

GRIT

FULL Report
Spring 2011

GreenBook Research Industry Trends Report

www.GreenBookBlog.org/GRIT

GREENBOOK®

M R G A
connected. trusted. experienced.

 Anderson Analytics

Surveys & Forecasts, LLC®

iCharts
One-Click Visual Data

BRAND360

 StrategyOne

 OFFSHORING
TRANSPARENCY

NEXT GEN
MARKET RESEARCH

LMC
group



www.strategyimplementation.com



 OnePoint
Mobile Research Made Easy
Any handset. Any country. Any language.

infosurv

GfK

GfK Custom Research
North America

www.gfkamerica.com



Your Business Innovation Partner

Fact-based consultants in over 100 countries with sector expertise and proven research and marketing techniques.

GfK Custom Research North America ■ (212) 240-5300 ■ www.gfkamerica.com

Table of Contents

**GRIT Report –
Spring 2011**

You are reading the
FULL version
of the Report

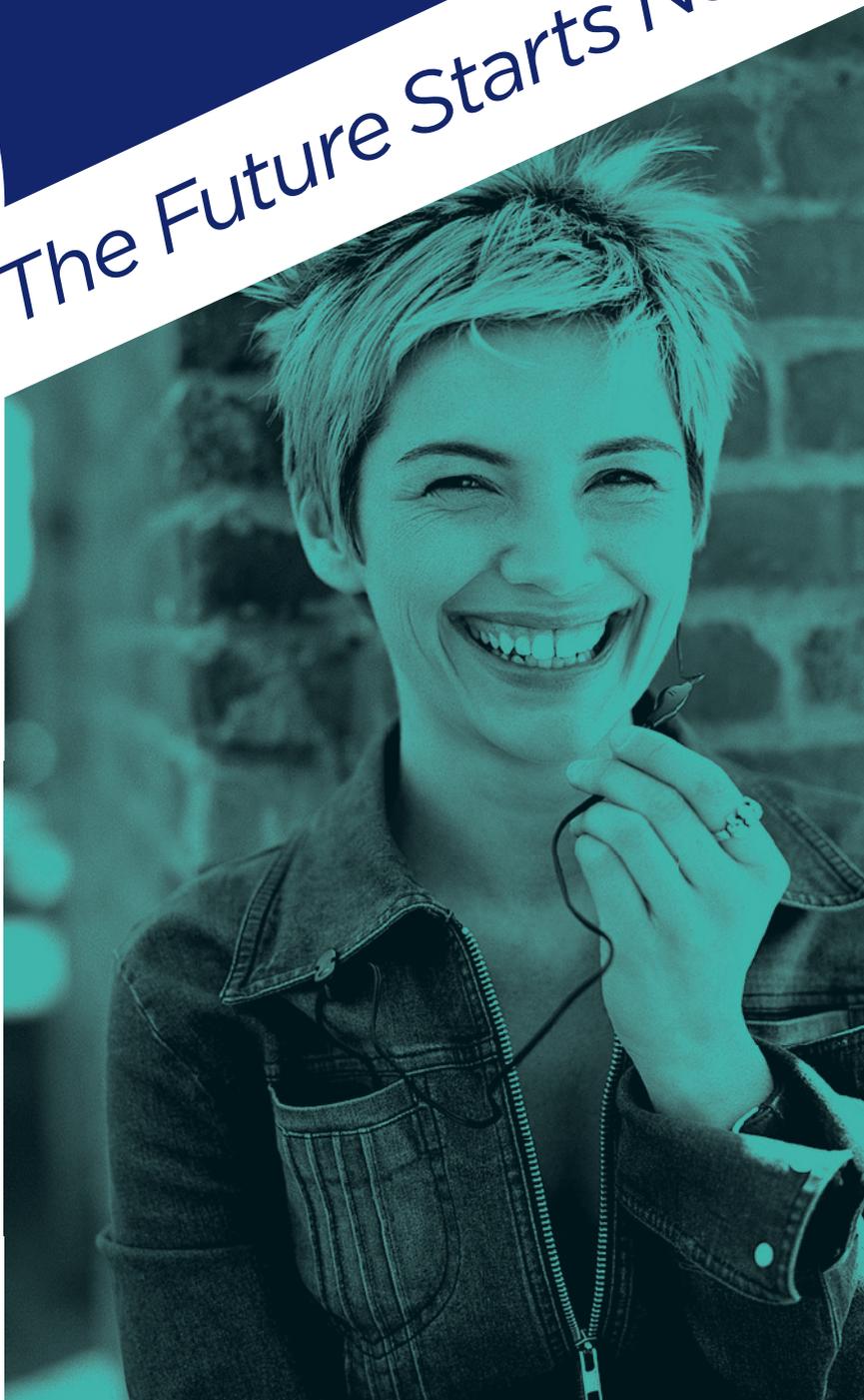
The EXECUTIVE version of the report is
available in print and online at:

www.GreenBookBlog.org/GRIT

Introduction	3
Executive Summary	4
Detailed Findings	
Respect & Changing View of Market Research	9
Systemic Issues	11
Anticipated Spending & Research Mix	13
Decision Drivers	14
Data Collection Choices: Quantitative	15
Data Collection Choices: Qualitative	17
Factors Affecting Data Collection Choices	19
Companies Perceived to be Innovative: The Top 50	20
Technology Adoption	24
Infosurv Predictive Markets Exercise	28
Anticipated Degree & Attitude towards Industry Change	29
How Companies Currently Position Themselves	31
Information Sources	32
Factors Affecting Data Collection Strategies	33
Perceived Importance & Choice Drivers	35
Next Steps	39
Acknowledgements	40
Partners	41
GreenBook®	41
Media Partners	41
Research & Production Partners	42
Consulting Partners	44
Appendixes	
Charts & Additional Findings	46
Research Spending	48
Outsourcing	49
Company Characteristics	52
International Coverage	55

GRIT

The Future Starts Now. Research Now.



A passion for excellence. A keen commitment to clients. A staff of over 1,000 professionals helping you achieve the most from your research.

We are Research Now. Powered by the largest, most responsive global online panels, we enable you to explore the minds of millions of people across the world. By providing custom solutions and superior service, we continue to define the future of online sample and data collection. There is no better time than now to get more than ever out of your research.

Imagine what you can discover.
Research Now.



www.researchnow.com



Welcome to the 9th edition of the GreenBook® Research Industry Trends Report! After 8 years GRIT remains the leading and most comprehensive survey of our industry, and we believe that taking our own pulse has never been more important.

We promised you colorful and comprehensive insights into how research buyers and providers are adapting to the current economy, to emerging technologies, and to the winds of change many feel are buffeting our profession and industry. You'll find that we fulfilled our promise.

For this iteration we continue to track all the trends in the industry that we have traditionally focused on, but we have made a strategic decision to turn our sights to the future. Our goal with this edition is to offer insights into innovation in the market research industry, into the pace of new technology adoption, into what companies are leading the industry forward, and into what the industry may be like in the future. We think we meet and exceed these goals with the help of our sponsoring partners and most importantly, participants in the study.

A major innovation is a predictive market supplied by our co-sponsor Infosurv, allowing our colleagues to test their prescience by predicting which technologies/methods will see the greatest adoption over the next 12 and 24 months. We will continue to include this module through 2012. One of the interesting by-products of this approach has been initial validation of the predictive market methodology against a more traditional survey approach. We're all looking forward to seeing how that plays out over time.

In years past thousands of global industry professionals have downloaded this report, and our findings have been cited at industry events, in numerous industry journals and in academic publications. We're excited that this year the results will be part of the keynote address at the IIR Technology Driven Market Research event in May!

Regardless of your role in the industry - client-side, supplier-side, academic - we think you'll find the results of this groundbreaking study vitally important and intensely interesting!

Together with GreenBook®, I would like to extend a special thanks to all of our sponsors: Market Research Global Alliance, Next Gen Market Research, Infosurv, iCharts, Interviewing Service of America, StrategyOne, OnePoint Mobile Surveys, Anderson Analytics, the FTO, Brand3Sixty, and LMC Group. We would be remiss if we did not call attention to the special contribution of Bob Walker of Surveys & Forecasts, LLC, the principle author of most of the report.

You can access many of the charts used in this report in an online interactive format provided via iCharts at <http://demo.ichartsbusiness.com/GRIT/index.html> What you are reading now is the FULL version of the report. The EXECUTIVE version is available at: www.GreenBookBlog.org/GRIT

On a personal note, I think this report is undoubtedly the best GRIT ever. We set the bar very high for ourselves and the result is what I consider to be the one of the most incisive explorations of the state of the market research industry ever produced, bar none. Obviously I am a bit biased, so I trust that you will let me know whether you agree or disagree with me?

Leonard Murphy

Executive Editor,

GreenBook® Research Industry Trends Report

www.greenbookblog.org

lmurphy@asklmcg.com

To receive an invitation to participate in the next round of GRIT or to be notified when the next Report is available, please register at www.GreenBookBlog.org/GRIT

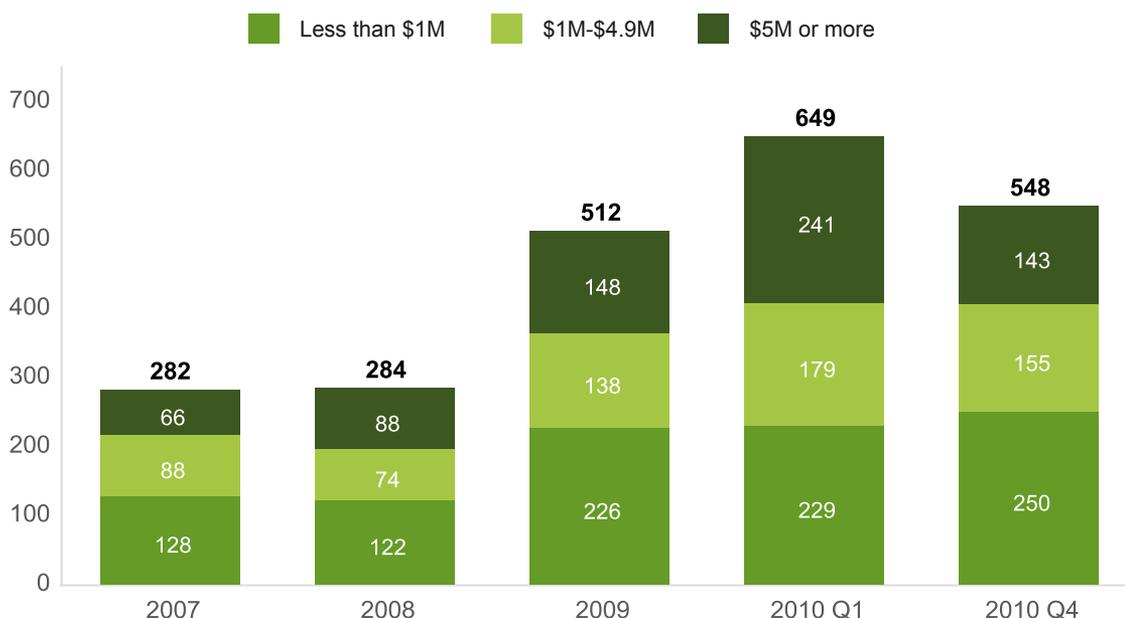
Executive Summary

Two GreenBook® Industry Trends studies (GRIT) were conducted in 2010. The first was executed in Spring 2010 and the second in October. Each covered key issues that have been trended since the initial study back in 2003, but also focused on specific topics of interest to the industry. The Fall 2010 study focused on research technology, along with the full complement of annual GRIT survey questions.

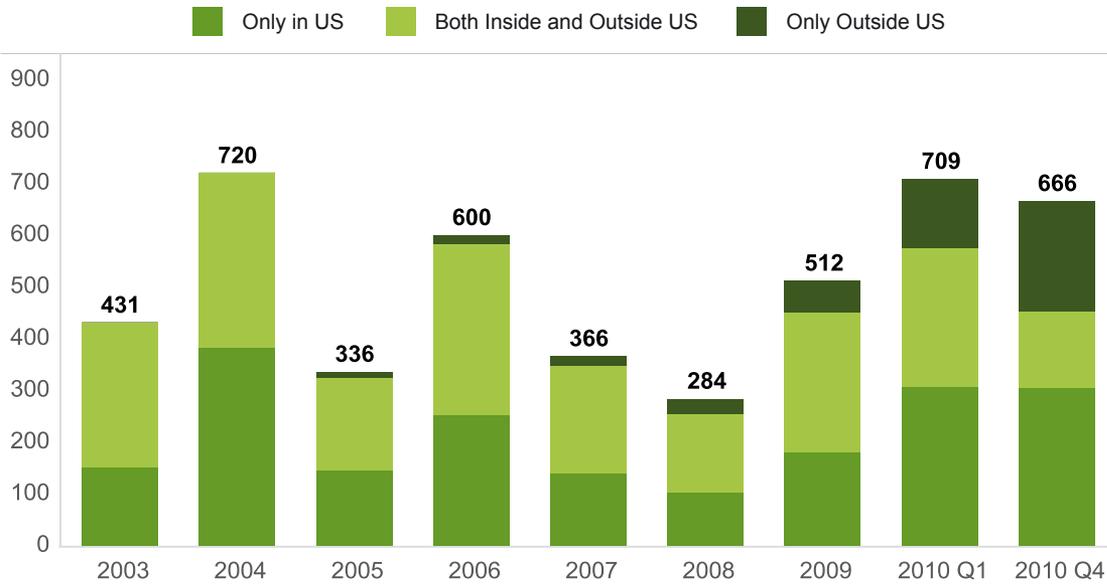
A brief email invitation was sent to individuals randomly selected from co-sponsors' internal lists of research providers and clients. As an incentive for participation, respondents were offered a complimentary copy of the 2011 edition of the GreenBook® Marketing Research Directory. From these invitations, a total of 673 usable responses were obtained. For reference, the historical respondent mix is displayed below:

	Fall'10	Spring'10	2009	2008	2007	2006	2005	2004	2003
Base:	(673)	(875)	(512)	(284)	(366)	(600)	(336)	(720)	(431)
Full-service providers	41%	48%	43%	46%	43%	43%	50%	44%	36%
Research consultant	26%	21%	26%	24%	21%	15%	13%	12%	14%
Academic/non-profit/medical	14%	2%	4%	4%	7%	7%	7%	7%	18%
Data Collection (Quant/Qual)	10%	10%	14%	13%	15%	20%	18%	5%	6%
Research client/buyer	6%	17%	11%	10%	11%	12%	9%	18%	22%
Advertising agency	3%	3%	4%	3%	3%	3%	4%	4%	5%

Annual Billings/Budgets: Trended (\$US)



US and Global Markets Served: Trended



While the United States comprises the bulk of respondents (67%) in this research, it is certainly worth noting that the historical trend in terms of non-US sample composition and research data continues to rise, and will only become more important with time. The composition of responding firms in terms of billings is almost identical to what we saw in 2009.

The results of this Fall 2010 GreenBook® Industry Trends Study wave revealed major structural and systemic changes being faced by those in the marketing research industry, and mirror much of what we have been seeing in the US economy as a whole. These structural changes have a multi-pronged effect, including (1) *more worrisome attitudes and beliefs about the marketing research profession*, (2) *more concern about the ability to keep up with the rapid pace of technological innovation*, and (3) *a growing tension between quality of work output and the demand for speed*.

 GRIT revealed major structural and systemic changes being faced by those in the marketing research industry

	Fall 2010	Spring 2010	Gap
Base:	(673)	(875)	+ / -
	%	%	
Value Research Same/More (Net)	55%	75%	-20%
Value research more today	18%	18%	-
Value research about the same	37%	57%	-20%
Value research less today	45%	25%	+20%

Perhaps most disconcerting is the erosion in self-perceived respect for research – even versus the prior wave – with a 20 ppt jump in the percent who feel that research is less valued than five years ago. Certainly, the timing of this wave (concurrent with a national employment crisis) has fueled some degree of pessimism, but such a large shift in such a brief period of time is nonetheless worrisome and warrants our continued monitoring.

Perhaps most disconcerting is the erosion in self-perceived respect for research

Part of the increased pessimism in the marketing research industry is fueled by “systemic stressors” that make it increasingly difficult to deliver on the shared goal of high quality, highly valued research. Attitudinally, two-thirds feel that research buyers are less able to tell the difference between high quality and mediocre research now, and most feel that quality is becoming less important than speed. Respondents acutely sense some blurring in what “quality” research now is or should be. This is perhaps unsurprising, in a world where clones and knock-offs are produced as fast as the innovation, and where speed-to-market is, in and of itself, a strategic advantage. But with ever-increasing speed comes legitimate concern about the quality equation. In particular, online panel data quality and the non-representative nature of online sample are top concerns for our respondents – concerns that are more pronounced among senior research professionals. This systemic stress is only expected to increase more rapidly in the years ahead.

As many readers know, online panel data quality, in particular, has received significant attention, not only by the AMA but in separate initiatives by the ARF (“Foundations of Quality”), CASRO, and ESOMAR. Our findings echo this concern, with

data quality remaining the *top* issue within the research community. Significant attention is being paid to improving both the representativeness of, and level of engagement among survey respondents; our data indicates that this concern will persist for some time to come.

Despite a backdrop of professional pessimism, anticipated levels of future research spending are actually favorable. Nearly 60% (in the overall sample) indicate that they are either now seeing stronger growth, or expect stronger growth to occur – especially for suppliers, where 65% are either experiencing or expecting increases.

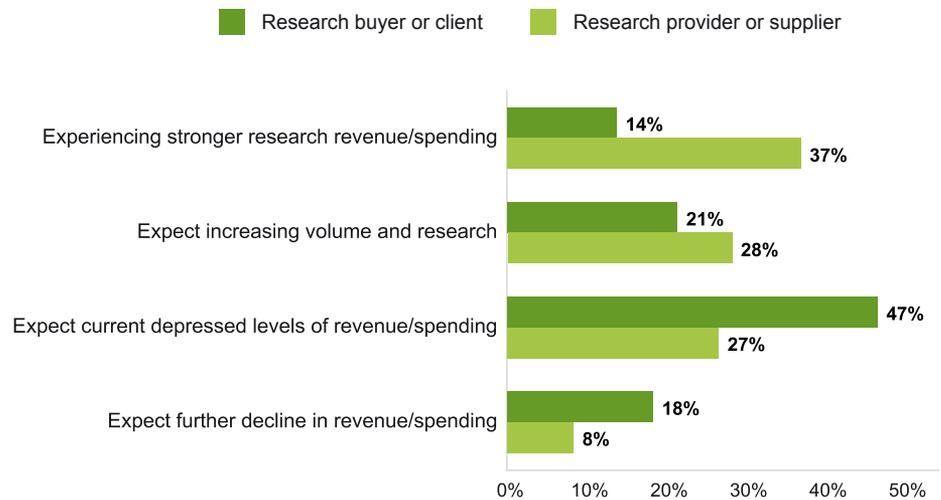
In terms of research mix, regardless of client or supplier side, over ¼ claim that spending will increase more for *qualitative* than *quantitative* in 2011. About ½ believe that the spending relationship between them will remain unchanged (i.e., flat). The positive news is that any change being reported is being fueled by greater volume, not higher prices per se. And a shift in the mix towards qualitative is not especially uncommon, as the US economy slowly emerges from its recessionary mindset, and focuses on new business development and topline growth.

Data quality remains the top issue within the research community

The emergence of newer data collection modalities is evident in both spheres, but perhaps not surprisingly, the types of research *most likely to be used* are relatively “traditional” – notably, online (internet) survey research and CATI on the quantitative side, and face-to-face focus groups or IDIs on the qualitative side. On the quantitative side, newer technologies such as social media monitoring (mentioned by 29%), mobile surveys (23%), and text analytics (20%) are data collection methods that will be used in the year ahead.

■ Newer technologies being used include social media monitoring (mentioned by 29%), mobile surveys (23%), and text analytics (20%)

Breakout of Growth Confidence and Experience



Note: Among research buyers (n=131) and research suppliers (n=542).

On the qualitative side, bulletin board (28%) or chat-based focus groups (25%), online communities (22%), and blogs (19%) are data collection methods mentioned most. Based on a prelist of these newer technologies, online communities and social media analytics are becoming the two most widely adopted research approaches used thus far, with buyers more likely than suppliers to have embraced them.

These self-reported data are consistent with a predictive markets exercise conducted by Infosurv, in which respondents placed bets on the likely growth of future technologies and methodologies (i.e., those that will experience the largest increase in adoption in the next 12 months). The most potential was seen for social media analytics, mobile surveys, and online communities.

But not every new research technology is being embraced just yet. For now, it appears that the bulk of research dollars are being applied against areas that bridge the known gaps between traditional data collection approaches and a growing world of less accessible, fragmented,

and dispersed respondents who, more and more, float between virtual communities and social media, and to which they are connected using increasingly powerful mobile devices.

Despite the more aggressive adoption of social media, mobile apps, and online communities, less than 10% of buyers or suppliers predict they will use these methods in the near future. The use of serious gaming, biometrics, neuromarketing, crowdsourcing, virtual environments, eye tracking visualization analytics, mobile qualitative, or mobile ethnography are, for now, being used at very low levels.

Our respondents are realists. When making decisions about data collection methods, respondents stress four key factors: effectiveness, timeliness, quality, and cost. At the end of the day, new technology must ultimately address one or more of these basic requirements.

Being novel per se is simply insufficient to drive widespread adoption of new research technology.

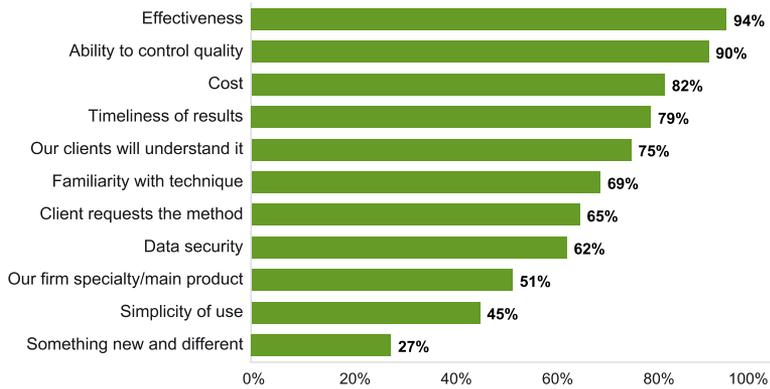
■ When making decisions about data collection methods, respondents stress four key factors: effectiveness, timeliness, quality, and cost

We anticipate that these novel and intriguing methods will sort themselves out over time, as their ability to address specific marketing and communications issues – and their potential payback – becomes more clear. We are clearly entering a consolidation phase, with a shakeout occurring between the world’s largest technology firms, in which different platforms and business models battle for market share (for example, Google vs. Microsoft in software-as-a-service, or Amazon vs. Apple in digital music). We expect the same process to work its way through the research industry.

Regardless of the technological fallout, significant change is anticipated in the marketing research industry in the next five years (two-thirds say “quite a bit”, “a lot”, or “tremendous”), and younger/less experienced researchers anticipate the change to be even more significant. But the news here is

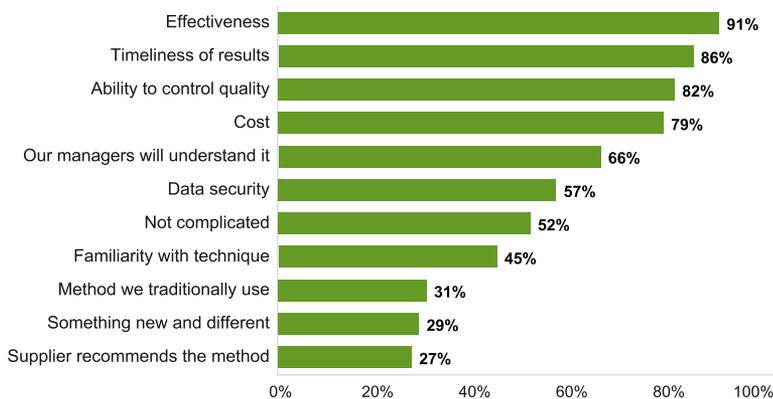
positive: among those who anticipate change, over 60% see more promise than threat and, again, this is more in evidence among younger/less experienced researchers. Still, change will be tempered by business reality: the need for effective and timely marketing research information to shape and inform business decisions. Some are enamored with technological solutions, others are perhaps too skeptical about the benefits of technology – hence the truth likely lies somewhere in the middle. As conveyed by our respondents, all of this change must be managed against a shifting backdrop of budgetary constraints, doing more with less, sample and data quality issues, declining response rates, and the drag of the larger economy as a whole. Navigating the technological landscape is now part of the required skill set for all researchers, regardless of client or supplier side position.

Choice Drivers of Data Collection Methods - Among Suppliers



Perhaps the most surprising finding is the importance of relationship factors for both clients and suppliers. Yes, utilizing the latest and most advanced technology is certainly important to both clients and suppliers, but the business relationship itself – personal service, responsiveness, and attentiveness – rises to the very top of the list of decision-making criteria. This was true regardless of whether choosing a quantitative or qualitative research partner. *Listening well* and *having a good relationship* with the client – along with familiarity with the client’s needs, rapid response, meeting deadlines, and having a knowledgeable staff – are key discriminators. In an age of high tech solutions, the “high touch” factors so presciently identified in 1982’s “Megatrends”, remain as important today as they have ever been. It appears that, for the foreseeable future, human beings will continue to play a central role in the profession we call marketing research.

Choice Drivers of Data Collection Methods - Among Buyers



Detailed Findings

Respect & Changing View of Market Research

Overall, most (55%) respondents feel that there is as much, if not more, value placed on research than was the case in years past. There are, however, striking differences in the perceived value of research by experience level and when comparing client vs. supplier side respondents.

Those with less experience and on the buyer side are more likely to feel that research is valued today than in years past. Conversely, those with more experience, and those on the supplier side, are more likely to feel that research is less valued than in years past.

How would you compare the value that today's marketers place on the products and services traditionally delivered by market research departments and suppliers to the value they placed on research when you came into the business/five years ago?

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	
Value Research Same/More (Net)	55%	74%	53%	+21%	68%	53%	+15%
Value research more today	18%	29%	17%	+12%	30%	16%	+14%
Value research about the same	37%	45%	36%	+9%	38%	37%	+1%
Value research less today	44%	26%	47%	-21%	32%	47%	-15%

There have always been tradeoffs between quality, cost, and speed, but we appear to have gone well past the tipping point in the marketing research field. Setting the generational and client vs. supplier-side issues aside, systemic stressors make it difficult to deliver on the promise of high-quality, high-value research. Overall, two-thirds feel that “clients today are less able to tell the difference between high quality and mediocre research” – something that even clients agree on.

Additional concerns:

- Ever-shorter timelines are preventing the delivery of quality: nearly 60% agree that the “quality of work is becoming less important than speed of deliverables” and that short timelines means that “we cannot deliver the quality we want to”.
- Perhaps most disconcerting: only 1/3 believe that “if they have to choose, clients prefer quality over speed”.

If only to reemphasize the point, respondents feel that these issues (e.g., clients preferring “short-term insights to deep understanding of consumer markets”, that the “quality of work is becoming less important than speed of deliverables”, and that clients “now demand such short timelines that we cannot deliver the quality we want to”) will become even more important in the near future.

 Systemic stressors make it difficult to deliver on the promise of high-quality, high-value research

Respect & Changing View of Market Research

Please indicate the extent to which you agree or disagree with the following statements, based on your personal/professional perspective. (Top Three Boxes on 7-Point Agreement Scale)

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	
Clients today are less able to tell the difference between high quality and mediocre research+	66%	64%	67%	-3%	63%	67%	-4%
I believe that quality of work is becoming less important than speed of deliverables	57%	49%	58%	-9%	53%	58%	-5%
Clients now demand such short timelines that we cannot deliver the quality we want to	56%	58%	56%	+2%	56%	56%	-
Clients prefer short-term insights to deep understanding of consumer markets	55%	47%	56%	-9%	48%	57%	-9%
'Classic' market research training is becoming less relevant to the practice of market research	45%	47%	45%	+2%	45%	45%	-
Clients see traditional primary research as an old-fashioned luxury	44%	32%	46%	-14%	38%	46%	-8%
If they have to choose, clients prefer quality over speed	33%	27%	34%	-7%	35%	32%	+3%
Clients would rather have us observe consumer behavior than ask questions about it	29%	30%	29%	+1%	31%	28%	+3%

How do you see the future of these issues over the coming year or so? Do you believe they will become more important, less important, or stay the same?

	Total Sample		More	Same	Less	Gap
Clients prefer short-term insights to deep understanding of consumer markets	55%	→	53%	41%	5%	+48%
I believe that quality of work is becoming less important than speed of deliverables	57%	→	52%	44%	4%	+48%
Clients now demand such short timelines that we cannot deliver the quality we want to	56%	→	46%	48%	6%	+40%
'Classic' market research training is becoming less relevant to the practice of market research	45%	→	42%	54%	5%	+37%
If they have to choose, clients prefer quality over speed	33%	→	43%	48%	9%	+34%
Clients see traditional primary research as an old-fashioned luxury	44%	→	35%	52%	13%	+22%
Clients today are less able to tell the difference between high quality and mediocre research	66%	→	37%	47%	16%	+21%
Clients would rather have us observe consumer behavior than ask questions about it	29%	→	29%	42%	30%	-1%

Systemic Issues

When asked about various economic and systemic/structural issues, several themes emerged:

- **Online panel data quality:** those with more experience more strongly felt that “the quality of online panel sample is worse than most clients believe”, and they are “concerned about the non-representative nature of online sample”. This is an industry issue that continues to attract attention from clients and buyers alike.
- **Offshoring:** those with more experience feel that the “practice of off-shoring research activities” will diminish respect for the research industry.

- **Cost/Timing:** neither the speed nor cost of “traditional” quantitative or qualitative research was seen as a significant issue – although qualitative research was seen as more “slow” and “expensive” among those with less research experience.
- **Commoditization:** about 60% of respondents feel that market research is becoming a commodity, but surprisingly fewer on the client/ buyer side believe that this is true.

How do you see the future of these issues over the coming year or so? Do you believe they will become more important, less important, or stay the same?

	Total Sample		More	Same	Less	Gap
I believe that the quality of online panel sample is worse than most clients believe	71%	→	59%	34%	7%	+52%
I am concerned about the non-representative nature of online sample	64%	→	59%	31%	10%	+49%
The practice of off-shoring research activities (primarily to S. Asia and E. Europe) in order to save costs will diminish respect for the market research industry	60%	→	56%	35%	9%	+47%
Market research is becoming a commodity	59%	→	50%	45%	5%	+45%
Market research is adapting quickly and well to changes in the consumer environment, such as social media and mobile data collection	44%	→	63%	34%	2%	+61%
I believe that traditional qualitative market research is too slow and expensive to meet the needs of clients	32%	→	46%	48%	6%	+40%
I believe that traditional quantitative market research is too slow and expensive to meet the needs of clients	31%	→	53%	41%	5%	+48%

 60% of respondents feel that market research is becoming a commodity, but surprisingly fewer on the client/buyer side believe that this is true

Systemic Issues

Respondents feel that all of these systemic issues will become even more important in the near future, especially the quality and representative nature of online panel quality, and most notably,

that market research must adapt “quickly and well to changes in the consumer environment, such as social media and mobile data collection”.

How do you feel about the following systemic and economic issues? (Top Three Boxes on 7-Point Agreement Scale)

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	%
I believe that the quality of online panel sample is worse than most clients believe	71%	56%	73%	-17%	71%	71%	-
I am concerned about the non-representative nature of online sample	64%	49%	66%	-17%	61%	65%	-4%
The practice of off-shoring research activities (primarily to S. Asia and E. Europe) in order to save costs will diminish respect for the market research industry	60%	51%	62%	-11%	62%	60%	+2%
Market research is becoming a commodity	59%	60%	59%	+1%	46%	62%	-16%
Market research is adapting quickly and well to changes in the consumer environment, such as social media and mobile data collection	44%	49%	43%	+6%	37%	45%	-8%
I believe that traditional qualitative market research is too slow and expensive to meet the needs of clients	32%	41%	30%	+11%	34%	31%	+3%
I believe that traditional quantitative market research is too slow and expensive to meet the needs of clients	31%	30%	31%	-1%	36%	30%	+6%

 Market research must adapt “quickly and well to changes in the consumer environment, such as social media and mobile data collection”

Anticipated Spending & Research Mix

The overall industry outlook appears bright, as 80%+ of respondents claim that their research spending will either maintain or increase in 2011 – irrespective of experience level or client/supplier side – and over 1/4 indicate that increased spending is anticipated.

Thinking about only your qualitative and quantitative research studies, which of the following statements best describes your situation?

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Uses/provides qualitative & quantitative research:	(456)	(47)	(409)	+ / -	(120)	(336)	+ / -
	%	%	%		%	%	
Same/Higher (Net)	81%	83%	82%	+1%	82%	81%	+1%
We will probably do a HIGHER proportion of QUALITATIVE to quantitative in 2010 than we did in 2009. (More qualitative research)	28%	26%	29%	-3%	28%	28%	-
We expect to do about the SAME AMOUNT of qualitative relative to quantitative in 2010 as we did in 2009.	53%	57%	53%	+4%	54%	53%	+1%
We will probably do a LOWER proportion of QUALITATIVE to quantitative in 2010 than we did in 2009. (More quantitative research)	18%	17%	19%	-2%	18%	19%	-1%

 80%+ of respondents claim that their research spending will either maintain or increase in 2011

Decision Drivers

Among respondents who conduct or provide both qualitative and quantitative research, the primary drivers are (1) more volume and (2) a shift in the mix of one over the other. Shifts in the qualitative/quantitative mix appear driven by supplier-side

adjustments more than being demand-driven per se. There is a noteworthy (+8 point) increase in quantitative social media monitoring, driven by client-side interest.

 There is a noteworthy (+8 point) increase in quantitative social media monitoring, driven by client-side interest.

What is the most important driver of the increase in quantitative/qualitative research as a portion of your research spending / revenue?

	Expect Higher Spending on [Quant]				Expect Higher Spending on [Qual]			
	Total	Buyers/ Clients	Suppliers/ Providers	Gap	Total	Buyers/ Clients	Suppliers/ Providers	Gap
Uses/provides qualitative & quantitative research:	(84)	(21)	(63)	+ / -	(129)	(34)	(95)	+ / -
	%	%	%		%	%	%	%
Higher volume for [TYPE] research	20%	10%	24%	-14%	13%	6%	16%	-10%
Our clients/organizations seem to want less [TYPE] research	18%	5%	22%	-17%	11%	15%	9%	+6%
We are introducing new [TYPE] methodologies	14%	19%	13%	+6%	20%	26%	18%	+8%
Our work is trending toward [TYPE] and away from qual/ quant	13%	14%	13%	+1%	16%	15%	17%	-2%
Goes in cycles and this year will be more of a "[TYPE]" year	12%	19%	10%	+9%	13%	18%	12%	+6%
Our client mix is changing	7%	5%	8%	-3%	3%	-	4%	-4%
Social media monitoring	4%	10%	2%	+8%	13%	12%	14%	-2%
Same volume but higher prices for [TYPE] research	2%	-	3%	-3%	2%	6%	1%	+5%
Other	10%	19%	6%	+13%	8%	3%	9%	-6%

Data Collection Choices: Quantitative

Among respondents who conduct or provide quantitative research, the dominant data collection method is online (i.e., internet) – and is nearly universal among clients/buyers (96%). On a most-often basis, online further dwarfs all other methods by more than three-to-one. Those with less experience are more likely to say that they will be using social media monitoring, mobile surveys,

and biometrics in the future. Those with more experience express a greater expectation of CATI use; those on the supplier side expect to conduct more research via CATI, CAPI, and mail – all of these being more “traditional” modalities.

When considering the quantitative studies you’ve done or plan to do in 2010, which data collection methods have you used (or will you use)?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Uses/provides quantitative research:	(605)	(64)	(541)	+ / -	(128)	(477)	+ / -
	%	%	%		%	%	
Internet	89%	89%	89%	-	96%	87%	+9%
CATI (Computer-Assisted Telephone Interviewing)	57%	44%	59%	-15%	48%	60%	-12%
Face-to-face or intercepts	53%	45%	54%	-9%	48%	54%	-6%
Social media monitoring	29%	41%	28%	+13%	46%	25%	+21%
CAPI (Computer-Assisted Personal Interviewing)	28%	22%	29%	-7%	20%	30%	-10%
Mobile surveys (from any wireless device excluding laptops)	23%	31%	22%	+9%	22%	23%	-1%
Text analytics/semiotics	21%	25%	21%	+4%	26%	20%	+6%
Mail	20%	19%	21%	-2%	11%	23%	-12%
Biometrics (neuromonitoring/eye tracking/facial analysis)	9%	16%	8%	+8%	12%	8%	+4%
IVR (Interactive Voice Response)	8%	6%	8%	-2%	5%	9%	-4%
Serious games	2%	2%	2%	-	3%	1%	+2%
Other	6%	8%	6%	+2%	7%	6%	+1%

Data Collection Choices: Quantitative

Which of these quantitative data collection methods have you used (or will you use) MOST OFTEN this year?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Uses/provides quantitative research:	(605)	(64)	(541)	+ / -	(128)	(477)	+ / -
	%	%	%		%	%	
Internet	58%	55%	58%	-3%	72%	54%	+18%
CATI (Computer-Assisted Telephone Interviewing)	17%	11%	18%	-7%	13%	18%	-5%
Face-to-face or intercepts	11%	14%	11%	+3%	3%	13%	-10%
CAPI (Computer-Assisted Personal Interviewing)	4%	5%	4%	+1%	2%	5%	-3%
Social media monitoring	3%	3%	3%	-	4%	2%	+2%
Mobile surveys (from any wireless device excluding laptops)	2%	2%	2%	-	1%	2%	-1%
Text analytics/semiotics	2%	6%	1%	+5%	2%	1%	+1%
Mail	1%	2%	1%	+1%	-	1%	-1%
Serious games	-	-	-	-	-	-	-
Biometrics (neuromonitoring/eye tracking/facial analysis)	-	-	1%	-1%	1%	-	-
IVR (Interactive Voice Response)	-	-	1%	-1%	-	1%	-1%
Other	2%	3%	2%	+1%	2%	2%	-

 Systemic stressors make it difficult to deliver on the promise of high-quality, high-value research

Data Collection Choices: Qualitative

“Traditional” (face-to-face) focus groups and IDIs are the most commonly used/anticipated qualitative data collection method in the future, and traditional focus groups are unlikely to be unseated as the dominant data collection modality anytime soon – as the most often data collection method, they are mentioned by more than a five-to-one margin over IDIs. Ethnographic, in-store

observational, and bulletin board focus group (BBFG) studies follow in popularity, and are more likely to be used in the future among those who are more senior, while those who are less senior are more likely to embrace chat-based discussions, and research among online communities.

When considering the qualitative studies you’ve done or plan to do this year, which data collection methods have you used (or will you use)?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Uses/provides qualitative research:	(524)	(56)	(468)	+ / -	(123)	(401)	+ / -
	%	%	%		%	%	
Traditional (In Person) Focus Groups	84%	79%	85%	-6%	83%	84%	-1%
Traditional (In Person) IDIs	62%	57%	63%	-6%	57%	64%	-7%
Telephone IDIs	48%	46%	49%	-3%	36%	52%	-16%
Ethnography	43%	30%	44%	-14%	54%	39%	+15%
In-store/shopping observations	37%	29%	38%	-9%	30%	39%	-9%
Bulletin Board Studies	28%	16%	29%	-13%	27%	28%	-1%
Chat (text) based Online Focus Groups	25%	30%	24%	+6%	25%	25%	-
Online Focus Groups with webcams	23%	21%	24%	-3%	17%	25%	-8%
Interviews/Groups Using Online Communities	22%	29%	21%	+8%	28%	19%	+9%
Monitoring Blogs	19%	23%	18%	+5%	25%	16%	+9%
Mobile (diaries, image collection, etc...)	17%	13%	17%	-4%	15%	17%	-2%
Telephone Focus Groups	16%	11%	17%	-6%	14%	17%	-3%
MROCs (Online communities)	16%	29%	15%	+14%	18%	16%	+2%
Online IDIs with webcams	15%	11%	15%	-4%	5%	17%	-12%
Chat (text-based) Online IDIs	13%	13%	13%	-	11%	13%	-2%
Other	5%	7%	5%	+2%	7%	5%	+2%

 Traditional focus groups are unlikely to be unseated as the dominant data collection modality anytime soon

Data Collection Choices: Qualitative

Of these qualitative methods, which have you used (or will you use) MOST OFTEN this year?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Uses/provides qualitative research:	(524)	(56)	(468)	+ / -	(123)	(401)	+ / -
	%	%	%		%	%	
Traditional (In Person) Focus Groups	54%	48%	55%	-7%	46%	57%	-11%
Traditional (In Person) IDIs	12%	7%	12%	-5%	12%	11%	+1%
Telephone IDIs	9%	11%	9%	+2%	9%	9%	-
Bulletin Board Studies	4%	0	4%	-4%	5%	4%	+1%
Ethnography	3%	4%	3%	+1%	7%	2%	+5%
In-store/shopping observations	3%	4%	3%	+1%	2%	3%	-1%
Chat (text) based Online Focus Groups	2%	4%	1%	+3%	2%	2%	-
Online Focus Groups with webcams	2%	2%	2%	-	2%	2%	-
Telephone Focus Groups	2%	4%	1%	+3%	2%	1%	+1%
MROCs (Online communities)	2%	5%	2%	+3%	3%	2%	+1%
Interviews/Groups Using Online Communities	1%	2%	1%	+1%	2%	-	+2%
Monitoring Blogs	1%	2%	1%	+1%	2%	1%	+1%
Mobile (diaries, image collection, etc...)	1%	4%	-	+4%	1%	1%	-
Online IDIs with webcams	1%	2%	1%	+1%	-	1%	-1%
Chat (text-based) Online IDIs	1%	-	1%	-1%	1%	1%	-
Other	2%	4%	2%	+2%	3%	2%	+1%

Factors Affecting Data Collection Choices

Regardless of client or supplier side, the primary factors driving data collection decisions are the perceived effectiveness, the ability to control quality, and costs. However, significant differences were observed between clients and suppliers on the familiarity with technique (suppliers were 24 ppt higher), the firm's main product/method traditionally used (suppliers were 20 ppts higher),

and either the client requests or the supplier recommends (suppliers were 38 ppts higher). With the exception of consultants, these levels were replicated across all types of suppliers. This further implies that suppliers "stick to their knitting", in offering products and services that they have specific expertise in.

Importance of factors in making decisions about data collection methods (Top Two Boxes on 5-Point Scale)

	Client Total	Supplier Total	Gap	Full-Service	Consultant	CATI/Online Provider	Data Collection/Field Service
Total Respondents:	(131)	(542)	+ / -	(269)	(160)	(38)	(48)
	%	%		%	%	%	%
Effectiveness	91%	94%	-3%	95%	93%	92%	92%
Timeliness of results	85%	79%	+6%	76%	81%	82%	85%
Ability to control quality	82%	90%	-8%	91%	89%	87%	90%
Cost	79%	82%	-3%	79%	84%	76%	88%
Clients/manager understand it	66%	75%	-9%	77%	72%	79%	75%
Data security	57%	62%	-5%	61%	59%	76%	67%
Simplicity/not complicated	52%	45%	+7%	42%	42%	55%	58%
Familiarity with technique	45%	69%	-24%	70%	69%	76%	67%
Firm's main product/method traditionally used	31%	51%	-20%	55%	39%	71%	63%
Something new and different	29%	27%	+2%	31%	22%	34%	29%
Client requests/supplier recommends	27%	65%	-38%	65%	58%	89%	81%

 Primary factors driving data collection decisions are the perceived effectiveness, the ability to control quality, and costs

Companies

Perceived to be Innovative: The Top 50

One of the areas of exploration in this iteration of the study was *innovation* in market research. We looked at technology adoption and attitudes towards methodologies; and we also asked respondents which market research firms first come to mind when they think of innovative market research companies.

Our initial goal was to develop a rank order list of the most innovative firms: a type of Homomichl listing but focused on innovation rather than revenue. Upon analysis we realized that we

didn't have a list of the "Most Innovative Companies"; rather we have a ranking of which companies *do the best job as being perceived as innovative* via their marketing efforts. In order

to truly rank companies by their innovation efforts another series of scoring dimensions will need to be added to the 2011 edition of the GRIT study and we are considering that option now.

In total, over 170 companies were mentioned, although many of those were only reported once. We decided to only focus on firms mentioned at least 4 times, which left us with a list of 50 companies that are making a positive impression among their peers regarding their innovation positioning.

The table on this page lists all 50 firms. We have included a breakout of mentions by respondent segment in addition to the total and their absolute rank in comparison to all others.

For purpose of analysis, we looked at only those companies who received more than 15 mentions as the "Top 10"; those firms are highlighted below and additional analysis was based only in that subset.

Companies that are being perceived as innovative in their marketing efforts

	Total Mentions	Absolute Rank
Brainjuicer	60	1st
TNS Global	32	Tied for 2nd
Vision Critical	32	Tied for 2nd
Synovate	31	3rd
Ipsos	25	Tied for 4th
Nielsen	25	Tied for 4th
Anderson Analytics	21	5th
Itracks	18	6th
GFK	17	7th
Peanut Labs	16	8th
20/20	15	Tied for 9th
Communispace	15	Tied for 9th
Millward Brown	14	10th
iModerate	13	11th
Maritz	11	Tied for 12th
OTX	11	Tied for 12th
QualVu	11	Tied for 12th
InfoSurv	10	Tied for 13th
Revelation Global	10	Tied for 13th
Toluna	10	Tied for 13th
Affinova	9	14th
Gongos Research	8	Tied for 15th
Knowledge Networks	8	Tied for 15th
Neurofocus	8	Tied for 15th

	Total Mentions	Absolute Rank
Research Now	8	Tied for 15th
Vovici	8	Tied for 15th
Burke Inc.	7	Tied for 16th
MarketTools	7	Tied for 16th
E Rewards	6	Tied for 17th
Emsense	6	Tied for 17th
Forrester	6	Tied for 17th
Gallup	6	Tied for 17th
Hall and Partners	6	Tied for 17th
One Point	6	Tied for 17th
Insight Express	5	Tied for 18th
Insites Consulting	5	Tied for 18th
Nunwood	5	Tied for 18th
StrategyOne	5	Tied for 18th
Truth	5	Tied for 18th
Allegiance	4	Tied for 19th
Buzzback	4	Tied for 19th
Copernicus	4	Tied for 19th
Insights Now	4	Tied for 19th
KidsEyez	4	Tied for 19th
Lieberman Research	4	Tied for 19th
Market Probe	4	Tied for 19th
Sands Research	4	Tied for 19th
SPSS	4	Tied for 19th
USamp	4	Tied for 19th

Based on absolute rank the 50 firms listed could be condensed to 19 positions, with significant overlap and ties for many of the positions, indicating that many firms have an opportunity for further communication as to why they are more innovative than their competitors .

These firms are doing the best job in branding themselves as innovative research companies globally. What was surprising was the high number of Honomichl 10 companies here; of course many of these companies are doing innovative work, but an area for further questioning could be how many made the list *simply because respondents associate larger brands with innovation as a default assumption* vs. actually knowing how these firms are really driving innovation? We're not suggesting that these companies are not truly innovative. Since this is a list based on perception, however, one has to wonder how much of their position is an artifact of respondent expectations rather than actual knowledge.

 An area for further questioning could be how many made the list simply because respondents associate larger brands with innovation as a default assumption

Companies

Perceived to be Innovative: The Top 50

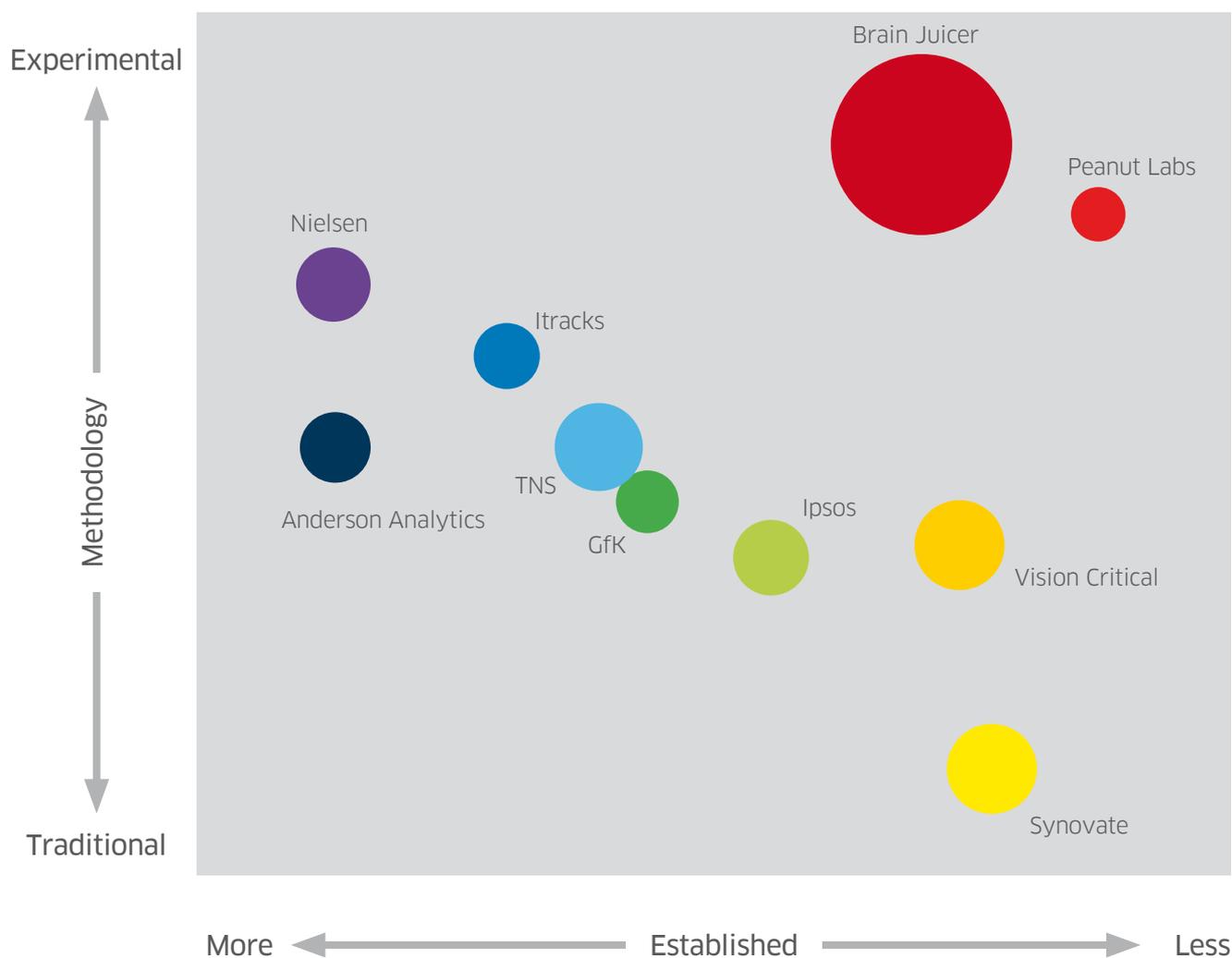
Because of questions like that, we decided to go further. Discriminant analysis was conducted among those respondents who mentioned any of the top 10 most frequently listed firms. The main purpose of the discriminant analysis is to predict group membership, in this case the values research professionals who selected a brand as innovative are likely to share. The resulting chart/map shows us how many research professionals feel a certain firm is “innovative” (represented by

size of circle), and also helps us understand the where those professionals fall on a matrix.

Interval variables included in the analysis included questions asked among both supplier side and client side researchers in various areas including type of research most often conducted, where research information is typically sought, and types of supplier attributes they value.

Here is what we found:

Top 10 Research Firms Perceived to be Innovative



The two overall dimensions that seem to best differentiate among those who view a respective company as innovative are their interests and feelings toward various new and traditional research methodologies, and how well known and/or established a company is. Factors that loaded heavily on this second dimension (X-Axis) included researchers opinion on sources where they typically look for information on research firms such as conferences, journals, trade associations as well as blogs and social media.

It's important to think about what we are actually looking at here. It's not the companies per se. *We are looking at those research professionals whom these companies have moved enough to say that "company XYZ is innovative".*

So, looking at the upper right quadrant, researchers who put far higher value on experimental/cutting edge techniques, and are not as concerned with pedigree are more likely to think of BrainJuicer and PeanutLabs as innovative. Both of these companies have some very interesting non traditional approaches to research. In addition, both are masterful marketers and stay "on message" via all their marketing channels. Thus, their perception in the marketplace indicates a high degree of success with their brand messaging strategy.

Synovate and Vision Critical on the other hand in the bottom right quadrant may appeal more to researchers who are less concerned with pedigree; they may in fact be new to research themselves. This also explains the fact that they appreciate their traditional online offering. These companies may be innovative in how they serve these more traditional/basic needs.

Researchers who seem to prefer a mix of traditional and experimental methodologies, or said a different way, experimental techniques with a strong basis in traditional methodology, are likely to prefer the Honomichl top-5 firms like Nielsen, TNS, GfK, etc... A surprise in this area of the chart was Anderson Analytics. While Anderson Analytics is a newer company clearly advocating a newer methodology (text analytics) the firm still seems to appeal to researchers who value traditional established brands. Is this due to the perception that a focus on analytical techniques and technology vs. data collection methodologies is associated with those qualities? We think so; Anderson Analytics's overall brand positioning appeals to the risk averse and traditional MR respondent.

Furthest toward the upper left, Nielsen's fans seem to value a little more experimentation, perhaps because Nielsen is so established this adds comfort to exploring new techniques.

Ultimately, we believe that this analysis shows us how researchers view themselves, and with what firms they most identify.

It will be interesting to observe how these rankings change over time, especially within the context of a dynamic of overall change within the market research space that will only accelerate over the next few years.

 Ultimately, we believe that this analysis shows us how researchers view themselves, and with what firms they most identify.

Technology Adoption

Online communities and social media analytics are the two most widely adopted research techniques and approaches across the board (34% and 28% respectively). While a similar percentage of buyers and suppliers report using online communities (38% and 33% respectively), *buyers are far more likely to have used social media analytics (44%) than suppliers (24%) – a gap of +20 ppts.*

In the U.S., one third (34%) of researchers report using online communities and 28% have used social media analytics, which is in line with the global data (34% and 28% respectively).

Buyers are far more likely to have used social media analytics (44%) than suppliers (24%) – a gap of +20 ppts.

Which of the following research techniques and approaches have you used for a client or commissioned from a supplier?

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	%
Online Communities	34%	52%	32%	+20%	38%	33%	+5%
Social Media Analytics	28%	36%	27%	+9%	44%	24%	+20%
Mobile Surveys	22%	29%	21%	+8%	16%	24%	-8%
Text Analytics	22%	23%	22%	+1%	27%	21%	+6%
Webcam-Based Interviews	18%	14%	19%	-5%	19%	18%	+1%
Eye Tracking	17%	19%	16%	+3%	24%	15%	+9%
Apps based research	11%	18%	10%	+8%	13%	10%	+3%
Visualization Analytics	10%	12%	10%	+2%	15%	9%	+6%
Predictive Markets	10%	19%	9%	+10%	11%	10%	+1%
Mobile Ethnography	9%	12%	9%	+3%	7%	10%	-3%
Virtual Environments	9%	10%	9%	+1%	10%	8%	+2%
Mobile Qualitative	8%	14%	7%	+7%	2%	9%	-7%
Crowdsourcing	7%	7%	7%	-	8%	7%	+1%
NeuroMarketing	6%	3%	7%	-4%	9%	5%	+4%
Biometric Response	5%	-	5%	-5%	7%	4%	+3%
Serious Games	2%	-	2%	-2%	2%	1%	+1%

There is clearly an age gap on MROC acceptance. While one third of all respondents have used online communities for a client or commissioned them from a supplier, when we break this out by years as Market Research professional, this number jumps to just over half (52%) of new professionals (5 years or less) compared to one third (32%) of senior professionals (6+ years).

- The data clearly suggests that younger researchers are more open to this new technology. When asked, *“what use of these techniques and approaches do you see ahead in your future?”*, only 15 % of the most seasoned MR professionals (20+ years) plan to use online communities often in the future, vs. one third (33%) of new MR professionals.
- Surprisingly, there is little discrepancy between new and senior professionals for the other technologies. However, the age gap in online community acceptance could be a harbinger of lower rates of technology adoption among seasoned MR professionals.
- Less than 10% of respondents have used serious gaming (2%), biometric response (5%), neuromarketing (6%), crowdsourcing (7%), mobile qualitative (8%) or virtual environments (9%).

According to Tamara Barber, “In the past two years, market research online communities (MROCs) have come of age as a research method that’s now reality more than hype, but the use of and business model around communities are evolving. In the next two years, MROCs will still retain their role as a resource for quick-turnaround qualitative insights, but they will also increasingly be used for more strategic innovation projects, and new capabilities in social and mobile applications will give members greater flexibility in how they participate.”

As one might expect given heavy mobile phone usage in Asia, mobile technology has been more widely adopted internationally than in the U.S. In particular, we see a spike in the use of mobile surveys, mobile ethnographies and mobile qualitative in the UK, Ireland, South Asia, India and China.

While 50% of researchers in South Asia/India have used mobile surveys for a client or commissioned them from a supplier, only 22% of researchers in the U.S. have dealt with this approach.

Size seems to impact experience with these techniques and approaches, suggesting that the high cost of training and technology may be prohibitive for smaller firms. Large firms [with annual billings of \$15M+] are significantly more likely to have experience with emerging technologies such as serious gaming (4%), biometric response (12%), neuromarketing (18%), crowdsourcing (12%), mobile qualitative (14%) and virtual environments (24%). This trend continues when we compare the use of the most widely adopted technologies such as mobile surveys (22% vs. 43%), social media analytics (28% vs. 42%) and online communities (34% vs. 58%).

 Only 15 % of the most seasoned MR professionals (20+ years) plan to use online communities often in the future, vs. one third (33%) of new MR professionals

Technology Adoption

What use of these techniques and approaches do you see ahead in your future?

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	%
Mobile Surveys	54%	63%	53%	+10%	41%	57%	-16%
Online Communities	53%	63%	52%	+11%	58%	52%	+6%
Social Media Analytics	50%	56%	49%	+7%	68%	45%	+23%
Text Analytics	38%	40%	38%	+2%	47%	37%	+10%
Webcam-Based Interviews	36%	27%	37%	-10%	29%	37%	-8%
Mobile Qualitative	31%	41%	30%	+11%	23%	33%	-10%
Mobile Ethnography	29%	36%	28%	+8%	25%	30%	-5%
Apps based research	28%	37%	27%	+10%	32%	27%	+5%
Eye Tracking	21%	29%	21%	+8%	25%	20%	+5%
Crowdsourcing	19%	29%	18%	+11%	26%	18%	+8%
Visualization Analytics	19%	27%	19%	+8%	24%	18%	+6%
Virtual Environments	18%	16%	18%	-2%	15%	18%	-3%
Predictive Markets	18%	26%	17%	+9%	21%	18%	+3%
NeuroMarketing	12%	14%	12%	+2%	14%	12%	+2%
Serious Games	9%	11%	9%	+2%	8%	10%	-2%
Biometric Response	9%	7%	9%	-2%	11%	8%	+3%

In our summer 2010 report, social media and mobile clearly topped the list of new technologies, research platforms or methodologies that researchers were most excited about. Despite general excitement over the potential of emerging technologies, when it comes to putting them into practice, both buyers and suppliers are skeptical that their use of these techniques and approaches will be significant.

Mobile surveys and social media analytics remain among the top approaches researchers predict they will use often (18% and 15% respectively), while online communities pulled ahead, with just over one in five (22%) planning to use this approach often.

Buyers and suppliers have a slightly different outlook on which new technologies they are likely to use often or sometimes in the future. While 70% of buyers anticipate using social media analytics,

suppliers are less convinced (45%). On the other hand, 57% of research suppliers plan to use mobile surveys, compared to only 41% of buyers. However, both buyers and suppliers agree that online communities are an emerging technology they plan to use [often or sometimes] in the future (58% and 52% respectively).

The discrepancy between suppliers and internal leaders on social media raises a number of important questions. Could it be that suppliers are behind the curve, wedded to interrogatory approaches as opposed to passive social media listening posts? Do suppliers view social media analytics ultimately as a DIY tool and not within their wheelhouse? This gap is likely going to be exploited by non-traditional suppliers who recognize the demand and are able to meet the need of client side researchers.

How well do you feel you understand exactly what is meant by each of these terms?

	Total	Under 6 Years	6+ Years	Gap	Research Buyers/ Clients	Research Providers/ Suppliers	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	%
Serious Games	50%	40%	52%	-12%	52%	50%	+2%
Visualization Analytics	45%	44%	45%	-1%	41%	46%	-5%
NeuroMarketing	42%	42%	42%	-	39%	42%	-3%
Crowdsourcing	39%	40%	39%	+1%	33%	40%	-7%
Virtual Environments	35%	30%	36%	-6%	32%	36%	-4%
Predictive Markets	34%	29%	35%	-6%	28%	35%	-7%
Biometric Response	32%	29%	32%	-3%	25%	34%	-9%
Apps based research	31%	22%	32%	-10%	32%	31%	+1%
Mobile Ethnography	26%	25%	26%	-1%	26%	26%	-
Mobile Qualitative	22%	19%	22%	-3%	24%	22%	+2%
Text Analytics	20%	18%	20%	-2%	16%	20%	-4%
Social Media Analytics	18%	14%	18%	-4%	11%	19%	-8%
Mobile Surveys	13%	5%	14%	-9%	12%	13%	-1%
Eye Tracking	12%	11%	12%	-1%	8%	13%	-5%
Webcam-Based Interviews	11%	7%	12%	-5%	6%	13%	-7%
Online Communities	11%	5%	11%	-6%	8%	11%	-3%

Adoption of social media, mobile and online communities is higher internationally than in the United States.

While only half of U.S. respondents plan to use mobile surveys often or sometimes, this number jumps to 82% in South Asia/India.

Despite their adoption of social media, mobile and online communities, less than 10% of buyers/suppliers predict they will use serious gaming (1%), biometric response (2%), neuromarketing (3%), crowdsourcing (4%), virtual environments (4%), predictive markets (5%), eye tracking (5%), visualization analytics (6%), mobile qualitative (7%) or mobile ethnography (7%) often in the future.

Time in the industry appears to impact willingness to adopt these new techniques.

In general, new professionals (5 years or less) are more open to using emerging techniques and approaches in the future than senior professionals (6+ years).

While the majority of respondents are familiar with the terms, many feel there is some ambiguity and need for further definition. Not surprisingly, mobile surveys (77%), webcam-based surveys (77%), online communities (75%) and eye tracking (75%) are the most understood terms. Although three out of four researchers understand these terms well, almost all respondents have some level of familiarity with the terms (96%, 95%, 95% and 94% respectively).

On the other hand, serious games, visualization analytics and crowdsourcing top the list as the terms researchers are the most unsure of (31%, 25% and 25% respectively).

Note:

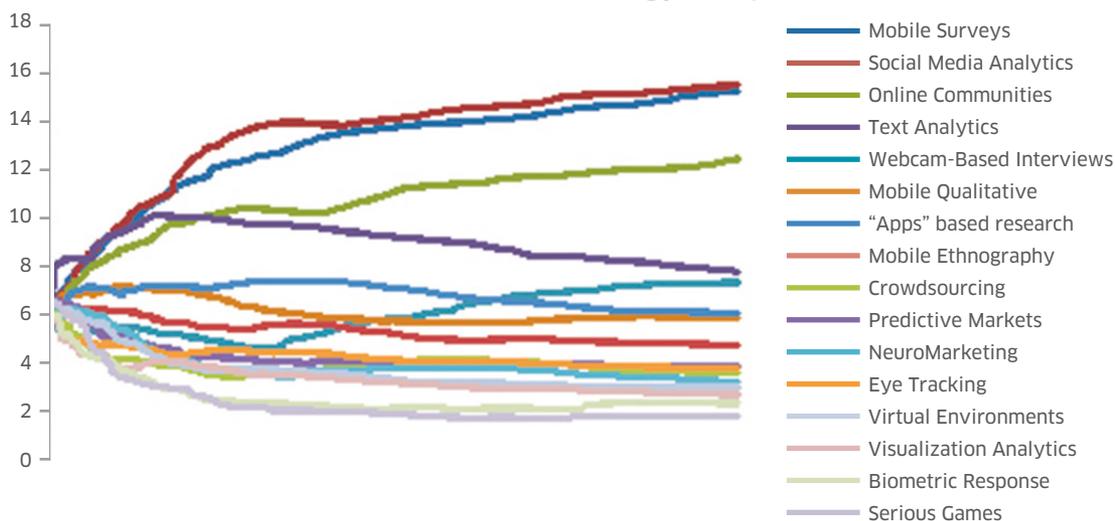
There is a similar level of understanding of all terms among internationally and in the U.S.

There is a similar level of understanding of all terms among both new (5 years or less) and senior professionals (6+ years).

When we compare client and supplier side, there is a similar level of understanding of all terms.

Infosurv Predictive Markets Exercise

Predictive Markets Assessment: Technology Adoption



Predictive markets show that social media analytics, mobile surveys, and online communities have predicted shares above 12%; the rest are at or below 8%

Which of these technologies/methodologies will experience the largest increase in adoption in the next 12 months?

	Predicted Share	Rank
Social Media Analytics	15.5%	1
Mobile Surveys	15.2%	2
Online Communities	12.4%	3
Text Analytics	7.8%	4
Webcam-Based Interviews	7.3%	5
Mobile Qualitative	6.0%	6
“Apps” based research	5.9%	7
Mobile Ethnography	4.7%	8
Predictive Markets	3.8%	9
Eye Tracking	3.7%	10
Crowdsourcing	3.6%	11
NeuroMarketing	3.2%	12
Virtual Environments	3.0%	13
Visualization Analytics	2.7%	14
Biometric Response	2.3%	15
Serious Games	1.8%	16

One of our survey sponsors, Infosurv, conducted a “predictive markets” exercise on future technologies. Infosurv has developed a virtual online stock market where respondents are given free virtual dollars to buy “shares” in products or services that clients wish to test. By observing how share prices change, predictions can be made about the real world potential for a concept, product, or service. Once the prices of all products in this hypothetical “market” are known, they can be interpreted as probabilities. In the context of this research respondents placed bets on future technologies (i.e., technologies or methodologies that will experience the largest increase in adoption in the next 12 months). The highest shares were seen for *social media analytics*, *mobile surveys*, and *online communities* (see below). To learn more about predictive markets, please visit: <http://www.infosurv.com/solutions/prediction-markets>.

Anticipated Degree & Attitude Towards Industry Change

Significant change is expected in the next five years: 63% anticipate either “tremendous”, “a lot” or “quite a bit” of change, and this predictably

varies by age, with younger researchers anticipating more of a shift, and more senior researchers more likely to expect “some”.

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

	Experience Level			Gap	Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years		Client	Supplier	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	
Expect Significant Change (Net)	63%	74%	62%	+12%	65%	63%	+2%
Tremendous. I think the kinds of research departments and research suppliers we have today will cease to exist.	7%	14%	6%	+8%	6%	7%	-1%
A lot. I think the industry is going through big changes, and I will be providing different services in new ways and possibly in an organization that is very different from my work situation today.	25%	26%	25%	+1%	24%	25%	-1%
Quite a bit. I think I will be delivering new and different products and services and possibly will be working in a different kind of organization.	32%	34%	31%	+3%	35%	31%	+4%
Some. I expect there will be new products and services but I don't think things will be all that different.	33%	22%	34%	-12%	31%	34%	-3%
Very little. I think I will be doing about the same kinds of work and delivering similar products and services.	4%	4%	4%	-	5%	4%	+1%

 63% anticipate either “tremendous”, “a lot” or “quite a bit” of change

Anticipated Degree & Attitude Towards Industry Change

On balance, the attitude towards industry change over the next five years is very positive, with 63% saying “more promise than threat”, but perhaps

expectedly, optimism is greater among younger versus older respondents, as well as those on the client/buyer side.

Optimism is greater among younger versus older respondents, as well as those on the client/buyer side

Which statement best describes your feelings about the pace and extent of change you anticipate in the industry over the next five years.

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Expect Change:	(426)	(54)	(372)	+ / -	(85)	(341)	+ / -
	%	%	%		%	%	
TOP 3 BOX (NET)	63%	78%	61%	+17%	71%	61%	+10%
Top 2 Box (Sub-Net)	39%	57%	37%	+20%	42%	38%	+4%
What threat? I'm excited for my future and can't wait	16%	24%	15%	+9%	20%	15%	+5%
I see much more promise than threat	23%	33%	22%	+11%	22%	23%	-1%
I see more promise than threat	24%	20%	24%	-4%	28%	23%	+5%
I see equal measures of threat and promise	24%	19%	25%	-6%	22%	25%	-3%
BOTTOM 3 BOX (NET)	13%	4%	14%	-10%	7%	14%	-7%
I see more threat than promise	5%	0%	6%	-6%	5%	6%	-1%
Bottom 2 Box (Sub-Net)	7%	4%	8%	-4%	2%	9%	-7%
I see these changes as much more threat than promise	4%	4%	4%	-	1%	5%	-4%
What promise? These things threaten our industry and my job	3%	-	3%	-3%	1%	4%	-3%

How Companies Currently Position Themselves

Data collection/field/tab organizations currently position themselves primarily on the basis of experience (71%), competence (68%), and superior client support (65%). Conversely, respondents were least likely to position themselves solely on the basis of aggressive or low pricing (just 14%). Of these organizations, about 1/4 indicate that they

anticipate making a change to their positioning, with the majority of these mentions around becoming a “provider of innovative or proprietary services” (34%), strategic services and/or consulting (31%), and more distantly “expert/leader in one or more specific areas” (13%).

What attributes does your company currently use in positioning itself in front of prospective clients?

	Supplier Total	Full-Service	Consultant	CATI/Online Provider	Data Collection/Field Service
Base - Data collection, field, and tab organizations:	(536)	(276)	(174)	(38)	(48)
	%	%	%	%	%
Experienced staff, good track record	71%	74%	62%	68%	85%
Outstanding competence and reliability	68%	66%	70%	84%	69%
Outstanding client service/support	65%	64%	64%	74%	65%
Full-service research provider	54%	79%	37%	16%	8%
Expert/leader in one or more specific methodologies	53%	54%	48%	66%	60%
Expert/leader in serving specific industries/markets	49%	53%	48%	37%	35%
Strategic services and/or consulting	49%	49%	63%	32%	17%
Provider of innovative or proprietary approaches/tools/methods	39%	48%	26%	37%	35%
Aggressive (low) pricing	14%	11%	15%	18%	23%

Is your company thinking about or planning to change its current positioning? In what direction?

	Supplier Total	Full-Service	Consultant	CATI/Online Provider	Data Collection/Field Service
Data collection/field/tab organization:	(536)	(276)	(174)	(38)	(48)
	%	%	%	%	%
Yes, planning change	26%	30%	17%	32%	27%
Base (Planning Change):	(137)	(82)	(30)	(12)	(13)
	%	%	%	%	%
Provider of innovative or proprietary services	34%	35%	37%	33%	15%
Strategic services and/or consulting	31%	33%	30%	33%	23%
Expert/leader in one or more specific areas	13%	10%	23%	0	23%
Full-service research provider	9%	5%	7%	25%	23%
Expert/leader in serving specific	6%	7%	-	-	15%
Outstanding client service/support	4%	6%	-	-	-
Experienced staff, good track record	1%	1%	-	-	-
Outstanding competence and reliability	1%	-	3%	8%	-
Aggressive (low) pricing	1%	2%	-	-	-

Information Sources

Staying abreast of industry developments is made possible by use of a wide range of sources, with no one method being especially dominant. Least used are Twitter and blogs; most commonly used are industry websites, seminars and conferences,

and technology websites or publications. Industry journals are more commonly used among suppliers, while blogs are relied upon more by clients.

Please rate the importance of each of the following for staying abreast of developments in research methodologies

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Total Respondents:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%	%	%	%	%
Industry websites	58%	68%	57%	+11%	59%	58%	+1%
Seminars or conferences	58%	62%	58%	+4%	60%	58%	+2%
Technology websites or publications	51%	58%	50%	+8%	45%	53%	-8%
Business networking communities like LinkedIn or Plaxo	50%	53%	50%	+3%	45%	52%	-7%
White papers	49%	56%	48%	+8%	53%	47%	+6%
Industry print journals	46%	53%	46%	+7%	38%	48%	-10%
Blogs	36%	52%	34%	+18%	44%	34%	+10%
E-mail delivery of blog subscriptions	31%	38%	30%	+8%	38%	30%	+8%
Twitter	16%	41%	13%	+28%	13%	17%	-4%
Other	9%	7%	10%	-3%	11%	9%	+2%

 Industry journals are more commonly used among suppliers, while blogs are relied upon more by clients

Factors Affecting Data Collection Strategies

The top issue affecting changes in data collection strategies are budgetary constraints (58% mentioned, 33% rated as the top reason). Additional reasons include declining response rates and the quality of sample (both mentioned

by 39%), and the economy/business slowdown (38% mentioned). Technological advancements are more often cited by those with less experience and those on the supplier side.

Which of the following issues have prompted a change in how you collect data in 2010?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Total Respondents:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	
Budgetary constraints	58%	52%	58%	-6%	58%	58%	-
Quality of sample	39%	42%	39%	+3%	40%	39%	+1%
Declining response rates	39%	34%	39%	-5%	46%	39%	+7%
The economy, business slowdown	38%	32%	39%	-7%	31%	39%	-8%
Increased use of mobile communications	22%	29%	21%	+8%	20%	21%	-1%
Client demands for innovation	21%	30%	20%	+10%	21%	20%	+1%
Higher CPIs for sample	21%	16%	22%	-6%	24%	22%	+2%
Reduced staffing or layoffs	17%	12%	17%	-5%	23%	17%	+6%
Increased use of tablet computers and	16%	29%	15%	+14%	11%	15%	-4%
Higher salaries/wages/costs	13%	11%	13%	-2%	8%	13%	-5%
Availability of non-US sample	11%	23%	10%	+13%	13%	10%	+3%
Availability of US sample	11%	18%	10%	+8%	14%	10%	+4%
Other	4%	4%	4%	-	2%	4%	-2%
None of the above	15%	18%	15%	+3%	14%	15%	-1%

The top ways of dealing with data collection issues include exploring new methodologies (53% overall, with few meaningful differences seen between clients and suppliers – although just 27% among companies that specialize in data collection mention this) and new

technologies (52% overall, 42% among companies that specialize in data collection), doing more with same resources (42%). These strategies are being used regardless of experience level or client versus supplier side.



The top issue affecting changes in data collection strategies are budgetary constraints

Factors Affecting Data Collection Strategies

Systemic stressors make it difficult to deliver on the promise of high-quality, high-value research

Which of the following issues have prompted a change in how you collect data in 2010?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Total Respondents:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	
Budgetary constraints	33%	33%	33%	-	37%	31%	+6%
The economy, business slowdown	13%	10%	13%	-3%	7%	14%	-7%
Declining response rates	10%	7%	11%	-4%	11%	10%	+1%
Quality of sample	8%	11%	7%	+4%	8%	8%	-
Increased use of mobile communications	5%	7%	5%	+2%	5%	5%	-
Client demands for innovation	5%	5%	6%	-1%	5%	6%	-1%
Higher CPIs for sample	3%	1%	4%	-3%	5%	3%	+2%
Availability of non-US sample	2%	1%	2%	-1%	4%	1%	+3%
Increased use of tablet computers and	2%	3%	2%	+1%	2%	1%	+1%
Reduced staffing or layoffs	2%	3%	2%	+1%	2%	2%	-
Availability of US sample	1%	1%	2%	-1%	1%	2%	-1%
Higher salaries/wages/costs	1%	-	1%	-1%	1%	1%	-
None of the above	15%	18%	15%	+3%	14%	15%	-1%

What steps is your organization taking to address these issues?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Base:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%	%	%	%	%
Exploring new methodologies	53%	47%	54%	-7%	58%	52%	+6%
Exploring new technologies	52%	52%	52%	-	52%	52%	-
Doing more with same resources	42%	38%	42%	-4%	47%	41%	+6%
Actively looking for better sample	29%	25%	30%	-5%	31%	29%	+2%
Exploring new sample resources	27%	21%	28%	-7%	27%	27%	-
Close partnering with quality access panels	27%	29%	27%	+2%	25%	28%	-3%
Working longer hours with less staff	25%	23%	26%	-3%	30%	24%	+6%
Spending/charging less for the same	22%	19%	22%	-3%	9%	25%	-16%
Negotiating discounts or shorter	19%	22%	18%	+4%	21%	18%	+3%
Using more sample provided by clients	17%	16%	18%	-2%	16%	18%	-2%
Recommending higher respondent	16%	18%	16%	+2%	10%	18%	-8%
More diligent validation	15%	12%	16%	-4%	13%	16%	-3%
Asking for sacrifices from employees	14%	14%	14%	-	14%	14%	-
Asking for sacrifices from vendors	12%	14%	12%	+2%	21%	10%	+11%
Other	8%	7%	8%	-1%	10%	8%	+2%

Perceived Importance & Choice Drivers

Interestingly, while having the latest and most advanced technology is certainly (or believed to be) important to prospective clients, the aspects of the business relationship itself – specifically, personal service and attentiveness dimensions – rise to the very top. And, this is true regardless of whether choosing a quantitative or qualitative supplier. These dimensions include listening well and understanding client needs (93%), having a good relationship with client (92%), familiarity with client needs (90%), rapid response (89%), meeting

deadlines (88%), and a knowledgeable staff (87%). Note that these are all at or above 90% top two box agreement.

Obviously, issues related to quantitative expertise (e.g., data analysis services, understanding online data collection, and analytical capabilities) tend to be important discriminators when making a quantitative choice. Given the more personality-driven aspects of qualitative research providers, price is less of a discriminating factor here.

How important do you think each of the following qualities is to [clients / you] when [they / you] select a [QUANTITATIVE/QUALITATIVE] research provider? (Top Two Box Basis on Five-Point Scale)

	QUANTITATIVE Supplier Factors	QUALITATIVE Supplier Factors	Gap + / -
Listens well and understands client needs	93%	93%	-
Good relationship with client/supplier	92%	89%	+3%
Familiarity with client needs	90%	90%	-
Rapid response to requests	89%	88%	+1%
Completes research in an agreed-upon time	88%	87%	+1%
Has knowledgeable staff	87%	85%	+2%
Previous experience with client/supplier	84%	83%	+1%
Good reputation in the industry	83%	79%	+4%
Flexibility on changing project parameters	81%	85%	-4%
Familiarity with the industry or category	79%	76%	+3%
High quality analysis	76%	77%	-1%
Consultation on best practices and methodology effectiveness	75%	69%	+6%
Provides highest data quality	73%	68%	+5%
Breadth of experience in the target segment	71%	75%	-4%
Length of experience/time in business	65%	72%	-7%
Provides data analysis services	62%	50%	+12%
Understands online data collection	60%	30%	+30%
Lowest price	47%	35%	+12%
Company is financially stable	43%	40%	+3%
Offers unique methodology or approach	41%	40%	+1%
Uses sophisticated collection technology/strategies	41%	29%	+12%
Uses the latest data collection technology	35%	27%	+8%
Also does qualitative research	29%	30%	-1%
Uses the latest statistical or analytical packages	27%	16%	+11%
Has an access panel	22%	16%	+6%

Perceived Importance & Choice Drivers

How important do you think each of the following qualities is to [clients / you] when [they / you] select a QUANTITATIVE research provider? (Top Two Box Basis on Five-Point Scale)

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Total Respondents:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%	%	%	%	%
Listens well and understands client needs	93%	88%	94%	-6%	92%	93%	-1%
Good relationship with client/supplier	92%	84%	93%	-9%	91%	92%	-1%
Familiarity with client needs	90%	94%	89%	+5%	83%	92%	-9%
Rapid response to requests	89%	89%	89%	-	90%	88%	+2%
Completes research in an agreed-upon time	88%	89%	88%	+1%	91%	87%	+4%
Has knowledgeable staff	87%	83%	88%	-5%	91%	86%	+5%
Previous experience with client/supplier	84%	78%	85%	-7%	70%	88%	-18%
Good reputation in the industry	83%	86%	83%	+3%	77%	85%	-8%
Flexibility on changing project parameters	81%	73%	82%	-9%	80%	82%	-2%
Familiarity with the industry or category	79%	83%	79%	+4%	68%	82%	-14%
High quality analysis	76%	72%	77%	-5%	75%	76%	-1%
Consultation on best practices and methodology effectiveness	75%	70%	75%	-5%	76%	74%	+2%
Provides highest data quality	73%	81%	72%	+9%	90%	69%	+21%
Breadth of experience in the target segment	71%	70%	71%	-1%	59%	74%	-15%
Length of experience/time in business	65%	58%	65%	-7%	47%	69%	-22%
Provides data analysis services	62%	59%	63%	-4%	62%	62%	-
Understands online data collection	60%	67%	60%	+7%	71%	58%	+13%
Lowest price	47%	47%	47%	-	41%	48%	-7%
Company is financially stable	43%	47%	43%	+4%	51%	42%	+9%
Uses sophisticated collection technology/strategies	41%	42%	41%	+1%	53%	38%	+15%
Offers unique methodology or approach	41%	45%	41%	+4%	45%	40%	+5%
Uses the latest data collection technology	35%	34%	35%	-1%	41%	34%	+7%
Also does qualitative research	29%	41%	28%	+13%	16%	33%	-17%
Uses the latest statistical/analytical packages	27%	30%	26%	+4%	28%	26%	+2%
Has an access panel	22%	31%	21%	+10%	24%	21%	+3%

 The aspects of the business relationship itself – specifically, personal service and attentiveness dimensions – rise to the very top

How important are the following qualities to [clients / you] in selecting a QUALITATIVE research provider?

	Experience Level				Buyer/Client or Supplier/Provider		
	Total	< 6 Years	6+ Years	Gap	Client	Supplier	Gap
Total Respondents:	(673)	(73)	(600)	+ / -	(131)	(542)	+ / -
	%	%	%		%	%	
Listens well and understands client needs	93%	86%	94%	-8%	91%	94%	-3%
Familiarity with client needs	90%	86%	90%	-4%	84%	91%	-7%
Good relationship with client/supplier	89%	79%	90%	-11%	89%	89%	-
Rapid response to requests	88%	88%	88%	-	85%	89%	-4%
Completes research in an agreed-upon time	87%	84%	87%	-3%	86%	87%	-1%
Has knowledgeable staff	85%	84%	85%	-1%	84%	85%	-1%
Flexibility on changing project parameters	85%	79%	86%	-7%	85%	85%	-
Previous experience with client/supplier	83%	77%	84%	-7%	73%	86%	-13%
Good reputation in the industry	79%	73%	79%	-6%	69%	82%	-13%
High quality analysis	77%	75%	77%	-2%	80%	75%	+5%
Familiarity with the industry or category	76%	80%	75%	+5%	67%	78%	-11%
Breadth of experience in the target segment	75%	77%	74%	+3%	64%	78%	-14%
Length of experience/time in business	72%	59%	73%	-14%	70%	72%	-2%
Consultation on best practices and methodology effectiveness	69%	68%	69%	-1%	74%	67%	+7%
Provides highest data quality	68%	71%	68%	+3%	70%	68%	+2%
Provides data analysis services	50%	57%	49%	+8%	53%	49%	+4%
Company is financially stable	40%	46%	39%	+7%	46%	38%	+8%
Offers unique methodology or approach	40%	46%	39%	+7%	44%	38%	+6%
Lowest price	35%	43%	35%	+8%	29%	37%	-8%
Also does quantitative research	30%	48%	28%	+20%	16%	34%	-18%
Understands online data collection	30%	50%	28%	+22%	37%	28%	+9%
Uses sophisticated collection technology/strategies	29%	43%	28%	+15%	29%	29%	-
Uses the latest data collection technology	27%	38%	25%	+13%	30%	26%	+4%
Has an access panel	16%	27%	15%	+12%	15%	17%	-2%
Uses the latest analytical packages	16%	30%	14%	+16%	17%	15%	+2%

Given the more personality-driven aspects of qualitative research providers, price is less of a discriminating factor here

Merlien

I n s t i t u t e



Market Research in the Mobile World 2nd International Conference

The future of Market Research is here!
Are you ready for the challenge?

19-20 July 2011, Atlanta
www.merlien.org

Venue Partner:



Sponsors:

GREENBOOK®



Next Steps

We believe that the pace of change impacting our industry will continue to accelerate. With that in mind we will continue to conduct the GreenBook® Research Industry Trends Study in 2011, again combining Q1/Q2 for the first phase and Q3/Q4 for the second phase.

As always we will look to build upon the most relevant questions from previous iterations for tracking purposes while including new areas for exploration. For instance, some of the issues we are considering addressing in 2011 are perceptions and utilization around DIY, industry usage of social media as both a research technique and for marketing, and the impact of consolidation and emerging providers on the industry.

We will also continue to push the boundaries of utilizing new techniques ourselves, and welcome your thoughts, suggestions, and participation as we explore how to increase the effectiveness and value of our efforts.

Thank you for joining us on this journey; we look forward to charting the future of the market research industry with you!



Get the whole picture.

QualBoard^{3.0}
with Webcam Technology

The world's most advanced qualitative research platform just got better. QualBoard™ from 20|20 Technology now includes the ability for study participants to answer questions using webcams. Seeing and hearing the *whole picture* adds a level of depth never before possible with bulletin boards.

See and hear what else your participants have to say!
Another innovation from 20|20 Technology.

20|20
TECHNOLOGY

Innovation Happens Here.

Learn more about QualBoard™ with Webcam technology by logging onto www.2020research.com/qualboard

www.2020research.com | Ph: 615.777.2020 | US Toll Free: 800.737.2020

Acknowledgements

Concept originator, GRIT Executive Editor

Leonard Murphy – LMC group

Questionnaire Primary Author

Bill Weylock – Brand3Sixty

Questionnaire Contributors

Kyle Burnam – Infosurv

Leonard Murphy – LMC group

Robert Moran – StrategyOne

Tom Anderson – Anderson Analytics

Design consultation

Lukas Pospichal – GreenBook®

Paul Sherman – Interviewing Service of America

Tim Snaith – OnePoint

Dana Stanley – iCharts

Sample

MRGA, NGMR, GreenBook®, Lenny Murphy

Data collection

Interviewing Service of America

Infosurv

Tabulation and banners

Interviewing Service of America

Chart production

iCharts

Interactive versions may be found online at

<http://demo.ichartsbusiness.com/GRIT/index.html>

Report Primary Author

Bob Walker – Surveys & Forecasts, LLC

Report Contributors

Bill Weylock – Brand3Sixty

Kyle Burnam – Infosurv

Leonard Murphy – LMC group

Robert Moran – StrategyOne

Tom Anderson – Anderson Analytics

Publication

MRGA, GreenBook®, iCharts

To receive an invitation to participate in the next round of GRIT or to be notified when the next Report is available, please register at www.GreenBookBlog.org/GRIT

GRIT Partners

About GreenBook®

GreenBook® brings resources to market researchers on both sides of the table and offers effective marketing opportunities in a variety of targeted media.

The GreenBook® media platform now includes the flagship GreenBook® Directory (online and in print), specialized GreenBook® Health directory, GreenBook® Blog, Research Vibes – a customizable market research portal, New Qualitative Research guide and directory (online and in print), and a new publishing program to provide stimulating, practical, and timely content on topics and issues relevant to the industry.

While becoming a rich source of marketing research content, GreenBook® continues to be the destination for detailed and accurate information on research providers of all types.

Buyers of research services come to GreenBook® Directory to review structured profiles of research firms including links to their blogs, published articles, white papers, videos, etc. The directory is helping market research companies to demonstrate their strengths and capabilities while generating qualified leads.

GreenBook.org | NewQualitative.org | GBhealth.org
GreenBookBlog.org | ResearchVibes.com

Media Partners



Market Research Global Alliance (MRGA)

The MRGA was founded was established in 2007 as the first social network for market researchers with the objective of helping them achieve their professional and career goals. Since then, our community has grown to over 9,000 members and is thriving on trusted platforms such as MRGAsn and LinkedIn. We continue to expand opportunities for our individual and corporate members to network, learn, and engage with the community; through a variety of tools and innovative features.

LinkedIn: <http://www.linkedin.com/e/gis/41051>

Website: www.MRGAsn.com



Next Gen Market Research (NGMR)

The market has changed, the customers have changed, why should consumer insight be the same? Marketing Research/Consumer Insights have changed little since the mid 90's and still offer only 1.0 Insights. This is an invitation only group for Analytics Professionals with 7+ years of experience who want more than traditional market research.

LinkedIn: www.linkedin.com/e/gis/31804

Website: www.nextgenmr.com

Research & Production Partners



Anderson Analytics

More than market research, Anderson Analytics is the first next generation marketing consultancy to combine new technologies, such as data and text mining, with traditional market research. Anderson Analytics helps clients gain The Information Advantage by combining the efficiencies and business experience found in large research firms with the rigorous methodological understanding from academia and the creativity found only in smaller firms.

www.AndersonAnalytics.com



Brand3Sixty

Brand3Sixty is a full service strategic research consultancy. Our vision is to provide our clients with access to both top research professionals and a broad scope of the most innovative research technologies. Specifically, we have organized ourselves around a concept, not a technique or a monolithic plan: We want our clients to make smart decisions based upon timely, targeted and insightful market intelligence. Our focus is on developing a consultative research strategy that meet the insights needs of clients, not trying to make our client's needs fit our preferred methodologies. The end result is a plan that gives you the best view of your brand possible, from all the angles.

www.Brand3Sixty.com



iCharts

At iCharts, our mission is simple - to empower the world to explore and share visual data. The company is the leading online solution for visual interactive reports in the \$36 billion market research industry. iCharts customers include global Fortune 500 consumer brand companies and the leading market research firms that serve them.

With our solutions, market research companies can augment their PowerPoint reports with highly-interactive visual charts that offer a lot more insights. We can collect and consolidate all your survey data. We cover the entire breadth - from simple small data sets on one end to large, complex data sets ranging over 100 million records. We process the data and automatically populate interactive charts so that you and your clients can filter data visually.

www.iChartsBusiness.com



Infosurv

Infosurv, Inc. was established in 1998 and has since established itself as a recognized leader in online research. We have conducted online employee, customer, and B2B/ B2C market research surveys for hundreds of global Fortune 500 corporations, major government agencies, renowned universities, and non-profit organizations. Infosurv has PhD-level researchers, experienced project managers, and a highly trained technical and analytical staff ready to cater to clients' every need.

Our mission is simple: we strive to provide innovation in online research, bringing unique technologies and methodologies to our clients. Living on the cutting edge of market research is our passion.

Infosurv has introduced the first true prediction market for consumer market research. Validated against both market performance data and side-by-side against traditional concept tests, our prediction market methodology, the Infosurv Concept Exchange (iCE), offers new levels of speed and efficiency for vetting new ideas.

www.Infosurv.com | www.iCEpredict.com



Interviewing Service of America (ISA)

ISA is one of the largest data collection and processing companies in America. With 500 CATI stations across 5 phone centers in U.S., Canada, and India; qualitative capabilities; and advanced technologies for IVR and “Flash” online research, we can handle any project. Multicultural experts for over 27 years, interviewing around the globe in 67 languages. Experienced in tracking, B2B, public policy, political/exit polling, and customer satisfaction including Linked Hera for call center satisfaction. ISA companies include focus group facility, Qualitative Insights (Sherman Oaks & Universal City) providing national focus group recruiting/coordination and field management division, Field by Design for national F2F and intercept “outside the mall” specializing in ethnic/hard to reach targets.

www.ISAcorp.com



LMC group

The LMC group is a new kind of consultancy focused on helping clients in the global business intelligence and insights industry to compete effectively in the 21st century.

We are a group of proven industry leaders, respected visionaries, and acknowledged innovators in our core areas of expertise. Our goal is to work with our clients find the missing pieces of the business success puzzle. We offer an integrated approach to uncovering the hidden opportunities for growth, innovation, and competitive advantage that may be overlooked by overtaxed leaders focused on running their businesses.

Our approach is simple: We work with you to define your vision. We develop a winning strategy to bring the vision to life. We ensure the tactical plan is in place and that you have the tools to implement it successfully.

Our practice areas are focused on: Business Strategy, Product Design & Innovation, Marketing Strategy & Communications, IT Infrastructure Architecture, and New Media Utilization.

www.askLMCg.com



OnePoint Mobile Surveys

Mobile Research Made Easy - Any handset. Any country. Any language.

As the global market leader in mobile phone survey technologies and services, OnePoint makes conducting mobile research easy and cost effective. OnePoint Surveys offers a complete mobile research solution encompassing the creation of mobile surveys which supports video and picture capture, location based services (LBS), recruiting and profiling mobile communities and panels, through to rewarding participants with cash and other incentives directly to their phone. The OnePoint mobile survey platform enables research to be deployed across 193 countries via multiple mobile channels; SMS, WAP, mobile applications, choice (where the participants selects their preferred mobile channel for completion) and mobile websites, using any type of mobile phone handset. Mobile surveys can be easily created and launched online 24x7 via your internet browser using the OnePoint secure web portal (software as a service - SaaS) that also enables you to monitor and analyze results in real-time.

Market research agencies, brand owners and enterprise feedback management (EFM) companies, use OnePoint for a wide spectrum of mobile research including; customer satisfaction, loyalty, Net Promoter Scores (NPS), diary tracking, voice of the customer and capturing in the moment insight.

www.onepointsurveys.com

Consulting Partners



Foundation for Transparency in Offshoring

The Foundation for Transparency in Offshoring
 Mission: The FTO is an independent, non-profit organization dedicated to educating buyers and suppliers of consumer research and analytics services on considerations related to offshoring, and to establishing sensible, clear disclosure standards for offshoring practices. FTO holds no position for or against offshoring research services, but maintains transparency and open dialogue between research buyers and suppliers are critical to making informed, secure business decisions.

FTO defines offshoring as the movement of a business process done at a company in one country to the same or another company in a different country, usually due to a lower cost of operations in the new location.

FTO certification is free. Market research suppliers may self certify on the site. Market research clients are encouraged to require their suppliers to certify and to show their support for the transparency initiative.

www.offshoringtransparency.org



StrategyOne

StrategyOne is an insights-driven consulting firm that employs opinion research and advanced media analysis tools to craft evidence-based communications strategies for clients across most major sectors. The firm specializes in multi-country reputation, branding and communications research.

StrategyOne's research-based counsel has informed the tactical communications efforts of an array of clients from trade associations to international corporations, healthcare to financial services, and non-profits to foreign governments.

StrategyOne's diverse capabilities encompass both qualitative and quantitative primary data collection methods, including telephone and online surveys, focus groups and dial testing, executive and niche in-depth interviews, eye tracking and online communities. The firm also has deep expertise in secondary formative research such as literature reviews, market trend analysis and best practices, needs assessments, secondary analysis, meta-analysis, observation, triangulation, and case study analysis.

With offices in New York, London, Paris, Washington DC, Chicago, Silicon Valley, Abu Dhabi and Atlanta, StrategyOne leverages exploratory, observatory and co-creative research to provide strategic counsel to corporate, organizational and governmental clients globally.

www.StrategyOne.net

Surveys & Forecasts, LLC

Surveys & Forecasts, LLC

Bob Walker runs Surveys & Forecasts, LLC, a strategic marketing research firm founded in 1994, with a short list of loyal clients. He is well-known for driving business success by helping clients understand market formation and structure, identifying meaningful brand levers, and aligning brand benefits with core consumer attitudes. He was the lead analyst on the Foundations of Quality study of online panel data, the largest project in the 75-year history of the Advertising Research Foundation. He leads workshops around the nation on data quality.

www.safllc.com

New Qualitative Research Methods & Tools

USER GUIDE

Choosing among today's qualitative options

Understand new qualitative research methods

Learn how to choose an appropriate method for a project

DIRECTORY

New qualitative research

PLATFORMS and **PROVIDERS**

www.NewQualitative.org



New York
AMA
Communication
Network

GREENBOOK®



QUALITATIVE RESEARCH
CONSULTANTS ASSOCIATION

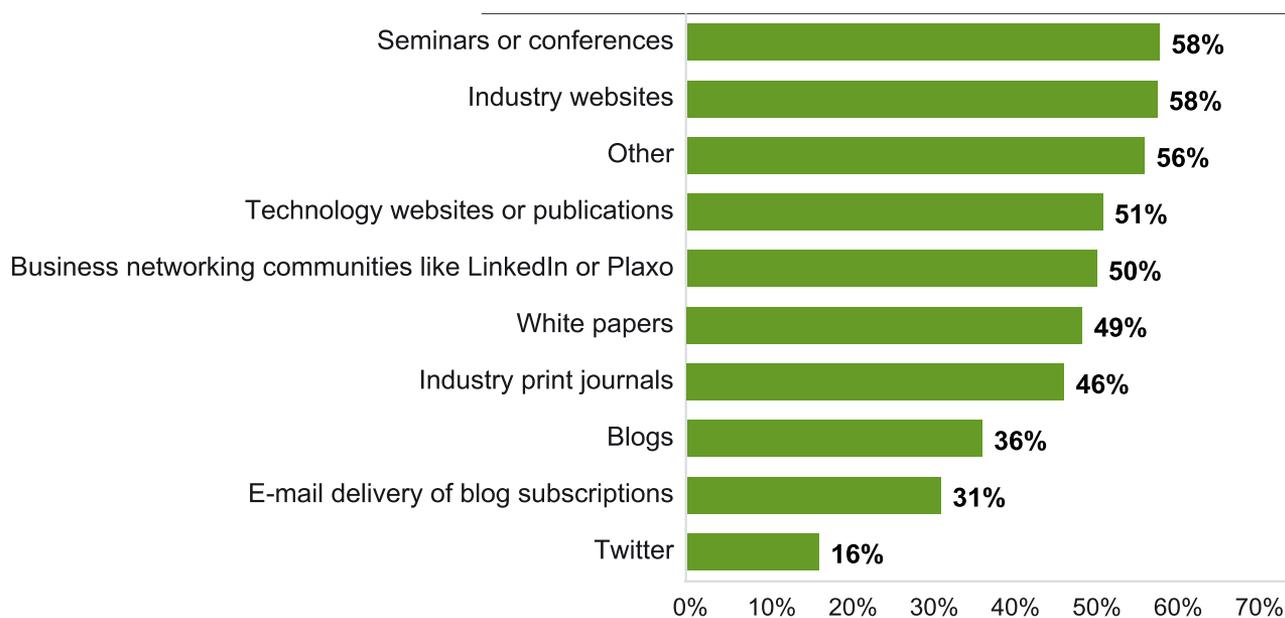
APPENDIX: Charts & Additional Findings

Additional visual and interactive charts for this report can be found at <http://demo.ichartsbusiness.com/GRIT>

Please rate the importance of each of the following for staying abreast of developments in research methodologies

	Total	Full Service	Research Consultant	CATI/ Online Provider	Data Collection	Non-Profit	Corporate Research	Agency/ PR Firm
Base:	(673)	(276)	(174)	(38)	(48)	(20)	(97)	(20)
	%	%	%	%	%	%	%	%
Industry websites	58%	56%	58%	61%	63%	65%	57%	65%
Seminars or conferences	58%	62%	53%	45%	58%	60%	63%	50%
Technology websites or publications	51%	57%	51%	55%	35%	50%	43%	40%
Business networking communities like LinkedIn or Plaxo	50%	50%	52%	63%	48%	35%	49%	50%
White papers	49%	50%	49%	29%	38%	60%	49%	80%
Industry print journals	46%	48%	48%	42%	56%	45%	36%	45%
Blogs	36%	38%	29%	37%	19%	45%	44%	60%
E-mail delivery of blog subscriptions	31%	30%	29%	32%	17%	60%	35%	50%
Twitter	16%	18%	12%	34%	4%	10%	19%	20%
Other	9%	8%	8%	8%	8%	10%	12%	25%

Ways To Stay Abreast of Industry Developments



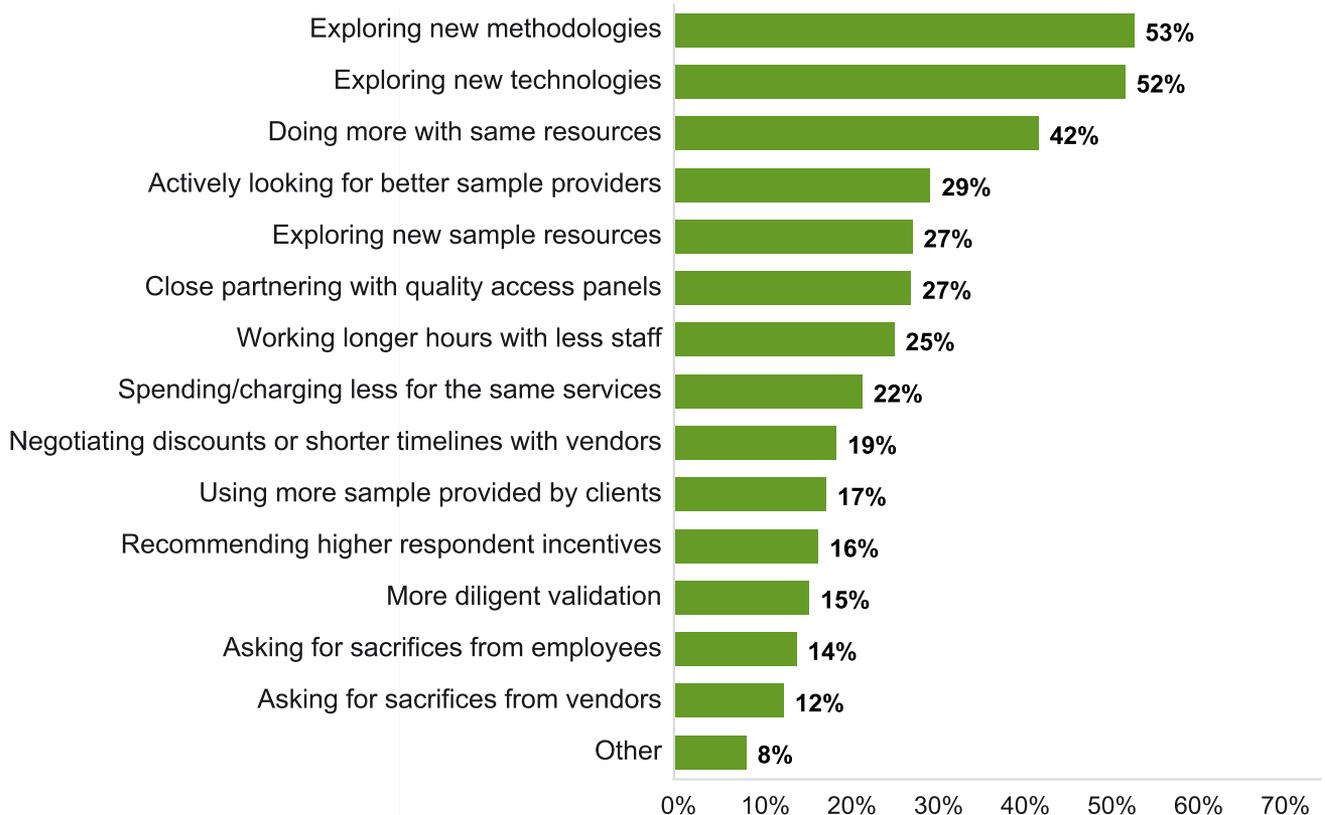
Note: Among total sample (n=673).

Question 33

What steps is your organization taking to address these issues?

	Total	Full Service	Research Consultant	CATI/ Online Provider	Data Collection	Non-Profit	Corporate Research	Agency/ PR Firm
Supplier Types:	(673)	(276)	(174)	(38)	(48)	(20)	(97)	(20)
	%	%	%	%	%	%	%	%
Exploring new methodologies	53%	56%	51%	39%	27%	60%	61%	65%
Exploring new technologies	52%	54%	48%	55%	42%	45%	59%	55%
Doing more with same resources	42%	39%	39%	45%	48%	55%	52%	25%
Actively looking for better sample	29%	33%	24%	32%	31%	35%	27%	30%
Close partnering with quality access panels	27%	31%	25%	21%	29%	15%	22%	40%
Exploring new sample resources	27%	28%	25%	37%	29%	25%	26%	30%
Working longer hours with less staff	25%	25%	17%	29%	25%	55%	34%	25%
Spending/charging less for the same	22%	23%	25%	39%	25%	5%	7%	10%
Negotiating discounts or shorter	19%	17%	16%	26%	25%	10%	22%	20%
Using more sample provided by clients	17%	17%	23%	5%	13%	20%	14%	25%
Recommending higher respondent	16%	17%	17%	21%	19%	25%	11%	5%
More diligent validation	15%	18%	11%	21%	21%	15%	12%	5%
Asking for sacrifices from employees	14%	16%	10%	18%	13%	10%	15%	5%
Asking for sacrifices from vendors	12%	10%	13%	3%	13%	10%	21%	30%
Other	8%	8%	10%	5%	2%	15%	9%	-

Ways To Address Data Collection Issues



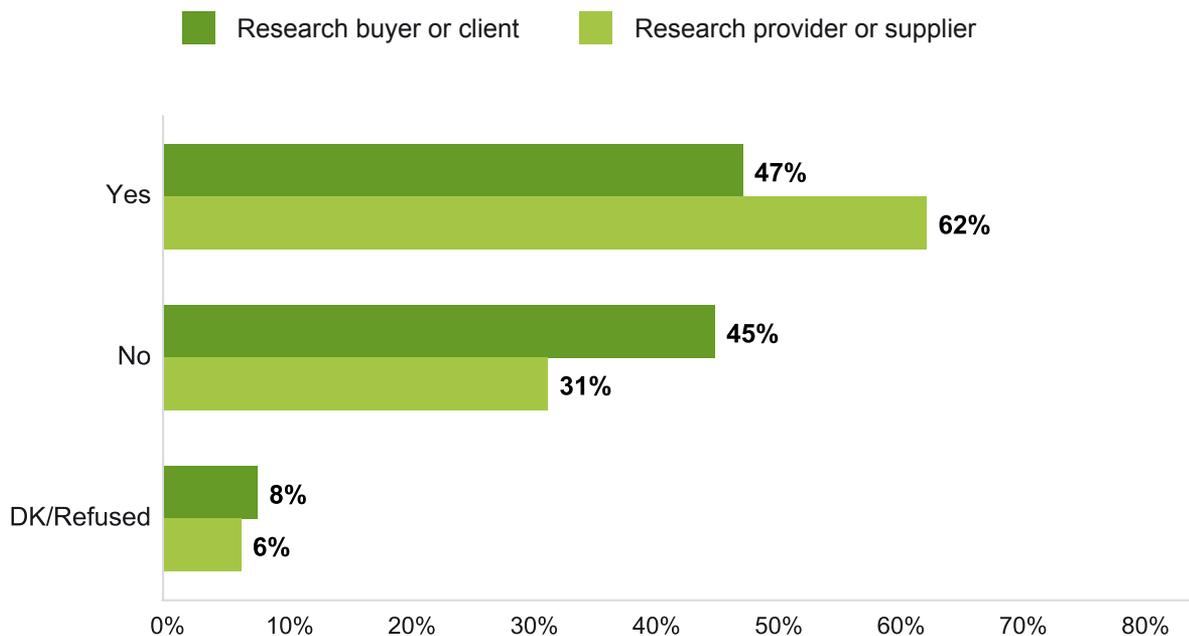
Note: Among total sample (n=673).

Question 36

APPENDIX: Research Spending

STANDARD TRACKING QUESTIONS	Total	Client	Supplier	Gap
Base:	(673)	(131)	(542)	+ / -
	%	%	%	
[Buyer/Client] Did your spending on/demand for research increase in 2010 compared to 2009?				
Yes	59%	47%	62%	-15%
No	34%	45%	31%	+14%
DK/Refused	7%	8%	6%	+2%
Please select the statement that best describes your expectations...				
Increase (Net)	59%	35%	65%	-30%
We are already experiencing stronger research revenue/ spending and are optimistic about the future.	32%	14%	37%	-23%
We expect increasing volume and research revenue/ spending over the next year, but we have not yet seen improvement.	27%	21%	28%	-7%
We expect current levels of research revenue/ spending to continue for some time to come.	30%	47%	27%	+20%
We expect a decline in levels of research revenue/ spending in the coming months.	10%	18%	8%	+10%

Research Spending and Demand Increase



Note: Among research buyers (n=131) and research suppliers (n=542).

Question 39

APPENDIX: Outsourcing

Do you outsource any of your QUANTITATIVE research work to other companies, rather than using internal resources, full- or part-time staff, or contractors?

Yes	60%	84%	54%	+30%
No	40%	16%	46%	-30%

In 2010, have you outsourced a higher percentage of your QUANTITATIVE research work, about the same percentage, or a lower percentage than in 2009?

Base = Outsourced Quantitative:	(402)	(110)	(292)	+ / -
	%	%	%	
Higher percentage than 2009	23%	17%	25%	-8%
About the same percentage as 2009	67%	74%	64%	+10%
Lower percentage than 2009	10%	9%	10%	-1%
No answer	-	-	1%	-1%

In 2010, what percentage of your outsourced QUANTITATIVE research dollars has gone to suppliers outside your country compared to 2009?

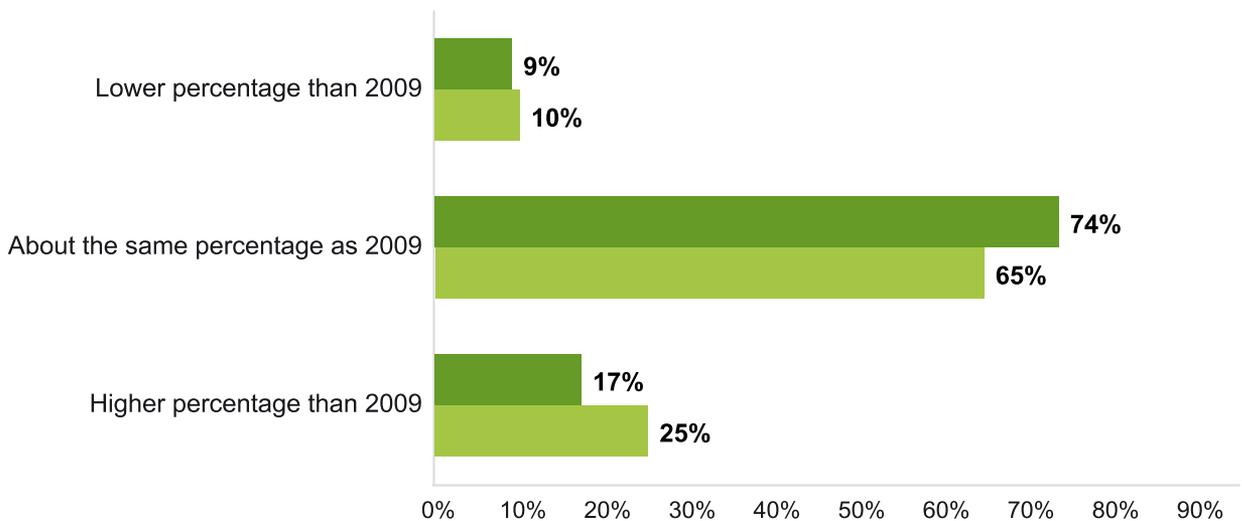
Higher percentage than 2009	14%	12%	15%	-3%
About the same percentage as 2009	73%	78%	71%	+7%
Lower percentage than 2009	12%	10%	13%	-3%
No answer	1%	-	1%	-1%

Do you outsource any of your QUALITATIVE research work to other companies, rather than using internal resources, full time or part-time staff, or contractors?

Yes	44%	72%	37%	+35%
No	55%	28%	62%	-34%
No answer	1%	-	1%	-1%

Outsourcing of Quantitative (Q4 2010)

■ Research buyer or client ■ Research provider or supplier



Note: Among research buyers (n=131) and research suppliers (n=542).

Question 42

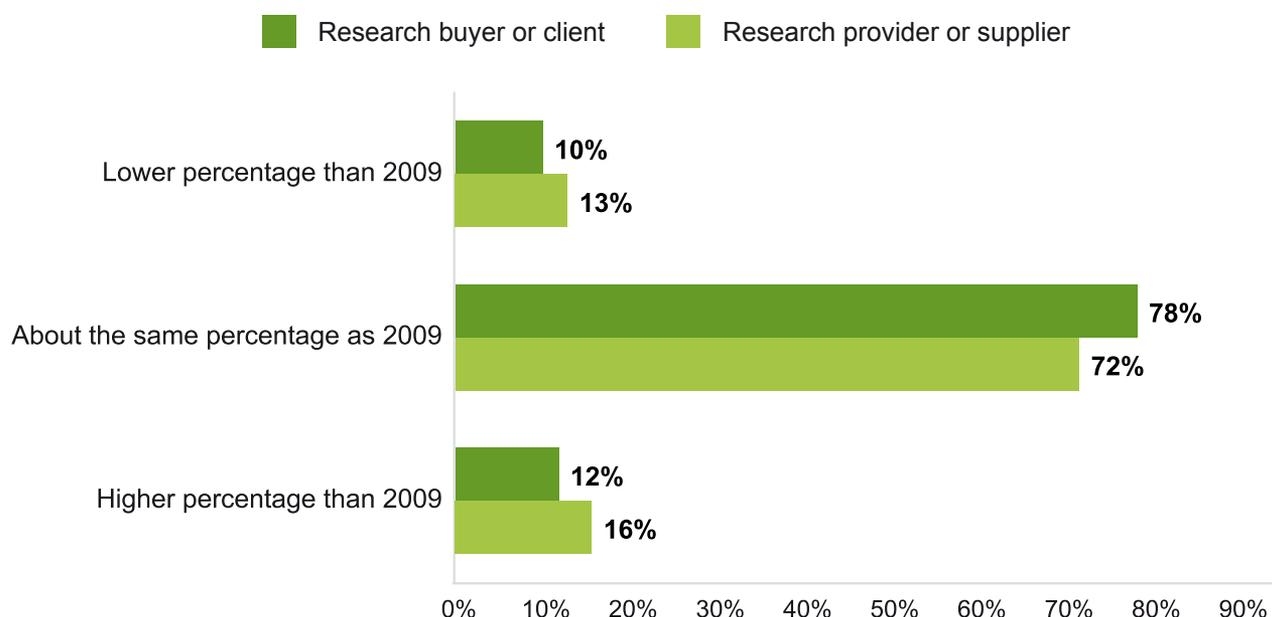
In 2010, have you outsourced a higher percentage of your QUALITATIVE research work, about the same percentage, or a lower percentage than in 2009?

Base = Outsourced Qualitative:	(297)	(94)	(203)	+ / -
	%	%	%	
Higher percentage than 2009	15%	14%	16%	-2%
About the same percentage as 2009	73%	76%	72%	+4%
Lower percentage than 2009	11%	10%	11%	-1%
No answer	1%	1%	-	+1%

In 2010, what percentage of your outsourced QUANTITATIVE research dollars has gone to suppliers outside your country compared to 2009?

Base	(297)	(94)	(203)	+ / -
	%	%	%	
Higher percentage than 2009	11%	7%	13%	-6%
About the same percentage as 2009	73%	79%	71%	+8%
Lower percentage than 2009	14%	13%	15%	-2%
No answer	1%	1%	1%	-

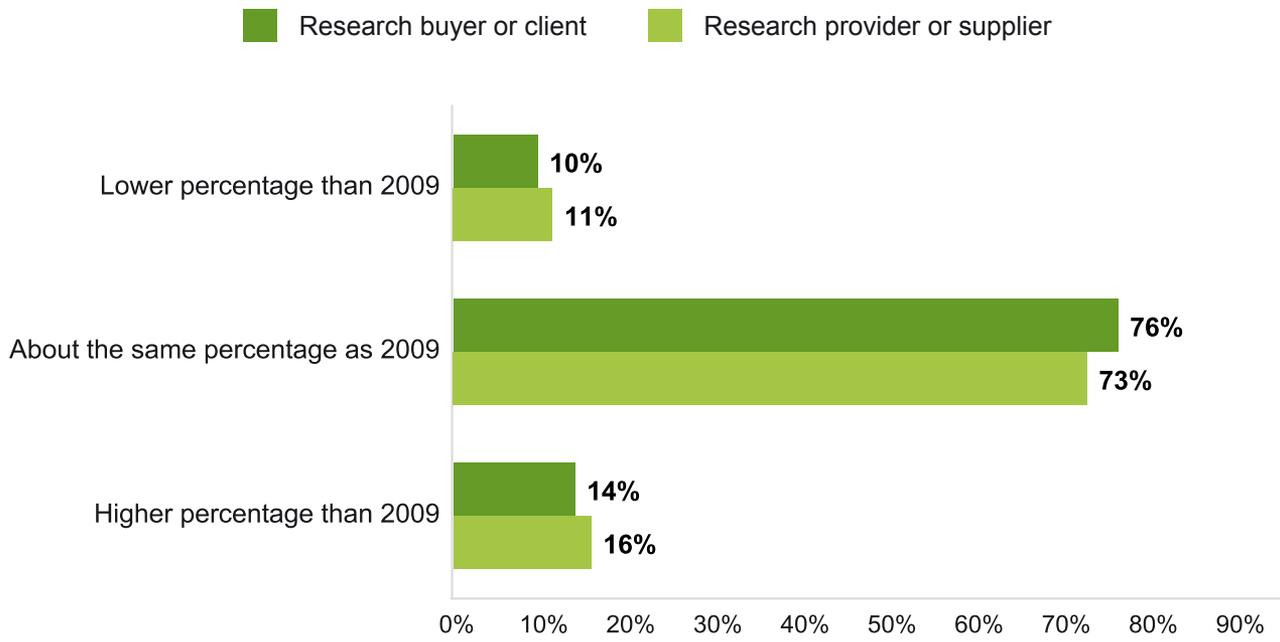
Outsourcing of Quantitative Spending Out of Country (Q4 2010)



Note: Among research buyers (n=131) and research suppliers (n=542).

Question 43

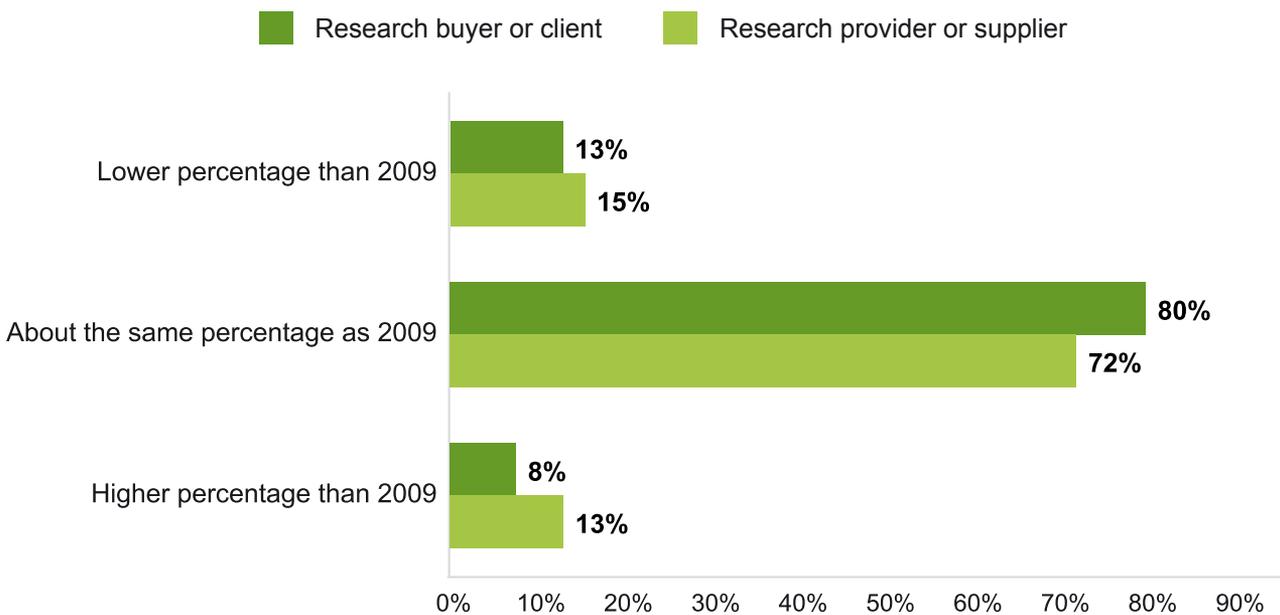
Outsourcing of Qualitative (Q4 2010)



Note: Among research buyers (n=131) and research suppliers (n=542).

Question 45

Outsourcing of Qualitative Spending Out of Country (Q4 2010)



Note: Among research buyers (n=131) and research suppliers (n=542).

Question 46

APPENDIX: Company Characteristics

STANDARD TRACKING QUESTIONS (CONTINUED)	Total	Client	Supplier	Gap
Base:	(673)	(131)	(542)	+ / -
	%	%	%	

Which of the following best describes your organization?

We are entirely based in the United States	45%	31%	49%	-18%
We are entirely based outside the United States	22%	10%	25%	-15%
We are primarily based in the US but have offices in one or more other countries	22%	50%	15%	+35%
We are primarily based elsewhere but have offices in the US	10%	9%	10%	-1%
No answer	1%	1%	1%	-

How many employees, counting yourself, does your research organization or department have?

One only (1)	15%	12%	15%	-3%
2 - 5 (2.5)	24%	31%	22%	+9%
6 - 10 (8)	12%	16%	11%	+5%
11 - 20 (15.5)	12%	15%	11%	+4%
20 - 50 (35)	14%	8%	16%	-8%
More than 50 (60)	22%	17%	24%	-7%
No answer	1%	1%	1%	-
Mean	22.3	17.6	23.4	-5.8

In how many cities does your company have offices?

One only	44%	12%	51%	-39%
2	14%	8%	15%	-7%
3	9%	8%	9%	-1%
4	4%	7%	3%	+4%
5	2%	5%	2%	+3%
6 or more	26%	57%	18%	+39%

How would you describe your position in your organization?

Owner or sole proprietor	27%	3%	33%	-30%
Research Director	17%	43%	11%	+32%
Partner or part owner	16%	2%	19%	-17%
Project Manager	8%	14%	7%	+7%
General Manager	7%	8%	7%	+1%
Department Head	7%	14%	5%	+9%
Principal	6%	3%	7%	-4%
Research Assistant	1%	3%	1%	+2%
Other	8%	9%	8%	+1%

STANDARD TRACKING QUESTIONS (CONTINUED)	Total	Client	Supplier	Gap
Base:	(673)	(131)	(542)	+ / -
	%	%	%	

In which of the following regions does your company currently have an office?

United States	74%	87%	71%	+16%
UK or Ireland	25%	45%	20%	+25%
Western Europe (Not UK or Ireland)	23%	45%	18%	+27%
Canada	21%	44%	15%	+29%
South Asia/India	17%	37%	12%	+25%
China	15%	36%	10%	+26%
Other SE Asia or Pacific Rim including	14%	36%	8%	+28%
Australia or New Zealand	14%	33%	9%	+24%
Other Latin America or Caribbean	13%	32%	9%	+23%
Eastern Europe including Russia	13%	23%	10%	+13%
Middle East and North Africa	12%	23%	9%	+14%
Mexico	11%	30%	6%	+24%
Central and Southern Africa	7%	18%	5%	+13%

In which of the following regions are you personally located?

United States	67%	82%	64%	+18%
UK or Ireland	6%	4%	6%	-2%
Western Europe (Not UK or Ireland)	6%	5%	7%	-2%
Canada	4%	1%	5%	-4%
South Asia/India	3%	2%	4%	-2%
Eastern Europe including Russia	3%	-	4%	-4%
Australia or New Zealand	2%	2%	2%	-
Mexico	1%	1%	1%	-
Other Latin America or Caribbean	1%	1%	1%	-
Middle East and North Africa	1%	-	1%	-1%
Central and Southern Africa	1%	-	1%	-1%
China	1%	1%	1%	-
Other SE Asia or Pacific Rim including	1%	-	1%	-1%
No answer	2%	3%	2%	+1%

STANDARD TRACKING QUESTIONS (CONTINUED)	Total	Client	Supplier	Gap
Base:	(673)	(131)	(542)	+ / -
	%	%	%	

What is the range of your company's annual market research billings/budget for primary market research (in USD)?

NOTE: No answer responses have been removed.

Answered Question:	(545)	(114)	(434)	+ / -
	%	%	%	
Under \$1MM (Net)	46%	41%	46%	-5%
Less than \$100,000 USD	14%	10%	15%	-5%
\$100,000 - \$249,999	11%	10%	11%	-1%
\$250,000 - \$449,999	7%	10%	8%	+3%
\$450,000 - \$749,999	7%	5%	8%	-3%
\$750,000 - \$999,999	6%	6%	5%	+1%
\$1MM - \$5MM (Net)	27%	37%	26%	+11%
\$1,000,000 - \$1,999,999	14%	13%	14%	-1%
\$2,000,000 - \$2,999,999	6%	9%	6%	+3%
\$3,000,000 - \$3,999,999	4%	6%	4%	+2%
\$4,000,000 - \$4,999,999	4%	9%	3%	+7%
Over \$5MM (Net)	27%	22%	28%	-6%
\$5,000,000 - \$7,499,999	6%	6%	6%	-1%
\$7,500,000 - \$9,999,999	4%	5%	3%	+2%
\$10,000,000 - \$14,999,999	4%	2%	4%	-1%
\$15,000,000 or more	14%	9%	15%	-6%
Mean (000s)	\$5,348	\$4,535	\$5,561	-\$1,026
Median (000s)	\$1,324	\$1,600	\$1,254	+\$346

APPENDIX: International Coverage

STANDARD TRACKING QUESTIONS (CONTINUED)	Total	Client	Supplier	Gap
Base:	(673)	(131)	(542)	+ / -
	%	%	%	

Over the past year, what percentage of your data was collected in the US?

All within the US	34%	43%	32%	+11%
Percent within the US	45%	44%	45%	-1%
None within the US	19%	10%	21%	-11%
No answer	2%	3%	2%	+1%

To be more specific, please indicate all of the following markets from which your organization collected research data from respondents in the past year (2010).

United States	42%	43%	42%	+1%
Western Europe (Not UK or Ireland)	41%	36%	43%	-7%
UK or Ireland	38%	33%	39%	-6%
Canada	37%	40%	37%	+3%
China	28%	24%	29%	-5%
Other Latin America or Caribbean	27%	20%	29%	-9%
Other SE Asia or Pacific Rim including	27%	22%	28%	-6%
Eastern Europe including Russia	27%	20%	29%	-9%
Mexico	26%	21%	27%	-6%
South Asia/India	26%	24%	26%	-2%
Australia or New Zealand	24%	23%	25%	-2%
Middle East and North Africa	19%	14%	21%	-7%
Central and Southern Africa	15%	11%	16%	-5%
No answer	36%	46%	34%	+12%

Presented by *The Market Research Event*

TECHNOLOGY DRIVEN MARKET RESEARCH EVENT

CAPTURE INSIGHTS IN REAL TIME
MEASURE MEANINGFUL CHATTER
BREAKTHROUGH METHODOLOGIES

Showcasing Revolutionary Speakers and Remarkable Tools

Neuromarketing – Virtual Shopper Behavior – Social Gaming – Crowdsourcing – Geo-Location – Mobile Research – Social Analytics – Visualization Analytics – Webcam Interviews – Text Analytics – Emotional Response Technologies – Privacy Policies – The Future Of Market Research

Special Offer - Save 20% off the standard rate with code TDMR11GRIT.

WWW.IIRUSA.COM/TDMR

5.2-3.2011 | CHICAGO, IL