A supplement to Quirk's Marketing Research Review



CORPORATE RESEARCHER REPORT 2018

An independent study, written for and developed with the help of client-side marketing research and insights professionals

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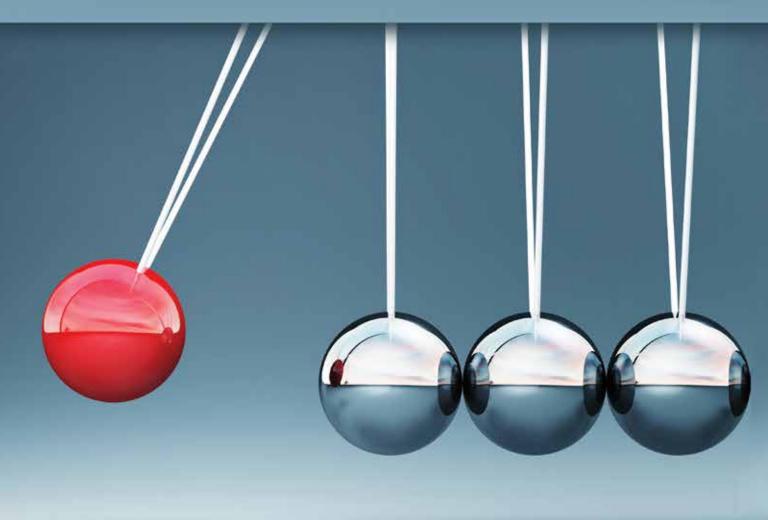








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Welcome to the fifth annual Quirk's Q Report!

The purpose of the report is to give corporate researchers (those whose job it is to gather, analyze and disseminate insights about their organizations' customers, products and services) an indepth look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.



Based on an invite-only online survey fielded from June 6 to June 28, 2018, among pre-qualified corporate marketing research (client-side) subscribers of Quirk's and ESOMAR members, the report covers two main areas – work life and compensation. In total we received 1,075 usable qualified responses. An interval (margin of error) of 2.9 at the 95 percent confidence level was achieved. (Not all respondents answered all questions.)

With communication as one of its main themes, the work life portion of the survey covered: budgets; MR-related changes planned for the coming year; the impact of tools and technology; outsourcing; organizational understanding of customers; and internal structure.

The compensation survey covered: job satisfaction; compensation packages; the hiring outlook for 2018; and their level of experience.

In our view, what makes this publication stand out from other trend studies in the research industry is that it is completely independent and focused on corporate researchers. It's not about research suppliers or even Quirk's – it's about you, the corporate researcher!

We want to thank all of our client-side readers who took the time to complete the survey and share their candid thoughts.

We also want to thank our content partners for sharing their industry insights. W5 created a two-page infographic of Q Report highlights and five other organizations – Research Now SSI, 20/20 Research, AYTM, Gutcheck and ESOMAR – have offered their takes on specific aspects of the study and its findings. Industry veterans Reg Baker and Jeffrey Henning also contributed a piece on the need for ongoing training and education in marketing research.

We hope you find this report useful. Please let us know how we can make next year's edition more informative and valuable to you.

Sincerely,

Joseph Rydholm
Editor | joe@quirks.com

P.S. For a complete breakdown of compensation (for both corporate researchers as well as suppliers) by job title, region, years of experience, etc., visit www.quirks.com/tools/salary-survey.

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Quirk's Marketing Research Media 4662 Slater Road | Eagan, MN 55122 651-379-6200 | www.quirks.com

Publisher • Steve Quirk steve@quirks.com | x202

Editor • Joseph Rydholm joe@quirks.com | x204

Digital Content Editor • Emily Koenig emilyk@quirks.com | x210



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INTERNAL/EXTERNAL

Exploring Market Research Communications and Relationships

The 2018 Q Report looks at the ins and outs of how market research buyers communicate internally and the role of outsourced partners.

INSIDE

Buyers struggle with resources and need support communicating the value of research internally.

Key Challenge

47% say the greatest barrier to understanding their customers is lack of resources: money, time, personnel.



Biggest Buy-in Barriers

- Lacking understanding
- Reliance on existing internal data
- Speed of insights
- Stakeholders fail to see value

Most Effective Strategies for Getting Research Buy-in



Case Studies



Track record of success



Showing cost savings



Demonstrating ROI



Saving time

Opportunities for Improved Communications

Securing Time Management **Strategic Planning** Budgets **Efficiency Concise Reporting** Team Support **Demonstrating ROI**

Outside

Outsourced partners bolster internal teams and provide expertise.

What Percent is Conducted In-House vs. Outsourced?

49% is conducted in-house

33% is fully outsourced

18% is partially outsourced

What Parts Get Outsourced?



Why Do You Outsource?

Lack of internal staff	33%
To provide an expertise we don't have	31%
It is faster	16%
It is cheaper	7 %
Management prefers outsourcing	6%

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QUIRK'S

'One more squeeze left'

Survey responses show researchers, as always, resilient and creative in the face of daily challenges

By Joseph Rydholm, Editor >> Quirk's Media

One of our overall goals with the corporate researcher survey for this year's edition of the Q Report was to investigate communication – between researchers and internal clients, between researchers and vendors and between researchers' organizations and their customers.

The value of good communication can't be overstated. With researchers and internal clients, it's what helps drive home the value of the insights function. With researchers and vendors, it's what facilitates a successful project. With organizations and their customers, it's what lets the customers know their input is listened to and valued.

We also sought to understand: how their insights function fits

into their organizations; the tools, technologies or techniques that have had the biggest impact for them recently; and any MR-related changes the researchers foresaw for the coming year.

That's a lot to cover in one questionnaire and we realize this year's survey was long. (Hats off to the diligent person who took the time to answer each open-end with the same "This survey is TOO LONG!!!!!" response. Message received!) Part of our reasoning was that in order to give you the most substantive report possible, we needed to ask many questions and perhaps more than the normal number of openends. Readers have repeatedly told us that one of their favorite parts of the Q Report is poring over the

candid observations of their peers, searching for kindred spirits and similarly tortured souls who are battling – and winning – the same wars as they are. And there's no better way to add that kind of color to research findings than with some good verbatims.

Do they know MR exists?

We asked researchers to think of times when internal stakeholders didn't include the insights function in important business decisions and gave them a list of possible answers. At 26 percent, "lack of awareness of the insights function's capabilities" was the most-cited response, followed by "stakeholders used other internal data to understand the issue" (18 percent), "insights function

viewed as too slow" (16 percent) and "stakeholders do not see value in gathering customer feedback" (13 percent).

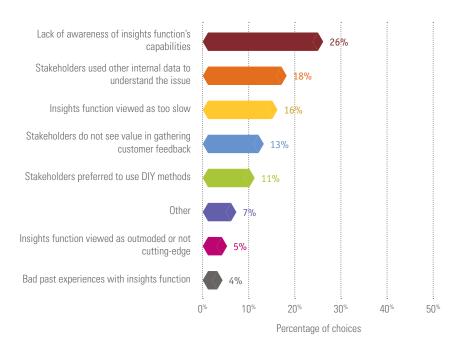
Of course, there's no better way to combat a lack of awareness than by improving communication with the colleagues who use your services! We dug a little deeper there with an open-end that asked for more information on the specific areas in which the respondents wanted to boost the quality of internal communication. Upping their data visualization skills was frequently mentioned, as was better reporting in general, along with many mentions of "socializing" the research findings.

"I think we are on the right track. We are investing a larger percentage of our budget on socializing this year and I see it paying off."

"People were unaware of our role and what we could be doing to help them. Recently, as I've joined the organization it's been a big focus to get out my team's name within the organization. People were/are doing a lot of things on their own, results and findings are very silo-ed. We're trying to be more of a connector of things that are happening."

"We need to let them know what we can do to help them but it's a balancing act between giving them a 'menu' (which causes them to be prescriptive in what methods we use) vs. telling them 'come to us for help' and we'll decide what methods to use (which is vague and causes them not to know when to come to us for research)."

"I'd most like to improve my ability to communicate with internal departments/customers in terms of helping them think through the business Thinking of times when internal stakeholders have not included the research or insights function in important business decisions, why do you think this has happened? (Multiple answers accepted)



problems they are trying to address, offering more comprehensive insights beyond quant survey and behavioral data, and providing more consultation/direction on next steps following the conclusion of research studies."

"I'm working now to get better stakeholder feedback after project completion. It's pretty easy to get, 'Thanks, this is super-wonderful, you guys rock' and harder to get really useful feedback on how we can do better, more useful work."

But despite their best efforts, sometimes researchers aren't able to make the impact they want.

"This seems to be more and more of an uphill battle. I don't remember having to or trying to educate on the importance of research like I have to do here. And receiving no interest in understanding it." "Everyone wants insights but it is a challenge to get them to read reports and digest the insights unless they have a specific need. All are so busy. They intend to get to it but don't."

"In our organization I think we're well known for being able to bring the voice of the consumer to a discussion but sometimes they forget to bring us along either because things are moving so fast or they aren't aware we have a tool to help them."

In many cases, it requires the researcher to get out there and do some work, whether it's selling the value of what they do or learning more about a business unit to better understand its specific needs and how research can help.

"Building deeper relationships – really learning the business, the issues they face. I've seen this step skipped a lot which leads to all the above reasons for them to go elsewhere or cut out the research function."

"More collaboration and less 'trying to take over the world' from the customer experience office. It is good to establish yourself as an expert in what voice of customer is but not smart to think you know more than the business line about the actual product or service."

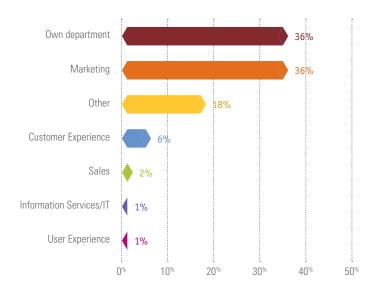
Thankfully, there were many responses like these, indicating that improving their internal communication was not a big priority because things were already pretty good:

- "Our company is great about insights having a seat at the table. I can't think of any important business decisions where we weren't included."
- "I don't have the issue of being left out of important business decisions. My company values the work I do and the perspective I bring."

Where does MR fit?

To get an idea of how the insights function fits into their organizations, we asked if MR was its own department or part of some other one and generally, the insights function seems to either be on its own (36 percent) or part of marketing (36 percent). A healthy 18 percent said "other," with "customer experience," at 6 percent, drawing the next-largest number. As for those "other" responses, some of the department names included: innovation, sales, business intelligence group, corporate strategy, business intelligence and analytics, strategic planning and usability.

In your organization, is the marketing research/insights function its own department or is it part of a larger group?



Insights pros have a range of newer options, most fueled by technology, to help them collect and analyze data and disseminate it to their internal clients.

What tools are working for you?

Making an impact internally, of course, depends a lot upon the tools you have available to you. Though the traditional stalwarts like PowerPoint and Excel are still depended upon, as are established techniques like focus groups and online research, insights pros have a range of newer options, most fueled by technology, to help them collect and analyze data and disseminate it to their internal clients.

We asked an open-end to gauge which technologies, tools and techniques had made the biggest impact on researchers' deliverables in the past year. Though we didn't ask for specific company or product names, many respondents offered them up. The number of references to Qualtrics was eye-opening. Others that received multiple mentions: DiscussIO, ZappiStore, Infotools Harmoni, QlikView, FocusVision Decipher, SPSS, Stata, Tableau, R, Fuel Cycle, Q Research Software, Microsoft Power BI, IBM, Question-Pro, Wincross, Sawtooth Software, icanmakeitbetter, Fulcrum, SurveyGizmo, Digsite, Compellon, Focus Vision Kinesis, think-cell, VisionCritical, MarketSight and Medallia.

"Qualtrics — without it, I would not be able to conduct as many research projects as I currently am. Specifically, Qualtrics Vocalize, which has taken the task of generating reports off my plate on several projects. This year, I've also implemented an in-house customer research panel, which will alleviate a lot of vendor interactions and make my department a lot more efficient."

"InfoScout as a tool has transformed our insights department for measuring household penetration and other key metrics in the convenience channel. Need-state segmentation is also proving to be an amazing tool for us."

"Fulcrum and SurveyGizmo ... we are able to save SO much money by doing all of the work ourselves!"

Of the tools mentioned, these were all cited multiple times: communities, dashboards, telemetry (passive data collection), agile solutions, eye-tracking, big data, virtual reality, cloud capabilities, blockchain, data visualization, social listening, journey-mapping ("We have a need and execs are seeing the value."), text analytics ("Helped us summarize a large number of verbatim comments.") and persona-building.

Some sample quotes:

"Agile, quick research. Everyone wants things fast. Our B2B online community has had success providing insights at the speed of business."

"Social media listening tools and content analysis have been key components of new projects."

"High-quality infographics. We are moving more and more into digestible, bite-size learnings/insights."

WHERE does the marketing research/insights function fit?

New teams

"I'm the first official 'research' person to work for the company."

"When I was hired two years ago, I was the first consumer insights person, and at that time I was under the 'strategic analytics' department. When we hired a second researcher about a year ago we became our own consumer insights department."

Reporting directly to the top

"Insights reports directly to COO. Remains highly cross-functional with marketing, product, sales and customer success."

"Department has been set up by me. It used to be part of marketing, now it is part of the analytics dept. reporting directly to CEO."

"Our function is currently part of the strategic planning team, who reports to the CEO. Over the years, we've been in various departments – communications, technology, marketing – but have always had the same MR function."

Its own department

"Marketing is separate. We are in our own research area (for good reason)."

"It has always been its own department but where it sits overall has varied. Originally it reported to the VP of new product development. Currently it reports to the VP of marketing and product management."

Still figuring it out

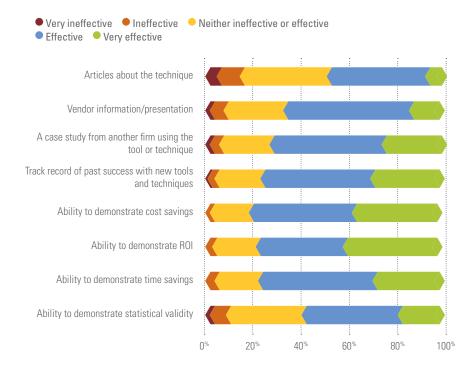
"Our team has moved all around. Where it's situated at this point honestly makes no sense. We're within the analytics group, which is within the loyalty group, which is within the marketing group."

"All the research and data analysis departments at my agency have been in flux for years. The company is still trying to figure out how to organize the groups. There is not enough cross-training and too many silos."

Don't know!

"Don't know. Have never been in touch with marketing at my company. You do make me curious because of this survey."

When seeking internal buy-in for using new research tools or techniques, how effective are the following in aiding the process?



"Online insight community — it gives us the flexibility to control our players, our timelines for research projects and the deliverables and objectives of any given project. It gives us control."

"Social media, of course, because we can reach a wide audience in more broad geographic areas without leaving our desk with very little \$\$ spent except for \$\$ spent for respondents."

"Tableau. Teams across the company just want our survey/research data to create their own deliverables. It has impacted the way we think about AI and automating research reports but we struggle with how to balance that with the insights we need to provide."

"SPSS & Excel, as always, for analysis. Lynda.com for teaching/training staff. Smartsheet – project management tool – helped vastly with planning for team." "Online community. Implementing the MROC has saved my company probably \$300,000, as we can use the MROC for studies we would have had to build out from scratch last year."

Some non-tech and not-so-new tools got some love as well, with conjoint analysis being mentioned several times.

"Our organization has really embraced conjoint. We used this technique for a project a couple of years ago and the results are being widely disseminated throughout the organization. And people really like what this type of project provides."

"Texting and mobile phone technology.

A generation used to texting seems far less likely to complete 'traditional' survey instruments."

"Availability of great DIY tools (e.g., SurveyGizmo) has enabled lots of

simpler work to be done very costeffectively."

"Crowdsourcing championed by the CEO. It has been touted as how we develop innovating ideas and that we listen to the 'crowd.' It does not really impact what we deliver but sometimes people in the organization think all insights can be done through crowdsourcing."

"Observational, 1-1 interviews with bio/physio measures including heart rate, facial coding, voice prosody ... differentiates pos/neg response between product prototypes where traditional questionnaires show parity."

"Statistical analysis — we have increased the amount of data we have on our marketing activities and have been able to increase the accuracy of our marketing mix modeling to increase impact on marketing investment decisions."

"Other software, such as SPSS and Sawtooth, have been invaluable for analysis of our data and performing conjoint and pricing elasticity studies."

"Interviews and online surveys. Tried and true."

To get funding to use some of these new tools, you most likely have to make a business case for doing so. We asked respondents to rate the effectiveness of a variety of ways to do that. "Ability to demonstrate ROI" drew the highest percentage of very effective votes, followed by "demonstrating cost savings." In the effective camp were "vendor information/presentation" and the "ability to demonstrate time savings," followed closely by "a case study from another firm using the tool or



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What is the biggest barrier to your organization improving its understanding of its customers?



technique" and "a track record of past success with new approaches."

How well do you know your customers?

To further plumb the workplace cultures, the survey asked how well respondents feel their organizations know their customers. Happily, some variation of "quite well" was the most-offered response. Now, one could say that of course a researcher would give that kind of assessment – customer knowledge is their bread and butter, after all – but along with being keenly aware of what's going right in the insights-gathering realm they are just as attuned to what's missing.

"It is the non-customers we fail to understand."

"We know them very well – what slows us down is evolving to what our customers want."

"We have been too focused on thinking of them as consumers, not people. This means we know everything about how they use/choose our products and the category but much less about their full lives. And hence we haven't connected to them on their key issues. People don't spend their entire day thinking about our categories!"

"Poorly. Our executives are COMPLETELY out of touch with

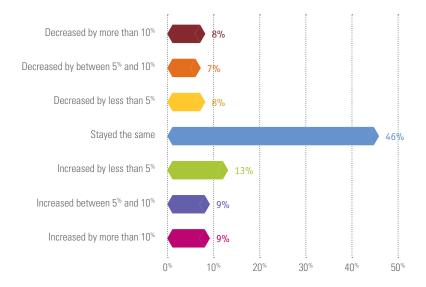
reality. They think our customers look/act like them."

"We are a B2B organization and each customer base seems to be department-specific. While some departments might have good knowledge of their own customers and key contacts at customer organizations, there is little transfer of this knowledge or systematic research/info-gathering and sharing across departments, often due to complexity of customer organizations, etc."

"We know so little it's embarrassing."

"Based on how often we say we know our consumers? Like the back of

How has your organization's overall budget or spend on marketing research changed in 2018 compared to 2017?



our hand. How often we really do? They're like the cousin you only see at the holiday gatherings – we know them a bit, but not nearly as much as we claim to."

"Pretty well! Sometimes we listen to our squeaky wheels too often but we have people like myself that try and balance that.:) Always room to improve though!"

"We're in the midst of an organizational transformation, so everyone is trying very hard to know our customers better, which started with identification of target segments. Two year ago, I would say our organization did not know its customers at all. Today, we are making progress."

Are you happy with the available tools?

So if there are deficiencies in the tools they use to talk to and listen to customers, what are they? We asked if they generally felt the available tools and methods were

working for them and, if not, what they would like to see added.

"Listening tools are continually limited. We haven't seen any reliable tools for sentiment or even text or image analysis that are quick and/or cost effective. As an agency, we move fast, and most research tools are not fast."

"My sense is that one of the bigger challenges is enabling insights to be disseminated and consumed in a holistic way, so that stakeholders have the most comprehensive view of customers that is possible and that market research is not getting too siloed in its thinking and approach."

"Many of the tools and techniques still seem tied to approaches that were developed in the 'nuclear family' era. Databases from these tools can be like anchors to prevent progress as changes can disrupt the ability to compare new results to old."

"Some are too broad and don't gather the context to understand where the customer is coming from. For instance, NPS is an OK measure but it would be even better if we collected or appended data to link the customer's experience/last touchpoint to understand areas where we are strong or weak."

"I get the most out of what I have. It's like that flattened tube of toothpaste — there's always one more squeeze left."

"Social listening is tricky — it is useful but ROI is hard to prove. In addition, you get the insights and the marketing team has trouble taking action on the 'so what' and to be frank the marketing research teams have trouble helping at times."

"Survey responses have been going down for years. In that sense they are not effective anymore, we need to open a continuous feedback channel with our customers and not just send them a survey once a year out of the blue."

"Panel sampling is getting to be a huge problem. We've had two sample companies we've relied on taken over by venture capital firms. They seek to boost profits so they can turn around and sell at a higher price. They replace experienced researchers with sales people who know little to nothing about providing good-quality sample. When response rates suck among younger age groups they throw in river sample without informing us. When results come back completely skewed due to the poor quality of the sample source they can't figure out what the problem is. When we dig into the data and figure it out they act as if we are being unreasonably picky. These are major companies not small

data synthesis: taking all of those firehoses of information and making them into a manageable trickle instead of a flood

mom-and-pop shops. The implications for the industry are frightening."

Many responses touched on aspects of a topic that is top-of-mind for most researchers these days: data synthesis. In other words, taking all of those firehoses of information and making them into a manageable trickle instead of a flood.

"I think we have a great range of tools. We have a lot of data from different sources. But we struggle to integrate it all into an understanding of what's happening in the world of the consumer, and the best way to affect it. We don't seem to have the time, as we run to complete one study or another, to sit back and think about the whole picture. Internal clients are also frustrated by the output: 'Study A said this, Study B said that.' But it's a manpower issue — who has the luxury of time to think about it all?"

Sometimes it's not the tools:

- "The tools available are fine. It's our culture and internal politics holding us back."
- "The tools are effective, what we are missing is budget; market research is increasingly expensive and it is more and more difficult to show a clear ROI."
- "It's a hodgepodge of things. They think they know it all. They some-

times think that if the study is not done by a consultant for \$300K then the data is not valid. This is most often for new and young employees that think they know it all."

- "Our tools are effective. However, our end user groups are very low-incidence. Many of our projects are slow because it's tougher to find end users willing to participate. We have an online community and access to B2B sample but things are not fast enough."
- "Big concern about sampling reliability."
- "Like to develop some methods of better mapping out B2B customer entities that acknowledge the organizational complexities and the various roles."
- "Plenty of tools exist. Our biggest obstacle is that we're so busy trying to do most of what the business asks us to do that we don't have much time to go after the issues we probably should be trying to answer the questions the business WILL ask when they think of them someday. Trying to skate to where the puck is going to be."
- "We operate under a complicated B2B model. Many DIY tools appear to be focused on B2C/mainstream audiences."

"Listening tools only listen to those that are speaking. Most of our consumers are not out on social media talking about our brands. Our products cost less than \$5. The consumers that do write about our brand are not representative. Tools that are REPRESENTATIVE of the marketplace are what are lacking."

What's coming next?

If the preceding is a snapshot of many of the issues currently facing researchers, what do they see on the horizon? We asked them to tell us about the biggest MR-related change their organization will make over the next year. Some foresaw having smaller budgets with which to work. There were many mentions of agile research and/or moving toward more agile approaches. Also lots of references to improving or increasing use of data visualization and of automating more processes.

- "Focus more on agile research techniques as part of sprint projects where we see a move away from traditional, proven methods to new, faster methods. This is particularly true in new product development where there is extreme pressure to move fast, often at the expense of research/insights."
- "Revising multiple NPS tracker studies (with almost a complete re-do/clean cut vs. the way that the studies have been conducted over the past seven+ years), reducing questionnaire length and setting up processes for more continuous measurement in future years."
- "Looking at newer methodologies and automation as well as knowledge platform (considering new vendors KnowledgeHound, Voxpopme, AYTM, ZappiStore)."





cx snapshot

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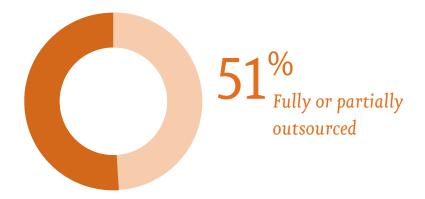
Innovative Features:

- Fully Automated Text & Sentiment Analytics
- Advanced Natural Language Processing (NLP)
- Topic Grouping through Artificial Intelligence
- Instant Dashboard with Excel Exporting
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Most Popular Uses:

- Voice of the Customer (VoC & NPS) Research
- Employee Engagement Surveys
- Advertising and Creative Tests
- Innovation Research
- Global, Multi-Language Studies

What percentage of your research projects are conducted in-house vs. outsourced?



Happily for both parties involved, communication between vendors and clients seems to be on good footing, based on the responses to our survey.

Some looked to the future with excitement, showing the can-do attitude typical of the modern researcher, who always seems to be forced to deliver on some combination of better-faster-cheaper:

- "Doing more with less \$ scrappy and agile early and often."
- "Finding more and better ways to ensure that each dollar spent has the greatest impact on the largest part of the enterprise as possible. Smarter spending for greater reach, usability and impact."
- "Adding new tools. Continuing to do work faster."
- "The integration with other systems so we can research smarter. Cleaning our data from our legacy registration and

end user systems and getting the right information into our CRM. Once that is established we will have the foundation for better insights."

- "Some of us 'traditional marketing researchers' are broadening our skill sets to also be design researchers as part of experience design teams/initiatives. Our company hasn't made a position for a full-time, focused XD researcher yet."
- "We are working towards a better data management system in order to glean insights across multiple sources of data. One company we have looked at and been impressed by is Knowledge-Hound but we will need to fight for a big budget increase."

Some took a more, er, pessimistic view:

- "Hopefully we'll get back to being researchers and not meeting/workshop facilitators."
- "My company is undecided if market research is a service group or a valued contributor."
- "We will probably disappear altogether."
- "No idea. I have new bosses, so anything can happen."
- "Our leaders/executives love shiny and new and don't appreciate what it takes to conduct real research with integrity. It's a disturbing trend and we're very worried about the culture here."
- "I would guess another reorganization. They are very popular around here."

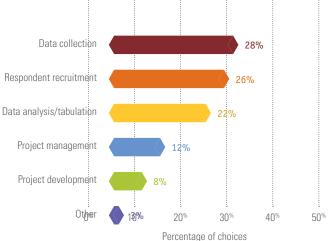
What about the vendors?

The other integral part of the research process, for most client-side researchers anyway, is the research vendor. And effective communication with them is just as crucial as that with internal clients or the users of your organization's products or services. Happily for both parties involved, communication

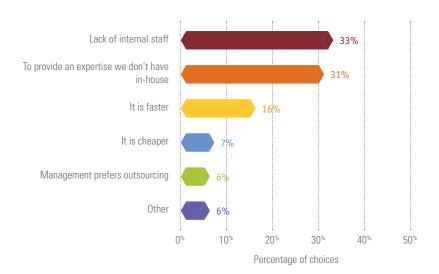
"Our leaders/executives love shiny and new and don't appreciate what it takes to conduct real research with integrity. It's a disturbing trend and we're very worried about the culture here."

What parts of the insights or marketing research functions do you outsource?

(Multiple answers accepted)



Why do you outsource? (Multiple answers accepted)



between vendors and clients seems to be on good footing, based on the responses to our survey. There were the satisfied:

- "Honestly, we have great vendors and great relationships with them. I can't think of anything!"
- "Communication is currently pretty darn good."

And there were the snarky:

- "Find vendors who can think. That would improve communication."
- "Stop trying to sell and listen!!! Please! And don't tell me you are innovative! I want real research solutions, not a sales pitch."

In between those two poles, respondents offered some constructive guidance for their vendor partners on what they are looking for – and not looking for – communicationwise.

"There is a real gap between what our vendors can understand about our business and business challenges and what my internal clients need. That gap creates a challenge when translating our business objectives to a research objective and vendors simply are not good at making that connection. I wish they could understand our needs and drivers better so that they could offer better recommendations from the research. Now, all vendors like to make recommendations but they are either super-obvious and just a regurgitation of the data or simply not useful and thus end up being totally ignored."

"Sometimes we put out an RFP and we are surprised by what we get back. Some are clearly not doing their research on our company and audience. We even had one that had the wrong organization name. Attention to detail, common sense and easy to work with/responsive are all very important attributes."

"I would love vendors to understand our business better. Every vendor meeting starts with, 'So, tell me what you do currently.' It would be revolutionary for a vendor to come in and say, 'Here is what I understand about your business and here are some ideas for how our tools can help you.' To date, all discussions have been me telling them how they can help us (or not)."

"We are sometimes stalled by internal procurement, who doesn't understand that research is not a commodity. It would help if our vendors could provide materials for corporate purchasing departments that explain that they are reasonably priced but why they are not necessarily the cheapest. I need their help to explain to others what makes their particular shops

a better fit for us and why they are worth more."

"I am bombarded with cold calls and e-mails on a daily basis. It makes it difficult to sift through the options. All communication should include info on the company, a presentation of capabilities and use-cases/white papers."

Keenly aware

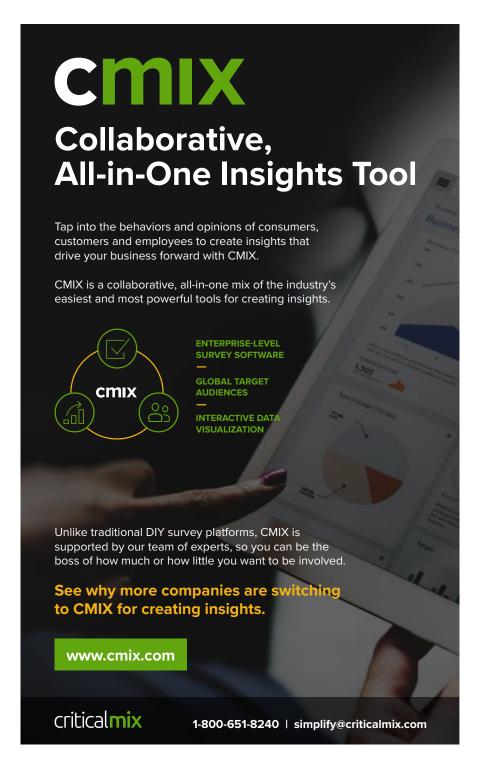
No one study can capture the breadth of the current experience of being a marketing researcher (despite some respondents' claims that we tried to do just that with our too-long survey!). This time around we focused on communication and found that insights pros are keenly aware of the importance of effective communication and its impact on the key relationships in their daily work.

METHODOLOGY

The Q Report work life study of corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research end-client subscribers of Quirk's and members of ESOMAR. The survey was fielded from June 6 to June 28, 2018. In total we received 1,075 usable qualified responses. An interval (margin of error) of 2.9 at the 95 percent confidence level was achieved. (Not all respondents answered all questions.)

Taken as a whole, the findings chronicled here show a profession under fire from the usual sources – shortages of time and money, a lack of respect for the discipline as a whole and a deluge of new data sources to wring value from. But

just as typical is their perseverance in the face of these obstacles and their ongoing ability to adapt their systems and methods to rise above them and continue the search for business-changing insights. Q



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QUIRK'S

Outsourcing offers many freedoms

By Joseph Rydholm, Editor >> Quirk's Media

As skilled as most researchers are at the multitude of tasks they need to tackle each day, they can't do everything. That's where outsourcing comes in. Q Report survey respondents indicated that about half (49 percent) of their projects are completed fully in-house, leaving the rest either fully (33 percent) or partially (18 percent) outsourced.

Data collection (28 percent) and recruitment (26 percent) were the most-outsourced parts of the research process, followed by data analysis (22 percent) and project management (12 percent).

Generally, outsourcing occurs to free up internal bandwidth for other projects and to be able to incorporate skill sets or areas of expertise that are outside of the research team's capabilities. Ranked in order, the top reasons for outsourcing were: lack of internal staff (33 percent); to provide an expertise that's not found in-house (31 percent); because it's faster (16 percent); because it's cheaper (7 percent); because management prefers outsourcing (6 percent).

The Q Report survey included an open-end to get more details on what parts they outsource:

"We handle more basic surveys inhouse (ad testing, basic AA&U-type surveys). We outsource projects that require more advanced analytics or complex sampling/data collection (segmentation, multi-market trackers, etc.)."

"When we outsource, we almost always go full-service. However, we are more hands-on than most clients, taking an active role in survey development, QA, data analysis and report development. In addition, several of our reports combine outsourced research with other data we collect ourselves."

"We outsource a special segmentation project. The firm that does this project for us has been doing it well before I came onboard and they do a pretty good job. Also, this is a massive project and I am the sole member of the market research/insights department, so it frees me up to do multiple projects at a given time."

"Our internal team designs the research, oversees the development and execution by vendors, guides the analysis and report-writing and then rewrites and shortens the presentations to tell the story and focus on the critical elements."

Another open-end sought more insights on why they choose to outsource.

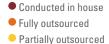
"We only do global projects - do not have language capabilities across all countries."

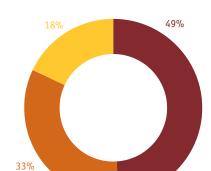
"It would be much more expensive to do all research we need in-house. Outsourcing means we do not need infrastructure, staff."

"It's a balancing act between how quickly vendors can provide results and the staffing capabilities they provide. Additionally, some of our larger strategic work (CSAT studies) is outsourced to avoid our own biases."

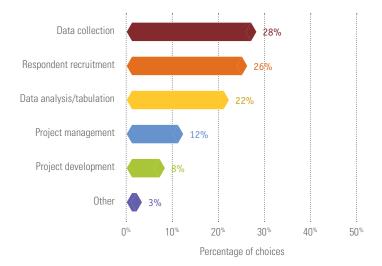
"The lack of staff isn't necessarily an issue now but we have done several

What percentage of your research projects are conducted in-house vs. outsourced?





What parts of the insights or marketing research functions do you outsource? (Multiple answers accepted)



projects that have tracked annually or semi-annually for a decade or more and that work has stayed with the same vendors so it's more a matter of difficulty transitioning internally when our outsourced partners already have the capabilities."

"We tend to outsource large, nationally representative consumer studies that are too complex and time-consuming for us to manage in-house, to recruit respondents for and to manage data collection ourselves, given the limited resources we have and lack of personnel."

"To get useful inputs from agencies who deal with many and varied clients — learn from their experience."

"To gain unbiased insights from a third party. In pharma, it is also critical to outsource market research in order to maintain compliance and adhere to industry regulations."

"Outsourcing is more expensive but we have a small team (one manager, one analyst, one intern) and will leverage vendors when we are at in-house project capacity. We also will outsource when we are interested in trying a new methodology."

"Only when our department is too swamped or when a certain level of distance is needed from an ethical standpoint."

"We like to see what suppliers can bring to the table in terms of design, analytics and reporting that we don't have in-house."

"The biggest reason is the regulated nature of our industry and need to manage the privacy and confidentiality of our respondents – particularly as it relates to HIPAA."

Clearly, outsourcing offers a number of advantages for researchers. But the biggest one may be that it lets them do what they do best: synthesize, analyze and present information to help their organizations answer their most pressing business questions.

"To not fatigue our client sample, which is small. For focus groups and other research that requires facilities."

"I am a one-man-show and need help to make projects possible."

"We are consumer insights professionals and our time is better spent on the 'so whats' than on performing the actual research tasks. It's a rabbit hole we don't want to go down as our vendors are experts on this part."

"We don't consider data collection as our core-business; instead, we prefer to focus on adding value via design and analysis."

"We don't get financially rewarded for being good at cutting data. We get rewarded for surfacing insights and implications and socializing them." Q from

20|20

How clients and vendors can build trust and get to work

By Julia Eisenberg, Vice President, Insights >> 20|20 Research

ccording to the 2018 Quirk's Q ${f A}$ Report, the main reasons clients outsource research are the lack of internal staff (33 percent) and the need for expertise they don't have in house (31 percent). If clients must engage outside partners, how can they do it effectively and efficiently? Successful outsourcing starts and ends with high-quality communication. An easy soundbite to offer but a difficult promise to keep. What does high-quality communication really mean? If a vendor has to say it, can they really do it? What is the measure for high quality? In reviewing the results of the Q Report, we felt compelled to explore how communication and the relationship between client and vendor impacts how insights are shared inside organizations.

Needs vs. wants

Knowing so many clients outsource research due to a lack of staff reveals an interesting point of tension. Clients may need to outsource but do they want to? Bringing in a partner can be efficient, save time and allow clients to delegate but it can also be annoying, frustrating and a large burden on already full plates. Based on feedback we heard in the Q Report, the key to a productive outsource experience starts even before back-and-forth communication – it starts with listening.

"Listen, and know us before you call."

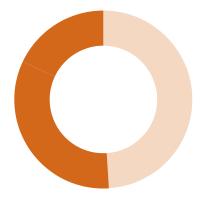
"Stop trying to sell and listen!!!"

"I'd like more face time and I'd like them to really listen. Be willing to evolve and push for better insights reporting."

Listening must be where clients and vendors begin when establishing a partnership. Clients must demand it and vendors must do it actively and with interest. This is the only way a vendor can ultimately deliver insights a client trusts enough to share. Good listening sets the tone for productive two-way communication and the combination of listening and communication is what creates understanding. It is not enough for clients to feel heard and to feel that communication is positive. The need to engage a vendor creates a gamble – one every client hopes produces genuine understanding of their business and insights they can share with confidence.

"There is a real gap between what our vendors can understand about our business and business challenges and what my internal clients need. That gap creates a challenge when translating our business objectives to a research objective and vendors simply are not good at making that connection. I wish they could understand our needs and drivers better so that they could offer better recommendations from the research. Now, all ven-

What percentage of your research projects are conducted in-house vs. outsourced?



51%
Fully or partially outsourced

dors like to make recommendations but they are either super-obvious and just a regurgitation of the data or simply not useful and thus end up being totally ignored."

Of course there is no quick and easy solution for bridging the understanding gap; a client will always know their business best. But here are some suggestions for how to start building a collaborative relationship for clearer – and less complicated – insights development:

For new relationships

Learning plan. With the luxury of time, the client and vendor can create a learning plan together. The client gets to share and showcase their ideas and hypotheses – even if raw or in early stages of development – and the vendor gets to research the topic, gain exposure to the business and help refine, discuss and dispute the client's hunches.

Request for proposal. The client adds a section asking the vendor to summarize what they already know

about the client's business, offering a chance to see how the researcher conducts research well before the first respondent is recruited. Clients should also be clear about how firmly they'd like vendors to stick to the RFP's parameters – should they be followed to the letter or would the client appreciate suggestions, questions and fresh ideas?

Three quick questions. Rather than sacrificing diligence when short on time, the client asks the vendor three clear questions: What is your unique value proposition? What is our unique value proposition? How would you address our research question? As a bonus, eventually the client can build a library of the responses that work best with the company/department's culture and needs.

For established relationships

Face time. Vendors should make in-person client meetings a priority. So much is enhanced, cultivated and diffused in the moments between meetings that can solidify – or sever – a working relationship.

Fresh knowledge. The vendors and client set time at regular intervals to discuss the client's business, not just individual research projects. What has changed? Who has changed? What remains consistent?

Use case. Are client and vendor on the same page about why, when and how often the client needs help? If not, this can lead to confusion on the part of the vendor about how they add value. Is the vendor for special projects only? Have results fallen short of expectations? Discuss how the vendor can add the most value by understanding the purpose they serve. How can the client help the vendor understand the reach of their solutions within the organization?

Posterity. The client and vendor should consider together what knowledge the vendor is able to hold and transfer as new stakeholders join or leave the client team. Are past insights organized and easily accessed or are new client stakeholders doomed to conduct the same research over and over because they can't see or understand what was done in the past?

"I would love vendors to understand our business better. Every vendor meeting starts with, 'So, tell me what you do currently.' It would be revolutionary for a vendor to come in and say, 'Here is what I understand about your business and here are some ideas for how our tools can help you.' To date, all discussions have been me telling them how they can help us (or not)."

If clients and vendors are clear and honest about why they've connected – especially when the client lacks the staff to get the job done internally – both can reach a state of mutual understanding faster and with fewer complications. When everyone knows how to add value and makes the effort to understand the business, clients can engage vendors as true extensions of their team. The result? Productive insights that are easy to trust, share and put into action.

How to trust an "expert"

When clients count on vendors to provide expertise they don't have in house, the stakes are even higher than when outsourcing due to lack of staff. There is a big difference between needing an extra set of hands and needing a distinct set of skills outside the client's main comfort zone. This is a leap that certainly starts with a need for listening and mutual understanding but one that also requires the complex experience of developing trust. It's one thing to know a business, a method or an approach and to then bring someone in from the outside to support it. It's something else entirely to decide to trust an external partner to add expertise that is totally different from a client's skill set. This type of trust, once earned and established, can result in productive long-term relationships that include collaborative strategic planning, multi-year forecasting and other macro initiatives that can be tackled together. But giving this trust opens a partnership up to risk and client/vendor relationships are not often easily up-leveled from basic client services or project management to a relationship that generates great insights.

"They're often great project managers but not creative or insightful. I'd like more help uncovering insights and opportunities but very few vendors do this well."

"Planning. Would like to bring them into the annual planning process earlier before we finalize the research agenda."

"I need them to think outside of the near-term project and partner in a more meaningful and collaborative way."

"...basically, become even more of a trusted partner and an extension of our research department."

The Q Report provides dynamic feedback and insight around this topic. It also begs the question - beyond this survey, are clients really asking for these types of relationships with their vendors? Are vendors regularly asking clients if they can partner in this way? On many levels, these needs are not being met by client or vendor and so the dialog must shift beyond looking at what support the research project needs to what support the client, the business and the vendor relationship needs for it to be considered successful and healthy. Only then can we shed the baggage tied up in the formation of the client/vendor relationship and get to a productive place of insights that make a difference inside an organization.

Share the insights love

How can a client's need to outsource ensure great insights are created and activated inside an organization? We believe these elements of listening, communication, understanding and trust form the basic foundation for everything (including insights) that come from a client's external relationships. When the terms of the engagement are clear, honest and laid out plainly from the start, great things happen. When stakeholders review a report that really "gets it," what they're really holding in their hands is the result of a solid relationship formed through high-quality communication. Whether through the process of collaborating on a learning plan or the vendor-as-hired-expert asking how the research will be used to make decisions inside the organization, the act of listening, communicating, understanding and trusting are vital to successful commissioned research.

The Q Report gives us a broad and current view of how things are going in the world of corporate market research. This data and the feedback gathered provides a raw and honest look at what is working, what is changing and what desperately needs improvement. This report is an incredible jumping off point for clients and vendors to start listening with intention, communicating more clearly and adjusting the ways we collaborate on corporate market research. Here at 20|20, we're listening and doing our best to uncomplicate research. Because the only thing worse than not having data from the Q Report would be failing to act on the insights it contains. ()

FOOTNOTE

1 All verbatim responses are excerpted from Q65 of the 2018 Q Report "In what area or areas would you most like to be able to improve your ability to communicate with your research vendors?"

20 20

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from



Automation bridges the growing communications gap in research

By Shanon Adams, Chief Revenue Officer >> AYTM

A utomation has become a buzzword among marketers and researchers but its roots come from the automobile industry and it refers to the implementation of mechanized product lines. Simply defined, automation is the adoption of technology to streamline time-consuming and expensive tasks typically performed manually by humans.

Some people vilify the concept, relating automation to robots taking over, but I prefer to think of automation as complementing the workforce and research. Our time is better spent pursuing creative and intellectual endeavors than manually tabulating a column of figures when software will do it for us in a click of a button.

The market research industry has embraced automation out of necessity to keep pace with the rapidly changing landscape of consumer markets and trends. We need data faster and cheaper and to be agile enough to make business decisions in hours instead of weeks.

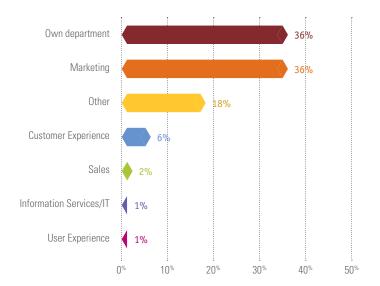
Market research automation has gone through a few transformations including data collection, methodology and data visualization. From paper to mobile surveys, the automating of advanced research methodologies such as conjoint is streamlining the process and improving the respondent experience while delivering higher-quality insights in a fraction of the time.

By embracing automation, researchers are changing and improving how we communicate to consumers, stakeholders and beyond.

Communications gaps in a rapidly evolving industry

Based on the 2018 Q Report, which surveyed research and insights professionals, we are seeing a shift in how businesses operate and structure teams, especially research departments. While 36 percent are still stand-alone departments, concurrently 36 percent are under the umbrella of their marketing department. The rest are organized in cross-functional teams sometimes supporting multiple departments. The challenge that is emerging is

In your organization, is the marketing research/insights function its own department or is it part of a larger group?



how these teams communicate – or do not, as indicated by one respondent on a research team.

"People were unaware of our role and what we could be doing to help them. Recently, as I've joined the organization it's been a big focus to get out my team's name within the organization. People were/are doing a lot of things on their own, results and findings are very silo-ed. We're trying to be more of a connector of things that are happening."

Automation tools can not only streamline tasks and processes, it can also become a central space to bring these newly "distributed teams" together and increase the visibility of the research team as a solutions provider in their organizations.

In-house is the new normal but doesn't mean you are on your own

Also noted in the report is that while 33 percent of respondent companies are still fully outsourc-

ing research and 18 percent partially outsource their research, a growing number (49 percent) are doing research in house. This continued shift to in-house research programs is driven by growing adoption of self-service and DIY tools. Often the major reason people still outsource is lack of internal staff (33 percent) followed by lack of expertise in certain areas (31 percent). Based on comments in the survey, bringing at least some research in house has allowed teams to provide insights faster with a cost savings to the company.

"Survey design tools and data analysis tools have provided better leverage of insights for the company."

While the majority (46 percent) state their budgets will remain the same, how companies utilize those budgets is changing as they adopt new technologies and bring more research in house. Market research automation of tried-and-true methodologies means you have the expertise at your fingertips and

can quickly gather results. As one respondent stated:

"'Quick' surveys allow us to make faster decisions for more tactical projects."

When asked what they plan to focus on the upcoming year, data visualization and dashboards seemed to dominate the responses.

"Developing KPI and customer insight dashboards has been the biggest push this past year."

"Focus on more data visualization and launching dashboards for senior staff."

While data collection and methodology automation have made great strides automating data, reporting and analytics is gaining momentum.

"Online dashboards enable me to deliver results in real time."

As more and more companies bring their research in house it's important to remember that while DIY is self-service it doesn't mean "you're on your own." Your DIY and automation platform of choice should still come armed with resources who have the knowledge and expertise to train your team as well as guide you on best practices. Launching an automated conjoint study without understanding the methodology is akin to jumping out of a plane without understanding how your parachute works. Needless to say, it's not a good idea to learn on the way down.

Automating collaboration from design to analysis

One way data collection has evolved is from paper surveys to mobile surveys, in turn reducing the time it takes to collect data in field from weeks to hours. The evolution of quantitative surveys has kept pace with emerging technology. Today it's important not to only be mobilefriendly but truly device-agnostic. We at AYTM have spent a great deal of time and resources designing surveys that are truly device-aware, which means a survey will look the same no matter what device your respondent uses. This consistency not only improves the survey design and data, it also increases respondent engagement.

Speaking of survey design and programming, collaboration is another emerging use for automation. Bringing the collaboration process into the survey platform makes it much easier for cross-functional teams to work together under tight deadlines. For instance, on our platform you can now share and edit surveys in real time with your team, stakeholders and/or clients and seamlessly switch between editor and viewer as you program the survey. This reduces the time spent on programming and editing, streamlining the design process and leading to optimized output and higher-quality results, faster.

Collaboration in automation doesn't stop at design. As soon as a survey is fielding you can instantly access your results vs. waiting weeks. You can then share your results in real-time with your team and/or clients. Plus, with robust filtering and analytical tools like crosstab analysis you can empower your internal clients to interact with data without waiting for the survey to even complete. Automa-

tion provides real-time data visualization for every question that can be filtered, customized and shared.

Whether you are a corporate researcher working with internal teams or a consultant working with clients, automation will do the heavy lifting for you. DIY tools allow you to communicate directly with your internal client without adding a supplier to the conversation, thus making things faster and easier. You save time and money while being able to tell the story of your consumer and shape your brand.

Communicating effectively with respondents is important

The purpose of market research is to collect insights and listen to your consumers or potential consumers, so why do we tend to treat respondents as if they are just numbers? We often forget to talk about how to optimize the most important conversation, the one between researcher and respondent. One of the main reasons for research automation adoption is the need for higher-quality data that is faster and cheaper. What people often forget is that technology cannot replace the human element of a survey - the respondent, panelist and survey taker. Essentially this is your consumer and there is not an endless supply of them, so their experience should be a priority.

This requires us to evaluate how we approach research and improve communication between researcher and respondent. Did we communicate our objectives to the respondent, do they have the tools they need to succeed and are they a good fit for this survey? Approaching these questions as if you were assigning something to an employee will not only improve data

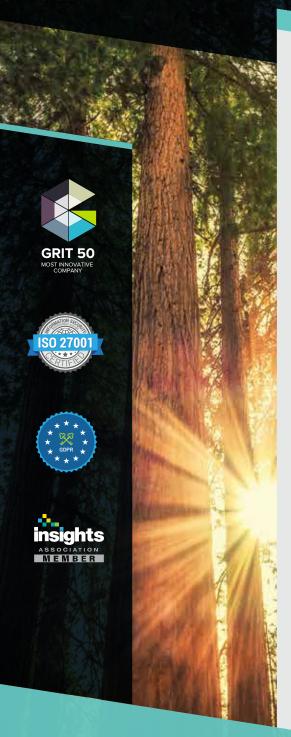
quality but increase respondent engagement for future surveys.

DIY survey tools built with the respondent experience in mind naturally guide researchers to higher respondent engagement, which leads to better data. From making your survey truly agnostic (not just mobile-friendly) to implementing advanced automated methodologies like max-diff and conjoint that once were cumbersome or expensive but are now easy and affordable to deploy, with automation the respondent benefits and that means you do as well.

Automation does not replace humans, it just unlocks our potential

So in conclusion, automation is not a buzzword that will disappear in a year or two, it's becoming the new normal. For newer companies it's their foundation and the core of their business. Established companies are also adopting automation rapidly to stay relevant and competitive. By embracing the use of automation in market research we are changing how we work and communicate with consumers, respondents and stakeholders for the better. Research automation tools that empower teams to improve survey design, collaborate and improve the respondent experience will generate better data, allowing more time for storytelling and making data actionable. This is where we truly unlock the greatest human potential, which no robot could ever replicate. ()

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How well do we know our customers' unmet needs?

By Renee Smith, Chief Research Officer >> GutCheck

n a world where three-fourths ▲ of all consumers say they would be willing to choose, recommend or pay more for a brand that provides a personalized service or experience (Forrester 2015, Epsilon 2018), it's imperative for brands to know their customers. Billions of dollars are being spent by marketers to personalize products, services and communications for their customers and prospects.

Yet, in this year's Quirk's Q Report, when asked, "How well does your organization know its customers?" almost half of all market research buyers indicated deficiencies or substantial gaps in organizational knowledge of their customers.1

When asked about the biggest barrier to improving their customer knowledge, 47 percent selected a "lack of resources (money, time, personnel) for doing so" followed by "other" at 15 percent and "lack of provable ROI for doing so" at 11 percent.2

In short, about half of all market research buyers say they need more information about their customers and about half say they face constraints from lack of time, money and staff to obtain it. Did we, as market research providers, know that about our customers? And if we knew, or now that we know, what are we doing about it?

One way suppliers can help market research buyers get more granular customer knowledge is to avoid testing concepts and ads only among the general population or

broad category users. Testing directly with a more targeted audience or using a targeted augment sample can help our market research buyers obtain insights relevant to personalization before they develop or launch a new product or service.

A second way we can help our market research clients know more about their customers is to arm them with insights about key subsets of consumers that we identify in-the-moment as we conduct other research for them. If while conducting a concept test we find that 40 percent of respondents are top-box favorable to a concept, we have identified an additional segment of consumers that we can profile on attitudes and behaviors. And if we move beyond survey-only profiling

to include non-survey data, we can do this in a very agile way. Profiles of these in-the-moment audiences can feed into the creative brief or can be used to develop personalized offers, messaging or product features.

A third option for helping research buyers obtain customer information relevant to personalization is to think differently about segmentation and needs studies. Traditional segmentation, need-state or demand-space studies remain expensive - often \$100K or more - and time-consuming, typically taking six-to-12 weeks. Sometimes these traditional studies are necessary and useful. But it's likely time to rethink these studies to evaluate whether applying automation and/or combining big data with survey data and/or applying agile market research principles can shorten turnaround times and provide more cost-effective options for today's market research buyers.

Currently, hundreds of millions, and perhaps billions, of dollars are being spent on systems and analytics to support in-market testing and optimization of personalized offers and messaging after a new product or line extension launches. But if we more systematically gather and feedforward customer and prospect information relevant to personalization, then identifying optimal combinations of product features, claims, packaging and ads for different types of customers can begin prior to launch, making post-launch optimization efforts more efficient. For example, if we know prior to launch that the dominant personality trait of top-box concept favorables is conscientiousness, that knowledge can be provided to the marketing team and used to tailor messaging

COMMON THREADS

Researchers share their takes on internal customer knowledge

Know Customers Well

Typical among the positive responses were explicit references to customer experience or sometimes integration of customer knowledge into the strategy.

"Increasingly well over years using different methods/techniques and approaches like market research/ UXR/internal data analysis."

"Really well actually – we have been at the cutting edge of customer experience (with emphasis on the member) for many years."

"Very well. Despite hurdles we do a good job of understanding consumers and customers and integrating into strategy."

But there was also a sense, among some, that what they know may not be enough.

"Well. However, we have been too focused on thinking of them as consumers, not people. This means we know everything about how they use/choose our products and the category, but much less about their full lives. And hence we haven't connected to them on their key issues — people don't spend their entire day thinking about our categories."

Not Well or Notable Deficiencies

Among those who expressed challenges, the size of the deficiency varied widely.

"We know so little it's embarrassing."

"Depth of knowledge varies from brand to brand. For critical brands, we know our consumers and retailers extremely well. For small brands, knowledge is more limited."

"Not so well, not enough segmentation and needs studies."

And there were direct references to a lack of knowledge for personalization.

"We know who they are, but not much else that would help personalize experiences."

"Overall very well, but yet not very well at a segmented level. We're working proactively with the business divisions to recommend activation around personas to inform product and experience design."

We need to think of every pre-market study as an opportunity to gather more information on personalization.

so that fewer in-market iterations are needed before the optimal set of messages is found.

In short, we need to think of every pre-market study as an opportunity to gather more information on personalization (e.g., concept-favorable audiences, high ad engagement audiences, segment and persona audiences, etc.). We also need to revamp how we help our market research buyers obtain strategic insights about consumers by applying agile market research principles and combining survey and non-survey data for greater depth at less time and cost.

The biggest barriers market research buyers cite to obtaining more customer knowledge - a lack of time, money and personnel are the same barriers that market research buyers were raising with us seven-to-10 years ago. And that buyer pain point led to the rise of agile market research approaches. We applied agile principles then and clients received insights faster and at a lower cost. Today's market research buyers still have an unmet need. Let's talk with them to learn more about their needs and identify agile ways to help them gain more customer knowledge so we can support their personalization strategies even before market entry or a product launch. ()

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"Power of Personalization." 2015. Forrester Research, Inc.

FOOTNOTES

1 Quirk's posed the question, "How well do you feel your organization knows its customers?" to respondents who said the primary product produced by their company is not market research. 556 respondents answered this open-ended question.

2 872 respondents answered this singleresponse question: "What is the biggest barrier to your organization improving its understanding of its customers?" Other responses included "lack of C-level support for doing so" at 8 percent, "low response rates to our customer surveys" at 7 percent, "available tools for understanding customers are not effective for us" at 6 percent and "lack of internal faith in the insights department" at 5 percent.





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The art of analytics, powered by technology

By Kalyan Raman, Chief Technology Officer >> Research Now/SSI

Today's market is overcrowded: too many competitors, too many products and services and too many media channels. They are all competing for the interest of potential buyers whose attention span continues to decrease and whose choices are driven by diverse tastes and trends that can change overnight. In this world, research-based insights that can help organizations understand and respond to shifts in demand and buyers' preferences are truly invaluable.

By extension, technology that assists in the analysis of research data to uncover those insights is also invaluable. The analytical context where technology can contribute revolves around three essential questions, which almost every organization is seeking to answer:

 Who is my next customer? Or, what specific groups of consumers should I target to grow my business and my market share?

- How can I fuel that growth? Or, what should I do to gain share among those specific targeted prospect groups?
- How can I reverse a decline?
 Or, why am I losing share among a specific group of customers and what should I do to change it?

There are innumerable variations on these core queries and many possible answers to each of them, leading to the notion of combinatorial scale. This issue of scale and the need to identify relevant combinations among billions of possibilities differentiates the nature of the underlying problem that technology is used to solve.

Market researchers have created methodologies and sophisticated scientific approaches grounded in data to tackle that combinatorial challenge and address the questions above. To get to the best answers – and to arrive at them quickly –

researchers use the same kind of deductive process any good investigator does, adapted to the specific requirements of market research.

- Collect all the evidence via consumer or buyer research.
- Connect the dots, or the relevant data points, to reveal patterns in the research results that can help shed light on the dynamics of demand.
- Contextualize the patterns to gain insights, based on knowledge of your organization, your customers and the marketplace in which you compete.
- Communicate the findings, recommendations and action plan
 to the decision makers in your organization who can consider the
 demand insights you've found,
 and make the decisions that will

achieve the results your organization seeks.

As an example of this process, consider a product or a service that is losing sales or growth among men 25-35 who live in a particular group of postal codes and own a specific brand of car. Researchers gather data from that segment and analyze the results to identify commonalities that more precisely define the customers being lost. They then communicate findings and recommendations – which may involve anything from different approaches to marketing, advertising, pricing, targeting or promotional strategies to changes in the product or service itself. This core process can be repeated to ensure that the actions taken are producing the desired results, without unintended consequences.

Technology has long played a central role in the first step of this process: collecting evidence. Given that the preferences of consumers vary at an individual level, it is important to understand preferences and design strategies for individual targets as opposed to groups of consumers and to have a measure of surety in the representativeness of the individuals. This is where the role of online research panels sits at the heart of all our offerings.

Now technology is enabling tools that can support and enhance the remaining steps of the process – connecting the dots, visualizing contextual insights and communicating them to decision makers to drive activation. While these tools are relatively new, and not universally adopted, they can provide important advantages.

Researchers are increasingly tapping large, well-curated data sets, integrated using state-of-the-

art data management and techniques, such as those provided by a consumer data platform. Technology that ranges from machine learning and deep learning to visual discoveries can act on these large sets of data to address the combinatorial scale problem, reducing the number of combinations by applying a relevancy filter at every stage using multi-step computational algorithms. These techniques can bring new and different insights into focus that are relevant to the context and may not have been evident using more traditional methods.

In addition, the sheer quantity of evidentiary data that researchers can collect today can overwhelm traditional analytical methods. Technology enables more powerful analytical modeling methods, such as multi-touch attribution or modeling of path to purchase along with visual discovery tools, to better cope with these large amounts of data.

Essential characteristics

The accelerated pace of competition and the unexpected disruptions that affect every market make speed and agility increasingly essential characteristics for every business. Technology can help analysts shorten the time to insights, particularly when dealing with high volumes of data, and bring the communication of results to near-real time.

Consider an example of the first of these values of technology – bringing new and different insights into focus: the application of machine learning to data analysis.

Traditional analysis starts with a hypothesis – what researchers or others believe is influencing consumer demand. The researcher then gathers data and analyzes the results to see if the hypothesis is supported or rejected in favor of a different conclusion.

The inherent limitation of this approach is that the hypotheses are based on expectations of what will be found, making it more difficult to uncover truly unexpected results. Hypothesis-based research tends to support incremental gains in understanding rather than truly surprising results that can lead to disruptive innovations.

By contrast, the method enabled by machine learning and large data sets introduces a discovery process that requires no starting hypothesis and is therefore independent of expectations. In this gaming approach, the computer identifies and learns from clusters of data points as well as the broader patterns they create, zeroing in on possible findings based only on the data itself.

Many, perhaps most, of these findings will ultimately prove irrelevant, because they are generated without any contextual understanding. Creating actionable insights from any findings requires the crucial contextual knowledge of an organization and its goals in the marketplace that machines do not possess.

However, this kind of analysis can lead to insights that no one would have predicted or expected. They, in turn, can lead to breakthrough ideas with the potential to truly revolutionize a company and a market.

Raised concerns

Another category of technologyenabled analytical tools – more familiar to most researchers – are dashboards and data visualizations. For some, these tools have raised concerns that visual displays may provide too-easy access to oversimplified results, particularly for research clients who are not trained in the finer points of data analysis.

It's true that these visual displays act as translators, serving as an accessible interface that simplifies and improves the interpretation of data and allows for a far more immediate grasp of dense research data than a table of numbers. Therein lies their value, and as the data involved in any research study grows in volume and complexity - such as analyses based on machine learning - the value of visualizations grows correspondingly. We are highly visual learners, after all, and data visualizations unlock the potential for visual discovery.

Technology-driven visualizations can add power to the art of analytics – helping analysts identify interesting and potentially important outliers in data, for example. Outliers have gained recognition for their potential to enrich research results with insights that can provide a major impact on a brand's success, such as identifying the "superconsumers" who are a brand's true evangelists – identified by Eddie Yoon in his book Superconsumers: A Simple, Speedy and Sustainable Path to Superior Growth.

Dashboard visualizations displaying real-time data can greatly simplify previously time-consuming analytical tasks. For example, our cross-media campaign effectiveness solution incorporates an interactive dashboard visualization allowing flexible data recombinations for virtually instantaneous comparative views. The tool makes it much easier to see and understand complex results from multiple media channels.

This dynamic linkage of realtime data with flexible visualizations offers users the additional advantages of speed and agility. Powerful tools such as these can help decision makers readily grasp important story lines in research findings, enabling them to make informed choices at the speed of the modern marketplace.

Need to pay attention

It's important to note, however, that not all analytical tools are created equal. Many have encountered online language translators that fell short. Since data visualization tools function as translators, researchers need to pay attention to the way they are built.

The ability of visualizations to simplify data interpretation through visual discovery is grounded in the idea of progressive disclosure. Under the principle, when a researcher shifts the view and focus of the visualization – from a high-level overview to a detailed segment, for example – the tool presents only the relevant, necessary data, not an ocean of data that would overwhelm the user.

Consequently, the tool must be designed with a thorough understanding of how research analysts work, and what they are trying to accomplish in any analytical task, to ensure the incorporation of the right data. That means not only providing the data the analyst needs at any given level of analysis but also masking the data that's not required – until the analyst reaches the point that it becomes relevant.

To fulfill these requirements, the tool must maintain dynamic, robust connectivity with the underlying research data. Otherwise it cannot deliver the flexible functionality that will ultimately provide a clearer path to insights.

Dashboards and data visualizations should be compatible with your communication and presentation tools, such as PowerPoint, as objects. That allows the display to update automatically based on changes in the underlying data, ensuring your presentation graphics remain up-to-date.

These analytical tools can play an important, valuable role as components in the deductive process. They can help researchers process raw data to uncover new and potentially more powerful insights into the shifting attitudes and behaviors that drive demand, while shortening the time it takes to reach them.

Of course, any analytical tool is only as good as the data that is fed into it, and technology-driven tools are no exception. They require robust, accurate, trusted data as the input. To deliver on their promised potential, their design and functionalities must have been guided by an understanding of the needs of marketers and researchers. Their output must be informed and evaluated by the judgment of thoughtful professionals to identify valuable findings and prioritize them for decision makers to act on.

When those conditions are achieved, technology in the analytical process extends and expands the ability of researchers to identify and uncover critical demand insights by collecting data, connecting the dots to understand its implications and communicating findings to drive decisions. In an overcrowded, oversupplied market, these fundamental benefits are simply too important to ignore. Q



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ESOMAR

A recipe for success in corporate-agency researcher relationships

By Finn Raben, Director General >> ESOMAR

10 years ago, the advent of "always on" big consumer data was causing tremors in the insights industry. There was much handwringing, as industry provocateurs stood on soapboxes to proclaim the end of survey research; behavioral data was going to make the long-standing research and analytics industry obsolete.

If anything, this goes to show how difficult it is to predict wholesale changes in a sector. A decade on and the skills and expertise of market researchers are just as much in demand as they have always been. That's not to say technology and always-on data hasn't changed the industry, it's just it's been far less destructive than the doommongers originally forecasted.

But of course, these changes aren't without their challenges.

As more data becomes readily available from a multitude of new sources, many of these new data streams are supplementing the more traditional research approaches, to provide far richer intelligence. Rather than the "death of the survey," this new data has led to a change (and often an expansion) in the makeup of the client-side insight team, as well as the skill sets that are required. As customer and consumer behavioral data becomes increasingly prevalent, client-side teams are bringing analysis in-house rather than using outside agencies. When you combine this with the automated and DIY platforms that make it easier to conduct quick, tactical quant and qual research, a significant proportion of what would have been supplied by external generalist agen-

cies a few years ago is now managed in-house.

This move away from outsourcing and back to insourcing started some years ago. As you can see from the global data in the companion chart from Cambiar Consulting, revenue for generalist agencies was already dropping in 2015, while revenue for specialist agencies was showing a significant increase over that 10-year period leading up to 2015. This is part of the change that has been gaining pace in the insights industry over the past 10 years and is impacting the relationships between brand-owners (clients) and their research providers.

Of course, the move in-house is not the only change. The commoditization of data is also affecting the relationship between client and research provider. As technology makes it easier to access data through automation and alwayson devices, the collection of data becomes an ever-cheaper function, no matter what the size of the business.

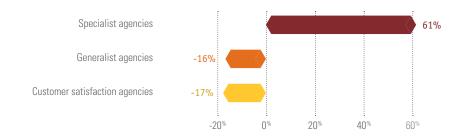
On the positive side, this opens up the potential value of data to all and increases understanding of how to leverage this new information asset. However, the growing abundance of cheap data, along with tighter research budgets, has also led to a race to the bottom and a growing disregard for key quality aspects such as rigor and provenance. This has meant that many research firms who may have been consultative before are now (mistakenly) trapped in the role of a "commodity" supplier.

And thus we get to that now commonly debated issue, which was first raised back when the industry wondered where big data would take us, and which hasn't changed much in the last decade: Why should a client work with a "consultant" rather than a "supplier"?

Consultant versus supplier

Data is just data; to turn data into insight is a much more complex process. For client-side researchers who are considering external agencies as partners in the search for insight, it may seem like an easy decision to make. You pick a consultant to work with when you need expertise, sector or methodological knowledge that you don't have in house. You pick a supplier when you just need the data or you just need a tool.

However, I would argue that this approach is overly simplistic and detrimental to the company's search for insight; it is also very dismissive of the added value that an external partner can bring. Establishing expertise: % revenue change, 2005-2015*



*After inflation; top 4 agencies excluded | Source: Cambiar Consulting

Whether you're dealing with a sample provider, a fieldwork company, a data analytics bureau or a full-service research house, the right relationship will always be consultative and mutually advancing.

When an in-house legal team approaches an external solicitor or barrister do they not invest in explaining what they wish of them? When a salesperson makes contact with a new retailer do they not invest in explaining how they will both mutually benefit from the relationship?

Whether you're dealing with a sample provider, a fieldwork company, a data analytics bureau or a full-service research house, the right relationship will always be consultative and mutually advancing. From the client perspective, open communication lines and a willingness to listen, sharing information on business priorities, strategies, cost pressures and market challenges are behaviors that build good relationships. While on the agency side, sharing insight about

methodology, processes, technology, study design, samples, question-writing and more helps to build a relationship and ensure that it is not simply transactional; in such a relationship, both parties benefit through deeper understanding, getting better, more valuable data and richer insights.

For client-side researchers it's a process that involves trust and time. Opening up to your agency and providing them an understanding of the bigger picture and the business questions you are asking to solve maximizes the chance of you getting what you need. But it's easy to say that, and of course part of whether you're working with a consultant or supplier depends on the agency you're working with. Many research agencies talk about being strategic advisors and then

"Honesty between both partners is essential in managing expectations on both sides and ensuring the best possible outcome."

behave like suppliers. They jump when clients say jump. Often this leads to poorly designed research outputs because the project or questionnaire itself has not been designed with the end game in mind. Scope-creep often leads to unrelated questions being put into surveys, moderators are told "just find out what people think about this too," costs start to escalate and before you know it the content has little cohesion, making it even harder to find (and then tell!) a story.

Agencies often agree to changes from clients to keep their business and maintain good relationships and in turn corporate researchers agree to changes and last-minute requests in order to please their stakeholders. Without a partner to review, discuss and challenge hypotheses and proposals both sides stumble. But the most important element in fostering a consultative and valuable partnership is through communication and openness, not just taking advice when given but asking for it and sometimes even challenging it. There is just as much value in the corporate researcher using these consultant behaviors to manage relationships with their stakeholders. You can develop the role of the researcher internally by listening and engaging with the broader strategic picture, using open and clear channels of communication and, of course, using a little pushback where appropriate. Your results will be

better, engagement will improve and the true value of your expertise can shine.

When corporate researchers truly partner with their agencies or suppliers, magic happens. One example that comes to mind is that of Zappi and Coca-Cola Japan, a case study of which was presented at ESOMAR Congress last year. If you're not aware, ZappiStore provides a series of automated data collection and analysis tools - and describes itself as a software company and certainly not a research agency. But rather than treating the firm as a supplier, Coca-Cola Japan brought it on as a true partner, embedded it within the Coca-Cola internal insights team and treated it as part of the company. This allowed Zappi to develop a tool for a new market, something that would have taken the start-up company years to do on its own. For Coca-Cola, this collaborative partnership led to innovation that revolutionized the way Coca-Cola Japan pre-tested its ads.

Although this was a unique partnership, it was held together by transferable elements that we can all learn from. Hisae Endo. group manager of knowledge, strategy and insights at Coke, said, "Transparency was a key element in the success of the project ... Having Zappi work on the same level as the rest of the Coke team during the project was incredibly important for both teams. Honesty between both partners is essential

in managing expectations on both sides and ensuring the best possible outcome."

So, when corporate researchers truly partner with their agencies the relationship can really work. But the onus cannot be one-sided. An agency needs to be bold and confident in pushing back and corporate researchers need to understand that, in most cases, you have approached your agency or data provider for expertise, and when they push back it's the expertise talking. As Anneke Quinn-de Jong, senior market intelligence manager brand creation at Philips, said, "We are continuously looking for quicker and more cost-efficient consumer insight solutions. Sometimes, we want a supplier to deliver just that. However, for more strategic projects, the third and very crucial factor is the added value we get from a true partner who understands our business challenges and thinks with us along the way."

Magic will happen

Technology has driven many changes within the insights industry and for the corporate researcher the landscape is radically different. The need for expertise, cost and speed are now key drivers in the procurement process. But I believe that if corporate researchers can add "consultative" when considering both their internal behaviors and their external research partners, then magic will happen more often, both sides will get more value from their research and, ultimately, we will create a stronger industry for the benefit of us all. 0

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Corporate Membership



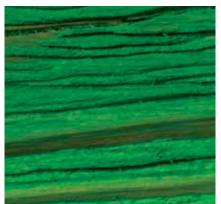


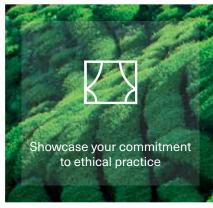
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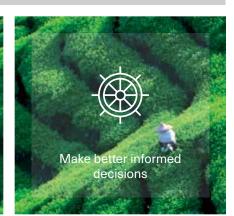
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Always learning: Corporate researchers in a changing landscape

By Reg Baker, Executive Director » Market Research Institute International, and Jeffrey Henning, President » Researchscape International

Ray Poynter and Sue York at NewMR recently ran a survey designed to answer the questions, "How much training do market researchers receive, and is it enough?" They interviewed just over 1,100 researchers (corporate and supplier-side) in 59 different countries. A full report is available at http://bit.ly/NewMR18.

Before looking at those results, let's stop and consider three features of the current environment that are especially relevant for corporate researchers.

First, we researchers seem to take a sort of perverse pride in the fact that most of us "fell into" this line of work with little by way of formal preparation. In the U.S., at least, there are a few undergraduate programs in market research and around half a dozen graduate

programs that turn out perhaps 100 or so Master's-level graduates each year. Professional associations in the U.S., Canada, U.K. and Australia all run certification programs with varying levels of participation by their members, themselves a subset of those working in the field. The safe bet is that most of us learned by doing (rather than through formal education) with some level of on-the-job, just-in-time training focused on a specific set of job responsibilities rather than setting a strong foundation of established principles. Many corporate researchers ended up in research after starting in another department in their firm (most often the marketing department but sometimes customer service or sales).

Second, we are living through a period of dramatic changes in

methods and sources. The world was once pretty simple. With a mix of surveys and focus groups, there was no insight that could not be discovered, no business problem that could not be solved. Today's world is very different, with data from social media, corporate Web sites, frequent-buyer programs, online communities and more. With all these sources comes the challenge to make choices - hopefully informed choices - about the best ways to study a business problem and help management make whatever decision it needs to make. Being successful in this world requires a broad understanding of methods rather than a singular focus on a particular skill.

Third, the role of corporate researchers is evolving away from the operational to either the tactical or

strategic, depending on the organization. In an operational role, corporate researchers managed external suppliers to deliver insights. Three innovation waves of the last 15 years - online survey tools, social media analysis and big data - have mostly migrated in-house, disintermediating external suppliers. In some organizations, this means the corporate researcher is fulfilling a tactical role, doing more of the direct work themselves, with external suppliers now technology providers. But, in others, the synthesis of multiple data streams is now the strategic function that corporate researchers fulfill.

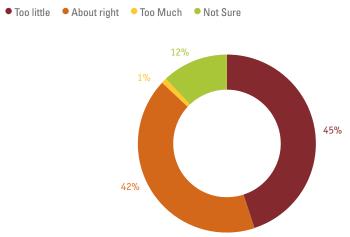
Not encouraging

Taken together, these trends suggest a strong need for fundamental and ongoing education and training, partly to just get people who are new to the field up to speed but also to ensure people are aware of the latest developments and the opportunities they offer for more useful insight. From this perspective, the results of the NewMR survey are not encouraging:

Two out of every five researchers report receiving less than six hours of training a year. The report also notes that the demographic group receiving the least amount of training are in the 35-45 age group, many of whom we would expect to be emerging leaders within their organizations and therefore drivers of change, a trend that Poynter and York characterize as "worrying." While not directly covered by this admirably concise survey, budgets for corporate researchers - in our experience - tend to be lean and lacking a line-item for training and education.

When asked whether they were receiving too much, too little or

Are you receiving enough training?



Source: NewMR Market Research Skills and Training Study 2018

about the right amount of training, survey participants were roughly split 50/50 between "about right" and "too little." Among those receiving less than six hours per year, 17 percent thought that was "about right" and 58 percent "too little."

The most often cited training format for those who had received some training in the past year was Webinars (60 percent), closely followed by in-person on-site (54 percent), in-person off-site (49 percent) and online (28 percent).

These results are not especially surprising, and in fact echo those of similar studies. Consider, for example, the 2015 Future of Research Report¹ from Cambiar, which looked at how market researchers learn. To characterize it as informal understates the problem. Too much training is still on-the-job, where people learn how to do one thing the way their particular organization does it. This typically is supplemented with Webinars by suppliers promoting their offerings, conference presentations that too often are thinly veiled sales pitches, bloggers for whom every new technology is a disruption about to render

everything we know about research irrelevant and an industry culture that values cheap and fast above all else. In its conclusion, the Cambiar report characterized the widespread lack of formal training for researchers on both the client and supplier sides as "frightening."

Cause for optimism

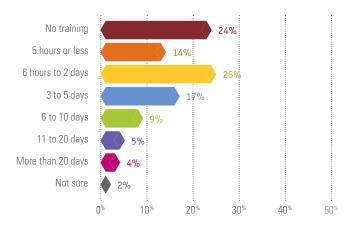
In our own, more modest study of how researchers learn, Market Researchers and the Love of Learning, a 2017 survey of 129 researchers in the U.S., U.K. and Australia, we found some cause for optimism. For instance, when asked what they like about working in market research, these corporate researchers focused on the appeal of learning:

"Learning more about people through trends and statistics."

"It is fun and you are constantly learning and readjusting strategies."

"It is a very interesting science. I like studying my company's business and learning how it works so at some point I can get to a similar point with my own successful company."

Amount of training received over the last 12 months



Source: NewMR Market Research Skills and Training Study 2018

Being successful in this world requires a broad understanding of methods rather than a singular focus on a particular skill.

Now, besides learning about customers and the business they work in, what skills and techniques should they be learning?

Beyond issuing still another call for more training, we need to also consider what contemporary corporate researchers need to know and what skills they require given the business imperatives they are asked to address. In our view, three skills stand out.

The first is **the ability to assess and evaluate the evidence** or, as David Smith describes it, assess its "safety." By that we mean the ability to look at how the evidence, whatever its sources, was brought together and see with a clear eye both its strengths and its weaknesses. What's missing? What are the biases? How well does it reflect the

behaviors and attitudes of the consumers the business seeks to serve? How well does it measure what it purports to measure? Where are the red flags? If there are contradictions across sources, how do we resolve them through synthesis? These skills are especially important for corporate researchers, who often have access to more data points than those on the supplier side executing somewhat standard methodologies.

The second is the ability to understand what the evidence is saying. How does it contribute to our understanding of the problem the business is trying to address? How does it fit or not fit with whatever else we know or with other data we might have? The old discipline of hypothesis formation

and testing is not practiced as it once was but we still need to be systematic in how we sort through the evidence and uncover its secrets. To listen to some conference presentations, what passes as insights today were simply hypotheses that researchers were too busy to frame and emerged from a bottom-up hunt through the crosstabs rather than a top-down discovery effort.

Finally, the third skill is the ability to translate the results of our analysis into insights that are actionable. That is, to recommend clear steps the business can take that will lead to improved business results. Inspiring action requires not just identifying the actions that need to be taken but communicating them consistently and widely throughout the organization and using leadership skills to point the way.

The Boston Consulting Group has outlined four stages of insight performance, each with an accompanying training need:

- Traditional market research skills – market research methodology and tools
- Business contribution team mix of methodology and tools coupled with business skills and experience
- Strategic insight organization

 integrated thinking, pattern
 recognition and communication
- Strategic foresight organization – integrated thinking, with focus on leadership and communication

Emphasize the fundamentals

In all of this, we might do worse than to continue to emphasize the principles on which surveys in particular have been based, the fundamentals that ensure the validity and reliability of our research results.

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Some would have us believe that the explosion of new methods and sources has made the fundamentals on which survey research is based obsolete. The reverse is the case.

The insights and recommendations we deliver to our clients are only useful if they truly represent the market and measure the underlying constructs that drive consumer decision-making. Surveys may no longer be the always first-choice method but representation and accurate measurement are as important as ever. At least until something equally robust comes along.

Some would have us believe that the explosion of new methods and sources has made the fundamentals on which survey research is based obsolete. The reverse is the case. Mastering all of this stillexpanding researcher toolkit is unrealistic and so one must learn to make choices that match method to the research problem, with a clear grasp of the compromises one inevitably makes to accommodate those cost and cycle-time imperatives. One needs a framework to vet all those alternatives, make good design decisions and, since perfection is forever elusive, confront the inevitable biases that are inherent in the choices we make.

The same criteria we used for surveys 40 years ago are just as useful now when thinking about other methods and sources. These criteria can be applied to something as far afield as big data just as effectively as we have used them for surveys. The ancient Greeks believed in the unity of knowledge, the identification of first principles to explain the world around them. Perhaps there is an analogue in contemporary market research. Surveys are no longer the always first-choice method but representation and accurate measurement are as important as ever.

The drive for training has often been to "stay current" but perhaps we would be better served to "stay grounded." The ground is a firm foundation, no matter what methods and sources fall from the sky. Q

FOOTNOTE

1 http://media.wix.com/ugd/e94d21_00e85 06d803c4386828bea765f10d3d3.pdf



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QUIRK'S

Women hold the majority

By Emily Koenig, Digital Editor >> Quirk's Media

There's a wonderful buzz throughout the marketing research industry around efforts to improve gender diversity and equality.

Achieving a 50/50 ratio of male and female speakers at MR conferences. Saying goodbye to male-only panels. Seeking female representation on advisory boards. And – particularly close to my heart – including more female voices in MR publications.

Quirk's has been a strong advocate for women since it began serving the industry more than 30 years ago. So when we were asked by several people to take a look at the state of the research industry in terms of gender equality, it seemed natural to include it in our annual Q Report.

Marketing research working environments tend to offer key aspects that women are traditionally drawn to (particularly in qual), such as flexible hours and clear mentoring opportunities. In fact, women appear to comprise a strong percentage of marketing researchers. According to Quirk's 2018 Corporate Researcher Report and Salary Survey, an invite-only online survey among pre-qualified marketing researchers, 58 percent of client-side and 52 percent of supplier-side respondents identified as female. (This year in addition to fielding the survey to Quirk's subscribers, ESOMAR sent the survey to its members.) These percentages have remained fairly consistent since we began reporting on the

survey in 2014. But are the numbers translating into greater leadership opportunities and equal pay throughout the industry?

The general outlook

Before narrowing in on the MR industry, let's check out the overall outlook for working women. A study conducted by LeanIn.Org and McKinsey, Women in the Workplace 2017 (https://womenintheworkplace.com), draws on data from 222 companies employing more than 12 million people, as well as a survey of over 70,000 employees and a series of qualitative interviews. The study highlights two themes:

 Hiring and promotion – "On average, women continue to be hired and promoted at lower rates than men, and at senior levels, the gap in promotions is more pronounced for women of color."

Representation and turnover

- "The lower representation of women does not appear to be driven by differences in company-level attrition: on average, women and men are leaving their organizations at about the same rate and very few plan to leave the workforce to focus on family."

A result of the disparities in hiring and promotion, according to the study, is that while women make up a total of 52 percent of the U.S. population, they only fill 20 percent of C-suite roles. In addition, the study found that nearly 50 percent of men think women are well represented in leadership in companies where only one in 10 senior leaders are women. So not only are women underrepresented in the C-suite across all industries, their male counterparts tend to be virtually blind to this fact.

figure 1

Gender parity and MR

So how is this playing out in the marketing research industry?

As previously mentioned, Quirk's 2018 survey found that 58 percent of client-side and 52 percent of supplier-side respondents identified as female. We also noted an interesting pattern when comparing age and gender among client-side respondents. While women make up the majority of respondents at each age level (with the exception of respondents 66+), the percentage begins dropping significantly starting with the 31-35 age group, as shown in Figure 1. Supplier-side respondents show a similar age pattern.

We also reached out to a few MR organizations for demographic data.

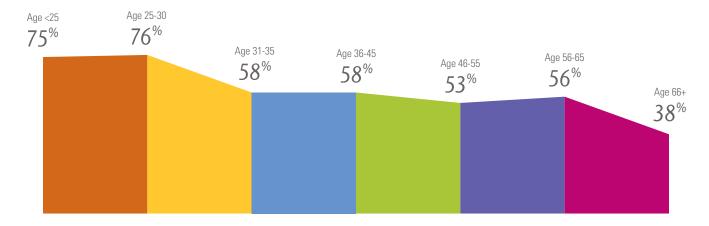
ESOMAR, a global nonprofit that promotes the value of market, opinion and social research and data analytics, provided us with information on its membership broken down by gender (Figure 2). In 2018, 40 percent of ESOMAR members identified as female, com-

pared to 60 percent male. ESOMAR did note that the gender split is changing among new members. In 2017 and 2018, there were more new female members than male (Figure 3). The organization expects this trend to continue and has a goal of reaching a 50/50 representation among members.

Women in Research (WIRe), a nonprofit focused on championing diversity in the marketing research industry, is made up of around 7,000 women around the globe. WIRe has conducted research on the topic of gender equality within the industry, publishing its Gender and Career Advancement study in 2012 and a follow up study in 2017, which I will reference throughout this article.*

In addition to looking at the stats, I contacted a number of researchers – both on the client and supplier side – to conduct short Q&As discussing MR and gender equality. Several client-siders were required to speak anonymously due to internal policies but the general tone was that marketing research is

Percentage of client-side respondents who identify as female



GENDER DIVERSITY

figure 2

ESOMAR membership gender division

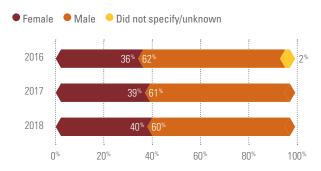
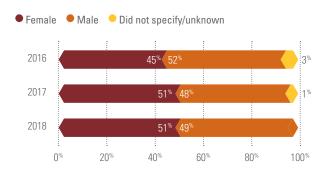
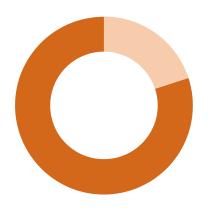


figure 3

Gender split new ESOMAR members





Among marketing researchers,

80%
of CEOs are male.

Source: WIRe Gender and Career Advancement study 2017

on par with other industries, if not a bit better in terms of overall female representation and leadership opportunity. Christina Jenkins, director of business marketing, North America, Twitter, says, "The market research industry is reasonably balanced in my opinion. As with many industries, we have to continue to work hard to ensure there is balance in leadership positions and women often have to work harder to compete with men in leadership positions in any industry."

Denise Offutt, manager, market research, at Epson, also shared her thoughts on the role of women in MR and notes several changes since she began working in the industry. "In the larger firms, women have much more opportunity in sales/account management opportunities

now," says Offutt. "When I began work, there were very few women in those positions."

When asked about gender diversity, Brin Moore, partner at market research recruiting firm Trusted Talent, says, "One of the things that strikes me about our industry is that all the way up the ladder, there are very talented women."

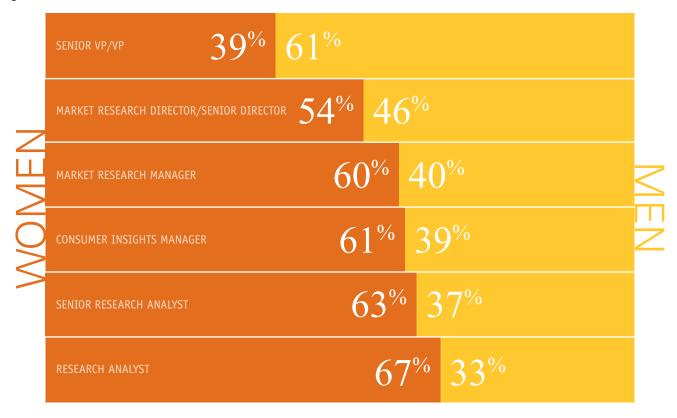
It seems to be obvious that there is no shortage of capable women in MR. While discussing gender and marketing research leadership roles, Patricia Houston, chief operating officer and founder of MMR Live and member of the WIRexec group, says, "I'd argue that the middle- to entry-level positions in our industry are somewhat female dominated and that flexibility might play a role here."

The challenge for the industry is now shifting to improving opportunities for women in the way of senior-level positions.

Disparity in promotions

According to the Women in the Workplace 2017 study, in the average company, women are 18 percent less likely to be promoted to manager. WIRe's study narrowed in on promotions in the MR industry. Among experienced researchers, men assume more of the top positions (executive+) with 10+ years of experience: 37 percent female, 56 percent male. CEOs are still predominantly male among marketing researchers, at 80 percent. Thirtythree percent of females outside of the U.S. responded that they have not very/not at all a fair chance of

figure 4



"We have to continue to work hard to ensure there is balance in leadership positions and women often have to work harder to compete with men in leadership positions in any industry."

receiving a promotion (as compared to 19 percent of males). Overall, the study shows that women are less optimistic about senior role promotions.

A study by PayScale.com, State of the Gender Pay Gap 2018, found that, "over the course of their career, men move into higher-level roles at significantly higher rates than women. By mid-career, men are 70 percent more likely to be in

executive roles than women. By late career, men are 142 percent more likely to be in VP or C-suite roles."

Quirk's data shows that women are dominating many roles within marketing research, with the exception of VP/C-suite. Quirk's 2018 survey shows that on the client-side, 39 percent of senior VP or VP respondents were female, compared to MR director/senior director at 54 percent female and MR manager at

60 percent female, as shown in Figure 4. Forty-six percent of senior VP or VP respondents on the supplier side were female and 42 percent of respondents that selected president/CEO/COO were female.**

The pay gap

In 2017, women earned 82 percent of what men earned, according to a Pew Research Center analysis of median hourly earnings of both full- and part-time workers in the United States. Research shows that much of this is linked to the disparity in promotions.

WIRe's 2017 study looked at the pay gap within the MR industry as compared to its 2012 study and found that the gender pay gap is shrinking at the senior level. In senior roles, the gender difference

"#HereWeAre is a great way to connect with other female leaders and become an outspoken ally and advocate of female empowerment."

dropped from \$20,000 in 2012 to \$8,000 in 2017. The overall pay gap has seen more progress outside of the U.S. with men making 4 percent more than women (all occupation levels) outside the U.S. compared to 21 percent in the U.S. Small firms have further to go to close the gap, with men making 24 percent higher salaries than females (all occupation levels) in 2017.

It should be noted that research shows that the promotion/ pay disparity isn't simply from a lack of trying on the part of women. Women do ask for raises. According to a 2014 study by Harvard University, which was conducted in Australia where employers keep detailed records of employee-asking behavior, women who asked for one obtained a raise 15 percent of the time, while men got their increases 20 percent of the time. (The study examined 4,600 randomly selected employees across 800 workplaces.) This really adds up over a lifetime.

What we can do about it

While there are many people throughout the research industry taking steps to further improve the general outlook of women's roles in the industry, there is a need for more action.

When I reached out to clientand supplier-side researchers to discuss ways we can all promote diversity in the workplace, they offered a variety of tips: Find (or become) a mentor. When talking to client-side researchers, WIRe was often mentioned as a way to connect with women and men at all levels. As Twitter's Christina Jenkins says, the group can become a "part of your trusted circle of advisors."

Join the conversation. Jenkins also recommends taking to social media to speak up and join the diversity conversation. "It only takes one voice or a single tweet to create a movement," she says. "#HereWeAre is a great way to connect with other female leaders and become an outspoken ally and advocate of female empowerment."

Know your worth. When it comes to salary and compensation, do the research and be your own best advocate. "About four years into my first real job, I learned that my pay was about 30 percent less than the product managers who I considered my equals. I dug into the compensation details for the Los Angeles market and made my pitch with charts and statistics," says Epson's Denise Offutt. "My director supported my position, spoke with the division president and within 30 days, my pay increased - dramatically! Use your research skills to collect data and make the case." Offutt also says she always participates in market research salary surveys as the "data

can be crucial" for everyone in the industry.

Participate. Practice being assertive by consistently participating in conversations in the workplace. When I asked Patricia Houston about strategies for asserting ideas in the workplace she said her personal mantra is, "If you don't raise your hand, you'll never get ahead." Jenkins echoed this sentiment saying, "Practice, practice, practice and look for champions to help elevate your ideas."

Seek diversity. Jenkins observes that men and women must seek diversity within their teams and management. "Hiring policies are one of the most effective ways to ensure diversity. Make sure you see people of all backgrounds and genders during the recruitment process and make sure the panel of interviewees is diverse as well," she says. Houston adds that you can make an impact even without being directly in charge of hiring. "Seek out other opportunities to bring in gender-diverse viewpoints," says Houston. "Schedule a women executive speaker or start a mentor program." And remember, diversity goes beyond gender. One clientside researcher I spoke to said the lack of diversity and inclusion of women of color in MR may be the true elephant in the room.

Demand equality at the top. Men and women must consistently push for and seek out diversity in leadership. Sima Vasa, CEO, Infinity Squared Ventures and founder, chief evangelist, Paradigm Sample, says, "Women specifically in the MR industry need to sit on more corporate boards, fill C-suite positions, invest in businesses and/or

be more entrepreneurial. This is when we will see the biggest change and movement for gender equality."

Network. Don't underestimate the value of old-school networking and personal recommendations. Work to build quality professional relationships - and take steps to keep positive office relationships alive even after you leave a company. "My best advice, irrespective of gender, is to network," says Offutt. "Do good work, treat people well, develop a reputation as reliable, hard-working and skilled. The opportunities will come to you as there will always be a shortage of good researchers who can solve problems and answer questions."

I'd like to end with the one tip shared by almost every researcher I spoke to: constantly look for ways to champion your female colleagues. Jenkins provides a great example from her past on why this is vital.

"I encountered a situation once where I jointly worked on a presentation with a male colleague and we were co-presenting at a number of meetings," says Jenkins. "Several

*The 2017 study included 989 interviews conducted globally. Forty-five percent of respondents were male and 55 percent were female. Visit https://www.womeninresearch.org/wire-gender-career-advancement-2017/ to learn more about the study.

times I was interrupted by the male colleague and no one else in the meeting spoke up. After, I pulled a colleague aside to ask if he noticed anything and he had, yet the meeting continued as if nothing had happened. It was normal."

A solid reminder that supporting your female colleagues and seeking out diversity in the workplace should be normal. Ignoring opportunity gaps should not. ()









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^{**}Quirk's did not receive a substantial number of client-side CEO responses this mirrors our audience, which primarily includes practicing marketing researchers - so we chose not to look at those numbers as we cannot comfortably claim that they are statistically representative of the MR population. If you'd like to take a look at the full Quirk's Salary Survey breakdown and crosstabs by job title, please visit https://www.quirks.com/tools/ salary-survey.

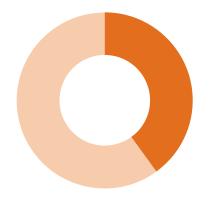
QUIRK'S

Researchers negotiating salaries, changing jobs

By Emily Koenig, Digital Editor >> Quirk's Media

The 2018 edition of the annual Quirk's corporate researcher salary survey received 1,075 usable qualified responses from full-time client-side insights professionals. In the past five years, we have seen a consistent trend in reported changes in employment as well as job satisfaction and total compensation. This year we're happy to report a slight upward trend in companies looking to hire additional marketing research employees.

As we did in last year's edition, we're letting the data speak for itself, highlighting a few tidbits and sprinkling respondent comments throughout. If you'd like a more de-



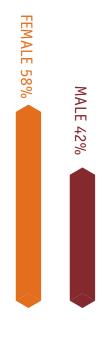
40%

said it was somewhat likely, likely or very likely that their company would hire additional marketing research employees in 2018.

tailed look at the salary survey (as well as supplier-side salary data), it is available online at: www.quirks. com/tools/salary-survey.

So what does the research industry look like today?

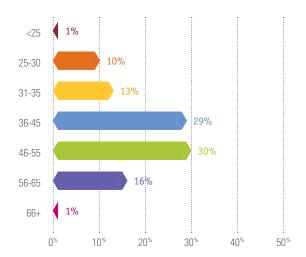
What is your gender?



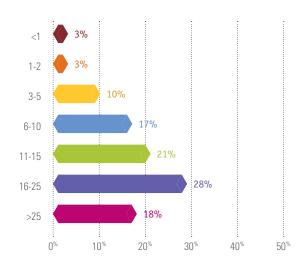
DEMOGRAPHICS

In 2016 and 2017 we found a larger percentage of employed client-side respondents were women as compared to men and made a note to watch this trend. This year, in addition to showing you the usual gender breakdown, we took a deeper look at the role of women in MR. You can find that article on page 48.

What is your age?



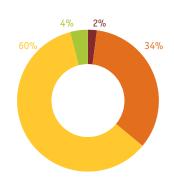
How many years of experience do you have in marketing research?



What is the highest level of education you have completed?







CHANGES IN EMPLOYMENT

Given the continued relative stability of today's job market, marketing researchers are pursuing new employment in hopes of better positions. Thirty-two percent of respondents reported that they are likely to seek employment at a different company this year. In addition, 40 percent of respondents said it was somewhat likely, likely or very likely that their company would hire additional marketing research employees in 2018 – up from 35 percent in 2017.

And according to verbatims from our 2018 survey, sometimes the grass is greener on the other side:

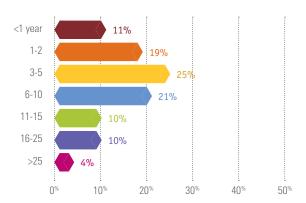
"I switched jobs from for-profit to not-for-profit and it's much, much, much better."

"I used to work on the supplier side at a market research firm. I switched to client-side nearly three years ago.

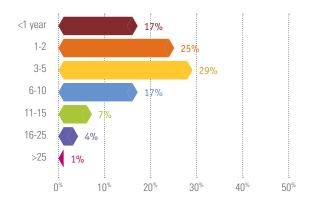
I work a lot less now — 40 hours a week compared to the previous 60 hours a week when I was supplier-side.

My dollars per hour is a lot higher even though I make slightly less overall than I did when I was supplier-side."

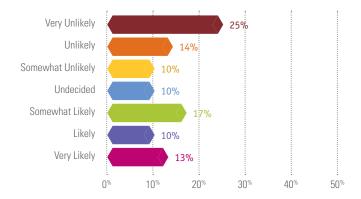
How many years have you been employed at your current company?



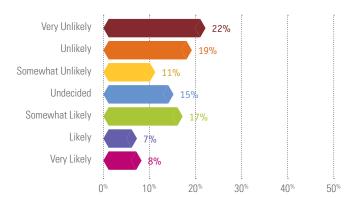
How many years have you been in your current job?



How likely is it that your company will hire additional market research employees in 2017?



How likely are you to seek employment at a different company this year?

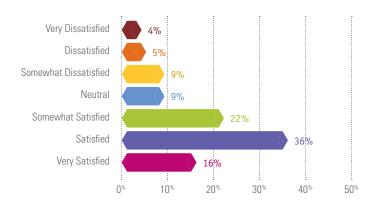


JOB SATISFACTION

Aside from a bout of dissatisfaction in 2011, job satisfaction has remained fairly consistent since Quirk's began reporting on the data. The 2018 survey shows that approximately 74 percent reported that they are somewhat satisfied, satisfied or very satisfied with their current employment. As in the past, we dug into the comments in the compensation section and found a few respondents highlighting non-traditional or non-monetary benefits that likely impact job satisfaction:

"I've received about \$10,000 worth of video games at my job every year."

How satisfied are you with your current employment?

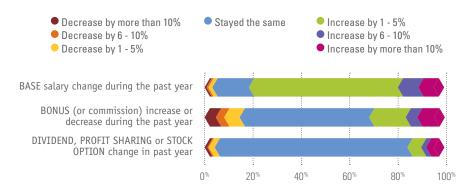


"We receive a ton of benefits from the company including: gym member-ship, breakfast, lunch, dinner, snacks, unlimited PTO, etc."

"I am provided with a company car for business travel inside our territory and also a company phone."

COMPENSATION

By what percent did your total compensation change in the following categories in the past year?



Approximately 81 percent of respondents saw an increase in base salary during the past year and less than 4 percent reported a decrease. Some reported the disappointment of stagnant compensation and others were happy to report promotions:

"Our bonuses were decreased for everyone but the company gave us a couple extra vacation days as a 'substitute."

"I haven't had a raise in several years ..."

"Job promotion led to base salary change."

"Despite strong performance ratings, it [compensation] was a tiny increase – less than cost of living change – and delivered using only restricted stock.

Leaves me contemplating a change."

One comment serves as a reminder that knowing your worth can be powerful leverage when negotiating a raise:

"I was able to work up to this level of compensation by showing my manager the results of this salary survey." Quirk's annual salary survey continues to receive responses from a wide variety of industries. This year, the highest percent of client-side respondents were employed in organizations that operate in health care/pharmaceuticals (10 percent), followed by consumer goods (9 percent), banking/financial (8 percent) and media/publishing/information (7 percent).

As in the past, several respondents indicated that they are unemployed, with 81 percent noting

METHODOLOGY

The Q Report work life study of corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research end-client subscribers of Quirk's and members of ESOMAR. The survey was fielded from June 6 to June 28, 2018. In total we received 1,075 usable qualified responses. An interval (margin of error) of 2.9 at the 95 percent confidence level was achieved. (Not all respondents answered all questions.)

that they are actively seeking employment. We hope that this study encourages everyone on the MR job sidelines, specifically those who are still finding it difficult to secure employment in today's job market.

The survey has so much more to offer than we can include in this re-

port. If you are interested in seeing a breakdown of compensation for all job titles, including crosstabs by age, gender, location, industry and more, visit www.quirks.com/tools/salary-survey and start digging!



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