GreenBook

Research Industry Trends Study

Summer 2010

REPORT

GREENBOOK

Media Partners: Market Research Global Alliance, NextGen Market Research

Partners: Anderson Analytics, Brand3Sixty, iCharts, iModerate research technologies, ISA, Offshoring Transparency, OnePoint, Peanut Labs, Pioneer marketing research, Research Business Report, StrategyOne

Introduction
and Methodology

In 2003, The GreenBook began collaborating with select industry partners to produce the annual GreenBook Research Industry Trends (GRIT) report. Initially focused on data collection issues, the scope of GRIT expanded to include directions in outsourcing, advances in technology, and inter-relationships among research providers/providers and clients/ buyers.

In late 2009 the collaboration was formalized by the formation of the GreenBook Research Industry Trends Study under the leadership of the GreenBook Marketing Research Directory. Partners include: Anderson Analytics, Brand3Sixty, iCharts, iModerate, Interviewing Service of America, The MRGA, NextGen Market Research, The Foundation for Transparency in Offshoring, one point Mobile Surveys, Peanut Labs, Pioneer Marketing Research, RFL Communications, Rockhopper Research, and Strategy One.

For 2010 GRIT will conduct two studies. The first was fielded in Spring 2010 and the second will be fielded in October. Each will cover key issues that have been trended since the initial GRIT study in 2003, but will focus on a select topic of interest to the industry. This survey asked a subset of questions from the annual study and focused on “Respect For Research” and probes perceptions of market research and researchers both within the profession and among other marketers. The second 2010 study will focus on Research Technologies and will include the full complement of annual GRIT survey questions.

A brief e-mail 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 2010 edition of the GreenBook Marketing Research Directory. From these invitations, a total of 875 usable responses were included in our analysis. The 2003-2010 respondent mix is displayed below.

Respondent Category	2010a	2009	2008	2007	2006	2005	2004	2003
Full-service providers	48.2%	42.6%	46.1%	42.9%	43.3%	49.7%	43.7%	36.0%
Research consultant	20.9%	25.6%	23.9%	21.0%	14.5%	13.1%	11.9%	13.7%
Research client/purchaser in an enterprise	16.9%	10.9%	9.9%	10.9%	11.7%	8.9%	17.9%	21.8%
Data Collection (Quant/Qual)	9.5%	13.7%	12.7%	14.8%	20.1%	17.6%	5.2%	5.8%
Advertising agency	3.0%	3.7%	3.2%	3.3	3.3%	4.2%	4.2%	4.9%
Academic/non-profit/medical researcher	1.5%	3.5%	4.2%	7.1%	7.0%	6.5%	7.1%	17.9%
Total Respondents	(875)	(512)	(284)	(366)	(600)	(336)	(720)	(431)

If you could change one thing in the attitudes or behavior of marketers and other clients toward market researchers, what would you change? Why do you say this?

To stay abreast of the most current issues facing the market research industry, we continue to modify the online quantitative survey instrument. Thus, year-to-year trends are not available for every question. Where possible, trend data are shown. Consequently, the base per question may change. For consistency in analysis, all rating questions are scaled to indicate "the higher the number, the more positive the result."

IModerate Qualitative Interviewing

Partnering with GRIT for the first time on this study, iModerate Research Technologies conducted 64 qualitative research interviews with respondents who were taking the survey online. Depending on their answers to qualifying questions (in particular their perceptions of whether there was an advance, a decline, or a status quo in respect for marketing research and MR professionals), respondents participated in a one-on-one online chat with a professional moderator in order to explore the topic of respect more deeply.

The touchstone for the interview was the following question, which respondents also answered in writing:

If you could change one thing in the attitudes or behavior of marketers and other clients toward market researchers, what would you change? Why do you say this?

The larger research agenda for the interviews was as follows:

- Explore views about changes in levels of respect for market research providers and organizations.
  - What do researchers feel is causing these changes?
  - Most importantly, what role, if any, has the availability of easy-to-use online survey software had on their perception of market research?
- Understand what researchers would change about the attitudes or behaviors of marketers and their clients toward market researchers and why.
  - What impact do they feel these changes would have on how research products and services are regarded?

Observations and verbatims from these interviews can be found in the Key Findings, the Special Issue Section, as well as in the back of the report.

Please see the final page for a list of acknowledgements to the many sponsors and partners who contributed to the success of this expanded RIT initiative.

For more information regarding the Research Industry Trends 2010, please contact:

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WHAT YOU REALLY NEED TO KNOW: Key Findings

A. Business Outlook Brighter in Spring/ Summer 2010

1. EXPECTATIONS ARE HIGHER

From Winter in 2009 to late Spring 2010, expectations for increased revenue and spending on research climbed from the lowest ever recorded by GRIT (only 47% expecting an increase in 2010) to a figure (73%) approaching the 2007 level of 79%.

Positive outlook was far more prevalent among research providers (80%) than research buyers (45%). But in 2009 only 31% of client side researchers had a positive outlook for the coming year.

We should note that data was collected shortly after a major run-up in the stock market and before fears of a double-dip recession surfaced in the business press. The forthcoming Fall 2010 GRIT could tell a different story.

2. EXPERIENCE SUPPORTS THEM

Although caution is indicated and the positive expectations recorded in the late Spring could turn out to be a blip rather than a trend, there is more heartening news. Not merely expecting better times, a striking percentage of 2010 respondents report that they are actually seeing stronger revenue and higher spending on research.

When GRIT 2009 data was being collected, only 6% said they had been pleasantly surprised by a stronger recovery than expected. The predominant attitude was a highly cautious optimism that at least the worst was over. A little less than half of respondents expected recovery but had not experienced any.

By Summer 2010 the change was dramatically positive.

In the Winter of 2009 only 27% were willing to believe that the worst was over (21%) or were already experiencing growth (6%). By late Spring and Summer 2010, that figure had more than doubled to 60%. Even more striking, the percentage reporting stronger revenue/spending leapt by a factor of 5 from 6% to 33%.

Buyers Optimistic, but Less So

For reasons that are not clear, research providers seem more likely to expect and to be experiencing growth. A strikingly higher percentage of client-side researchers (34% to 12% of suppliers) expect continued depressed spending levels or a further decline. Perhaps they know something that suppliers do not.

Still, 66% of client/buyers expect or are already experiencing growth in budgets and spending.

It is sadly possible that some of the increased business reported comes from the widespread business failures among research providers during the past year. With fewer competitors, the survivors have richer pickings.

B.Special Focus Issue: Respect and Regard for Research

Some researchers feel the profession is under siege: beset on the one hand by unrealistic client expectations for pricing and turnaround and on the other by a growing notion that there is "nothing all that special about conducting surveys" among non-research managers with easy access to user-friendly online polling applications.

Some researchers on the supplier and on the enterprise side feel that their clients are often unable to judge quality and as a result increasingly view research as a commodity.

This edition of GRIT 2010 addresses this dynamic as "Respect for Research." The key questions seem to be whether marketing research is in fact losing stature as a key component of corporate strategic planning and whether research professionals are regarded less favorably than in the past.

Respect for the Research Product

Do you feel that the products and services traditionally delivered by market research practitioners are receiving more or less respect from marketers today than they did when you came into the business?

While most (70%) researchers feel research is at least as well respected today as in the past, almost a third see a decline in respect. Further, among those in the best position to know (researchers with more than 10 years in the industry), 35% see diminished respect, compared to fewer than 23% of those with under 10 years experience.

Respect for the Research Profession

Compared to when you came into the business or five years ago, do you feel that market research is now receiving more or less respect as a profession?

Again, time in the industry seems to play a pivotal role in perceptions.

While a large majority in all respondents categories feel that researchers as a profession are as well respected or better respected than formerly, there is a significant minority of "old timers" with more than 20 years in the industry who perceive less respect. They are twice as likely to feel that way as are researchers with 10 years or less experience.

Details and further breakouts are available in the following discussion section.

Factors that Enhance or Erode Respect - A Qualitative Perspective

iModerate Research Technologies approached the question of respect for research qualitatively, using one-on-one interviews to glean additional insight into how respect for the industry has changed, and what underlying factors contributed to the change.

Marketers and researchers alike expressed a sense that the industry has evolved in recent years, shifting some perceptions about research. However, this did not translate into a belief that the industry overall is held in lower esteem.
Instead, respondents feel that there has been a transformation in the way research is used and how its relevance is determined.

Buyers reported that they increasingly seek out suppliers who understand the intricacies of their particular business, and who deliver strategic insight rather than boring 100-page decks full of data.

Suppliers, in turn, are recognizing the power of differentiating themselves by serving as confident and vital advisers who offer actionable ideas and recommendations.

- When corporate research suppliers deliver such insight, esteem rises; when they fall short, clients question the value they provide.
- How suppliers measure up on this issue also influences how tempting—or irrelevant—cheap and easy do-it-yourself (DIY) options appear to clients.

(The preceding section was prepared by iModerate's qualitative research analysts.)

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DETAILED FINDINGS

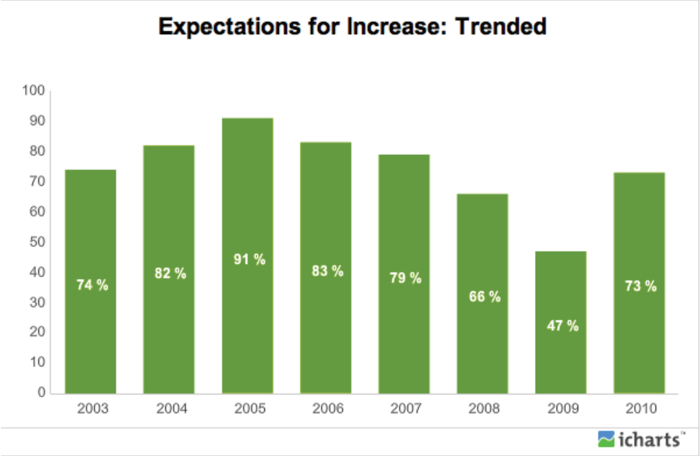
A. The business:
Improved Outlook (for the survivors)

Expectations for Increased Revenue and Spending are Markedly Higher

Do you anticipate that your spending on [revenue from] research will increase in 2010 compared to 2009?

From the Winter of 2009 to the late Spring and Summer of 2010, expectations for increased revenue and spending increased nearly to 2007 levels.

Expectations for Increase: **Trended**



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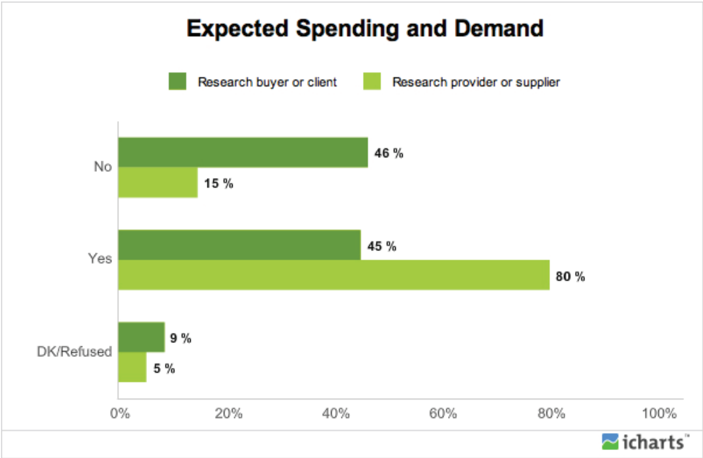
Clients were less optimistic than suppliers by a striking margin, but clients were much more optimistic than they had been in 2009.

Expected Spending and Demand



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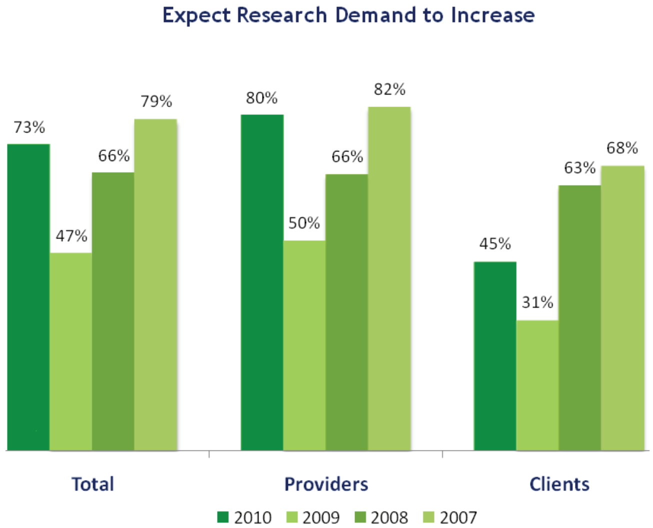
In 2010, suppliers were almost as enthusiastic about growth prospects as they had been in 2007 (80% to 82%). Clients were more positive than in 2009, but a far cry from their positive expectations in 2009 (45% to 68%).



Guarded Optimism for 2010 in GRIT 2009 Was Justified

Please select the statement that best describes your expectations.

When GRIT 2009 data was being collected, 70% of respondents expected some degree of recovery to begin soon or were already seeing an uptick in business and revenue. Only 6%, however, said they had been pleasantly surprised by a stronger recovery than expected. The predominant attitude was a highly cautious optimism that at least the worst was over. A little less than half of respondents expected recovery but had not experienced any.

By the Summer 2010 the change was dramatically positive.

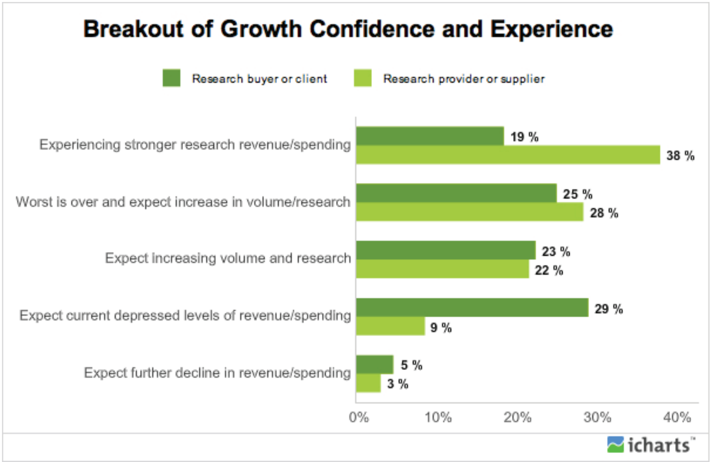
In the Winter of 2009 only 27% were willing to believe that the worst was over and expected or were already experiencing growth. By late Spring and Summer 2010, that figure had more than doubled to 60%. Even more striking, the percentage reporting stronger revenue/spending leapt by a factor of 5 from 6% to 33%.

Expectations for Revenue/Spending	2009	2010
We expect a further decline in levels of research revenue/spending in the coming months.	8%	3%
We expect current depressed levels of research revenue/spending to continue for some time to come.	21%	13%
We believe that we may see increasing volume and research revenue/spending later in the year, but we have not yet seen improvement	44%	23%
We believe that the worst is over for our business and expect increasing volume and research revenue/spending	21%	27%
We are already experiencing stronger research revenue/spending recently and are more optimistic about the future than we expected to be.	6%	33%
BASE – Total Respondents	284	875

Buyers Optimistic, but Less So

For reasons that are not clear, research providers seem more likely to expect and to be experiencing growth. A strikingly higher percentage of client-side researchers (34% to 12%) expect continued depressed spending levels or a further decline. Perhaps they know something that suppliers do not.

Still, 66% of client/buyers expect or are already experiencing growth in budgets and spending.



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B. Special Issue:

Respect and Regard for Research

Respect And Regard For Research

In the 2009 GRIT lack of respect for research and the research function emerged as a concern, with 73% agreeing that research is treated as a commodity with "less willingness to pay for high quality" and with 63% expressing concerns about marketing managers outside research departments doing their own surveys on the internet with Zoomerang, Survey Monkey, and the like.

For the first half of 2010 the GRIT questionnaire included a section on Respect for Research: focusing in particular on whether researchers see any trends or whether, perhaps, these concerns are perennial.

• Respect for the Research Product

Do you feel that the products and services traditionally delivered by market research practitioners are receiving more or less respect from marketers today than they did when you came into the business or five years ago?

While most (70%) researchers feel research is at least as well respected today as in the past, almost a third see a decline in respect. Further, among those in the best position to know (researchers with more than 10 years in the industry), 35% see diminished respect, compared to fewer than 23% of those with under 10 years experience.

	Less Respect	About the Same	More Respect
OVERALL	30%	50%	20%
Years of MR Experience			
1-5 years	23%	55%	22%
6-10 years	21%	51%	28%
11-20 years	35%	49%	16%
>20 years	35%	48%	17%
Expectations for 2010			
Expect Growth	17%	60%	23%
Expect No growth	30%	53%	17%
"Side"			
Suppliers	22%	58%	20%
Clients	15%	57%	28%
Respondent Location			
Canada	40%	47%	12%
US	31%	51%	19%
Asia	26%	51%	23%
Eastern Europe/Russia	21%	45%	35%
MENA/Africa	19%	38%	44%

A range of factors were mentioned by respondents as contributing to either the increase or decrease of respect for market research products and services.

Negative comments include:

- Quality of research has declined, with a corresponding lack of insights (22%)
- The economy and concerns about cost of research (17%)
- Changes in information technology (e.g., moving research online) (15%)
- DIY research (11%)
- Clients' lack of understanding of market research (10%)

Positive comments include:

- Advances in technology and other innovations (12%)
- A better appreciation for research and the value of research (7%)
- Production of good insights and actionable results (6%)
- More mature clients with greater marketing awareness (5%)

Obviously, there is a good deal of texture to these perceptions, influenced by the experiences of the individual respondents. Both suppliers and clients agree on the relative decline in quality of research, but suppliers are more concerned about the effects of the economy and changes in information technology.

Respect for Researchers and the Profession

Compared to when you came into the business or five years ago, do you feel that market research is now receiving more or less respect as a profession?

The same factors were cited as contributing to change in respect for the profession of market research as for respect for research products and services, but the profession in general is seen in a more positive light than its deliverables. This is generally true from both the client and supplier perspectives. This is perhaps more positive news, in that products and services can always be enhanced and more effectively focused to better serve the 'brand-center' of the market research profession itself.

Note, however, that "old timers" who have more than 20 years in the industry are twice as likely to see a falling off of respect as are new entries.

	Less Respect	About the Same	More Respect
OVERALL	30%	50%	20%
Years of MR Experience			
1-5 years	14%	66%	21%
6-10 years	14%	55%	31%
11-20 years	19%	63%	18%
>20 years	31%	49%	20%
Expectations for 2010			
Expect Growth	17%	60%	23%
Expect No growth	30%	53%	17%
"Side"			
Suppliers	22%	58%	20%
Clients	15%	57%	28%
Respondent Location			
Canada	21%	58%	21%
US	21%	59%	21%
Asia	14%	44%	42%
Eastern Europe/Russia	17%	66%	17%
MENA/Africa	13%	44%	44%

A range of factors were mentioned by respondents as contributing to either the increase or decrease of respect for the profession of market research.

Negative comments include:

- Quality of research has declined, with a corresponding lack of insights (14%)
- The economy and concerns about cost of research (8%)
- DIY research (8%)
- Changes in information technology (e.g., moving research online) (7%)
- Clients' lack of understanding of market research (6%)

Positive comments include:

- A better appreciation for research and the value of research (16%)
- Advances in technology and other innovations (9%)
- Production of good insights and actionable results (8%)
- More mature clients with greater marketing awareness (7%)

Factors that Enhance or Erode Respect - A Qualitative Perspective

Although respondents in the iModerate sessions typically felt that respect for the research industry has stayed the same or increased, they cited several factors that can be damaging to its overall perception. These factors included:

- The advent of DIY tools such as SurveyMonkey and online and social media listening approaches. These options have given many research users and buyers the sense that all research should be quick and inexpensive.

"With all of the available on-line tools, anyone can ''create'' and launch a survey, giving people a false sense of ability to do good research and lowering the perceived skill set required to conduct quality research." - Research Provider, Sees Same Respect for Research

- Increasingly compressed timelines and budgets within companies, coupled with a growing insistence on having data to back up more and more decisions. In some cases this difficult equation has led to a "just get it done" approach (both on the client and provider sides) that can negatively impact quality and has increased reliance on DIY approaches.

- Concern that some providers simply deliver shoddy work. Possible reasons for this include tight deadlines, low budgets, poorly trained employees, and cultural barriers inherent in off shoring.
- A sense, from both vendors and clients, that the services currently provided by research suppliers do not always measure up to evolving expectations on the client side. Specifically, clients now increasingly seek out vendors who will turn raw data into actionable, strategic, targeted recommendations.

"I think [suppliers] got the impression we've given them. When you act like an order taker, as opposed to a thought leader, you tend to get viewed as an order taker. This diminishes your strategic image." - Research Provider, Sees Same Respect for Research

Conversely, many of the factors that respondents perceived as damaging respect for the industry were also simultaneously seen as enhancing its image. These included:

- Market research has increasingly become more accessible and integrated into public life and culture. This has had the effect of demystifying it, helping both laymen and marketers understand its power.
- This widespread awareness has impacted the business world. More companies and industries that have not historically done research are now willing to incorporate it into their toolboxes.

"When I started in market research I had to constantly explain what I did. But over time I've seen research start to touch other parts of people's work and lives… I have an associate who works in pharma who never touched research until a few years ago. Now she uses qualitative and quantitative in her department. I see this happening more frequently." - Research Provider, Sees More Respect for Research

- The ongoing and exciting innovations in research technology—from DIY approaches to social media to virtual shopping-have helped make research seem a bit "cooler" than in the past.
- As a result of this evolution, the most successful providers have begun to partner with their clients on a more strategic level, adding value by offering insight and actionable recommendations in addition to charts and tables and Power Point presentations.

(The preceding section was prepared by iModerate's qualitative research analysts.)

Client and Supplier Side Researchers Fare About the Same

Which of the following statements best expresses your views about changes in levels of respect for supplier and corporate research providers and organizations?

Both corporate and supplier research providers have gained respect	*14%*
Corporate research providers have gained more respect than supplier providers	*12%*
Supplier research providers have gained more respect than corporate providers	*7%*
There has been no real change in respect for either group	***42%***
Supplier research providers have lost more respect than corporate providers	*9%*
Corporate research providers have lost more respect than supplier providers	*3%*
Both corporate and supplier research providers have lost respect	*13%*

While there are sizeable groups that feel there has been change in levels of respect (more positive than negative) the plurality of respondents do not perceive much change for either client or supplier research. Not surprisingly, corporate researchers are more likely to feel they have gained respect relative to suppliers, but suppliers are more likely to feel they have gained relative respect. Again, perceptions are colored by position in the research world.

Would You Choose to be a Researcher Knowing What you Know Today?

If you had it to do over and were making the decision today, would you go into marketing research again?

Researchers seem generally happy with the careers in which they find themselves.

Researchers newer to the industry are most enthusiastic, as are researchers in Asia and Eastern Europe. The enthusiasm of Asians was particularly striking, with 93% saying they definitely or probably would choose a research career again if given the choice.

	Definitely or Probably Would	Might/ Might Not	Probably orDefinitely Not
OVERALL	66%	19%	15%
Years of MR Experience			
1-5 years	73%	15%	12%
6-10 years	64%	22%	14%
11-20 years	66%	20%	10%
>20 years	63%	17%	20%
Expectations for 2010			
Expect Growth	68%	18%	14%
Expect No growth	63%	19%	18%
Buyers/Providers			
Suppliers	65%	19%	16%
Clients	70%	17%	12%
Respondent Location			
Canada	63%	23%	14%
US	65%	20%	15%
Asia	93%	5%	2%
Eastern Europe/Russia	72%	10%	17%
MENA/Africa	56%	19%	25%

Reasons For Choosing a Research Career Again

Researchers who would re-enlist if given the chance for do-over simply like their jobs. They enjoy the variety, the challenge, the chance to make a difference and the opportunity to learn new things.

	%
Enjoy my job	60%
Dynamic field, variety of clients, new technologies	15%
Feel I add value and make a difference	13%
Enjoy finding answers and solutions	13%
Challenging field	9%
I enjoy learning new things	8%
(Base = Def or Prob Would Choose Research (531)	

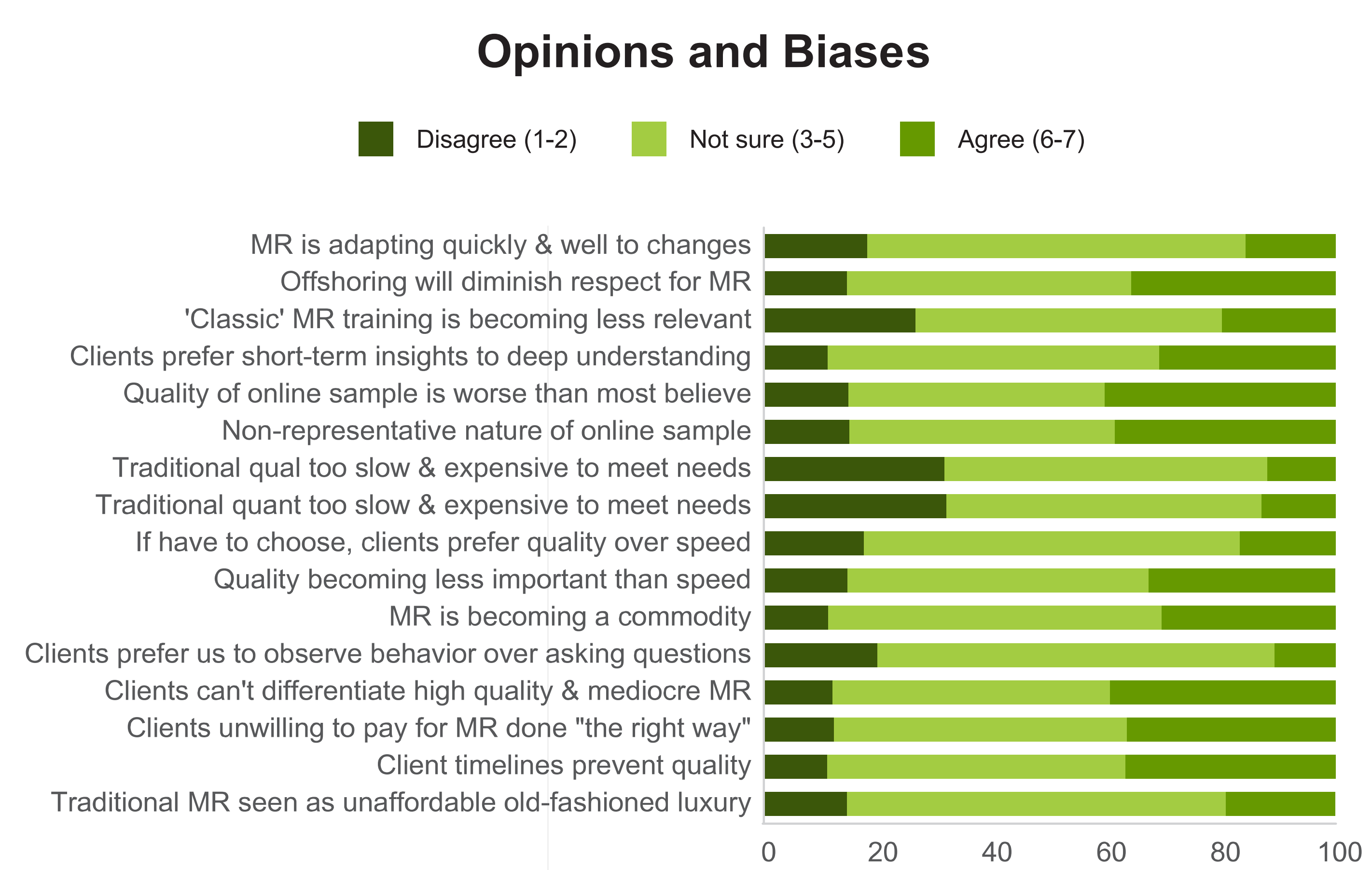
Taking Another Path

Reasons for abandoning a research career read like a litany of common complaints by dissatisfied workers in any white collar job, although respondents do mention declining respect for marketing research, shrinking budgets, and demands for faster information.

	%
Money could be better	26%
Dull, boring, stressful work	17%
Little career growth	14%
Declining respect for MR	13%
Long hours	13%
Clients diminishing budgets	11%
Clients want information faster	8%
(Base = Def or Prob Would Not Choose Research (189)	

Breakout of Opinions and Issues

Please indicate the extent to which you agree or disagree with the following statements, based on your personal/professional perspective. By "clients" we mean either internal marketing groups if you are part of a corporate marketing research department or research buyers if you are with a research supplier.



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There is a high level of overall agreement with two groups of these statements. One theme involves concerns about online panel/sample:

- Quality of online panel sample is worse than most clients believe
- Concern about the non-representative nature of online sample

The other is concern for the popular practice of offshoring market research.

- Offshoring Market Research to developing countries will diminish the respect for market research

While concern regarding offshoring is high among both supplier and client side market researchers, buyers are even more likely to agree that it is a point of concern for our profession.

Regarding the issue of online panel quality, qualitative research providers show a higher level of agreement with the first statement, perhaps because they are less likely to utilize online sample and have less at stake. They are arguably also less qualified to judge.

The other theme involves a perceived dilution in the demand for "quality":

- Clients today are less able to tell the difference between high quality and mediocre market research
- Clients are no longer willing to pay for research done "the right way"

- Clients demand such short timelines we cannot deliver the quality we want to

Interestingly, client and supplier researchers have similar levels of agreement with the quality versus mediocre research and short timeline issues. Clients, however, agree less that they are unwilling to pay for research 'done the right way.'

This function-based split in perceptions extends to other issues, as well. Suppliers agree more than clients that:

- Market research is becoming a commodity
- Clients prefer short-term insights to deeper understanding
- Quality of work is becoming less important than speed of deliverables
- Clients see traditional primary research as an unaffordable old-fashioned luxury

Not surprisingly, suppliers with international bases agree less than those based only in the US that off shoring will diminish respect for the market research industry. They are also more concerned about clients demanding shorter timelines.

Years of experience in the field (which is highly correlated with age), also influences perceptions. In general, increasing amount of experience is associated with greater agreement with concerns over the quality and non-representative nature of online sample, clients being less able to distinguish high quality from mediocre research, and concerns over off shoring practices.

Conversely, younger (or at least less-experienced) researchers agree more strongly that market research is adapting quickly and well to changes in the consumer environment (like social media), 'classical' market research training is becoming less relevant, traditional qualitative research is too slow and expensive to meet client needs, and clients would rather have researchers observe consumer behavior than ask questions about it.

These last observations are important. There seems to be an age/experience divide developing in the field of market research, as it is in many other arenas. The question is whether the effect is developmental in nature – and individual perceptions will change and 'mature' with time and experience – or that it is a cohort/period effect, with the perceptions of younger researchers better reflecting the emerging realities of a new social and technological environment for research. Only time will tell.

C. Technology

We are thinking ahead to the next GRIT 2010 mini-survey. Please name the new technology, research platform or methodology that most excites you.

Social Media and Mobile clearly top the list of the hot topics that the next edition of GRIT 2010 will be addressing.

	%
Social media (Facebook, MySpace, LinkedIn)	17.3%
Mobile phone/App technology/Texting	16.9%
Online research	12.9%
Communities/MROCS	5.0%
Biometrics/Eye tracking/Neuroscience/ EEG	4.1%
Text mining/Semantics/Content analysis/ Blog scraping/Text analytics	4.1%
(Base = All Respondents)	

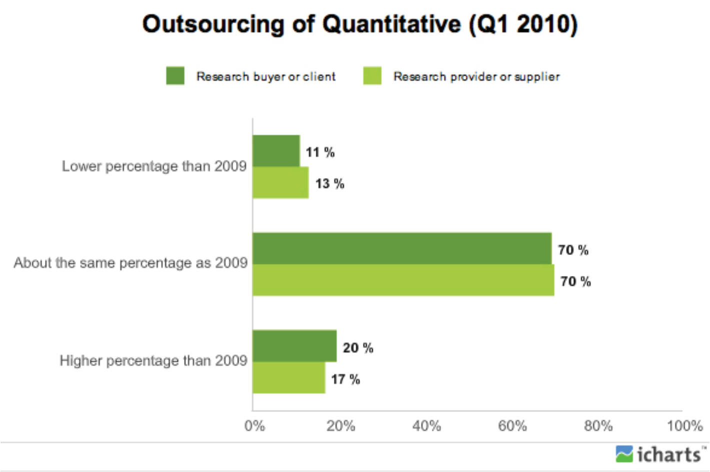
D. Outsourcing

Most Expect Stability or Growth in Outsourcing

As in 2009, most respondents expect their current level of outsourcing to be maintained in 2010.

Over 85%, however, expected that outsourcing would either maintain at current levels or would increase in 2010. While the trend is more pronounced for quantitative research, outsourcing in qualitative research is also expected more likely to increase than decrease.

Overall Outsourcing Trends



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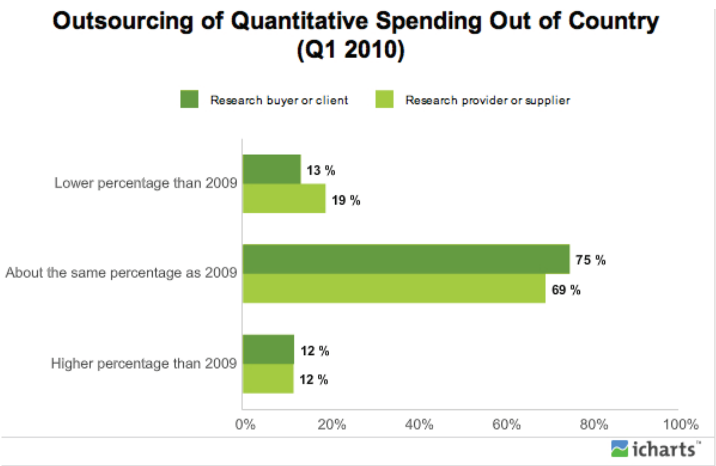
"Cross Border" Outsourcing



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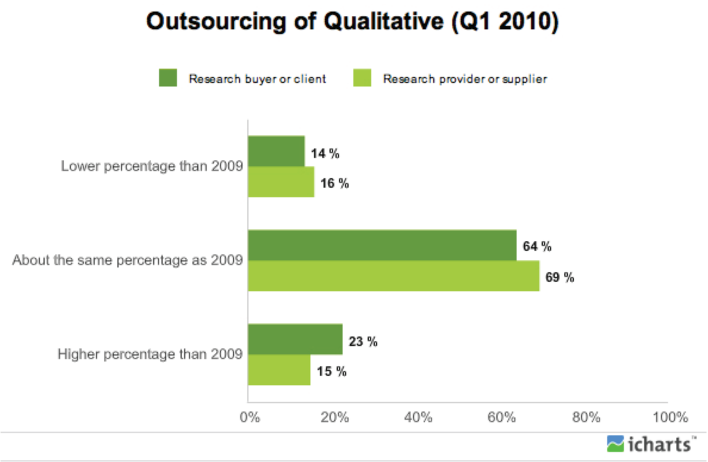

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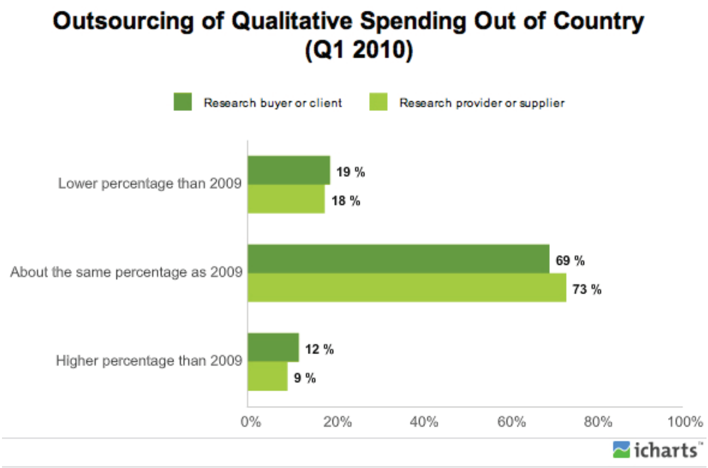
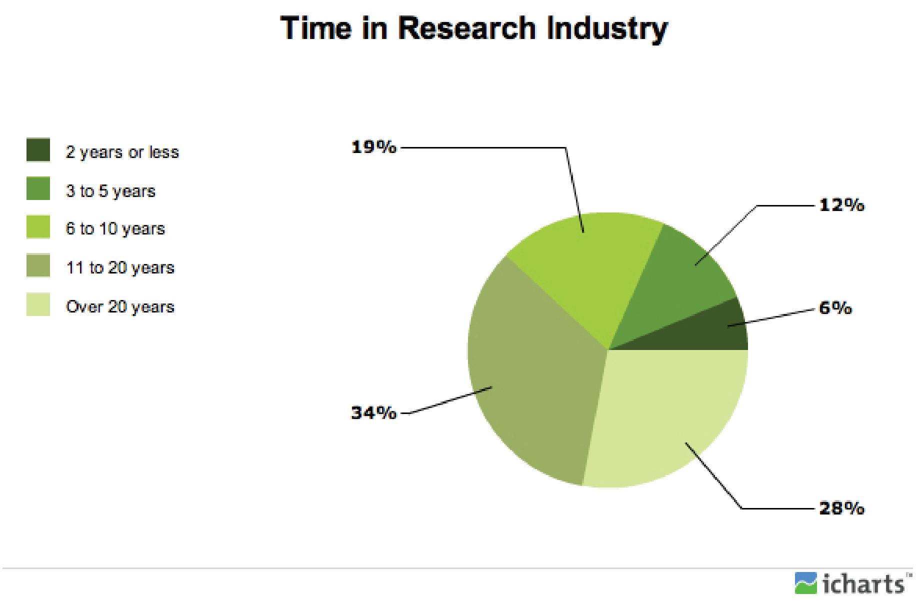


http://demo.ichartsbusiness.com/RIT/dashboard2.html

E. Respondent Profile Data:

1. Longevity

A majority of 2010 respondents have over 10 years in the industry.



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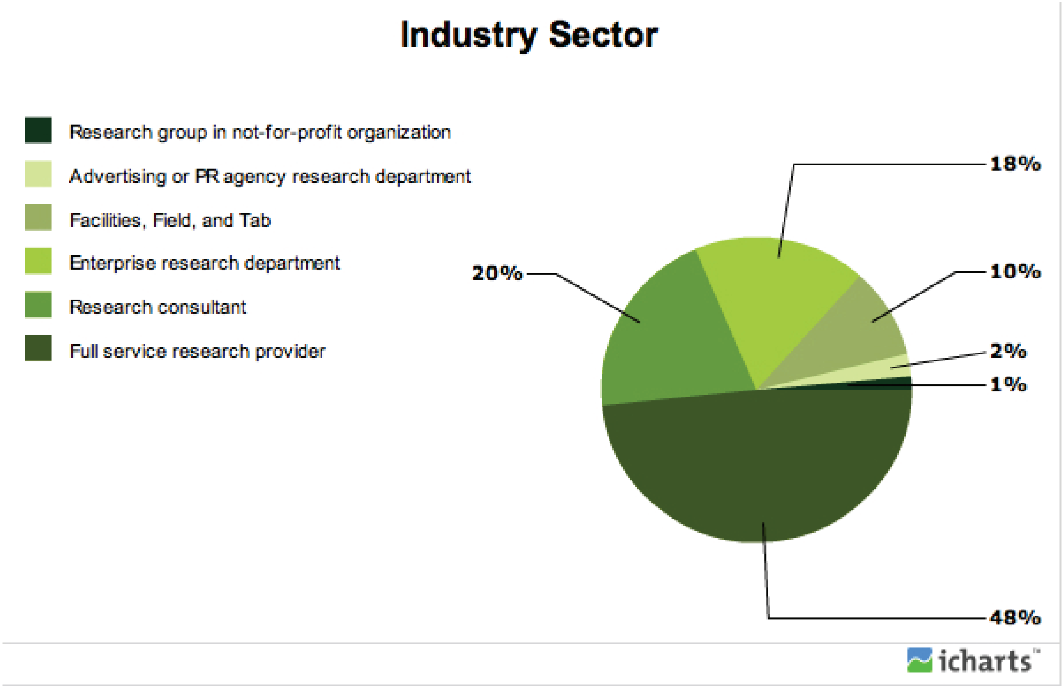
2. Type of Company

Full service researchers and consultants predominated in the sample, but a healthy 20% came from client-side research departments and agencies.



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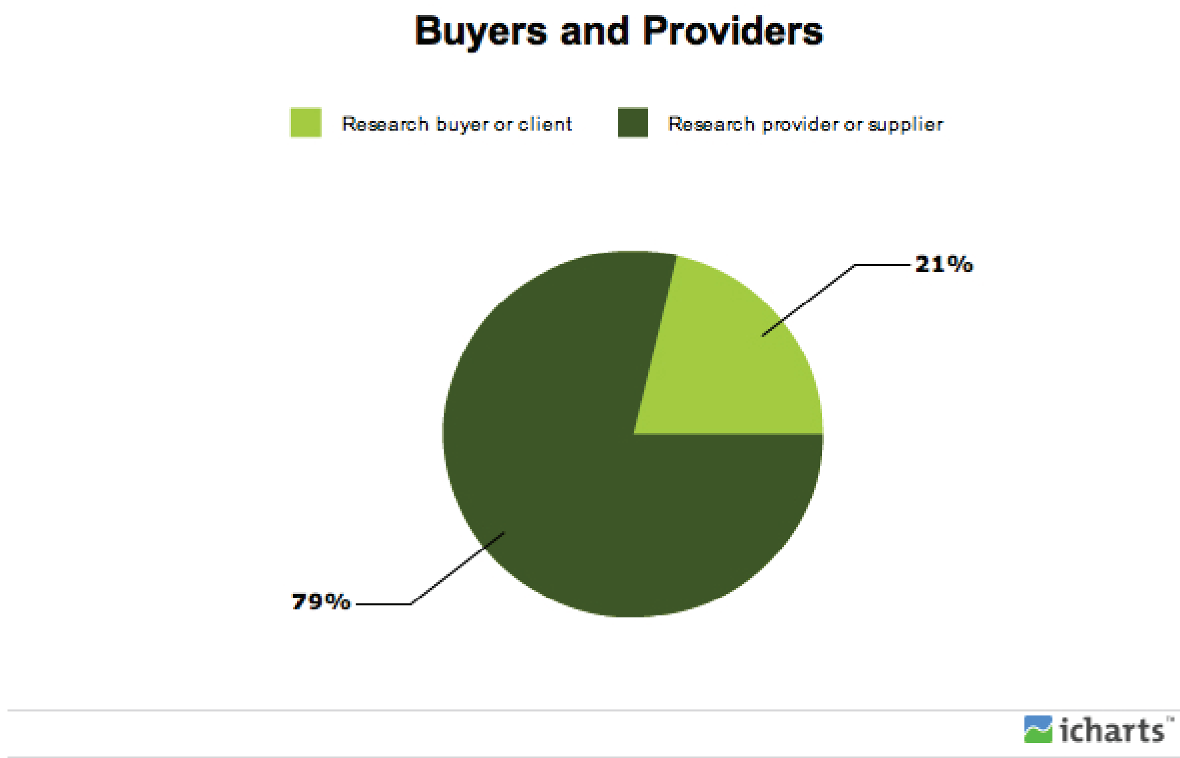

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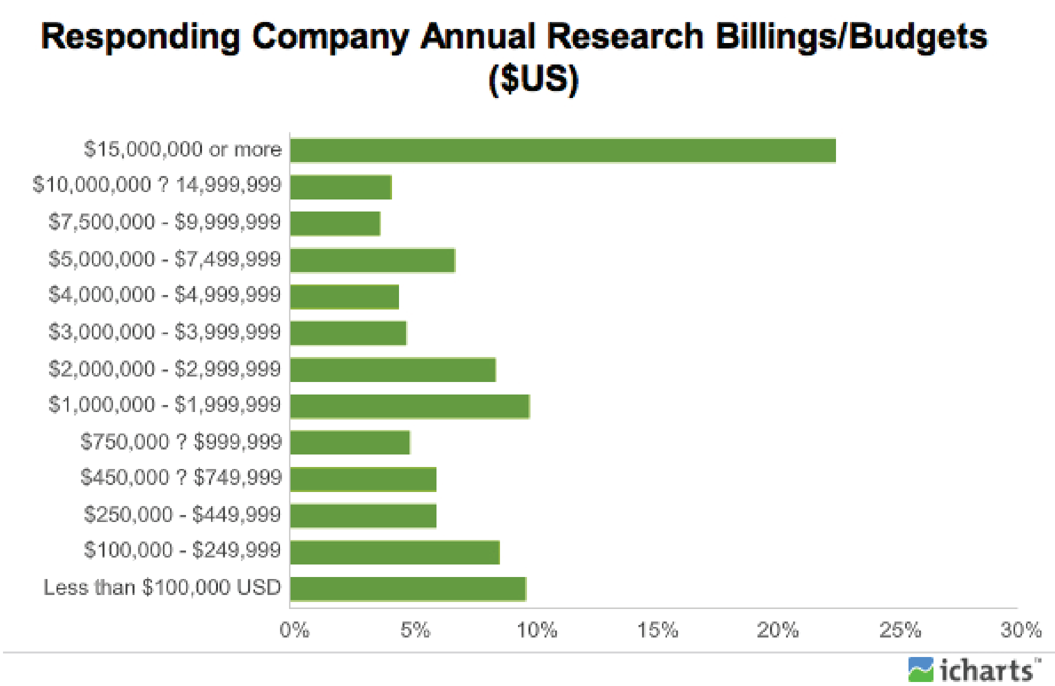
3. Annual Revenue

Larger organizations were better represented in 2010 than in 2009: a consistent trend over the past few years.



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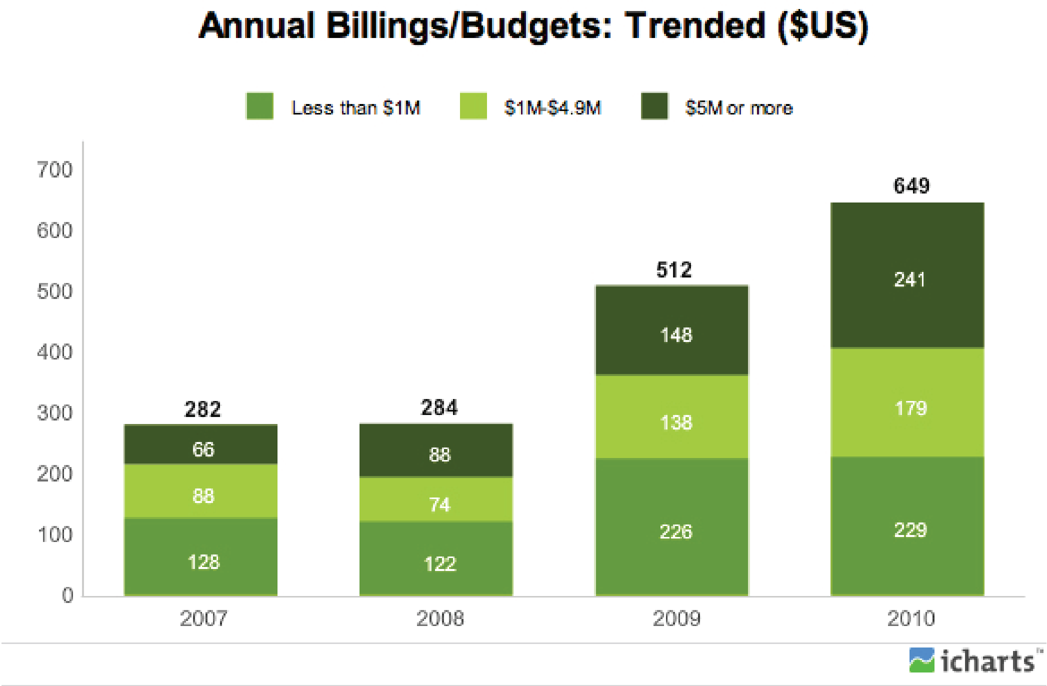
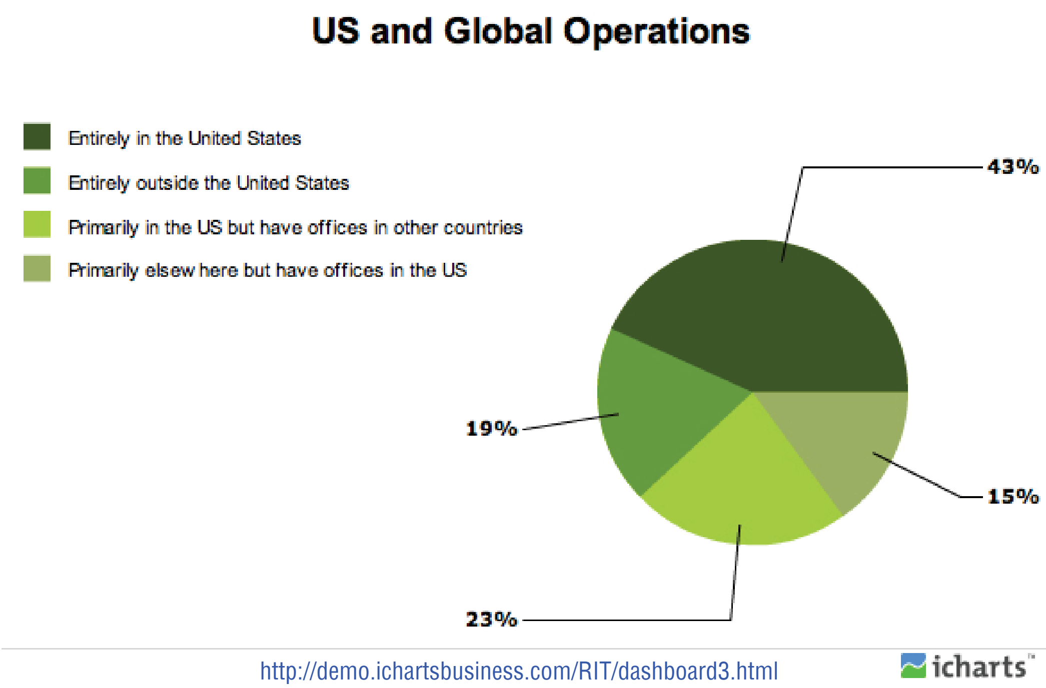


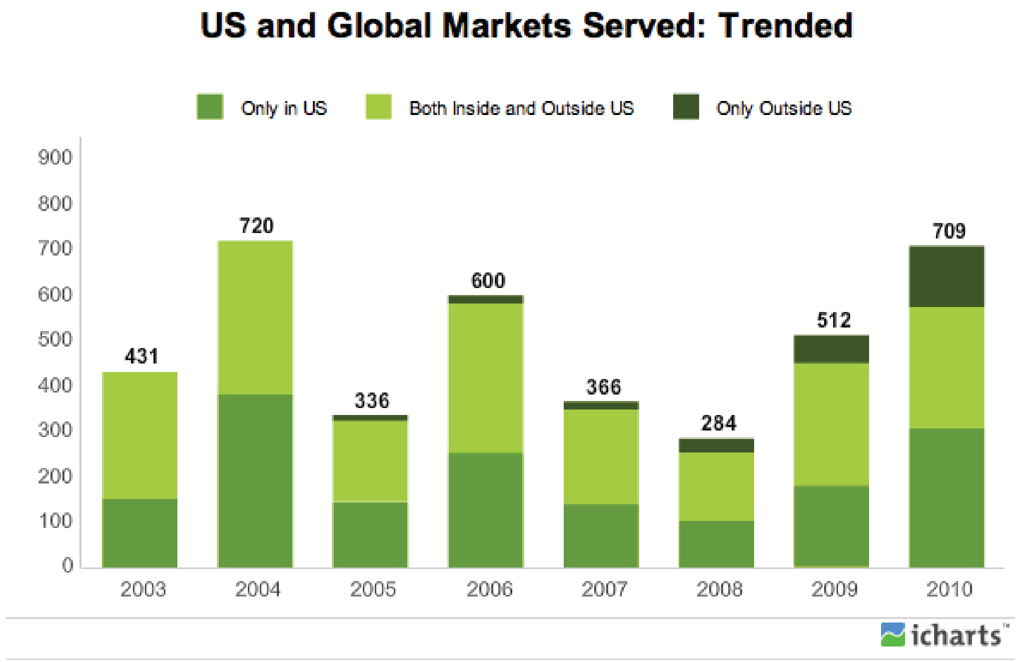
http://demo.ichartsbusiness.com/RIT/dashboard2.html

4. US Domestic vs. Global Operations

In which of the following regions does your company currently have an office?
A welcome trend continues of a higher proportion of responding researchers from outside the United States.



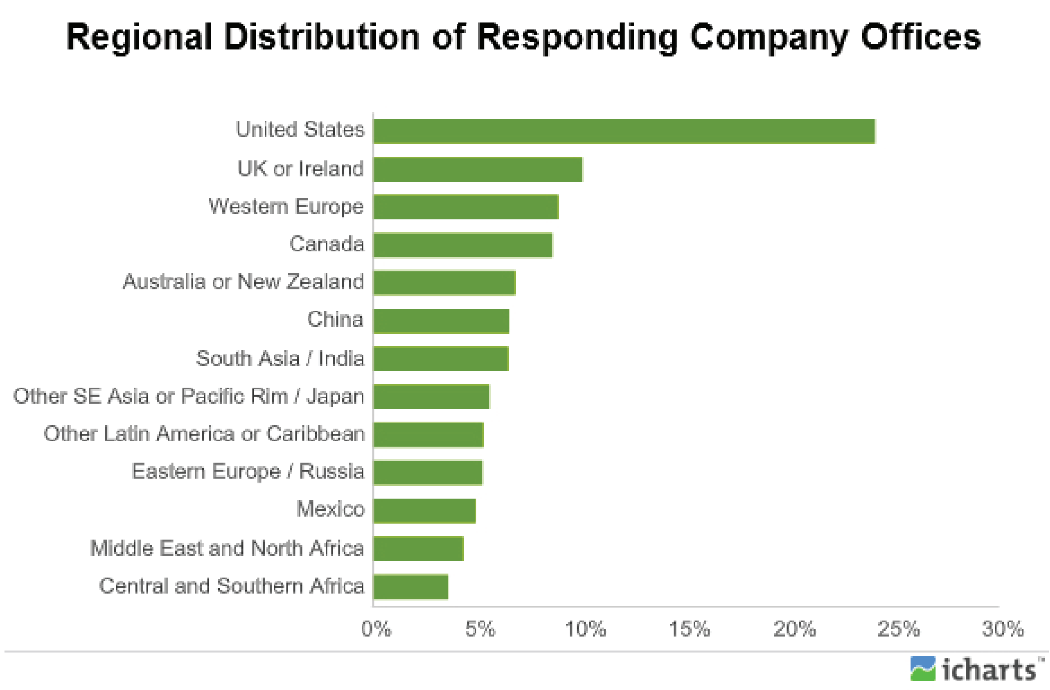
http://demo.ichartsbusiness.com/RIT/dashboard3.html



http://demo.ichartsbusiness.com/RIT/dashboard2.html

5. Geographic Distribution of Respondent Offices

In which of the following regions do you currently have an office?
As in GRIT 2009, GRIT2010 respondents are much more representative of the global research community than in previous GRIT studies.

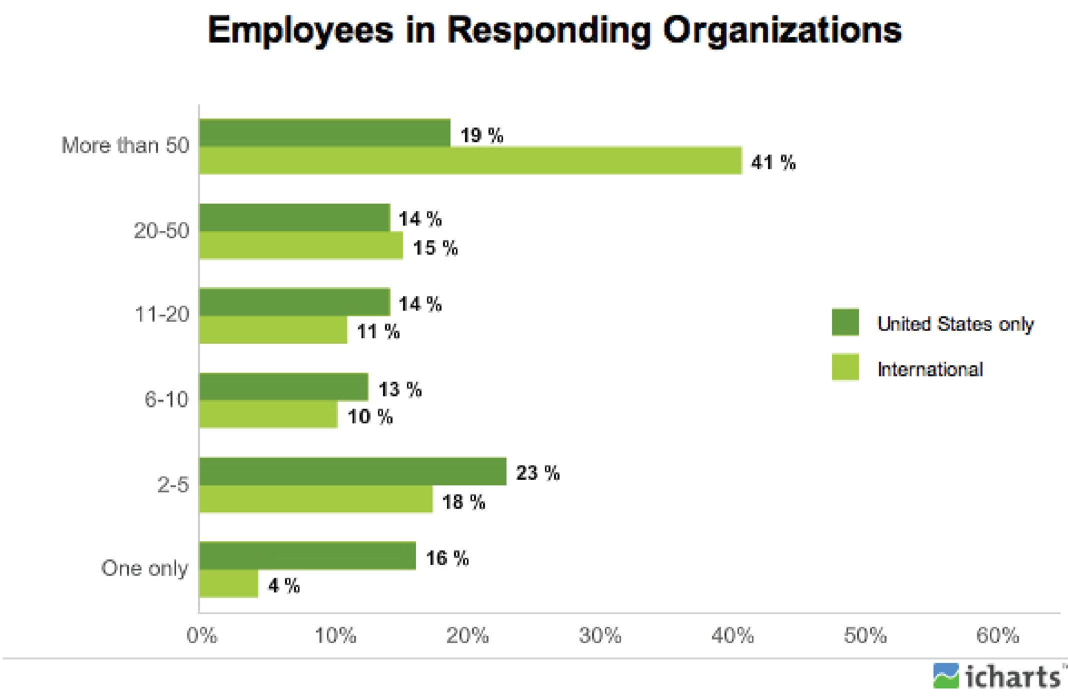


http://demo.ichartsbusiness.com/RIT/dashboard3.html

Respondents participated from locations all over the world. While the US and Canada continue to dominate the sample, the global spread of GRIT 2010 contributors is evolving to better represent the globalizing nature of the market research business.

6.Employees

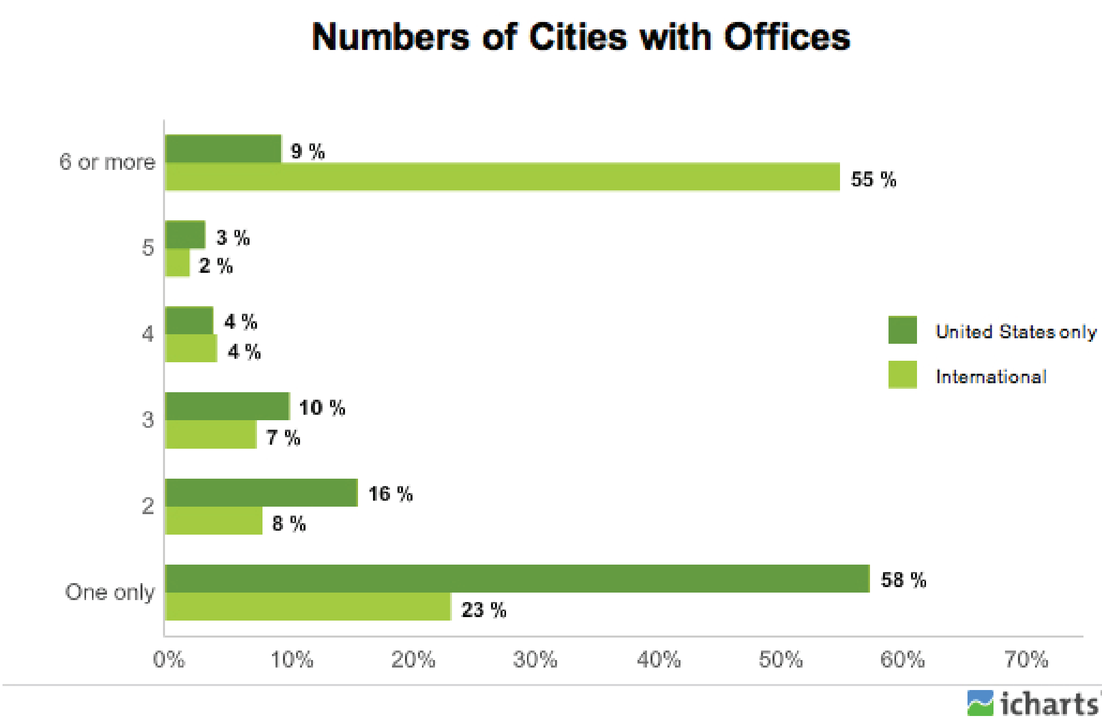
How many employees, counting yourself, does your research organization or department have?



http://demo.ichartsbusiness.com/RIT/dashboard3.html

7. Number of cities with offices

In how many cities does your company have offices?



http://demo.ichartsbusiness.com/RIT/dashboard3.html

Verbatim highlights
from qualitative

How Perceptions Have Changed

While I have never really felt a shift in clients' perceptions of research and the role it plays in decision-making, there are certainly changes in expectations with regard to uses of various technologies, but not about the role of research itself. - Research Provider, Sees Same Respect for Research

I think there's been a shift in the type of research that's expected. It's really no longer enough to send off a deck with a bunch of figures - clients are looking for analysis of not only what this information means, but also what they should do with it. The pressure is on the MR supplier to come up with answers... - Research Provider, Sees More Respect for Research

Impact of Online/ DIY Tools

It's not the software it's the people. I liken it to construction. Some guy who has some experience in home improvement suddenly decides he wants to build a house. Access to heavy machinery is now cheaper and more commonplace than ever, but in the hands of someone untrained in its use it is dangerous. - Research Provider, Sees Less Respect for Research

The problem is the focus is on the tools, and now on the users and implications of the data. We've done a poor job of positioning ourselves as the real value in MR, and instead have let the tools take prominence. – Research Provider, Sees Less Respect for Research

Emphasis on Speed and Cost

Researchers haven't kept up with the speed of decision making... - Research Provider, Sees Less Respect for Research

I think [researchers] need to be more responsive and speed of deliverables is a key factor today. The quicker they can deliver helpful info to the business the more role they play. - Research Provider, Sees Same Respect for Research

The big difference is that now clients are far more cost driven than before. So a few years ago they might not have respected research, but they sort of accepted that it costs a certain amount to do a good job. The past few years they've moved toward the notion that everyone does good enough work and they don't make a great effort to find out if that is true. - Research Provider, Sees Same Respect for Research

Researchers Need to Provide Greater Strategic Insight

Planners are perceived to be ''more strategic'' ... researchers are perceived as more tactical. Researchers tell people what not to do. Planners tell people what TO do... To paraphrase a client, 'MR uses lots of unfamiliar terms and hides behind statistical mumbo-jumbo. Planners talk to me in Marketing-speak and tell me what to do. Which would you prefer?' - Research Provider, Sees Same Respect for Research.

We are not providing enough strategic insight. There is little imagination in our conventional methods... We see decks from other companies with 80 to 100 pages of data and no summaries - we get focus group reports from competitors with 50 pages of rambling narrative, no conclusions but lots of out of context clip art.... As a result, consulting companies, design firms, branding consultants and other professional service providers are doing their own research. We see a lot of Survey Monkey, more than makes me comfortable. - Research Provider, Sees Less Respect for Research

I see in my consulting business an increased ability to impact organizations. Clients are looking for somebody to come in and give strong direction, not just report information. It seems the more I'm willing to go in terms of making marketing-focused recommendations, the more respect I have -- even if I'm not an expert in the business/field of my client. - Research Buyer, Sees More Respect for Research

Acknowledgements

and GRIT partner profiles

Concept originator, GRIT Managing Director
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Bill Weylock, Mike Dailey

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RFL Communications, StrategyOne, Cambiar

Qualitative component
iModerate

Sample
MRGA, NGMR, PeanutLabs, Lenny Murphy

Data collection
Interviewing Service of America

Tabulation and banners
Mike Dailey

Chart production
iCharts
Interactive versions may be found online at
http://demo.ichartsbusiness.com/RIT

Report
Bill Weylock, Mike Dailey, iModerate

Copy edits, review, and supplementary analytics
Mike Dailey, iModerate, Tom Anderson

Publication
MRGA, GreenBook, iCharts

GreenBook

GreenBook® is a leading resource for market research professionals. Although mostly known for its premium directories of market research firms and focus group facilities, GreenBook has been transforming itself into an integrated media platform for the market research industry.

GreenBook now includes the online and print directory, the specialized GreenBook Health directory, the GreenBook blog, a popular Twitter feed, an e-newsletter, and a new publishing program to provide stimulating, practical, and timely content on topics and issues facing 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.org 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.

GreenBook Health's unique focus extends the lead-generation power of GreenBook more deeply into the ever growing field of healthcare market research where industry-specific references and proof of expertise are critically important for earning new business.

www.GreenBook.org | www.GBhealth.org

GRIT Partner Profiles

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: http:// 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.

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

iModerate

iModerate is an online qualitative research firm that listens, connects and digs deeper with consumers online to deliver the research story you need to win in the marketplace. Our customized approach utilizes live, online, one-on-one, professionally moderated interview sessions to engage your consumers. The result is candid insight that gives you a holistic view of the consumer.

Founded in 2004, iModerate answered the call of researchers searching for a way to get more out of their online surveys. Our first solution brought quantitative and qualitative together - seamlessly meshing the two disciplines by layering professionally moderated online chats into a survey. The success of our hybrid tool coupled with the marketplace's desire for efficient and effective consumer insights led us to expand our solution set with a stand-alone qualitative offering.

Today, iModerate is the leader in online one-on-ones. We have conducted over 100,000 sessions and have succeeded in our charge to make qualitative more accessible, flexible and intimate. Our dedicated team and proven approach sets us apart and provides our clients, including 32 of the Fortune 100, with solutions they can count on.

www.imoderate.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

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.

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Peanut Labs

Yesterday's breakthrough technology for tomorrow's market research, the online survey is being outpaced by Peanut Labs' technology advancement. Offering the world's most comprehensive access to consumer sample for market research, Peanut Labs' sampling methodology is integrated within over 400 leading networks and applications – providing access to fresh respondents globally.

Our unique sampling environment operates as a trusted source (within the social network) leveraging open communication and dialog, and enabling the collection of quality respondent data. Surveys are promoted as network activities where invitations are delivered within the voice of the network and not via email. Rewarded with community-based virtual currency upon completion of a survey, respondents are incentivized based on their interests and their specific social network. All sample supplied by Peanut Labs is 100% verified through OptimusID, which guarantees your respondents are of the highest quality.

In addition to our social media sample offerings, we provide services such as social media monitoring, crowdsourcing, mobile research, digital fingerprinting, and programming & hosting. Peanut Labs is based in San Francisco with offices in Seattle and New York City.

www.peanutlabs.com

Pioneer Marketing Research

Founded in 1979, Pioneer provides quality full-service marketing research on consumer and B2B markets. We help clients in a wide range of sectors to solve critical business issues that affect their bottom lines. Our work centers around user experience, stakeholder research, branding, and new product development.

Pioneer's in-house data collection services include web, telephone/CATI, in-person, on-site, focus group, mall-intercept, plus hybrid methodologies. Our 100-station call center has predictive dialing technology and is staffed by highly experienced interviewers, including native Spanish speakers. Pioneer provides a full range of advanced analytical and reporting services, with nationally recognized expertise in conjoint analysis.

www.pioneermarketingresearch.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.

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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

RFL Communications / Research Business Report

RFL Communications, Inc. is the world's foremost publisher of news and business information for market researchers. RFL's suite of newsletters (including Research Business Report) cover cutting-edge news, technology and methodology innovations, the best content from conferences held around the world and in-depth profiles of top MR departments.

www.rflonline.com

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.

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