, the newest method, or the supplier that was approved by procurement. We've treated too many of our relationships between marketers and researchers as transactional events. We're simply suppliers and the product is pushing data and presentation decks up the corporate chain.

Run-of-the-mill suppliers don't get invested in their customer's businesses; they can't afford to. They are not given the time nor are they provided an incentive, since they can be replaced at the drop of a hat by someone hawking the next AI-powered, future-proof, buzzword-laden solution. And when your insight provider doesn't have a firm grasp on your business environment, your competitive landscape, and your corporate strategy, how can they be expected to deliver a clear, consultative story that has measurable ROI?

It seems what the industry is clamoring for has less to do with innovation and technology and more about forging relationships between marketer and insight partner that allows them both to work together. Partners trust each other, partners get deeply involved in each other's success, and partners work together towards a common goal.

The next wave of innovation in our industry might have little to do with technology and more to do with rethinking the fundamental way we work together.

BEST PRACTICES APPLICATION

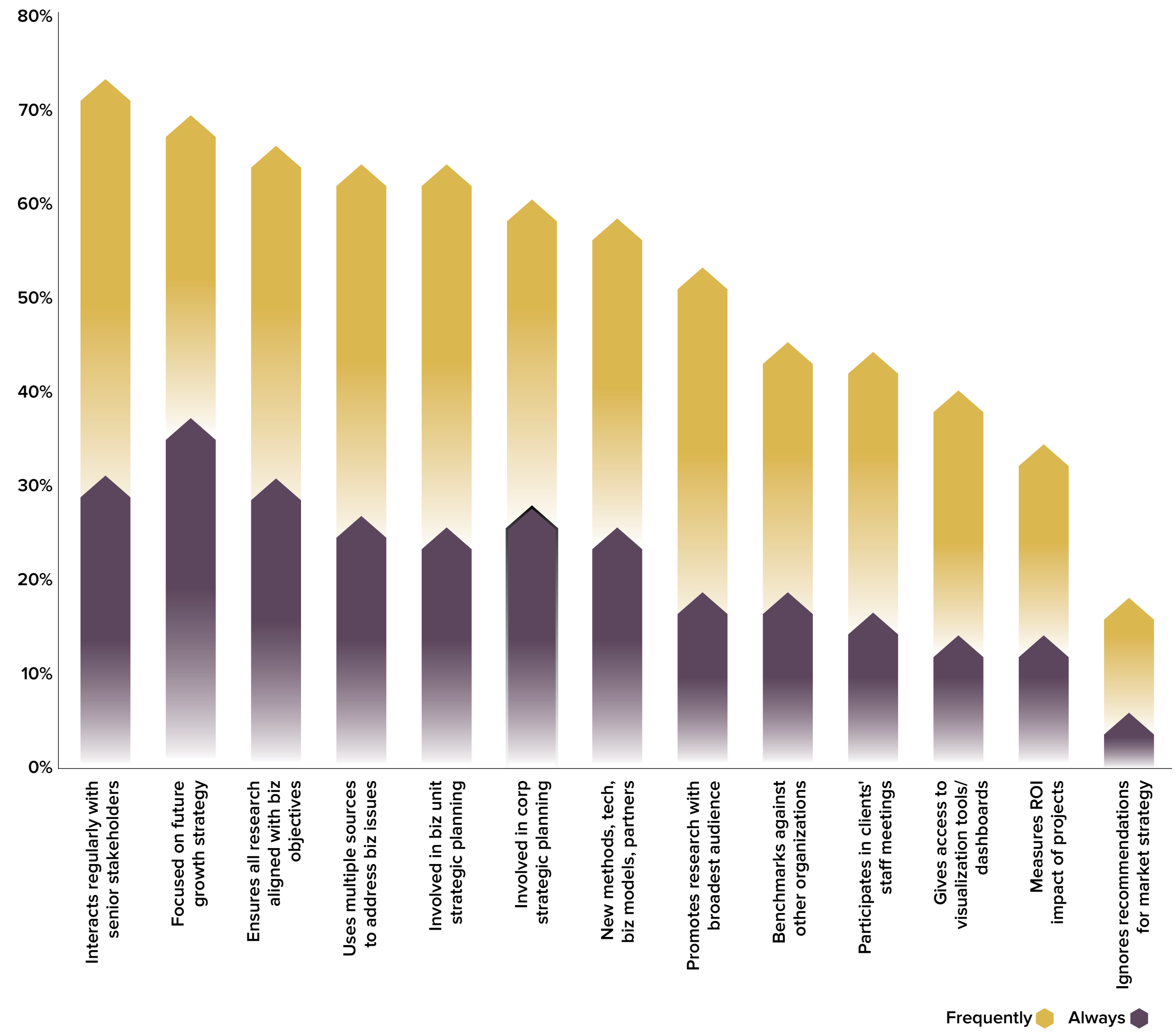
Respondents were presented with a series of 13 behaviors or actions their organization could take and were asked how often their organization did so. Three levels of analysis were conducted. The first shows a simple frequency of taking these actions. Next, we use network analysis to display not only the frequency of the actions but also the degree to which actions cluster together. In short, if an organization takes one action, what is the connection to actions that could be taken? Finally, we explore the impact of these actions on respondents' perceptions of whether their organization will grow over 2016 – or not.

The charts on right depict the frequency of actions taken by clients and suppliers.

Not surprisingly, there are similarities. For example, insights buyers and providers share three actions within their top five:

- My organization is focused on future growth strategy
- My organization interacts regularly with senior stakeholders
- My organization ensures all research initiatives are aligned with senior stakeholders' business objectives.

ROUTINE ORGANIZATION ACTIONS: INSIGHT BUYERS

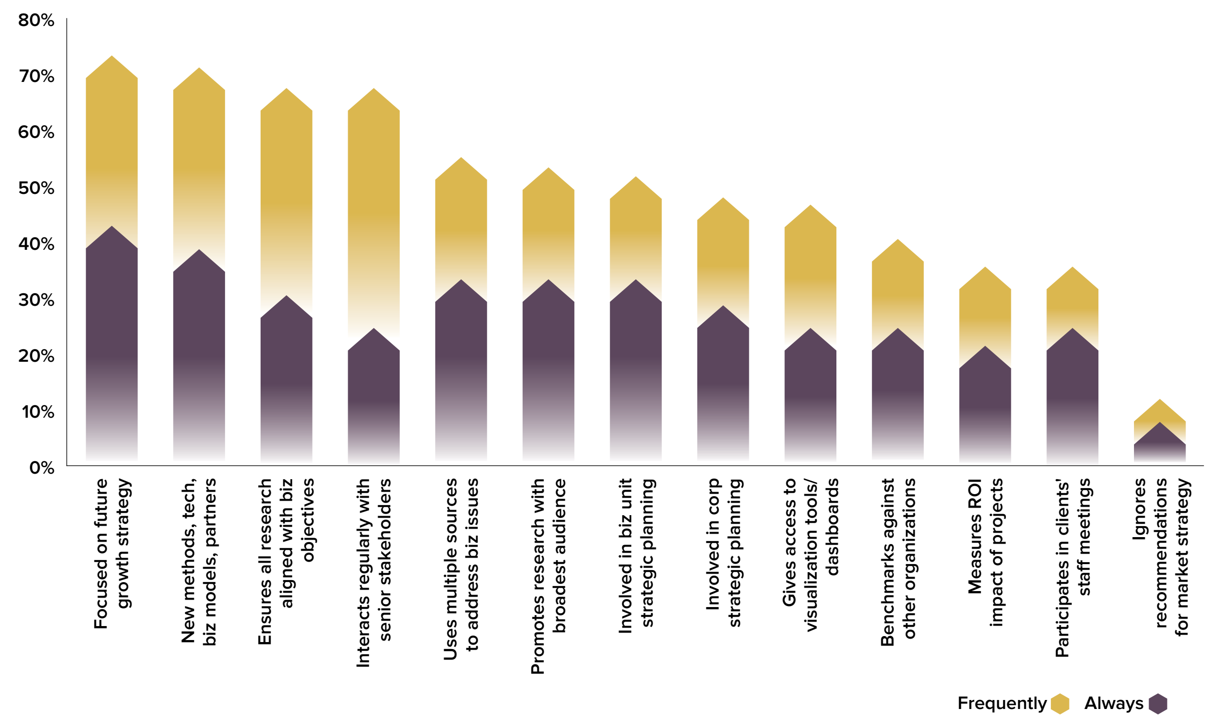


Differences observed in the most frequent actions are consistent with the role of buyer and supplier-side organizations. For example, insight buyers more frequently say they are routinely involved with business unit strategic planning or corporate level strategic planning. Insight providers more frequently say they explore new methods, technologies, models and partners.

One gap worth noting as it represents an increasingly important skill for our industry is the 'use of multiple data sources instead of a single study to address business issues.' While 64% of insights buyers say they do this 'always' or 'frequently', only 54% of insights providers do. While it might be argued that this is related to issues of data access, it is a skill which insight providers must bring to the table with increasing frequency. This gap must be closed.

Another point worth specific mention concerns getting a 'seat at the table.' Neither buyers or providers excel at this. Only 44% of insight buyers say they 'always' or 'frequently' participate in client staff meetings – we would argue a precursor to more senior level meetings. Again, providers trail buyers here – only 33% of insight providers say they do this routinely. The more an insights provider can achieve participation in meetings, the better he/she will know the clients' business issues and the more value they will provide in their ultimate analysis.

ROUTINE ORGANIZATION ACTIONS: INSIGHT PROVIDERS



One gap worth noting is the 'use of multiple data sources to address business issues.' While 64% of insights buyers say they do this 'always' or 'frequently', only 54% of insights providers do

NETWORK ANALYSIS: FREQUENCY AND RELATIONSHIPS AMONG ORGANIZATIONAL ACTIONS

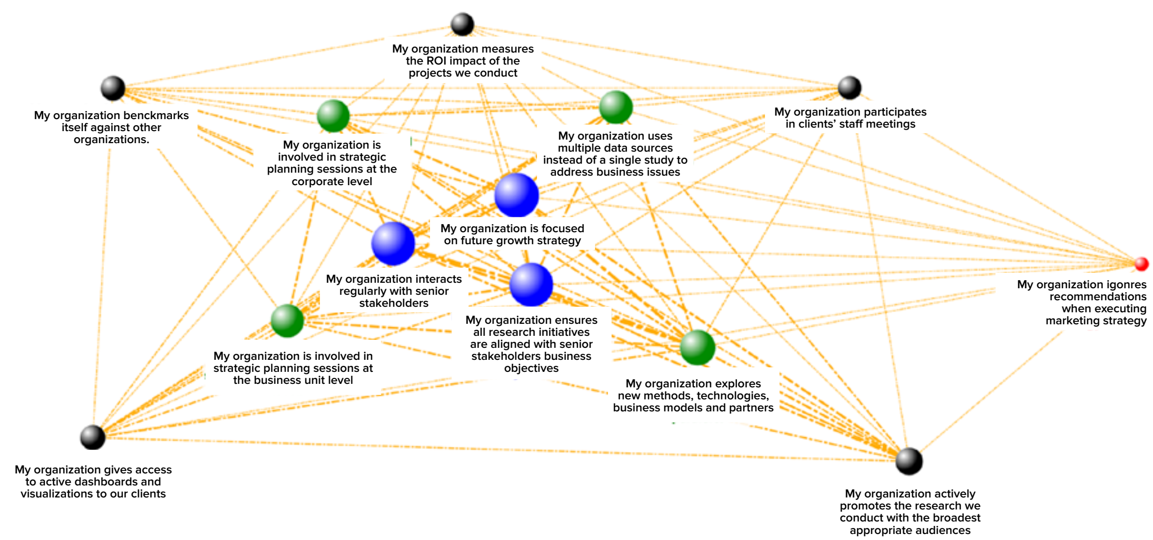
It can be difficult to conceptualize the findings across the 13 behaviors/actions cited. To assist with this, a visual network analysis was conducted to facilitate visualization of the relationship among these actions. This analysis provides a visualization combining insights buyers and providers given the similarity of their responses.

For those with limited experience with this technique, a word of explanation is merited.

The blue spheres are activities with the highest proportion of insights buyers and providers saying they 'always' or 'frequently' engage in the activity; green spheres the next most frequent and the black spheres the least frequent actions. The red sphere is a negatively worded organizational action, 'My organization ignores recommendations when executing marketing strategy' and therefore appears less integral to the map content. The thickness of the lines between the spheres depict the level of the relationship among the actions which could be taken. This visualization allows you to quickly grasp what is core to successful organizational behavior, reinforcing our prior commentary.

The final analysis in this section provides an understanding of which of these actions are the most critical to driving growth – defined as insights buyers or providers indicating their organization will grow over 2016 levels. We utilized a regression analysis to understand this dynamic.

NETWORK ANALYSIS – VISUALIZATION



Conducted by Multivariate Solutions

The results are intriguing and point to strategic initiatives that should be considered to ignite growth. Among insights buyers, our findings argue it is all about a focus at the executive level: interacting regularly with senior stakeholders, aligning research initiatives with business objectives, and measuring the ROI of projects. These actions are core to what an executive team expects. The more an internal insights team achieves or delivers on these actions, the greater the value the executive team will place on the team and its contribution to the business.

For insights providers, the drivers of growth cover a wider spectrum including focusing on future growth strategy, the exploration of new ways of doing business, visualization tools and the integration of multiple sources of information among others. Again, not surprising. Insight providers have the dual strategic needs of growing their business but doing so by continually meeting the evolving needs of their clients.

These findings provide the beginning of a road map to achieving growth and will provide readers of this report a foundation for fruitful discussion. These drivers are critical but let's also remember a finding from an earlier section of this report. The number one characteristic of a successful research effort is providing consultative recommendations with a clear story line. Without that, success will be elusive.

ACTIONS MOST CRITICAL TO DRIVING GROWTH

INSIGHT BUYERS	INSIGHT PROVIDERS
My organization interacts regularly with senior stakeholders	My organization is focused on future growth strategy
My organization ensures all research initiatives are aligned with senior stakeholders' business objectives	My organization explores new methods, technologies, business models and partners
My organization measures the ROI impact of the projects we conduct	My organization interacts regularly with senior stakeholders
	My organization ensures all research initiatives are aligned with senior stakeholders' business objectives
	My organization is involved in strategic planning sessions at the business unit level
	My organization gives access to active dashboards and visualization tools to our clients
	My organization actively promotes the research we conduct with the broadest appropriate audiences
	My organization uses multiple data sources instead of a single study to address business issues

Among insights buyers, it is all about a focus at the executive level: interacting regularly with senior stakeholders, aligning research initiatives with business objectives, and measuring the ROI of projects

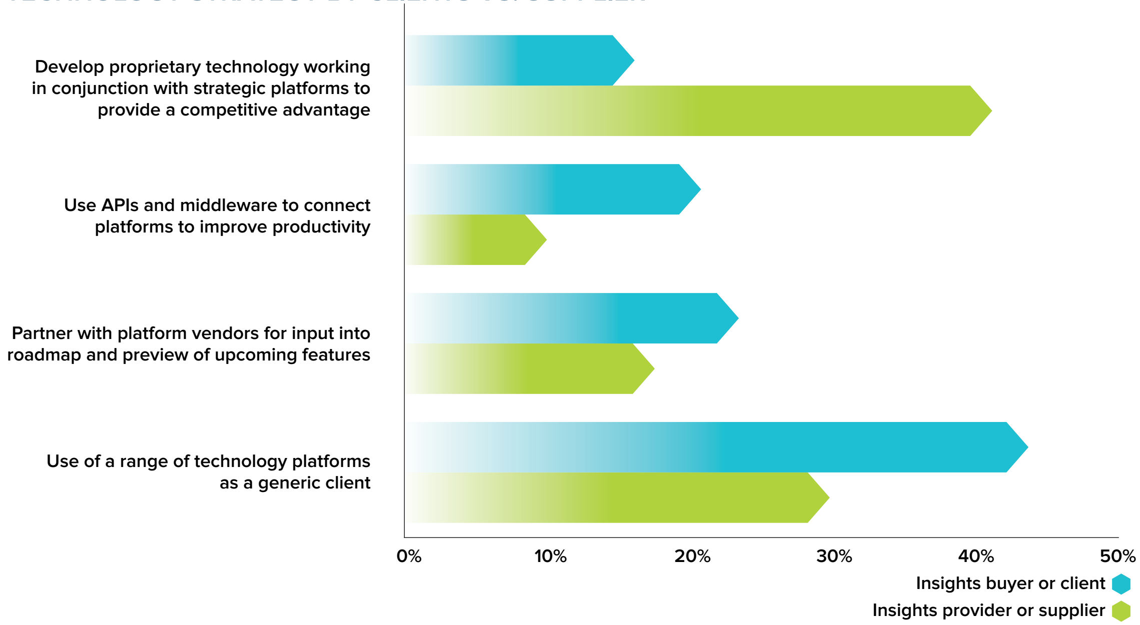
TECHNOLOGY STRATEGY

Technology platforms are essential for organization to collect, analyze, display, and house information. These platforms allow our industry to harness the quality, cost, and time savings – for both the research buyer and the research provider – that is required to compete in today's business world. All organizations represented in this wave of GRIT have adopted these platforms, with varying degrees.

The most basic of these relationships is that of a generic client, which is represented by a third of the respondents. As expected, research buyers are more often customers under this model than are research providers (44% to 30%, respectively). About 20% of respondents say they have an even deeper relationship with the technology platform in that they provide input into the product roadmap and get first looks at new features. The buyer side is a bit more prevalent in this model as well. Continuing to move up the relationship ladder, 11% of respondents said they are integrating with platforms using API or middleware connections. Again, this model is skewed to the research buyers than the providers (18%, 10% respectively). The relationship that reflects the deepest commitment is the development of technology platforms, of which 36% of GRIT respondents say that they are doing. As expected, this commitment is dominated by the supplier side with 44% indicating they are doing. Interestingly, the buyer side is not being left out of this – 16% say they have developed technology platforms themselves. For these clients, the current tech platforms have not met their needs.

It is obvious that tech platforms have made some of the deepest impact on our industry, and given where the opportunities are for data integration, meta-analyses, AI, and automation, we expect the relationships to deepen. We remain curious about the 16% of research buyers that are developing their own platforms – what is the industry missing?

TECHNOLOGY STRATEGY BY CLIENTS VS. SUPPLIER



We remain curious about the 16% of research buyers that are developing their own platforms – what is the industry missing?

IS YOUR ORGANIZATION'S TECHNOLOGY STRATEGY WHERE IT NEEDS TO BE?

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In 1983 the U.S. Defense Intelligence Agency embarked on Project Socrates, a program to develop a national technology strategy designed to restore the country's competitive edge. Companies wishing to stay successful must do the same. Every organization must have a tech strategy, and it must also reflect the understanding that tech does not stand still.

Most companies find themselves falling behind because staying on top of tech is hard. But getting a strategy in place and following it is critical to staying competitive and protecting valuable information in a dark internet world.

1. Make A List of What Is Demanded By the Times.
This falls into three areas – Tech services you may market now or want to, evolving Cybersecurity demands, and legal requirements, such as the looming data protection requirements in various countries, including our own.

2. Assess Where You Stand.
This is known as a Gap Analysis. This gives you an understanding of the spread between where you are with hardware, software, security, resources, etc., and where you need to be, and what steps should be taken to ensure the variance between the two is closed.

3. Develop A Detailed Road Map.
This is your game plan arising from the results of your Gap Analysis, after your rank what is necessary and what is desirable. Most necessary steps require being compliant or keeping marketable technologies up to date. Desirable is usually where you want to go in the marketplace.

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4. Establish Benchmarks With A Timeline.
Tag specific steps to each tech goal and apply a timetable and ownership to each. Put timetables on software that can be accessed by internal stakeholders to see progress against goals. Hold regularly scheduled meetings that require accountability.

5. Have the Right Leadership In Place.
The link between business strategy and technology plays an important role in organizational success. Who governs the relationship between IT and the business is critical. The tech and business teams must be committed to working together toward a common goal and committed to resolving conflicts as they arise.

6. Have the Right Tech People.
Not all tech people are created equal. The skills you need may include the flexibility to move seamlessly from one programming language to another, to understand the business you are in and not just the technology, and to have a vision for forward-thinking solution- building.

7. Stay Attuned To The Latest Threats.
Be knowledgeable about disruptive forces that could cause your organization to stumble. Some of these are tech threats like ransomware attacks, but some are tech trends, like automation or artificial intelligence, with potential to usurp services you provide.

8. Prepare A Risk Management Plan.
Identify threats, vulnerabilities and their likelihood of occurring. Build a culture where employees feel compelled to report an incident, should it occur, and not be tempted to sweep it under the rug.

9. Build Funding Into Your Strategy.
Know the requirements of your existing applications and the resources required to maintain or develop them further. Technology tradeoffs can include having to choose between introducing a new product, broadening sales efforts, or hiring more employees.

10. Include A Commitment To Evolve.
For a strategy to be effective, it should both create and deliver value. For an organization's technology strategy in the digital age, this is an ongoing process.

PRIORITIZATION DRIVERS

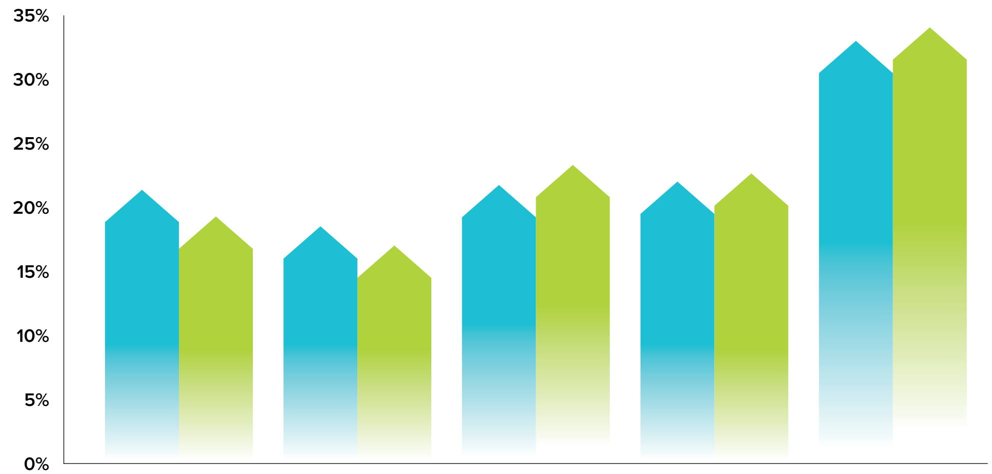
Finally, we asked about the importance of several key attributes in selecting methods for research projects.

This was perhaps the best news of all: clients and suppliers seem in almost perfect alignment in their decision process, although that process is different than one might have suspected. Quality of insights generated is number one by a wide margin, but Speed/Innovation/Costs are all effectively tied for second with only marginal differences between them. Geographic reach is a distant last.

We believe the close clustering of Speed/Innovation/Costs shows the impact of automation and DIY approaches on the industry. Both clients and suppliers are expecting quality to be table stakes, but whatever method is being considered must also be fast, cheap, and innovative. That is good news for many companies in the GRIT Top 50 rankings, of course, but perhaps not so great news for the more traditional players in the industry.

“Cheaper, faster, better: pick 2” is no longer acceptable: both clients and suppliers expect all three and plan to have all three present every day in all projects.

PROJECT PRIORITIZATION



	Price	Geographic reach	Innovative approach	Speed of results	Quality of insights generated
Insights buyer or client	18,3	15,9	18,6	18,8	28,4
Insights provider or supplier	16,6	14,7	20	19,4	29,32

Insights buyer or client
Insights provider or supplier

“Cheaper, faster, better: pick 2” is no longer acceptable: both clients and suppliers expect all three

THE BIG PICTURE

Research organizations now have a framework to begin the process of measuring themselves against. The online tool will allow for real time scoring against the dataset on key measures that are highly correlated and predictive of growth. It is debateable that budget/revenue growth may not be the best dependent variable to use, but it is generally indicative of success so for now that is what we'll use.
So, what does the highest-performing research organization look like? Well, based on these data we can say that successful companies do a few things consistently:

The goal from here is for all research organizations to compare themselves to this standard to see what they are doing well, where they can do better, and develop a plan to make it a reality. Look for more on how these data can be accessed to make that happen soon.

WHEN "WHAT WE SAY" DOESN'T MATCH "HOW WE REALLY FEEL"

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When I read the following question from the GRIT survey I felt a momentary **sense of dread:**

If you imagine the most ideal and impactful market research study, which of the following elements do you feel are most important and which are least important?

"Oh no!" I thought, "This report is essential for providing insight for the industry on our future, we're not going to rely on a stated importance question for true insight are we?"

I read on and felt a modest **sense of relief** when I saw that this was going to be a MaxDiff exercise.

"Whew, at least we're going to get derived importance by looking at the trade-offs that people will have to make when answering," I sighed, "even if the answers passed through the conscious filter of each respondent."

Then I looked at the data and **felt my hopes dashed** again.

I saw what we see so often at Sentient: conscious responses only give us part of what we need for true insight. The relative importance of the 21 elements tested only ranged from two to seven percent (note that random importance across 21 items is 4.7%).

Trying to give us all the benefit of the doubt, I thought, "Well, I suppose it's *possible* that the industry places nearly equal importance on all 21 elements. Let's see if the general patterns align with industry investment trends."

"Oh no!" I thought again, as I saw *fast results* and *low cost* come in low on importance. "Automation is a major wave of change in this industry, and these two key advantages aren't important?"

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"Uh oh," I gasped as I read on, *"Delivering consultative recommendations* is #1, *clear storyline* is #2, and *rigorous analysis* is in the top tier. Wait a minute, those are people heavy and project specific elements, that doesn't exactly match the automation movement," I thought at first.

So, I looked at the Automation section and saw that the number one function being automated was *data analysis* (56.4%), and nearly one-third (32.1%) reported automation of *report writing* (a key vehicle for *consultative recommendations* and *storytelling*).

Something seemed amiss. What we were saying was important didn't seem to match how we were behaving.

This led me to three hypotheses and one conclusion.

The first hypothesis was that the patterns represented different sub-groups of people and therefore trends in the industry would close the gap overtime. This gave me a **sense of calm** knowing that we now have important benchmarks in place for tracking future change.

The second hypothesis was that the data was winking at the great opportunity offered by automation: by making components of research faster and cheaper, we can focus more resources on getting deeper insights and inspiring action. This gave me a **sense of excitement** envisioning how our work would become more interesting and impactful.

The third hypothesis was that an *implicit* measure of how people *feel* about the 21 elements would likely reveal sharper insight on what is most important. This gave me a **sense of hope** knowing that we now have quantitative methods that capture how people truly feel.

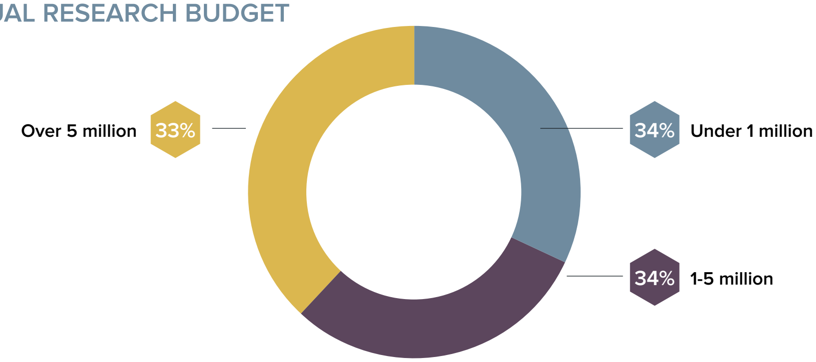
The conclusion I came to is perhaps one we can all agree on: **more research is needed**. Let's make that research captures what people say as well as how they feel.

FINANCIAL OUTLOOK

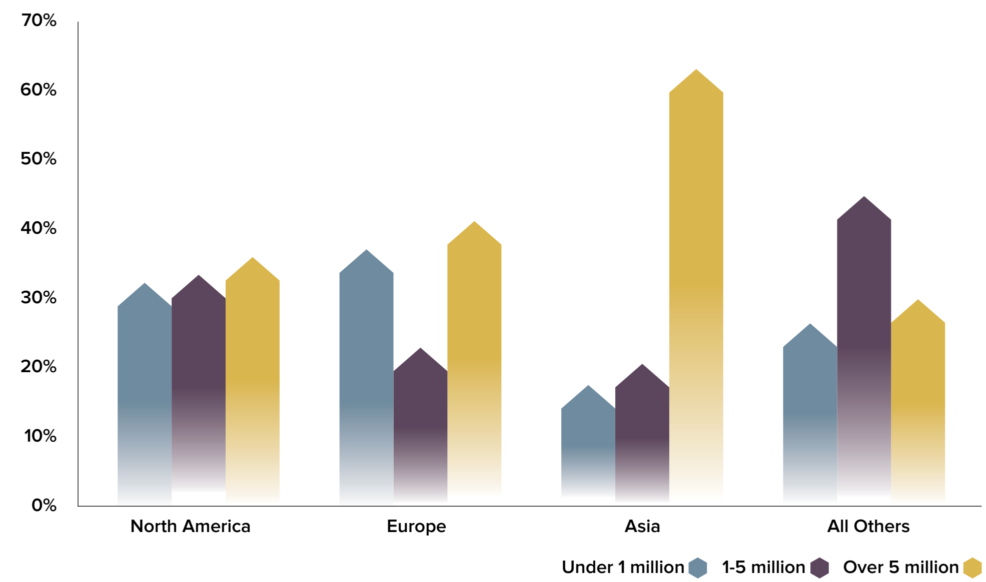
The Q1-Q2 2017 wave of GRIT again sees participants representing all quarters of the industry. On the client side, one-third of respondents come from firms with research budgets under $1m. Overall, 75% of client-side respondents spend less than $10m per year. About 10% come from the largest clients who spend over $30m per year.

These figures reflect important differences by region and sector. Those respondents representing companies whose headquarters are in Asia have the biggest budgets, with over two-thirds spending more than $10m per year. This is followed by Europe (40% of respondents over $10m per year) and North America (33%), and the rest of the regions (only 20%, combined).

CLIENT ANNUAL RESEARCH BUDGET



RESEARCH SPEND BY REGION

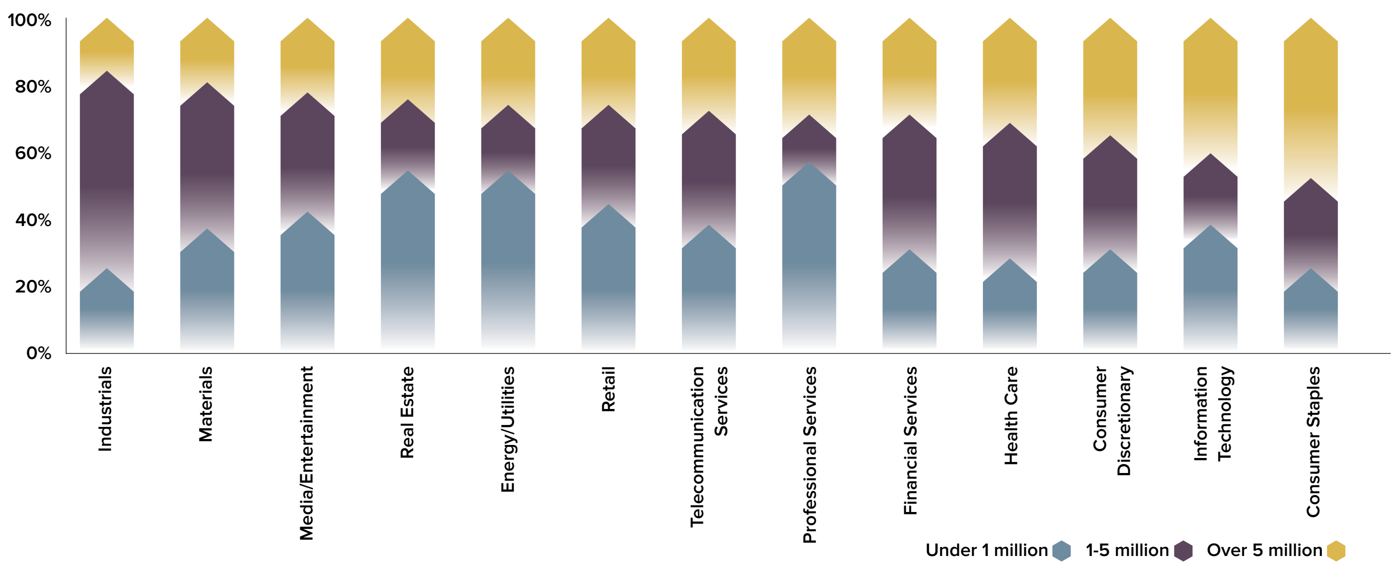


Budgets are biggest for companies operating in the consumer staples, media and entertainment, and health care sectors.

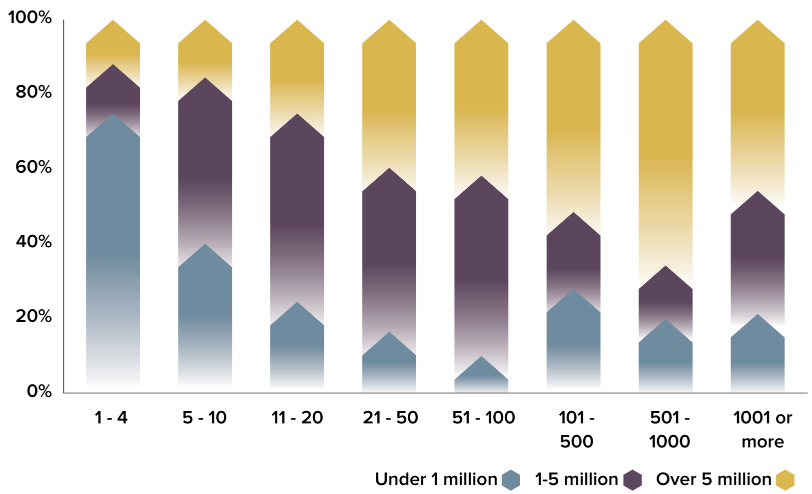
Budgets tend to correlate with company size as measured by headcount: the bigger the company, the bigger the budget. That said, there are still many respondents from larger companies whose research spend is more reminiscent of smaller organizations.

We also wanted to understand the relationship between annual budget and number of projects. Client-side activity as measured by number of projects yields findings similar to those for spending. Overall, about 25% of respondents report running fewer than 25 projects per year (about 2 per month). 62% report running no more than 100 per year, and 17% report running over 250 per year. By region, respondents from companies headquartered in Asia run the most projects, followed by those in Europe, then in North America. Intuitively, the more money is allocated, the more projects are run.

RESEARCH SPEND BY SECTOR



RESEARCH SPEND BY HEADCOUNT



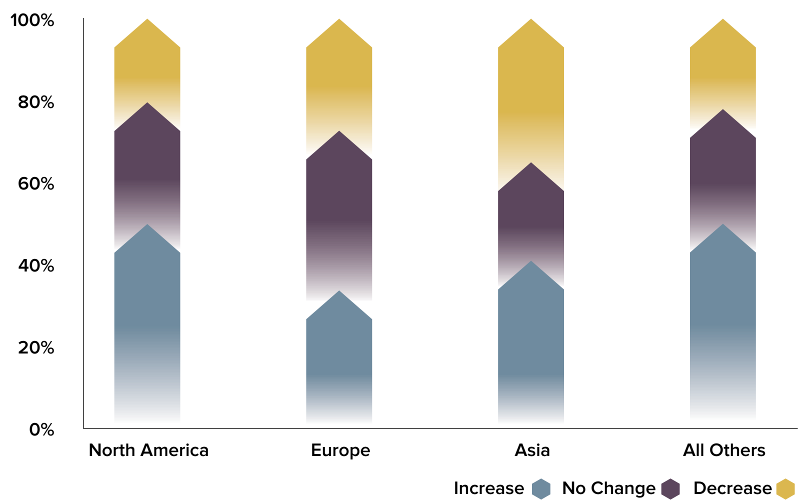
Budgets are biggest for companies operating in the consumer staples, media and entertainment, and health care sectors

BUDGET GROWTH?

By and large, budgets have improved for client-side researchers in 2017. 39% say their budget is larger this year than last. 32% say budgets have stayed the same while 30% say they have decreased. North American firms are driving this change, where 45% of respondents say budgets have increased. Respondents working for Asian firms are mixed, with almost 40% indicating budgets increased and the same indicating they decreased. In Europe, about 40% say budgets have remained the same.

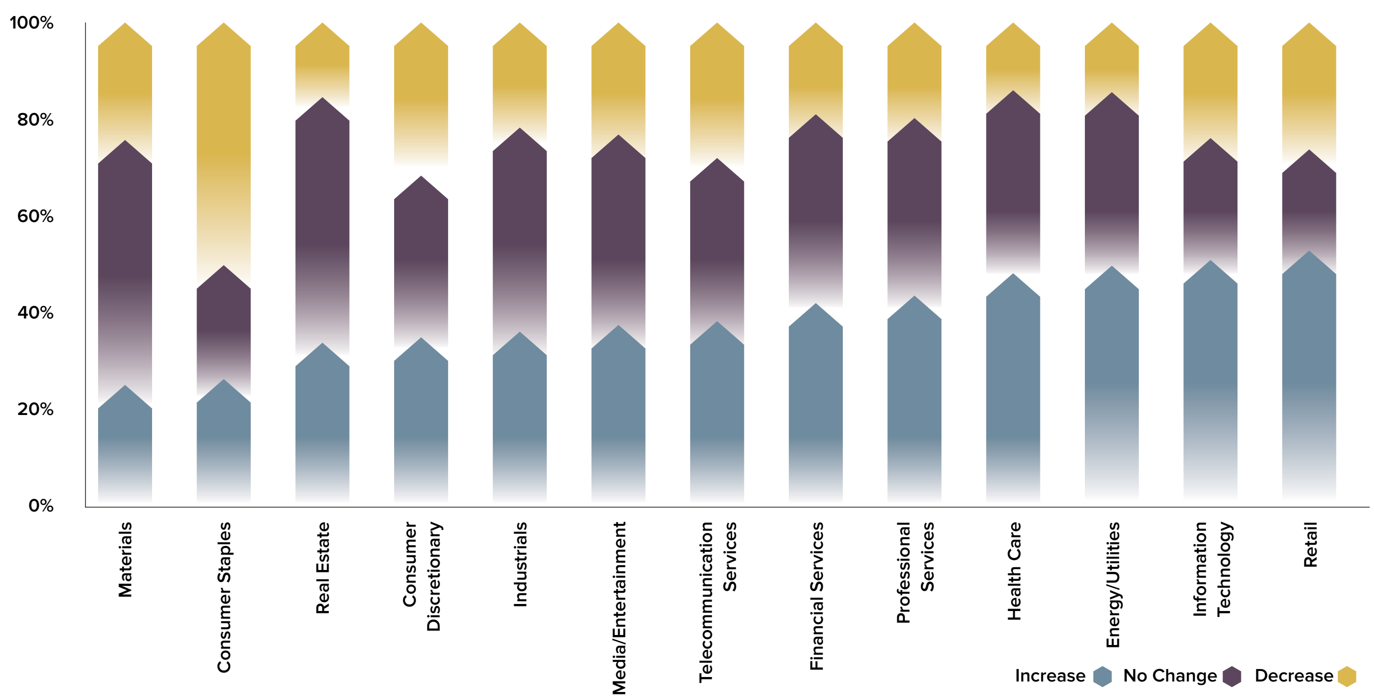
The biggest winners this year have been researchers in the Retail, Health Care, Energy/Utilities, and IT sectors, with 50% indicating budgets have increased. The biggest losers have been those in the Consumer Staples, Consumer Discretionary, and Real Estate sectors with 50%, 30%, and 25% (respectively) saying their budgets have decreased. Changes in budgets don't appear to be correlated with firm size.

WILL SPENDING ON RESEARCH INCREASE, STAY THE SAME, OR DECREASE VS LAST YEAR? (BY REGION)



Budgets have improved for client-side researchers in 2017. 39% say their budget is larger this year than last

WILL RESEARCH SPEND INCREASE, STAY THE SAME, OR DECREASE VS LAST YEAR? (BY SECTOR)



BALANCING QUALITY, SPEED, AND COST IN A ZERO-BASED BUDGETING WORLD

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

The dynamic nature of the marketing and marketing research worlds means people are tasked with staying innovative in order to grow their business. With zero-based budgeting practices becoming commonplace, it's a constant challenge to conduct the research needed to support innovation and ultimately growth. Further, people are being asked to do more with less in shorter amounts of time. So, can the market research industry support the above challenges? In short, yes. But this requires clients to be surgical about the methods they employ, including an understanding of the tradeoffs that need to be made.

When asked how they prioritize methods for research projects, participants in the GRIT survey overwhelmingly chose quality as the most important factor, indicating that even in times where cost-cutting strategies are sweeping through all industries, quality cannot be compromised. But with today's challenges, speed and cost become major players when choosing the best research method.

Today, there are three foundational research methods: traditional, do-it-yourself (DIY), and agile. Each has its rightful purpose in the marketplace based on needs, and each has its tradeoffs.

Traditional, full-service solutions, which have been around the longest, are best suited for higher-risk decisions where you need the maximum level of confidence. They are mostly custom efforts to address your business's unique objective. However, project execution can take weeks or months and often costs tens of thousands to hundreds of thousands of dollars.

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GRIT COMMENTARY

With DIY solutions, users can gather data within days from a largely standardized approach with limited flexibility. These options are affordable and ideal for lower-risk decisions that don't require deep diagnostics. But, in order for the studies to yield helpful insights, you need an expert researcher with the time to execute the study and do the analysis.

With agile research solutions, there is a full-service team, similar to more traditional methods. The delivery timelines and the costs are comparable to those of DIY, but they are not as customizable as a traditional study. Agile finds the balance among quality, speed, and affordability based on the customer's business needs.

This balancing act ties back to Colin Powell's 40–70 rule: if you have less than 40% of the information, you are shooting from the hip. If you have more than 70% of the information, the opportunity has already passed.

Because the length of time, depth of insights, and cost can vary among the foundational methods, it's important to understand when to use which. Here are some basic examples:

- Use traditional validation techniques at the "last gate," when there is time and you need to have the maximum amount of confidence prior to further investment, such as large-scale manufacturing or advertising spend.
- If you have two days to get some feedback on concepts from a generic audience, you don't need customization in the questions you're asking, and want an automated snapshot view of the data without human analysis or implications, DIY is a good fit.
- If you need timely insights driven by custom audiences; flexible, but not fully custom research design; and expert analysis and reporting, agile research is the best fit.

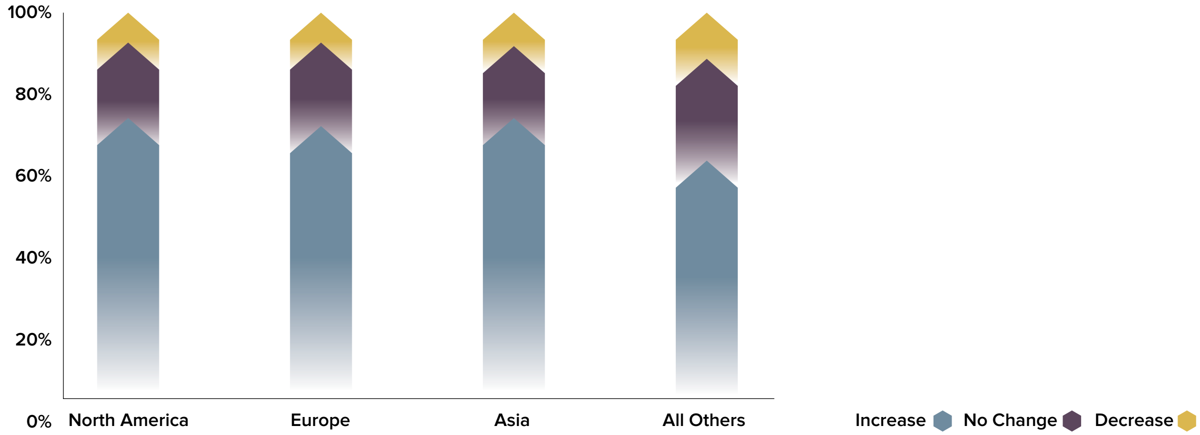
A single solution isn't going to work for every business need. But if you understand when and where to make tradeoffs, you can identify the best research solution that enables you to work smarter, not harder.

SUPPLIER REVENUE ESTIMATES

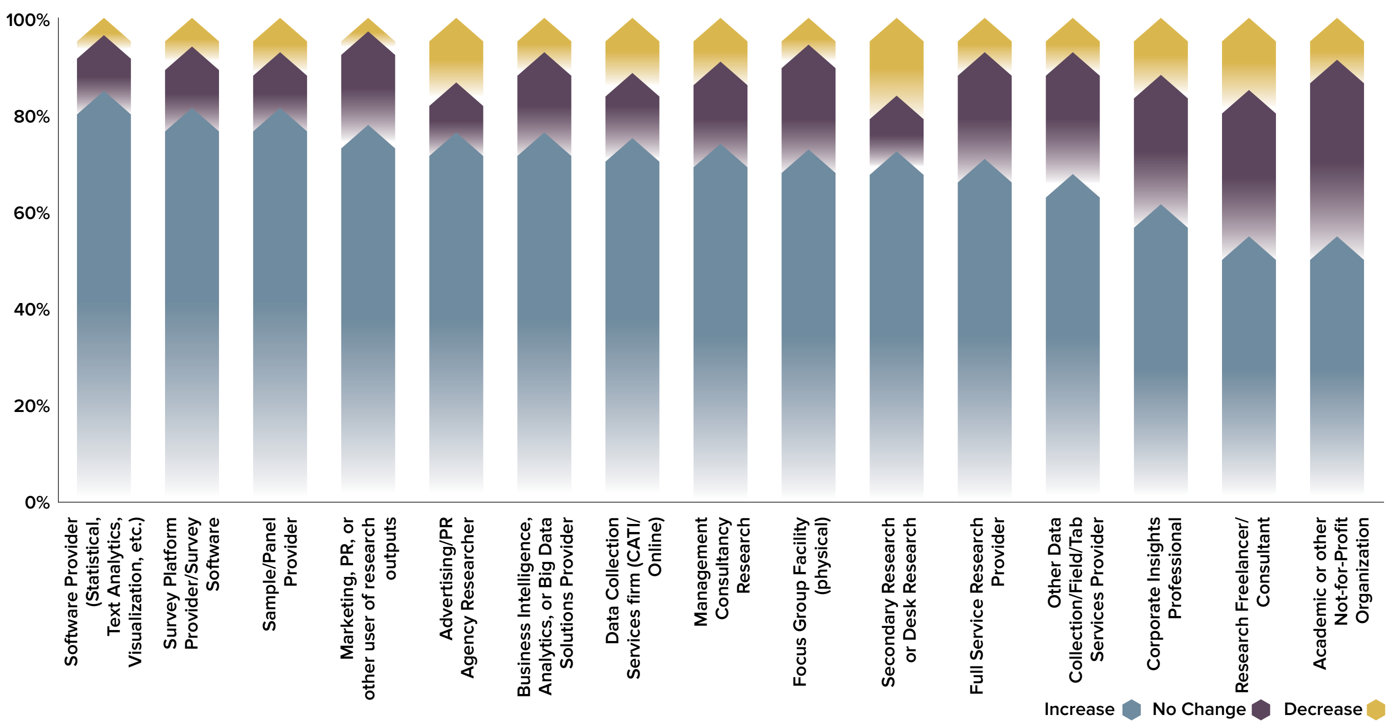
Suppliers are optimistic in 2017. 72% of supplier respondents expect sales to increase. 20% expect revenue to remain the same, and only 8% expect a decrease. These figures are largely consistent in North America, Europe, and Asia. Outside these regions expectations are lower, yet still 60% of respondents expect revenue to grow.

The larger the company, the better its revenue prospects according to this wave's respondents. By sector, technology players (those providing software or solutions) and sample/panel providers are the most optimistic. Over 80% of respondents working for these types of companies expect revenue to grow. Analytics suppliers and consultancies also overindex. Freelancers are the least optimistic for 2017 revenue prospects, yet still 50% of them expect revenue to grow versus 2016.

WILL REVENUE INCREASE, STAY THE SAME, OR DECREASE VS LAST YEAR? (BY REGION)



WILL REVENUE INCREASE, STAY THE SAME, OR DECREASE VS LAST YEAR? BY TYPE OF SUPPLIER



THE BIG PICTURE

Optimism abounds with both clients and suppliers, although, as always, there does seem to be a certain disconnect: While 45% of clients expect budget increases, 72% of suppliers expect revenue increases. It seems as if the client-budget pie will have to be cut into many small pieces for both predictions to be true, but then again, we didn't ask suppliers by how much they expected their budgets to increase so it could work.

On a related note, we did not ask clients where they would be allocating their budgets However, if the supplier-side analysis that indicates companies that play more on the tech side drive revenue growth within the industry, we can assume a relationship there. Based on other results in GRIT that all point to an increasing shift to technology solutions within the industry, this certainly would seem to be a reasonable position to take.

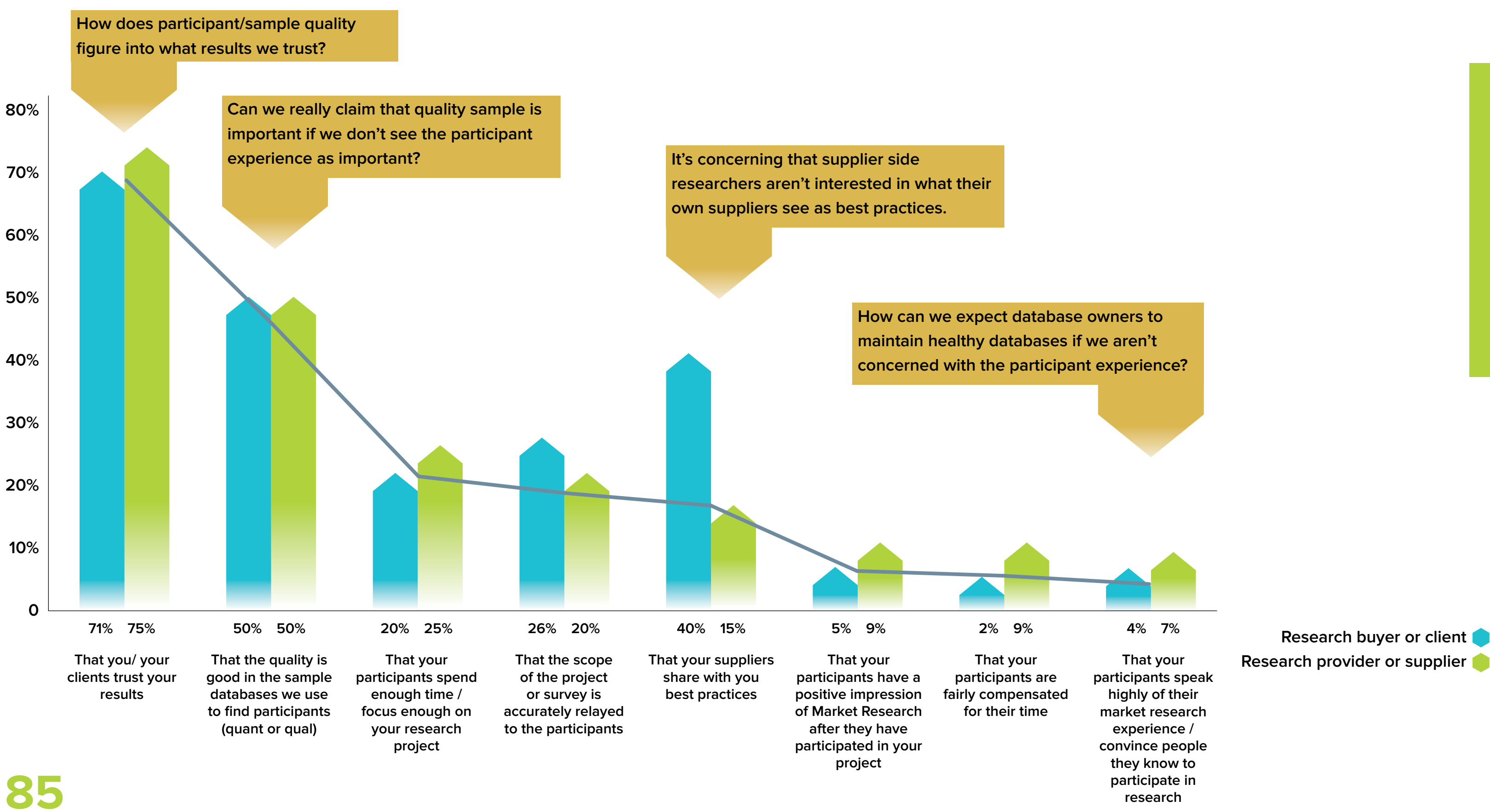
Overall the economic outlook is promising for most, with some exceptions. As the year unfolds, we hope that everyone thrives.

72% of supplier respondents expect sales to increase. 20% expect revenue to remain the same, and only 8% expect a decrease

[ADDENDUM] CONSUMER PARTICIPATION IN RESEARCH

In the Q3-Q4 2016 edition of the GRIT Report, we asked researchers to rank various factors in importance when designing a research study. Respondent Experience was at the absolute bottom of the list, which we found quite alarming. Participants are the lifeblood of market research, and disregarding the respondent experience in the research process is counter-productive to say the least.

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



Customer-centricity, user experience, engagement, and design are the heart of product development and marketing, but yet are hardly even a consideration in research

Customer-centricity, user experience, engagement, and design are the heart of product development and marketing, but yet are hardly even a consideration in research. In years past it didn't have to be, but that is a legacy that must be jettisoned in order for our industry to be effective in the 21st century. More than that, it's necessary to survive as an industry: many options outside of the traditional MR space now exist that insights buyers can use to get the needed information to support their decisions; we stopped being the only game in town long ago. Those competing approaches have user experience built into them from the ground up and often reinforce brand relationships with consumers overtly.

As researchers, we get it; every time we field the full GRIT study we get an earful from other researchers about their experience with the survey design, usually negative. It's easy to get defensive and rationalize those concerns away (and sometimes perhaps even rightfully so). However, the bottom line is that people have a choice on how they spend their time, and we are asking for some of that time. If we don't make it a good experience, we run the risk of becoming like that friend or family member who is always asking for a favor of some kind (that we don't want to do), so we just start ignoring them as much as possible.

We weren't the only ones who found this situation to be cause for concern, so we reached out to various stakeholders in our industry and developed a concept for asking consumers directly about their experience participating in research. AYTM, Dalia, Focus Pointe Global, G3 Translate, Global Research Business Network (GRBN), reportbook by IfaD, Lightspeed, Mobile Digital Insights (MDI), Multivariate Solutions, Recollective (Ramius Corporation), Reconnect Research, Research Now, SSI, Toluna, and Virtual Incentives all joined us in fielding the new **GRIT Consumer Participation in Research** study (GRIT CPR) in March of 2017.

This groundbreaking GRIT CPR study was conducted in 15 countries and 8 languages among 6,208 consumers via online, telephone, and mobile-only surveys.
We asked questions about the types of research they participate in (qual and quant), frequency of participation, preferred method/device for participation, how they want to receive invitations, what rewards they want, the impact of survey design, and more. In doing so, we discovered a tremendous amount about how consumers view research, and much of it is less than optimal for our industry.

It's time to bring the participant experience to the forefront and we hope the GRIT CPR report will help in that effort.

We've included some of the highlights here:

A key finding is that, in aggregate, only a quarter of all respondents globally are satisfied with their experience participating in research, indicating that researchers' lack of prioritizing the respondent experience shows through to respondents.

Additional eye-opening findings are:

The GRIT CPR study was conducted in 15 countries and 8 languages among 6,208 consumers via online, telephone, and mobile-only surveys

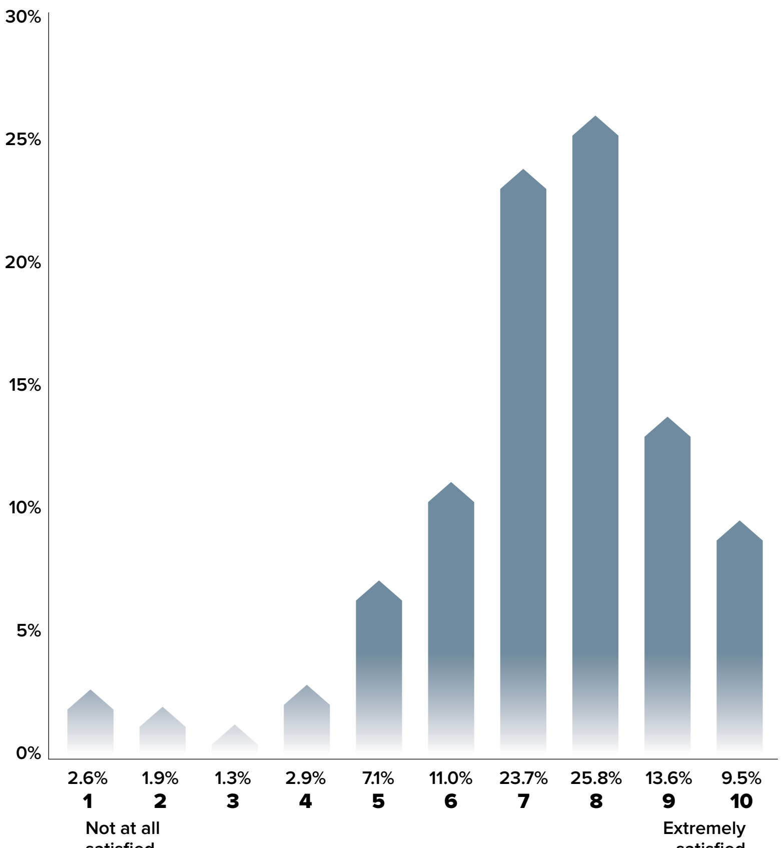
Our industry does a poor job of putting the respondent first, despite having the means and knowledge to do so

Only a quarter of all respondents globally are satisfied with their experience participating in research

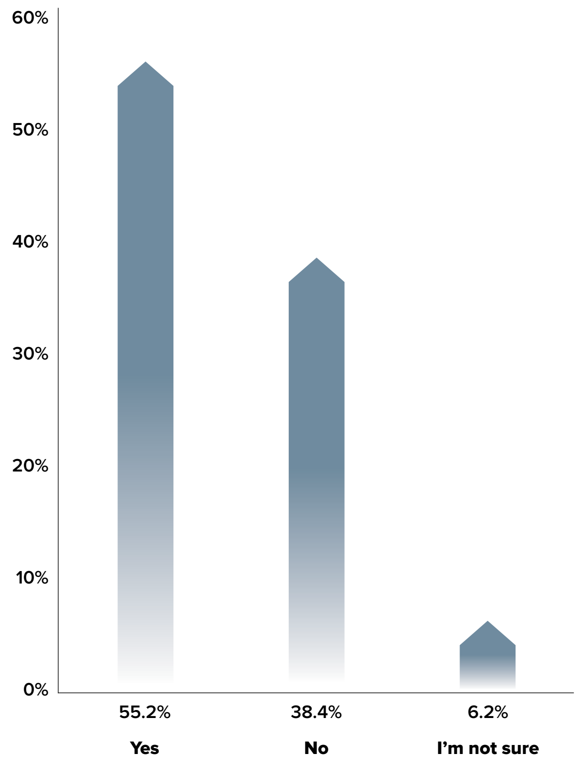
Over half of all respondents admitted that the design of a survey impacts their willingness to complete it

45% of respondents said surveys should be less than 10 minutes in length

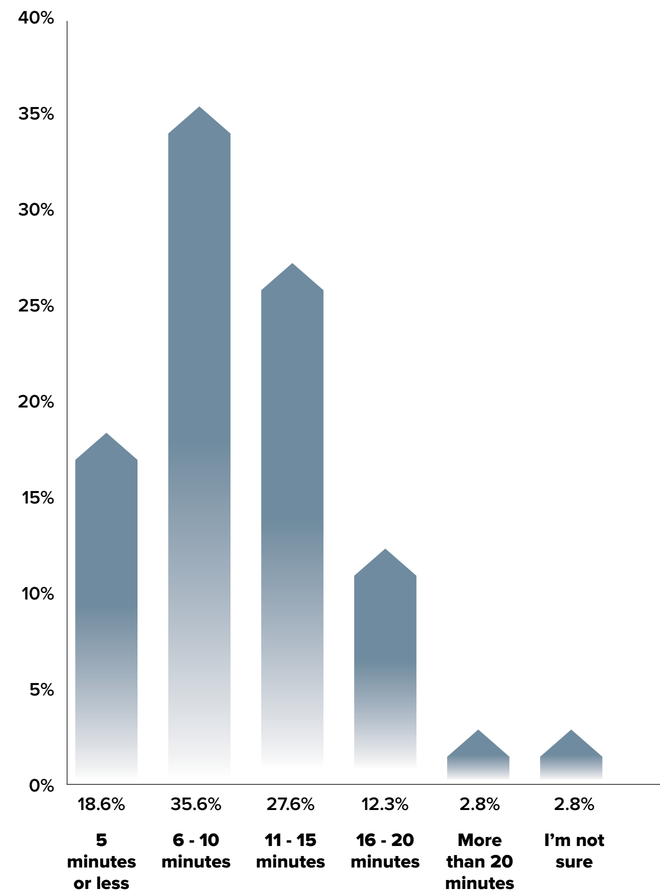
THINKING ABOUT YOUR AVERAGE EXPERIENCE WITH THE TYPE OF RESEARCH YOU PARTICIPATE IN MOST FREQUENTLY, PLEASE TELL US HOW SATISFIED YOU ARE ON A SCALE OF 1–10, WITH 1 BEING NOT AT ALL SATISFIED AND 10 BEING EXTREMELY SATISFIED



DOES THE DESIGN OF A SURVEY AFFECT YOUR WILLINGNESS TO COMPLETE IT? FOR INSTANCE: WORKING WELL ON A MOBILE SCREEN, BEING SHORT IN LENGTH, OR USING INTERESTING VISUALS RATHER THAN JUST TEXT?

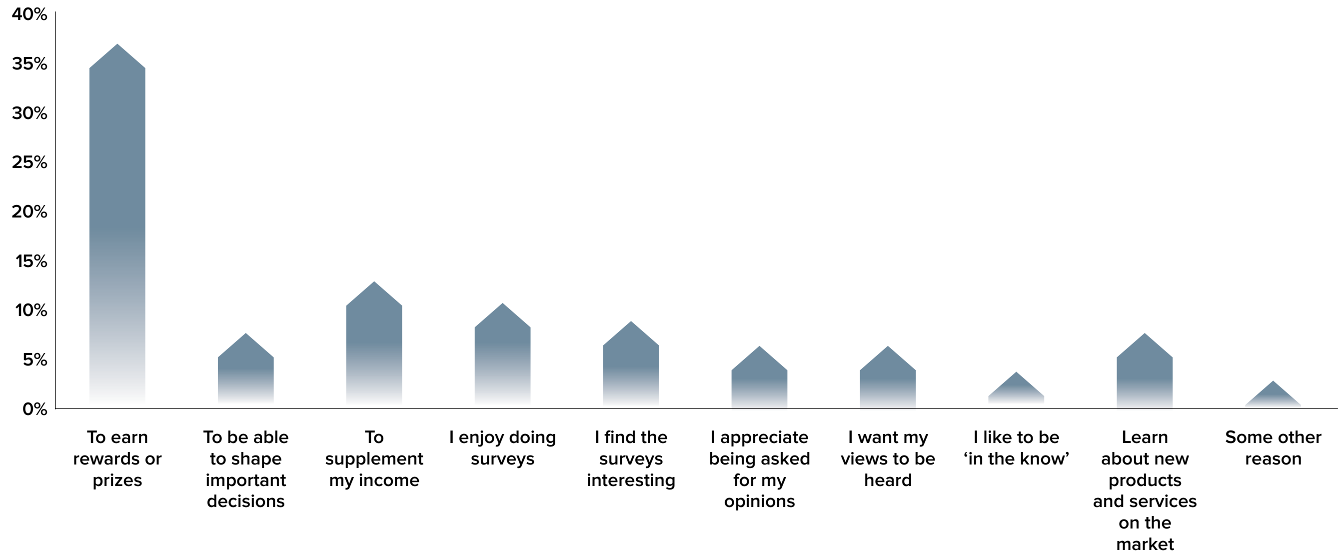


THINKING JUST ABOUT SURVEYS OR POLLS NOW, WHAT DO YOU CONSIDER TO BE THE IDEAL LENGTH FOR YOU TO PARTICIPATE IN ONE?



1/3 of all respondents cite a desire to earn rewards or prizes as their primary reason for participating

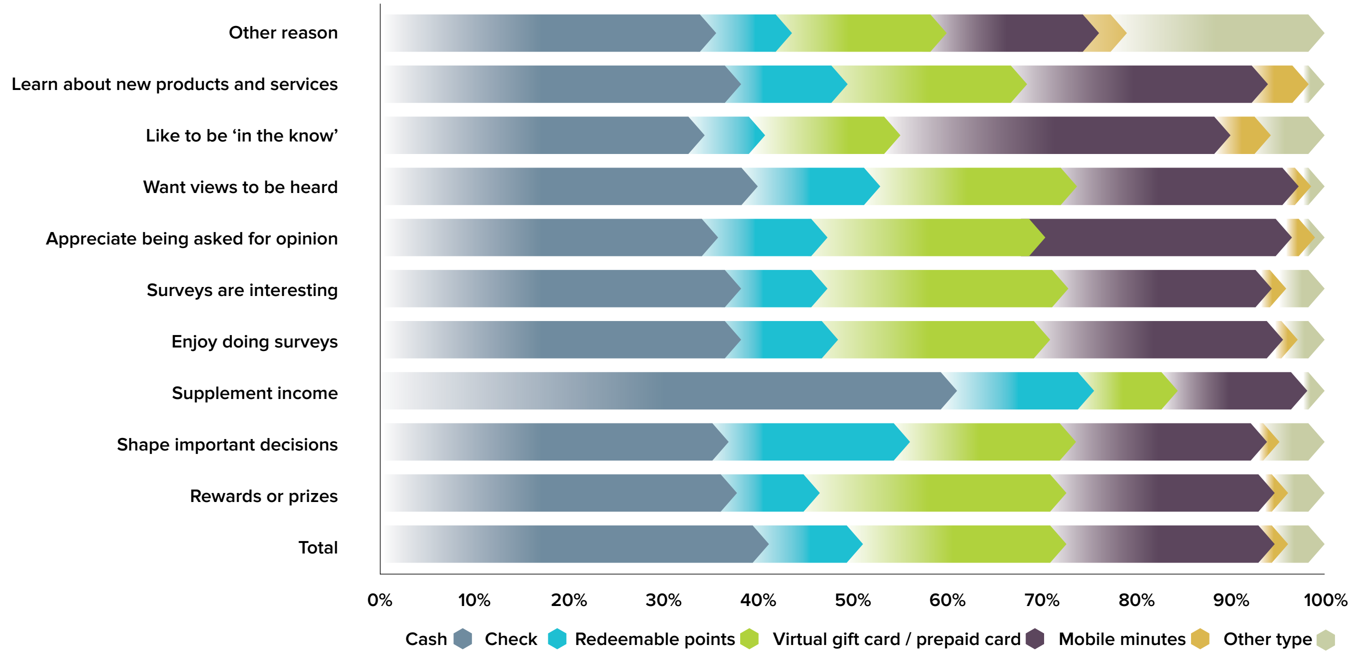
WHAT IS THE MAIN REASON YOU PARTICIPATE IN RESEARCH?



Cash may be king, but virtual cards are queen: across all sample types, countries and demographics respondents want incentive flexibility

WE FOUND THAT EVERYBODY LOVES CASH, OF COURSE, HOWEVER CONSIDERING THE MYRIAD IMPRACTICALITIES OF REWARDING WITH CASH VIRTUAL CARDS ARE THE STRONG SECOND CHOICE OF RESPONDENTS, AND THAT IS LARGELY TRUE ACROSS ALL DEMOGRAPHIC CUTS AND COMPARISONS BY OTHER VARIABLES IN THE STUDY.

CASH IS KING, BUT VIRTUAL CARDS ARE THE SECOND MOST PREFERRED INCENTIVE TYPE



Overall, the results of the study reinforced our belief, set forth initially in the GRIT Report, that our industry does a poor job of putting the respondent first, despite having the means and knowledge to do so. We should capitalize on that and bring the participant experience to the forefront.

So, what to do? Well, based on these data, a priority action list could look like this:

1. Go "mobile first" in designing studies
2. Stay under 10 minutes
3. Think like game designers, marketers, or UI experts when designing research
4. Reward respondents the way they want to be rewarded and give them choices
5. Use research as a brand engagement and relationship building opportunity

Other ideas can be found in the recent GRBN Special Report: Improving the online survey user experience available at www.grbnnews.com/special-report-improving-the-online-survey-user-experience.

The GRIT CPR study is a call to action for the entire industry: clients, suppliers, and everyone in between. We must change, or risk losing access to respondents.

What is the "so what" in all of this? We as an industry must change our ways, and respondents have just given us a pretty clear set of directions on how to do that. The way we have always conducted research may have met our needs in the past, but the world has changed and research participants now expect more from their relationships with our industry.

We've distilled the message from the GRIT CPR study into a blueprint for success: a three-part action plan that we believe will go far in helping the industry capitalize on these learnings and overcome the challenges we have identified.

The world has changed and research participants now expect more from their relationships with our industry

PRINCIPLES	IMPLEMENTATION	CX FOCUS
Build brands & relationships	Leverage technology	Put the respondent first
Be transparent	Make it mobile first	Let respondents set the terms of engagement
Engagement is key	Keep it short	Be respectful
Make it simple & clear	Deliver flexible & real-time rewards	Make it rewarding
UX matters	Ensure 100% data quality	Create win/win relationships

Finally, what isn't measured isn't managed, so we encourage everyone to participate in the **GRBN TRUST & PARTICIPANT ENGAGEMENT INITIATIVE** for UX benchmarking. You can find out more here: http://grbnnews.com/pei_partners_set_goals

The full GRIT CPR report can be found at www.greenbook.org/GRIT/CPR.

INCREASING PARTICIPATION AND DATA QUALITY THROUGH TRANSPARENCY

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The recent GRIT Consumer Participation in Research report (GRIT CPR) states its main finding loud and clear: **Only a quarter of all respondents globally are satisfied with their experience participating in research.**

The findings in the GRIT CPR report are in-line with the findings in our own study of online survey user experience. Reading these two reports, there is no hiding from the conclusion that too often people are being given a bad experience when participating in research and we are turning them off.

Please take a moment to reflect on what you would recommend to a client armed with this type of data? Action or inaction? Even without knowing the specifics, I think most of us would recommend the client to do something about it? Right?

The cobbler's children have no shoes

And yet, the evidence shows that many of us are not doing anything, or at least not enough about it. Why? I can think of four basic reasons:

1. People don't know it is a problem
2. People know it is a problem, but don't know what to do about it
3. People know it is a problem, know what to do about it, but feel powerless to influence it
4. People know it is a problem, but don't care

Through reports such as the GRIT CPR report and thought-pieces like this, we are getting the message out there, and fortunately most of the recommended actions are relatively easy to implement. But to act, we also need to care.

CONTINUED ON NEXT PAGE

Why you need to care

Our evidence suggests that not only is poor participant engagement damaging data quality, it is having a longer-term damaging effect on the reputation of business, of marketing in general and specifically of the companies and brands commissioning research.

If people have a bad experience with a survey they tend to either drop out or rush through the questions. Interestingly, many also think badly about the companies/brands in survey, in effect blaming the end-client for the poor experience, and in these days of hyper-connectivity, tell others about the bad experience.

In order to understand why they blame the end-client, we need to understand people's motivations for participating in research. Yes, financial incentives are important, but also the desire to influence things is a strong motivator for many participants. They want to have their opinion count and in particular, many want to help companies and brands they like. Therefore, if in return for their willingness to help, they are treated without respect and given a poor experience, it hurts.

So, by giving bad user experiences we are not only damaging ourselves, but also our clients, either directly or indirectly. Therefore, most of us should care.

Transparency as a motivator

Both reports tell us that the simple act of telling people who the survey is for can have a powerful influence on people's willingness to participate. Obviously, it is not always advisable to do this during the recruitment phase, but I think in most cases there is no barrier to doing so afterwards.

I am old enough to have cut my teeth in face-to-face and telephone data collection. Back then it was standard practice to end the survey with something along the lines of:

"Thank you for taking the time to answer this survey, which we are conducting on behalf of CLIENT X."

Somehow, this practice got lost when we switched to online data collection, but I think it is high time to reinstate this practice, and I challenge you do this on your surveys from now on. There are many other things we need to do to improve participant experience, but let this simple change be a start.

Join us if you care

Together with a growing number of corporate partners, GRBN is undertaking a Participant Engagement Initiative in order to drive up participation rates across the globe. You can read more about the initiative at www.grbnnews.com/pei_partners_set_goals. If you want to get involved, get in touch at andrew.cannon@grbn.org.

CONCLUSIONS & FINAL THOUGHTS

When thinking about the value chain in the insights industry, from problem definition to finding an answer to influencing an organization (based on that answer), I believe that we are growing in capabilities in all of those – as we must. The value of this wave of the GRIT study is that it provides a new and unique look into the expectations around creating answers and influencing change.

From the Top 50 list of most innovative suppliers and the related verbatim analysis, it is clear that technology is driving innovation in the industry. Fundamentally, that technology delivers on two key attributes: driving efficiency and creating new data that can be leveraged for better insights. Most of the big movers in the Top 50 are in one of these two categories. The Top 25 list of most innovative clients reflects the critical role of creation of new data for insights, with four of the top five companies creating data that it then uses to improve consumer intimacy and engagement.

Use of automation is becoming widespread as both suppliers and clients are taking advantage of the efficiencies it offers. Without a doubt, there will continue to be great improvements in efficiency – but one can imagine a day when there the returns begin to diminish. As for new data to leverage – I struggle to anticipate a time in the future when less data and information is created.

At the same time, high-value consulting is becoming even higher value for the insights industry. From the benchmarking trade-off exercise (and many other places), we learn that the most important elements of a research project's success are consultative recommendations and a clear storyline. These two elements are necessary ingredients (though not the complete ingredient list) to influence an organization. We are often not very good at it and, as a result, excellence in these two areas can be elusive. Some agencies in the Top 50 are focusing on high-value consulting and it is likely the reason they are in the Top 50 and it is also why some of the more traditional consultancies, like McKinsey and BCG, see an opportunity in the insights industry.

The value we create is improving. But there is still much left to do to eliminate inefficiency, improve data sourcing, and create strong answers that are aligned with business objectives and consumer needs. We are getting there – just better and quicker in some cases than in others.

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AYTM – Ask Your Target Market

Data Processing

Ascribe
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Infographic

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20|20 Research
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Sentient Decision Science
Toluna
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Go to www.GreenBook.org/GRIT to read the GRIT Report online or to access all GRIT data and charts via OfficeReports, which you can use for your own analysis.

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Ascribe's leading suite of survey, data mining, visualization, sentiment and text analytics software quickly collects data via a massive sample powered by Google, and then transforms closed- and open- ended customer comments into precise, actionable insights. Our intuitive technologies collect, code, analyze and visualize a wide variety of unstructured data, including survey, social media and speech-to- text feedback. Ascribe connects seamlessly with your existing platform, enabling the fastest time to high quality insights from customer comments compared to other providers. For nearly two decades, we have served the world's top research firms, driving continuous, disruptive innovation via multiple proprietary technologies and outsourced coding, translation and transcription services. We process hundreds of millions of verbatim comments annually for elite corporate and research brands across 57 countries, enabling them to efficiently and effectively make informed decisions that lead to relevant product development, exceptional customer journeys, improved operations, revenue growth and increased profits.

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Consensus Point

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Consensus Point is a global provider of Prediction Market research, analytics and software to research firms and Fortune 1000 brands. Leveraging a validated algorithm combined with a gamified user interface, the company's proprietary platform, Huunu™, takes advantage of the "the wisdom of the crowd" to predict future trends and market preferences.

G3 Translate

www.g3translate.com

G3 Translate, official GRIT Translation Partner, is the premier foreign language translation resource for the MR sector. Teams consists of the world's finest translators and cultural experts. Our unparalleled speed of implementation, unmatched linguistic elegance and exceptional customer service set us apart.

Gen2 Advisors

www.gen2advisors.com

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

GRBN, Global Research Business Network

www.grbnnews.com

GRBN brings together 4 regional federations, over 40 national associations and over 3500 research businesses globally. GRBN's mission is to promote and advance the business of research through developing and supporting national research associations and implementing global industry-wide initiatives.

Lightspeed

www.lightspeedresearch.com

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

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

Michigan State University

www.marketing.broad.msu.edu/msmr

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

MROC JAPAN
Online Marketing Insights Company

MROC Japan – Community Solutions Company

www.mrocjapan.com

MROC Japan is the Community Solutions Company specialized exclusively in community research in Japan. By providing MROC 360, the hybrid methods both quantitative and qualitative from asking, listening, observing, & co-creating to nonconscious/emotional analytics, the company tries to help the clients put the voice of the customer at the heart of their marketing strategy. Our services are the online qualitative research, insight community, community CRM, overseas MROCs, RUA, or real-time U&A, and ICR-IS method.

mTAB®

mTAB

www.mtabsurveyanalysis.com

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

Multivariate Solutions

Multivariate Solutions

www.mvsolution.com

Multivariate Solutions, is an analytics consultancy that does data science, research design, project strategy, strategic communications, and marketing consulting. We are that rare polymath, both marketing strategists and data scientists with skills in both traditional and "next gen" data analytics and implications. Among our core competencies are market segmentation, pricing, conjoint analysis, regression modeling, forecasting, data mining, project management, and overflow reporting when work gets busy. Our clients include Fortune 500 companies, communication strategy firms, political consulting, and many of the top marketing research companies in the United States and around the globe.

#NewMR

NewMR

www.newmr.org

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

ODINTEXT

OdinText Inc.

www.odintext.com

The leader in text analytics for marketing research.

OfficeReports

www.officereports.com

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

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

Research Now

www.researchnow.com

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

Researchscape International

www.researchscape.com

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

Stakeholder Advisory Services

www.stakeholderadvisory.com

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

Virtual Incentives

www.virtualincentives.com

Virtual Incentives is the leading provider of virtual Visa® and MasterCard® accounts as well as eGiftCards from more than 600 merchants around the world – to meet the needs of both your domestic and international research projects. By simplifying order and delivery processes, the market research incentive solutions available are cost-effective, flexible and completely customizable. VI's innovative digital rewards connect with your respondents in a way that's meaningful and motivating.

SAMPLE PARTNERS

WISCONSIN SCHOOL OF BUSINESS
UNIVERSITY OF WISCONSIN–MADISON
TOGETHER FORWARD®
A.C. NIELSEN CENTER *for* MARKETING RESEARCH

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

go.wisc.edu/wsb-marketing-research

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

ACEI
Asociación Colombiana de Empresas de Investigación de Mercados y Opinión Pública

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
Asociación Investigadores de Mercado

AIM

www.aimchile.cl

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

AMAI
INTELIGENCIA APLICADA A DECISIONES

AMAI

www.amai.org

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

AMA AMERICAN MARKETING ASSOCIATION
New York

American Marketing Association New York

www.amanewyork.org

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

ARIA

www.ariaalliance.org

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

Asia Pacific Research Committee (APRC)

www.aprc-research.com

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

Australian Market & Social Research Society (AMSRS)

www.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.

BVA

www.bva.fr/en/home

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

ESTIME

www.estime-neurobiomarketing.com

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

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.

Next Gen Market Research (NGMR)

www.linkedin.com/groups/31804/profile

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

Provokers

www.provokersite.com

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

Qualitative Research Consultants Association

www.qrca.org

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

SampleCon

www.samplecon.com

SampleCon is the industry changing forum focused on survey sampling. Launched in 2013, SampleCon has grown into an industry wide discussion, providing a collaborative environment to share perspectives on industry issues, challenges, trends and most importantly successes.

The Research Club

www.theresearchclub.com

At the heart of The Research Club is our desire to connect people within the Market Research Industry. We host a series of business networking events which provide the opportunity to make new contacts, develop national and international business opportunities and keep up to date with the latest industry developments. we widen our geographical reach to new markets and collaborate with the many of the industry's leading conference organisations. We now host up to 30 events a year, covering the Americas, Europe and Asia Pacific, with a growing membership of 15,000 members worldwide.

UNIVERSITY OF TEXAS ARLINGTON

The UTA MSMR Alumni Association

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.

Principles of **Market Research**

University of Georgia | MRII

www.marketresearchcourses.org

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

University of Georgia & MRII are proud education partners of GreenBook. University of Georgia offers three online certificate courses designed to teach the market research core body of knowledge--the basic skills you need to design, execute, and report on a market research project from beginning to end. Over 8000 practitioners in 104 countries have enrolled in the Principles of Market Research or the Principles of Pharmaceutical Market Research. The Principles of Mobile Market Research is self-paced course that explores emerging mobile techniques and their application in market research. All courses are updated regularly to reflect the newest methods and approaches.

WiRe WOMEN IN RESEARCH

Women In Research

www.womeninresearch.org

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

COMMENTARY PROVIDERS

20|20

20|20 Research

www.2020research.com

20|20 is a global leader in the development and service of digital qualitative research. Founded in 1986, the company works with researchers around the world to simplify the path to consumer understanding through its leading-edge technology and support services.

Civicom
MARKETING RESEARCH SERVICES
Innovative Technology Solutions

Civicom® Marketing Research Services

www.CivicomMRS.com

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

Confirmit

Confirmit

www.confirmit.com

We understand that MR companies are under constant pressure to deliver results in the most cost-effective way. Confirmit Horizons spans the entire survey project lifecycle, we can drive efficiencies, cost-savings, and quality throughout the entire course of your programmes.

Discuss.IO

Discuss.io

www.discuss.io

Discuss.io is a video conferencing platform that enables brands and researchers to conduct real-time, online Consumer Connects, IDIs, and Focus Groups with consumers around the globe in a fraction of the time and cost of traditional market research methods.

FPG Focus Pointe Global
DEEPER CONNECTIONS. DEEPER INSIGHTS.

Focus Pointe Global

focuspointeglobal.com

Focus Pointe Global (FPG) provides high-quality qualitative and quantitative marketing research data collection services to research practitioners across the United States. FPG owns and operates focus group facilities in 18 locations and recruits a vast array of existing and emerging demographics, including consumers, healthcare professionals, patients, and caregivers.

FUEL CYCLE

www.fuelcycle.com

FUEL CYCLE is a mobile-first community platform for supercharging the relationship between brands and customers. From discussion boards and live chats to gamification and rewards management, FUEL CYCLE offers an easily customizable and robust solution for brands and businesses to build high-impact online experiences for their customers. FUEL CYCLE provides customer intelligence for organizations across industries including media & entertainment, consumer goods, financial services, healthcare, automotive and technology. Brand communities powered by FUEL CYCLE include ELLE, Hertz, UPS, AIG and more.

GutCheck

www.gutcheckit.com

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

RealityCheck Consulting

www.realitycheckinc.com

RealityCheck is a global partnership of experienced qualitative market researchers, creative facilitators, psychologists and strategic conceptual analysts. From moderation and recruitment, to field management and analysis, we help brands make human connections.

Research Now

www.researchnow.com

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Sentient Decision Science

www.sentientdecisionscience.com

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

Toluna

corporate.toluna.com

Toluna is a leading provider of real-time digital consumer insights and empowers companies to brainstorm ideas, uncover new business opportunities and answer their questions in real time. Toluna is transforming the way marketing decisions are made by bringing consumers and brands together via the world's largest social voting community of 10+ million members across 62 countries. This real-time access to consumers is coupled with its state-of-the-art, market research survey and analytics platform.

ZappiStore

www.zappistore.com

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

ADVERTISERS

THE ONLINE QUAL PLATFORM FOR THE BRIGHTEST STRATEGIC MINDS

Aha! Online Qualitative Research Technology

www.ahaonlineresearch.com

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

AYTM – Ask Your Target Market

aytm.com

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

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Innovative Technology Solutions

Civicom® Marketing Research Services

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Netquest

www.netquest.com

For over 15 years, Netquest has provided market researchers with genuine, insightful data. Netquest's consumer-panel and data-collection capabilities in 23 countries are a reliable partner that helps institutions and businesses analyze the market, gain valuable insight and genuinely understand consumers.

RealityCheck Consulting

www.realitycheckinc.com

RealityCheck is a global partnership of experienced qualitative market researchers, creative facilitators, psychologists and strategic conceptual analysts. From moderation and recruitment, to field management and analysis, we help brands make human connections.

Schlesinger Associates

www.schlesingerassociates.com

A leading data collection company delivering intelligent recruitment and project management for any qualitative or quantitative methodology. We have research facilities in US and EU with a worldwide reach. An uncompromising commitment to your success sets us apart.

Virtual Incentives

www.virtualincentives.com

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GRIT REPORT

GREENBOOK RESEARCH INDUSTRY TRENDS REPORT

2017 Q1–Q2

WWW.GREENBOOK.ORG/GRIT