THE QREPORT

CORPORATE **RESEARCHER** REPORT 2019

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

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Welcome to the sixth 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 in-depth look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

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 and the Insight Management Academy. The survey was fielded from May 22 to July 1, 2019. In total we received 828 usable qualified responses. An interval (margin of error) of 3.35 at the 95% confidence level was achieved. (Not all respondents answered all questions.)

The work life portion of the survey covered: pain points; MR-related changes planned for the coming year; the impact of new data sources; usage levels of various tools; and assessments of MR and insights as a business discipline. The compensation survey covered: job satisfaction; compensation packages; the hiring outlook for 2019; 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 provide their candid thoughts.

We also want to thank our content partners for sharing their industry insights. P2Sample examined what the industry can do to achieve and ensure representative sample. FocusVision offered strategies for making the insight function relevant in a big-data world. Four industry organizations – ESOMAR, the Insights Association, MRS and the Insight Management Academy – addressed ways for researchers to elevate their internal standing. And Huey Yii "Daphane" Tan and Sean Jordan explored how researchers can prepare for the rise of automated analysis.

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.

CONTENTS

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Clear Seas
RESEARCH
Making the complex clear

Researchers confident in their roles as assemblers of the 'jigsaw of useful data'

By Joseph Rydholm, Editor » Quirk's Media

In the several years that we have conducted the reader survey that forms the core of our annual Q Report, our editorial staff has always been struck by the remarkable consistency of the data. Other than salaries and other employment-related aspects fluctuating a bit as a result of then-current economic situations, the assessments expressed are typically all within some expected ranges. For that reason, and to keep things interesting for you and for us, rather than ask the same questions each year, we've been on a three-year cycle of inquiring about certain parts of the marketing researcher's job, from vendor relationships to evaluating new methods.

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 and The Insight Management Academy. The survey was fielded from May 22 to July 1, 2019. In total we received 828 usable qualified responses. An interval (margin of error) of 3.35 at the 95 percent confidence level was achieved. (Not all respondents answered all questions.)

As we did in 2016, this year we focused on pain points, the impact of the data deluge and some assessments of MR and insights as a business discipline. (See Emily Koenig's article on the salary and compensation side of things elsewhere in the Q Report.)

Popular pain points circa 2019 are just what you might expect. "Too many projects for our budget" and "too many projects for our staff" again earned top combined always/often a pain point percentages. (And, as with previous Q Report surveys, the audience of researchers was not shy about expressing their, ahem, feelings about our survey. To the question about pain points, one person replied: "*My biggest pain point at this moment is that you did not allow Don't Know responses in this survey. :)*")

Our open-end seeking more thoughts on their pain points drew a range of interesting responses from the researchers. Some themes

were familiar – difficulty reining in rogue DIYers; not enough time or money; shoddy reports from vendors; and managing internal clients' expectations. Some were new, including these two instances of researchers having trouble with country/cultural issues within their organizations:

"My company is very supportive of research and takes seriously the need to put consumers in the forefront of what we do. However, we are a global company based in France and a major challenge is getting consideration for local or U.S.-based suppliers, as the bias is definitely toward European research suppliers, methodologies and ways of thinking about research."

"I deal with our global headquarters (in a different country) who doesn't have a research SME and ignores our recommendations for methodologies, questionnaire design, interview guide design and selection of research agency and the resulting insight is often not very useful."

And, unfortunately, too many mentions like this one of trouble finding quality sample:

"Respondent quality is awful from many panels. Feels like the majority of respondents are professional or not caring and thus each year more and more efforts must be made to screen out bad data."

Sentiments were also similar to 2016's on the question of how readers would rate their company's research function on a number of fronts. As might be expected, with the constant drumbeat to provide measurable proof of research's value, "ability to demonstrate ROI" earned a similar combined very

How would you rate your company's marketing research function on the following fronts?

● Very poor ● Poor ● Fair ● Good ● Very good

poor/poor percentage this year – 28% – compared to 2016's 33%. "Ability to mitigate risk for the company using research" was also cited as an area where research's performance was poor.

On the positive side, the ability to uncover business problems (47%) and (separately) solve them (53%) were seen as strengths. Interestingly, the ability to demonstrate statistical validity went from a 32% "very good" in 2016 to a 20% "very good" in 2019. Granted, the combined good/very good percentages were 73% in 2016 and 65% in 2019 but one wonders if some of the pressure to deliver insights ASAP is making researchers fret over their ability to maintain rigor.

Key metrics

Research ROI gets a lot of play as the one metric to rule them all but it's also seemingly impossible to uniformly define so we asked an open-end to find out what key met-

rics are used to judge respondents' research and insights functions.

They ranged from the specific…

"# of action plans implemented as a result of survey findings."

"Do our business partners make changes based on insights? Are we coming to our business partners with actionable and cost-effective research solutions? Speed of research."

"Sales return within two years of market research."

"Output-based measures – number of projects, number of participants, number of people on the panel, diversity of panel."

"Return on ad spend, success of project KPI (could be click-through rate, completion rate, etc.) and speed to delivery."

"Number of completed projects (lame, I know)."

…to the vague (but interesting-sounding!)…

"It seems like it's the qualitative opinion of the clients that we work with who judge the inside function."

"We actually really struggle to answer this question since the number of projects and objectives/goals differ all the time. It's really hard to measure 'how well' we are doing. We are not sure of the best way to approach but we measure which departments within the organization we are working with and make sure that we are working across all business lines and truly supporting the organization as a whole."

"This is a tough question. The function is judged based on the performance of individuals to support business objectives of their specific categories. We might also be judged on our ability to work cross-functionally, to collaborate, to be a proactive and engaged strategic thinker. But I'm not sure of the 'metric' for that. It tends to show up in individual performance reviews as best I can tell."

While the quest to define and demonstrate ROI is certainly admirable, the responses to our question point to the futility of agonizing over a one-size-fits-all approach. With the endless variables in play – company size, company type, department size, department budget, level of management belief in marketing research – every situation is different. Some readers indicated they aren't subject to any kind of specific success measurement but many sketched out what sound like workable scenarios – a bit of NPS here, the number of projects

completed there – that have been cobbled together to try to place a value on what they do.

Then there's the situation of this lucky (or maybe not!) researcher:

"Metrics? None! Executives and leaders throughout the org like us & use us and we've not been asked to quantify our value with specific metrics (yet!!! dreading the day it comes)."

Become less and less central

As organizations are awash in data these days, observers feel that research's role as the conduit through which the customer's voice is heard is under threat. When surveying or talking to customers isn't the only way to get customer data, the thinking goes, research will gradually become less and less central. We posed a question along those lines to see if respondents felt the drive to integrate the voice of the customer would elevate or put MR at risk, and a healthy 42% said it "definitely" elevates research and another 39% said it "probably" elevates it.

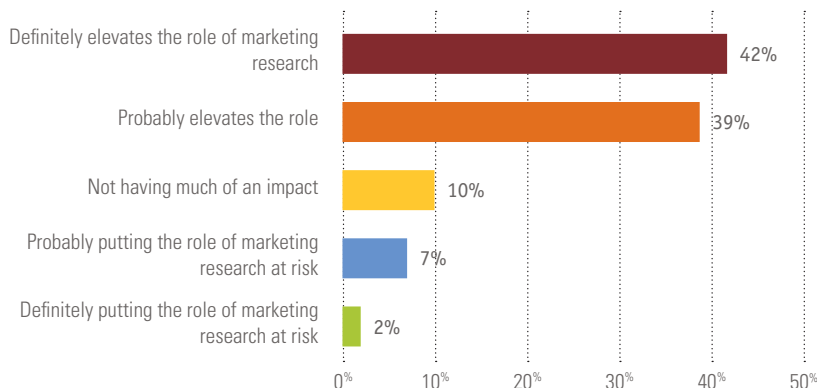We asked for comments and got some very thoughtful responses.

"Every touchpoint is an opportunity to gather understanding. We should embrace these potential data streams rather than ignore or fight against them."

"I think it should elevate the role of market research, as long as the researcher grabs the challenge and stays front and center as a leader in the area. If brand managers, on the other hand, see it as one of their primary responsibilities, they might benefit from the visibility to the detriment of the researcher since, as everyone knows, marketers are far better at grabbing the limelight! :-)"

"I think shifts like this are an opportunity for strong research/insights leaders and teams. Nimble teams who have built trust and demonstrated their impact and value will be able to elevate their role; ones who haven't will struggle to stay relevant."

"Sadly, this often becomes shorthand for having overworked product or sales managers collect input in ways that are not reliable for decision-making."

There is a lot of discussion about integrating the customer's voice into every aspect of an organization. Do you feel this elevates the role of marketing research as a stand-alone function or puts it at risk?

Definitely elevates the role of marketing research	42%
Probably elevates the role	39%
Not having much of an impact	10%
Probably putting the role of marketing research at risk	7%
Definitely putting the role of marketing research at risk	2%

"Puts us even more at risk in a company that thinks everyone can do VOC. Instead of fighting it, I've decided to help this happen more formally and systematically by implementing a VOC program for everyone in the business to use. If you can't beat them, join them!"

Multiple responses cited the potential dangers of a fragmented approach to customer listening, as it could lead to inefficiencies of effort and budget (many internal groups trying to answer the same questions) and, perhaps more damaging for researchers, a sense that anyone in the organization can gather and analyze data.

But for some, it's clearly been a good thing:

"[We are getting] more and more calls for research initiatives to provide the voice of the customer. We now have a pipeline of 10 initiatives whereas two years ago we typically had 1-2."

"'Anyone can send out a survey' is the phrase we hear. VOC masks the real work of insights, which is helping to identify the right business issues to research and drawing out the correct

implications and application of what's learned. We consistently see folks conduct VOC on the wrong issues, be clouded with confirmation bias, not see the orthodox-challenging findings, not advocate for the customer in the business decisions. We (insights team) are continually called into help because we are 'independent' or the voice of truth.'"

Along those lines, we asked if the wide availability of customer data from sources other than marketing research is potentially damaging to the research and insights function or if it had the potential to elevate its role. Twenty-two percent of respondents said they felt it puts MR at risk while 24% said they felt it "definitely" elevated MR's role and 34% said it "probably" did.

In their comments after answering the question, many rightfully acknowledged the reality that other sources are here to stay but that researchers can still flourish by taking on the role of the sensemaker and storyteller who can assemble all the data points into a cohesive view:

"It's sometimes hard to reconcile hard, transactional data and self-reported behavioral data. It's a blending of the two that creates the insight and understanding."

"This all depends upon what you do with it and can you as a professional step up and use this data as another truth-telling platform."

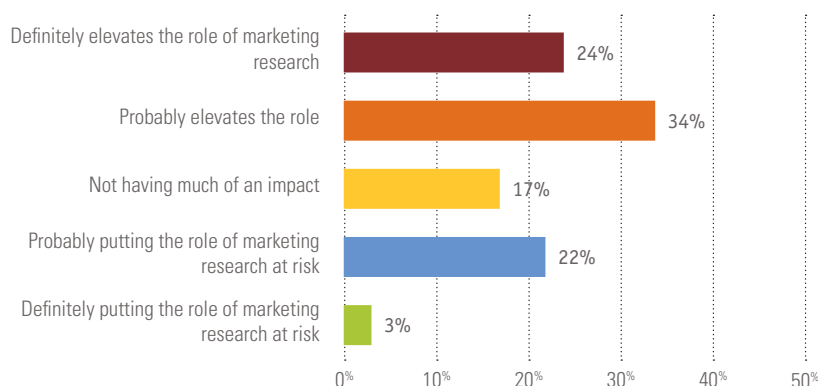"As long as insights is method-agnostic and gives holistic answers, it's a win."

"Availability [of data] was never the issue; knowing what to do with it has been the issue. I don't pay a carpenter $100 for the hammer and nails; I pay them because they know where to put the nails to build/fix stuff."

"[Non-MR-generated data] tends to be backward-looking and faster to deliver, which makes it a preferred tool for senior management. However, the results often only provide limited direction that management then acts on with instinct/experience. That instinct is typically their personal perspective – not always the same as what the customer or consumer or shopper wants."

"The various data sources are all part of the jigsaw of useful data; they complement each other rather than compete."

"If we can get access to this information (this is an issue in my company), the data opens up a wide range of things we can do from an analysis standpoint. It can make the insights team much more well-rounded and not be viewed as 'those people who do surveys.'"

Still, despite the rosy potential of serving as data integrators, things don't always go so smoothly.

Do you feel the wide availability of customer data from sources other than marketing research (CRM data, sales data, web analytics, etc.) elevates the role of marketing research and insights or puts it at risk?

Category	Percentage
Definitely elevates the role of marketing research	24%
Probably elevates the role	34%
Not having much of an impact	17%
Probably putting the role of marketing research at risk	22%
Definitely putting the role of marketing research at risk	3%

"Ideally, marketing research PULLS TOGETHER various sources (internal and external, primary and secondary, customer records, etc.) to create a comprehensive, cohesive, 360 view of reality. That NEVER happens, though."

"Data analytics people (separate from insight in this organization) think they can understand/predict consumer behavior just because they have big data."

"I lost my former job as a market research manager because of a company focus on analytics rather than primary research."

"Top management sees big data, customer analytics, etc., as ways to get customer voice for free. They don't see the decreased value."

"It elevates the role but presents challenges in terms of skill sets. Finding people with the combination of technical skills to leverage this data – but also a strategic lens to use the insights – can be challenging."

"These data streams should, theoretically, integrate well and tell a more holistic narrative. In practice, data tends to get siloed and integration rarely happens."

"Data from other sources causes me confusion because I am rarely ever told other initiatives are happening. The UX people started an ongoing NPS project without my knowledge. Respondents to my surveys were complaining that I send too many surveys and that's how I found out about the NPS project inside my own company. This kind of thing really grinds my gears."

"The challenge is getting access to this data and then support to use and integrate it properly. I recently asked for a Salesforce account so I could do DIY market research and my request for an account was rejected because the gatekeepers – sales leadership – did not see why they should spend to give a market researcher access to 'their' system."

"I think it can elevate the role of MR, but one has to be careful in using data from other parts of the firm. Often the MR function is not an expert in what is going on in that area, so partnering and sharing credit and insight is critical. I think the biggest danger facing MR is that other areas are becoming more astute about this data use and ownership and are getting on the 'big data bandwagon' – if one engages in a turf war with these areas, MR is often the loser since we are not seen as "mission critical.""

Isn't widely understood

We asked twin questions about how valued respondents felt the insights function is as a profession in the general business world and also at their respective organizations. On a 10-point scale of "not valued at all" to "extremely valued," researchers generally feel that insights is valued more highly in their companies than in the general business world.

In their comments after the question, some observed that research just isn't well or widely

Compared to two years ago is your company doing more or less of the following?

● A lot less   ● Some less   ● About the same   ● Some more   ● A lot more
● Have not used in the past 2 years
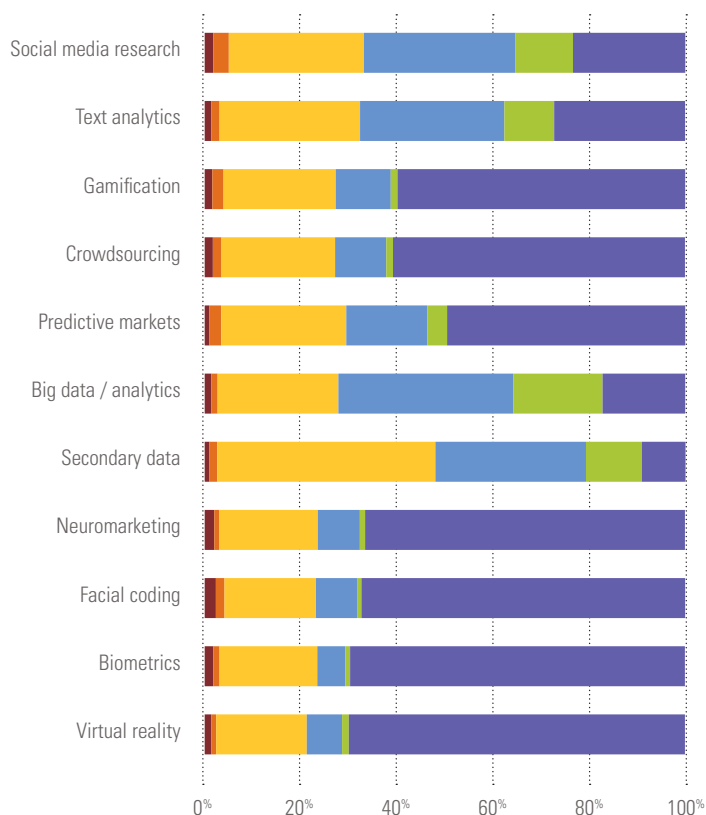
It's a struggle. *Only 33% of respondents rate their market research function's ability to demonstrate ROI as good or very good.*

FAIR
38%

POOR
24%

GOOD
27%

VERY POOR
5%

VERY GOOD
6%

understood in business spheres and that even for those who do know of it, the impression isn't always that MR is an essential practice.

"Generally, people see it as an expense, luxury or a tool to uncover what went wrong rather than a leading indicator or risk reducer. But at larger companies or companies with leadership experience in larger companies, this is not the case."

"While I think my company values the marketing research and insight function, I'm concerned that the general business world values it less so. It started with big data and the idea that you don't really need insights people as long as you had someone who could handle data. I see that more and more, and have heard of companies, including two that I have worked for, eliminating their entire

research departments in favor of data analysts."*

"I think that companies are getting distracted by AI and other tools a bit and some traditional MR functions are getting lost in the shuffle. MR needs to show that it can incorporate all of the new data sources and AI to be even more relevant."

"Honestly, it is valued to a point, but decision-makers rarely let bad news stop them."

"I don't think the general impression of MR is as doom and gloom as some would promote. But, we all need to push ourselves to be better at understanding the business aspect, and connecting with our parts of the business, if we want to have a better reputation."

This response, and many others like it, struck a more confident tone:
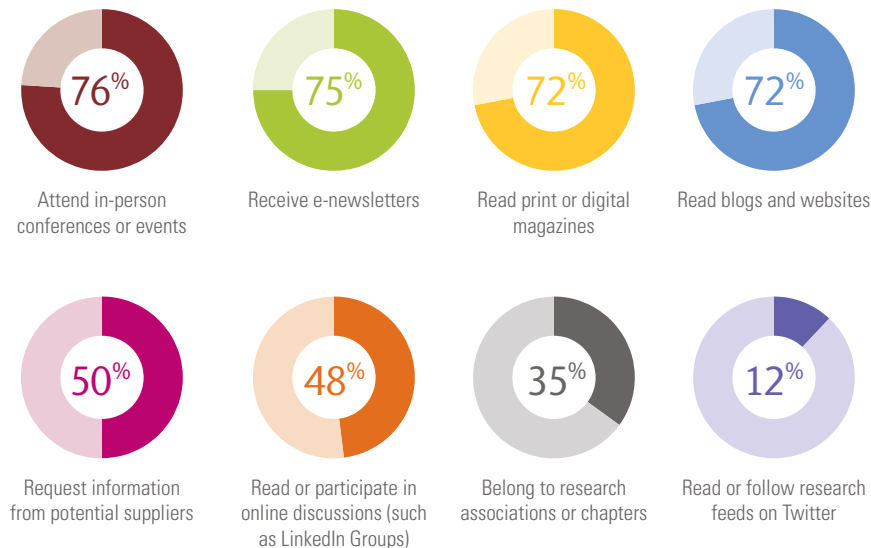
"Market research influences so many aspects of the business: it impacts product development and strategy; it provides a thorough and nuanced lens into the customer and their motivations, habits and preferences; and when done correctly, can predict and impact marketing functions to make the right decisions and gain competitive advantage."

Compare usage
To get an idea of usage levels of various techniques – established and newer – we asked respondents to compare usage from two years ago to today on methods ranging from traditional focus groups to virtual reality. The mix of approaches with the highest percentages of "have not used in the past two years" includes traditional approaches like telephone focus groups and paper-based surveys and buzzed-about tools such as facial coding, virtual reality and biometrics.

It's telling that big data analytics has the second-lowest percentage of "have not used in the past two years" at 17% while netting a combined 54% who say they are using it some more or a lot more. The reported usage of secondary data confirms anecdotal comments heard in recent months at industry conferences that more researchers are (re)turning to secondary sources: 31% say they are using them some more and 12% say they are using them a lot more. Online surveys (23%) and social media research (12%) also have instances of "a lot more" usage. In general, the tried-and-true methods of traditional and online focus groups, online surveys and panels seem to

Which of the following do you do to stay up-to-date on research methodologies and techniques? (select all that apply)

76% Attend in-person conferences or events

75% Receive e-newsletters

72% Read print or digital magazines

72% Read blogs and websites

50% Request information from potential suppliers

48% Read or participate in online discussions (such as LinkedIn Groups)

35% Belong to research associations or chapters

12% Read or follow research feeds on Twitter

be holding their own, with some of the highest levels of "about the same" usage percentages.

A big part of employing the new methods and techniques is finding out about them in the first place and hearing others who have

METHODOLOGY

The Q Report work life and salary and compensation 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 and The Insight Management Academy. The survey was fielded from May 22 to July 1, 2019. In total we received 828 usable qualified responses. An interval (margin of error) of 3.35 at the 95% confidence level was achieved. (Not all respondents answered all questions.)

used them talk about their experiences. We asked readers to tell us how they stay up to date on MR methods (select all that apply) and "attend in-person conferences and events" netted 76%, followed closely by e-newsletters (75%), "read blogs and websites" (72%) and "read print or digital magazines" (72 percent). Social media-based outlets were less popular, with "participate in online discussions (such as LinkedIn groups)" 48% and "read or follow research feeds on Twitter" at 12%.

What does the future hold?
So, against a backdrop of data integration and competition from within their own organizations over who holds the right to speak for the customer, what does the future hold? We asked researchers to tell us the biggest changes their organizations would make over the next year.

There were multiple mentions of enhancing efficiency to free them up to do more analysis, either by teaching DIY techniques to

internal audiences ("*Greater emphasis on helping select internal stakeholders with DIY research on lower-risk projects, both to help them know their customers better and to free up our professional researchers' time for higher-payoff efforts.*") or by offering new capabilities ("*Challenging the standard ways we do current research – innovation process on research studies.*").

Also, many researchers will be upping their digital game. Several offered a variation of the phrase "digital transformation" and talked about automation and dipping their toes in the AI/VR waters.

And, lots of talk of changing roles/responsibilities and reorganizing, either due to company-wide shifts or an insights department-driven plan: "*Moving to a 'shared service' model with differentiated roles (e.g., analyst, programmer, project manager, vendor & contracts, consultants, etc.).*"

There were multiple mentions of plans to move beyond capturing reported or stated behavior and many cited plans to look for newer, more agile suppliers with new tools and new ideas: "*We plan to use new suppliers, usually tech startups who can do things faster & cheaper but don't have a ton of insights expertise AND rely less on claimed-behavior surveys – more in-the-moment data capture.*"

Qual will get some love as well, with several respondents mentioning their plans for using more in-person methods: "*Investing more in qualitative, specifically in both deeper-dive observational (and possibly ethnography) and smaller mobile qual projects.*"

Perhaps the most promising plan of all was this one:

"*More emphasis on research as a profit center.*"

That has a nice ring to it! Q

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Researchers experienced and satisfied

By Emily C. Koenig, Digital Editor » Quirk's Media

The 2019 edition of the annual Quirk's corporate researcher salary survey received responses from a total of 828 full-time (defined as 35+ hours per week) client-side insights professionals. In the past few years, we have seen a consistent trend in reported changes in employment as well as job satisfaction and total compensation.

As we've done in the past, we're letting the data speak for itself, highlighting a few tidbits and sharing respondent comments throughout. In honor of publishing our first salary survey article 10 years ago, we will also be sprinkling in a few data points from years past to see how far we've come since the study debuted.

If you would like a more detailed look at the salary survey (as well as supplier-side salary data), it is available online at: www.quirks.com/tools/salary-survey.
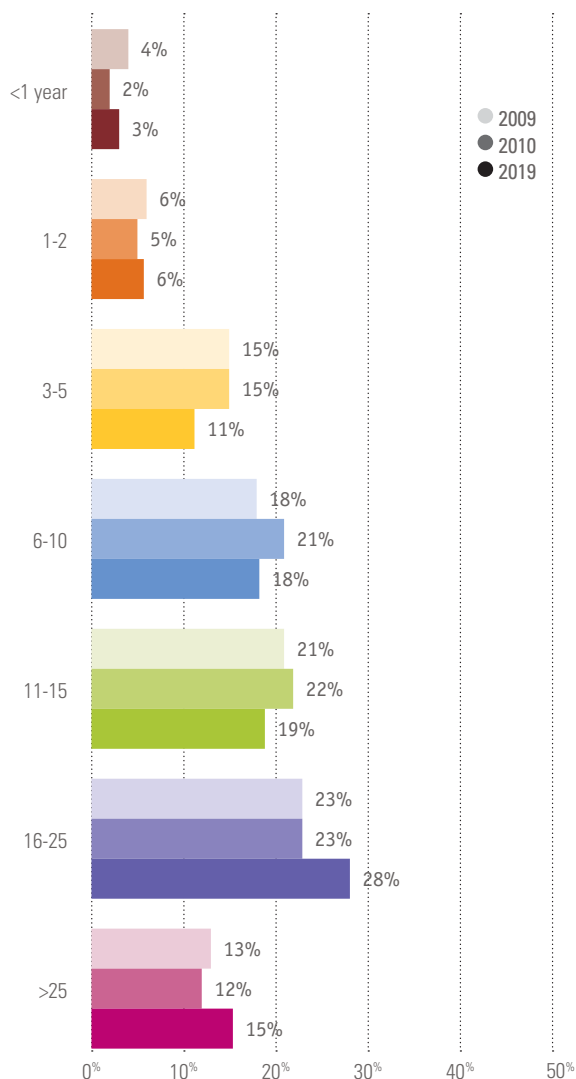
Our **10**th *annual salary survey was answered by* **828** *client-side insights professionals.*
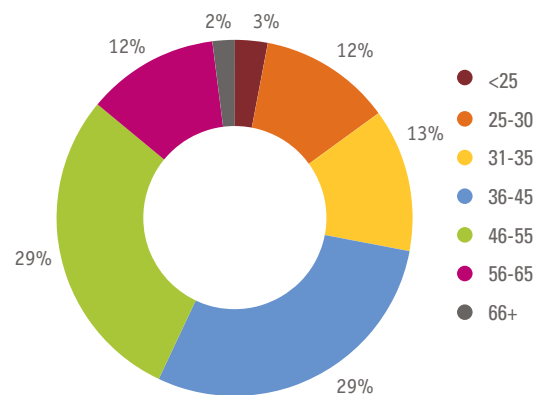
DEMOGRAPHICS

This year, 43% of respondents reported having 16 or more years of experience in marketing research, higher than many previous years – though not quite as high as last year's survey (46%). In 2009, 36% reported 16+ years and in 2010 it sat at 35%. While this may speak more to Quirk's loyal reader base, it is interesting to note this slight shift.
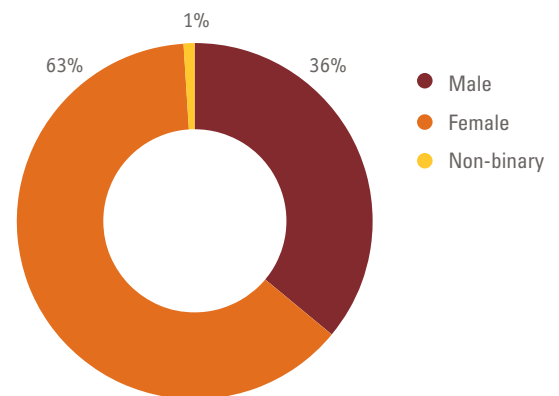
What is your age?

- <25
- 25-30
- 31-35
- 36-45
- 46-55
- 56-65
- 66+

2% 3% 12% 13% 29% 29% 12%

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

2009
2010
2019

Years	2009	2010	2019
<1 year	4%	2%	3%
1-2	6%	5%	6%
3-5	15%	15%	11%
6-10	18%	21%	18%
11-15	21%	22%	19%
16-25	23%	23%	28%
>25	13%	12%	15%

What is your gender?

1% 36% 63%

- Male
- Female
- Non-binary

What is the highest level of education you have completed?

2% 36% 57% 5%

- High School Graduate
- College Graduate
- Masters Program Graduate
- Ph.D. Graduate
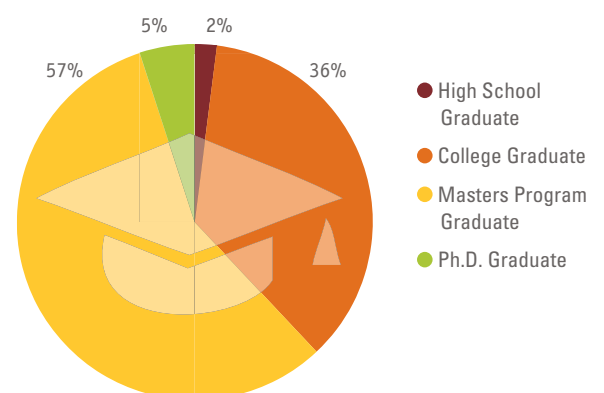
CHANGES IN EMPLOYMENT

Given that the salary survey debuted at the height of the Great Recession, it doesn't come as a surprise that today's respondents are reporting a higher likelihood that their company will hire additional market research employees in the next 12 months. Back in 2010, 60% said it was very unlikely, unlikely and somewhat unlikely that their company would hire additional employees in 2010. Today only 48% report it as very unlikely, unlikely and somewhat unlikely.
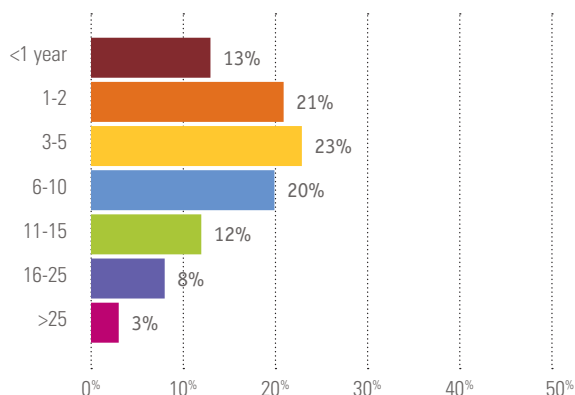
On another interesting note, today's respondents are more likely to report that they have been at their current job for less than one year (13%) than in 2009 (8%). This is possibly due to more comfortability with job hopping – or an increase in open MR positions – as the economy has improved.

When looking through this year's verbatims, we were also reminded of the pros and cons when changing jobs:
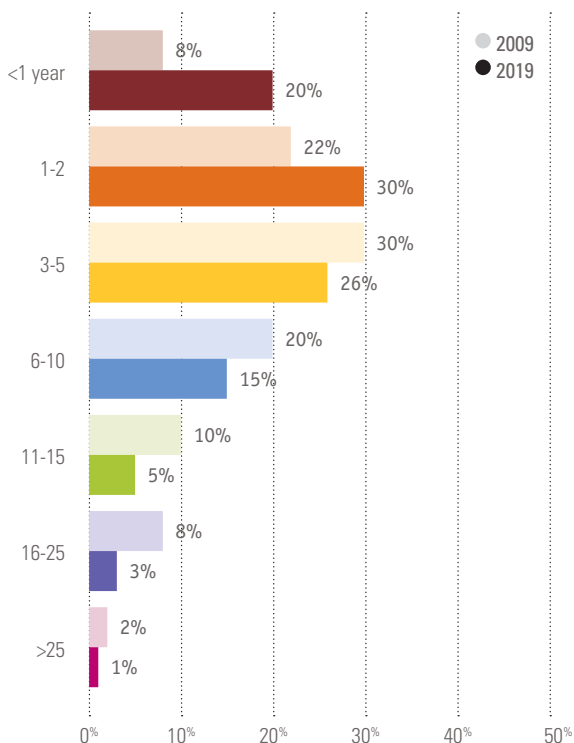
"I left a dysfunctional dept. culture for a better culture, more flexibility and a nice office to boot. Since I now have my health care and other benefits with my wife's plan, the pay difference is negligible. The boost in my sanity is well worth it."

"Base salary decreased as I moved sideways into a new role and took a base salary cut and lost company car benefit."
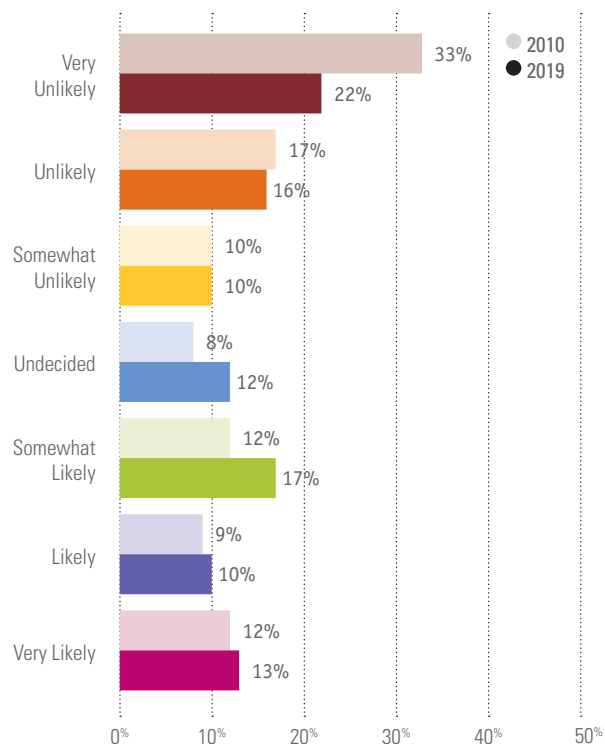
How many years have you been in your current job?

2009 / 2019

Years	2009	2019
<1 year	8%	20%
1-2	22%	30%
3-5	30%	26%
6-10	20%	15%
11-15	10%	5%
16-25	8%	3%
>25	2%	1%

How likely is it that your company will hire additional market research employees this year?

2010 / 2019

	2010	2019
Very Unlikely	33%	22%
Unlikely	17%	16%
Somewhat Unlikely	10%	10%
Undecided	8%	12%
Somewhat Likely	12%	17%
Likely	9%	10%
Very Likely	12%	13%

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

Years	%
<1 year	13%
1-2	21%
3-5	23%
6-10	20%
11-15	12%
16-25	8%
>25	3%

JOB SATISFACTION

While past surveys (2011, specifically) show that the research industry went through bouts of dissatisfaction in the workplace, job satisfaction has remained relatively steady since our 2013 report. The 2019 survey shows that approximately 75% reported that they are somewhat satisfied, satisfied or very satisfied with their current employment.
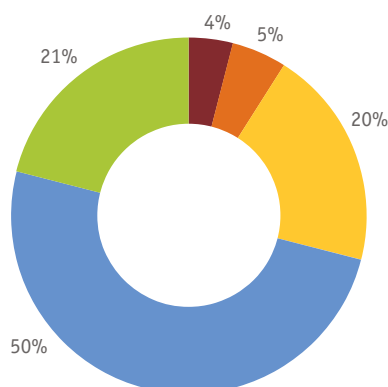
How satisfied are you with your current employment?

Category	%
Very Dissatisfied	3%
Dissatisfied	5%
Somewhat Dissatisfied	9%
Neutral	8%
Somewhat Satisfied	20%
Satisfied	38%
Very Satisfied	17%
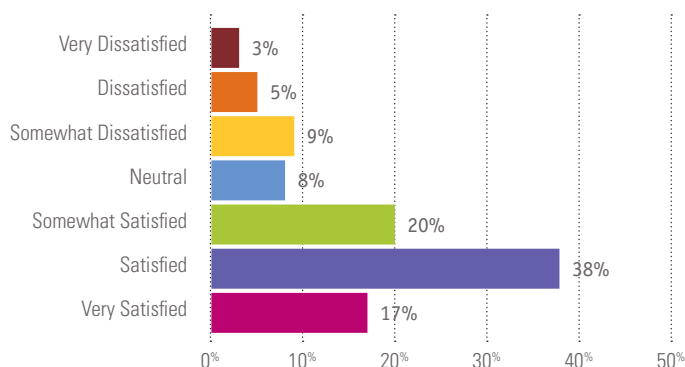
How valued do you think the marketing research and insight function is at your company?

(Scale of 0-10, "not valued at all" to "extremely valued")

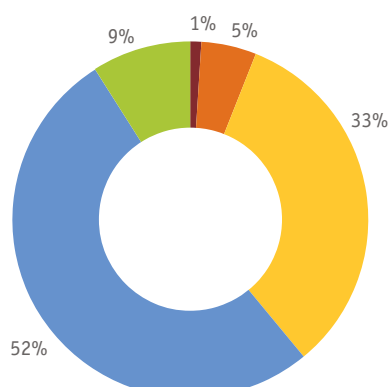● 0-2 ● 3-4 ● 5-6 ● 7-8 ● 9-10

- 0-2: 4%
- 3-4: 5%
- 5-6: 20%
- 7-8: 50%
- 9-10: 21%

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

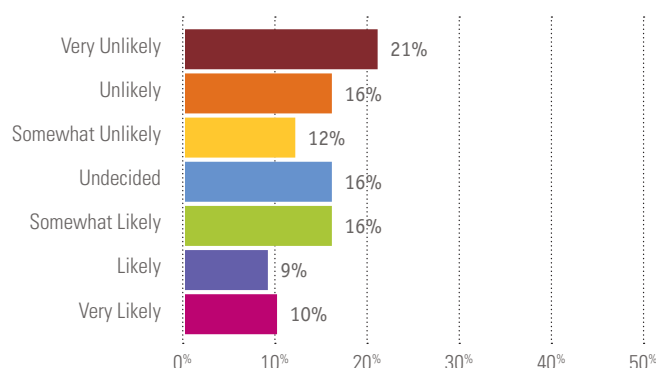| Category	%
Very Unlikely	21%
Unlikely	16%
Somewhat Unlikely	12%
Undecided	16%
Somewhat Likely	16%
Likely	9%
Very Likely	10%

How valued do you think the marketing research and insight function is as a profession in the general business world?

(Scale of 0-10, "not valued at all" to "extremely valued")

● 0-2 ● 3-4 ● 5-6 ● 7-8 ● 9-10

- 0-2: 1%
- 3-4: 5%
- 5-6: 33%
- 7-8: 52%
- 9-10: 9%

What are your pain points in managing and conducting marketing research at your company?

● Always ● Often ● Sometimes ● Rarely ● Not a pain point

- Difficult to get management buy-in for research
- Too many projects for our budget
- Too many projects for our staff
- No consistent or effective way to rank priority of projects
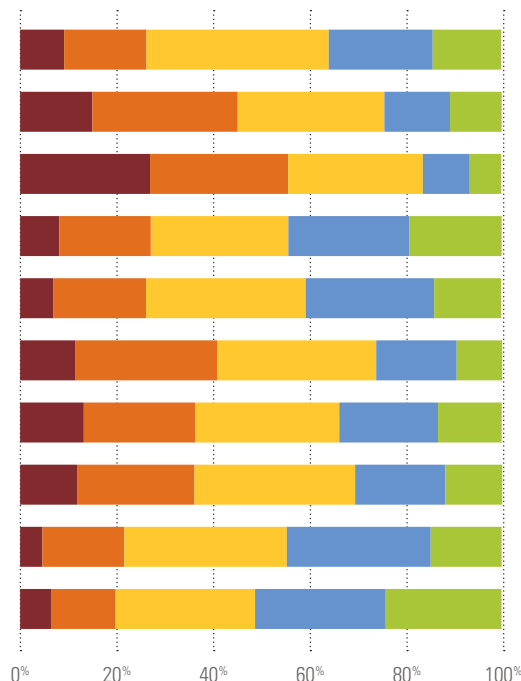- Unclear project goals and objectives
- Decisions that go back and forth and/or get made late or ineffectively
- Cutting costs without reducing quality of research
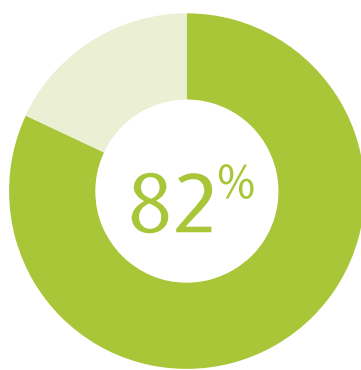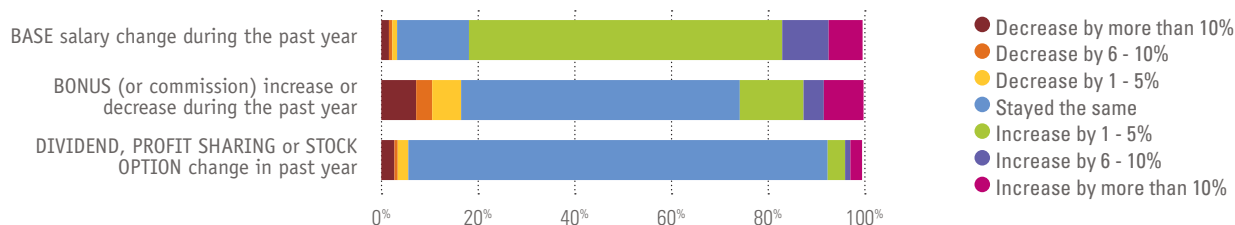- No consistent or effective way to measure value of completed projects
- Staying up-to-date on research methods
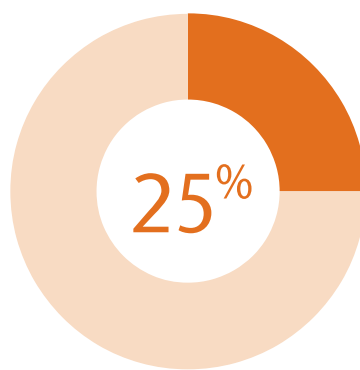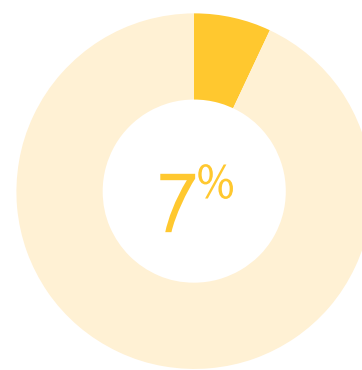- Finding and keeping good marketing research employees

COMPENSATION

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

BASE salary change during the past year

BONUS (or commission) increase or decrease during the past year

DIVIDEND, PROFIT SHARING or STOCK OPTION change in past year

- Decrease by more than 10%
- Decrease by 6 - 10%
- Decrease by 1 - 5%
- Stayed the same
- Increase by 1 - 5%
- Increase by 6 - 10%
- Increase by more than 10%

82%

Saw an increase in BASE SALARY

25%

Saw an increase in BONUS

7%

Saw an increase in DIVIDEND, PROFIT SHARING or STOCK OPTION

Less than 4% of respondents reported a decrease in base salary during the past year and approximately 82% saw an increase. As in previous years, we dug into the comments in the compensation section:

"We had a great year and blew out our targets."

"Company is going through a tough time so no raises or bonuses were given as far as I'm aware."

"2018 was a tough year for my company."

"I was promoted from research analyst to senior research analyst last year and received a 10% bonus."

"Company went private so stock benefits decreased significantly."

"I was promoted."

"The only monetary compensation I receive is my salary."

"Bonus is tied to overall business performance. Revenues were flat YOY, so bonus targets were not met."

"I changed jobs earlier this year and my base salary went down but I was given a signing bonus that took me

above my prior job's salary. That, and the value of the additional benefits – free benefits, 401k contribution – made the position very attractive."

"Base salary increased due to promotion bonus increase due to above average scoring on the employee rating scale."

"Bonus and other non-base compensation directly linked to company performance (which was weak) and hence major reductions."

"I switched jobs so base salary improved significantly."

RESPONDENT INDUSTRIES
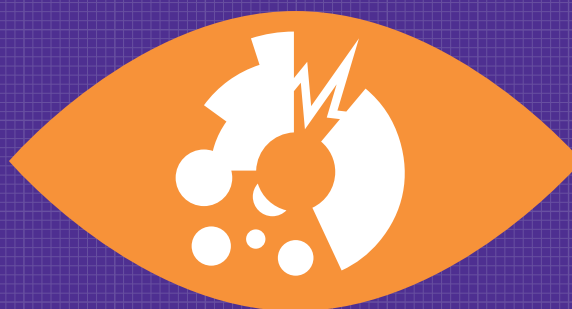

- 10%
- 10%
- 7%
- 7%
- 6%
- 6%
- 6%
- 5%
- 5%
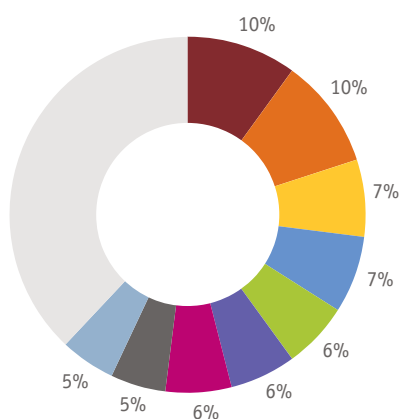
- Consumer Goods
- Health Care/Pharmaceuticals
- Media/Publishing/Information
- Banking/Financial
- Insurance
- Manufacturing
- Food/Beverage
- Technology/IT/Web
- Retail
- Other

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 consumer goods (10%), health care/pharmaceuticals (10%), media/publishing/information (7%), banking/financial (7%) and insurance (6%).

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

METHODOLOGY

The Q Report work life and salary and compensation 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 and The Insight Management Academy. The survey was fielded from May 22 to July 1, 2019. In total we received 828 usable qualified responses. An interval (margin of error) of 3.35 at the 95% confidence level was achieved. (Not all respondents answered all questions.)

Market research panel outlook: Securing representative sample is within our reach

By JD Deitch, Chief Research Officer » P2Sample

What can we do as an industry to improve participation and reduce bias? We have more opportunity now in the digital age to drastically change our research practices to overcome challenges in securing representative research participants. New technologies, methodologies and approaches are now allowing us to improve the respondent experience and give them respect, prioritize reach and diversity and put quality front and center.

It's no secret that we are some distance away from accomplishing these goals. In fact, many are still scrambling to execute the basics that are being demanded by changes in the social, economic and digital landscape. Innately connected consumers – the so-called "digital native" generation – aren't joining traditional panels. Individuals are demanding more from every interaction, online and otherwise. Transparency and accountability are permeating every aspect of life. Those who don't get it right in the market research space will find themselves increasingly sidelined.

Rapid transformation

When we examine the world of sample specifically, i.e., how participants are sourced, how much it costs to access real respondents and the future of panels themselves, there are several things that should be occurring in the midst of rapid transformation. Some of the challenges that remain include:

• **Poorly designed surveys.** We live in a world where great attention is spent on user interfaces and processes that reduce friction, where information is easily accessible and even complex transactions are made simple. And still there are tons of poorly designed surveys and surveys that don't properly render regardless of screen size. There are still high-friction interactions for panel

registration or during the survey experience as users are bounced from router to router (being asked their age and gender every time). The whole thing sticks out like a sore thumb.

- **Dismal interactions.** Even those respondents who like to share their opinions don't see panels or surveys as the first place to do so. They can make their voices heard everywhere from Yelp! to Amazon to Google reviews to Reddit. Research methodologies have evolved to include engaging voice and free-form chat as methods for data collection. Respondents can interact directly with brands, companies and their peers to speak their minds. And they often get immediate gratification in the form of a response, aggregate or otherwise. Are people going to stop needing surveys or taking surveys? It's very possible.

- **Payoffs that suck.** Respondents figure out fairly quickly that they have to take a large amount of surveys to earn enough points for any kind of payoff. Incentives are small, hard to earn and don't resonate with the survey respondent. Some clients are recognizing that this has an impact on participation. Some aren't.

In addition to these enduring market research issues, many researchers largely don't understand sample supply and many continue to operate under assumptions that haven't been true for 10 years. Just some of these misunderstandings include a lack of comprehension of how real-time sample works in the age of automation, a misconception that double opt-in panels are "better" and the misguided belief that fraud is easily solved with traditional, static measures. In fact, sample is a dynamic space that, in

some cases, is creating solutions through nimble use of technologies like artificial intelligence and automation. Those that aren't using technology to solve problems are being left behind.

Moving the dial for solid data outcomes

There are several key areas where we can start to institute real change and some companies are already making strides toward this future. It's time to examine how the digital world has opened up new avenues for uncovering quality data.

Reach and diversity

Aggregating respondents from multiple sources is a practical solution for creating diversity. By pulling in individuals from a wide range of outlets such as affiliate networks, publisher networks, shopping sites, social media platforms, ad agencies, blog networks and loyalty sites, there is a better chance of obtaining a diverse and representative cross-section of the population. As suggested above, non-panel sources are more important than ever in the face of declining participation.

Automation allows us to optimize this process and benefit all stakeholders. Some sample providers are making investments in programmatic acquisition, which in turn allows recruitment at scale that evolves alongside the market, providing a competitive advantage. When this manner of recruitment is done right, providers can
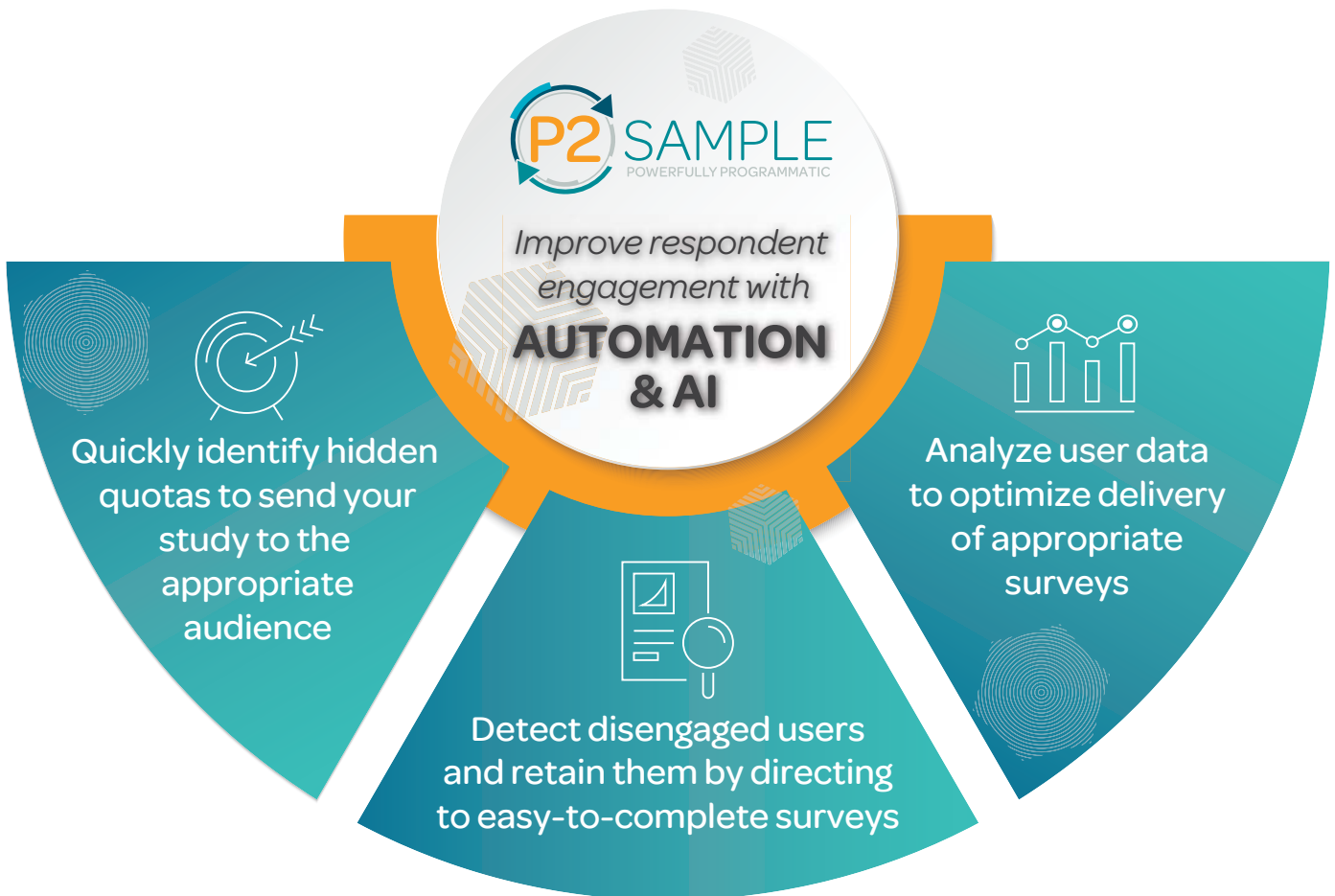
efficiently source from hundreds of sample suppliers of all types, thereby providing diversity while also minimizing other biases that arise with concentrations of certain types of people.

This kind of shift naturally leads to the need for a new way to measure quality. The traditional static look at counts of registered participants by demographics and response rates is effectively meaningless for judging a supplier's ability and dependability to supply respondents for a given project. What matters now is real-time feasibility across an ever-evolving collection of sources and the headroom across those sources to facilitate growth. Reach across numerous diverse sources is the only way to increase feasibility and reduce coverage bias.

Respondents will be rewarded, respected and heard

The entire model for incentivizing respondents is beginning to change, as they are no longer content with earning points and getting small rewards. Many suppliers have now figured out how to improve incentive choice and have streamlined the fulfillment process to meet consumer demands for choice and instant rewards. This is actually the easy part.

Automation and artificial intelligence allow us to improve respondent engagement from multiple angles. While the incentive definitely plays a role, and customization and personalization contribute to its overall perceived value, engage-

> *Reach across numerous diverse sources is the only way to increase feasibility and reduce coverage bias.*

P2 SAMPLE
POWERFULLY PROGRAMMATIC

Improve respondent engagement with
AUTOMATION & AI

Quickly identify hidden quotas to send your study to the appropriate audience

Detect disengaged users and retain them by directing to easy-to-complete surveys

Analyze user data to optimize delivery of appropriate surveys

ment has more to do with making things better for respondents all around. As researchers, none of us should underestimate the impact of engaged and happy respondents on data quality – and *future* participation!

Automation and artificial intelligence give sample companies the tools needed to improve the respondent experience from the ground up. Just a few of the things they can do for us:

• quickly identify hidden quotas to present the study only to the appropriate, qualifying audience, even when correct parameters were not provided up front;

• detect users who look like they are become disengaged or are ready to stop participating and try to retain them by directing

them to highly rated, easy-to-complete surveys; and

• analyze the vast pool of user data to determine habits, like completion rates overlaid with times of the week, in order to optimize delivery of appropriate surveys.

With problems like router bouncing and more that create negative user experiences, directly managing the process in field to stop bad experiences is a must. This can include everything from employing automation to spot trouble in field – trouble which can be algorithmically identified by using things like low complete rates and even user-generated survey ratings.

Engagement can also improve when suppliers take advantage of the millions of data points that are available to them. Using this data,

backed by automated algorithms, surveys can be targeted appropriately so users spend less time trying to qualify for a study and find a faster path to a good experience.

Automation also allows for a complete feedback loop, in which respondents can be rated based on their behaviors (such as thoughtful responses versus speedlining) and respondents can also rate the surveys they take. Their feedback can be coupled with algorithms that automatically monitor dozens of field statistics to gauge the respondent experience. At P2Sample, we promote great experiences through increased sample flow, while bad ones have their traffic slowed and may even be quarantined. Bad experiences cause participants to disengage or drop out, which leads

> *The methods and barriers we used in these early days to mitigate fraud will no longer work in the age of automated digital recruitment where speed, scale and sophistication benefit both good actors and bad actors.*

to bad data. This kind of forward-thinking approach can help boost engagement and satisfaction, while also eliminating avoidable delays and weird data that only become apparent once the project is complete.

Modern fraud mitigation

Online research, due to its relatively high payout, has attracted its share of fraud. Estimates of fraud in surveys range from 5-20% of completes, sometimes higher. In the early days of the internet and online research, fraud was somewhat confined due to lack of automation and other technologies that now make it easier to trick the system. The methods and barriers we used in these early days to mitigate fraud will no longer work in the age of automated digital recruitment where speed, scale and sophistication benefit both good actors and bad actors.

The bad actors can now use technology to launch thousands upon thousands of attacks on panel company servers and even include the trading of stolen credentials in the dark web. These are not "bots," as so many in the industry call them, as if they were amateurishly written programs. These are humans working with machines and they are easily defeating the industry's "best" tools. Conventional techniques (think e-mail validation and Captcha) must now be combined with more advanced techniques to be effective.

One advanced method that works is the smart use of machine learning, a subset of artificial intelligence that significantly enhances detection. Using billions of data points and leveraging domain knowledge at the outset, machines can be trained to recognize unusual emerging patterns like surges in identical user profiles. This kind of system intelligently adapts to changing threats.

Equally important to containing fraud is the capture of personally-identifiable information on the individual. While this comes with high standards for data protection and privacy, it greatly facilitates fingerprinting and fraud detection. It also eliminates one of the main concerns about real-time sample, as it results in a concrete opt-in event and permits all kinds of work that was heretofore impossible, like re-contacts and product tests and even offline qualitative work.

Further considerations

The above is just scraping the surface of the changes that are occurring in the digital landscape for our industry. For years, we have generally focused on the tactical benefits of technology, such as using automation to reduce costs and uncover insights more quickly. But the "north star" for us as an industry has always been, and must continue to be, providing data that our clients can trust.

The companies that are committed to this outcome are set apart because of the *way* they use the technologies that are now available to them. They are using things like automation and artificial intelligence not just to meet demands for speed and profitability but also to deliver materially better, more accurate data. A focus on things like improving the respondent experience, reducing fraud, improving targeting and proactively solving problems in field begins to create a virtuous circle that improves outcomes for everyone. Q

What happens when you bring two technology leaders together?

It creates the most powerful solution for the world's most innovative insights companies.

All the benefits of automation with seriously better quality.
www.p2sample.com/automation

The technology backbone of the world's most successful insights companies.
www.cint.com

Cint's acquisition of P2Sample redefines the way insights companies run market research operations.

Even in a world of big data, here's proof that customer insights are still much-needed

By Zoe Dowling, SVP Research » FocusVision

In recent years, big data promised to solve all our problems. Why ask people questions when we can tap into the plethora of data being gathered every second, from clicks and transactions to geolocation and sensors, providing hitherto unattainable detail on the actions they've taken?

To be sure, this type of data is extremely valuable. We know that people don't always (intentionally or unintentionally) provide accurate accounts of their behaviors. Post-activity recall, particularly as time goes by, becomes shaky, not to mention social-desirability factors. Do you really want to admit to exactly how often you picked up your smartphone in a day, never mind how long you've spent matching

gems? Big data, collected with the appropriate permissions, provides extremely useful and accurate information. However, it doesn't tell you why people do the things they do; the emotion behind the actions.

The role of emotions in decision-making

Emotions are a core part of what makes us human. While there are cross-cultural variations on their expression and intensity of expression, we all have them. Yet we are often hesitant to talk about them and even less likely to admit to them playing any role in our decision-making process.

Over the past few decades, breakthroughs in academic investigation have pushed forward our

understanding of emotions and their function in decision-making. The renowned neuroscientist Antonio Damasio developed his "somatic markers" hypothesis, where the feeling (emotion) attached to a memory is elicited during decision-making and influences the outcome.

Amos Tversky and Daniel Kahneman put forward two ways that we think: intuition (System 1) and reasoning (System 2). Intuition thinking is fast, automatic and emotional and takes place on a subconscious level while reasoning thinking is slow, logical and requires effort and takes place consciously. Tversky and Kahneman argue that most of our decisions are intuitive (and therefore based on emotion). This

Feel has **1.5x more** impact than **think**
(average across four outcomes)

Act

PURCHASE   LOYALTY   ADVOCACY

"Think" and "Feel" variables are statistically significant drivers of business outcomes (at a 99% confidence interval level).

Base: 522 U.S.-based consumers Source: A commissioned study conducted by Forrester Consulting on behalf of FocusVision, 4/19.

In short, emotions drive business results.

Using the right data
In the decades since the new thinking on their role in decision-making emerged, there's widespread acceptance around the importance of emotions. This is apparent in the same Forrester study, where 93% of companies agree that consumers are more likely to spend money with a brand that they feel connected to. Additionally, 88% agree that a better understanding of how their customers think and feel will help them win new customers.

However, despite the recognition about the role of emotion and the need to understand their customers in order to engage them in ways that will resonate, only 38% strongly agree they know why one customer chooses to buy from their brand while another doesn't. There's clearly a disconnect – and one that is explained when looking at the data that companies are using to understand their customers: more than half (56%) report relying more or fully on big data (versus small data) to answer questions about how their customers think and feel. Big data – clickstream,

is often portrayed as a negative but intuition affords us decision-making at the speed and scale we need to navigate the world around us efficiently; otherwise, we would quickly become incapacitated.

So, we know that emotions play a role in decision-making, but to what degree?

Newly released research by Forrester Consulting, commissioned by FocusVision, found that how a customer thinks and feels about the brand are both statistically significant drivers of how they act (purchase, loyalty and advocacy).

Further, how a customer feels – their emotional connection with the brand – has a 1.5 times greater impact on driving positive business outcomes than what they think.

93% of companies agree that customers are more likely to spend money with a brand that they feel connected to.

Base: 228 marketing and customer insights decision makers | Source: A commissioned study conducted by Forrester Consulting on behalf of FocusVision, April 2019

A one-point* gain in average positive thoughts or feelings toward a brand increases the likelihood of...

continuing a subscription by as much as
+10.2%

purchasing in the next 3 months by as much as
+11.2%

maintaining loyalty by as much as
+14.8%

advocating on behalf of brand by as much as
+15.4%

*point scale of 1–5   **Base:** 522 U.S.-based consumers **Source:** A commissioned study conducted by Forrester Consulting on behalf of FocusVision, 4/19.

transactional, POS, CRM, location and so on – is an important way to understand what your customers are doing. However, it can't tell you why they are doing it. It can't convey how they think and feel.

This is demonstrated in the Forrester study, which found that big data – such as the frequency with which consumers interact with the brand, the length of time the consumer has subscribed to the brand and the frequency with which consumers purchase from the brand – are not statistically relevant indicators of how they'll

act – the intent to continue subscribing, loyalty or advocacy.

Insight data can predict business outcomes

On the other hand, brands can use small data – gathered by asking questions – to predict business outcomes. By understanding how customers think and feel about their brand and making improvements to these perceptions, companies can predict business outcomes.

According to the same Forrester study, brand qualities like trust, helpfulness and value play

the strongest role in driving action. The return is apparent. By making a one-point improvement on a five-point scale, brands can increase the likelihood of customers continuing a subscription by as much as 10%; purchasing in the next three months by 11%; maintaining loyalty by almost 15%; and advocacy on behalf of the brand by 15%.

Understanding your Customer Truth™

Not knowing why your customer acts the way they do leaves opportunity on the table. The need to get close to them through small data (such as surveys, online research communities and interviews) is clear. Understanding their likes, dislikes, routines, habits, beliefs, values and all the other contextual information around how, where and why they are using your product or service provides essential information to drive your brand forward.

The Forrester study shows that small data isn't just nice to have, it's crucial when it comes to winning your customers' hearts and minds and delivering experiences that don't just keep them coming back but also make them advocates for your brand.

So, the next time someone in your company says there's no time to ask those questions and/or "let's just look at the big data," here's proof that the data you gather about your customers is essential.

Visit our resource library to download a copy of the Forrester study, commissioned by FocusVision: https://www.focusvision.com/resources/forrester-study-commissioned-by-focusvision/. **Q**

The study found big data such as:

Consumer brand interaction frequency

Consumer brand time subscribed

Consumer brand purchase frequency

are **NOT** statistically relevant indicators of the intent to continue subscribing, loyalty or advocacy

Base: 228 marketing and customer insights decision makers | Source: A commissioned study conducted by Forrester Consulting on behalf of FocusVision, April 2019

THE TRUTH IS OUT THERE

Discover how your customer thinks, feels and acts for better business outcomes.

FocusVision

How do we develop successful insight people?

By James Wycherley, CEO » Insight Management Academy

Every insight leader wants to develop the most effective insight function they can. For some, that might mean a focus on generating better insights about consumer behavior and its drivers. For others, that might mean a focus on knowledge development. And for a number, there will be a focus on how that knowledge is disseminated around an organization.

There are a lot of best practices for all insight leaders to learn from in each of these areas.

Our organization, the Insight Management Academy (IMA), was set up in 2004 to support client-side (end-user) research and analysis teams in large organizations. The IMA's Insight Forum has been meeting every quarter in London since early 2005, and at every meeting we discover new angles to these topics and fresh examples of best practice.

However, a focus on what people do and which processes they follow is no substitute for thinking about our people themselves, their skills and how they deploy them. According to the IMA's capability benchmarking, less than one in every six large organizations has an insight strategy, and even fewer have a structured plan for thinking about their insight people.

This makes no sense. Faced with choosing between great people who need to adopt new processes or having great processes but a mediocre team with poorly balanced skills and little aptitude for the job, very few leaders would go for the mediocre team. Clever analysts, incisive researchers, creative insight managers – these people can bring joy to working in an insight team and unlock a world of potential for organizations who want to use customer and market understanding to improve business performance.

So how do insight leaders improve the situation? The starting point is to map the various aspects involved and to establish some key principles for each area. The next step is to reflect on where you would like your organization to get to and how far away from that you are at the moment. There is no insight function in the world which has completely nailed every aspect of developing its insight people, but there are marked differences between the evidence provided by some teams on one aspect or another and the norm.

The rest of this article is devoted to a quick introduction to the IMA's thinking on the five key areas we have identified. We have also published individual guides for insight leaders on each topic, drawing on our own expertise and the collective experience of our corporate members.

Key areas to consider
Successfully developing insight people isn't a topic which can be viewed in isolation because it is closely connected with many other

aspects of insight management. But it does have distinct elements to it which will be missed if you only focus on team projects, processes and strategy. The IMA recommends that all insight leaders pay attention to the following:

- insight leadership
- insight skills and attributes
- insight perspective
- insight recruitment and development
- insight teamwork

Insight leadership

What does an insight leader actually do? Research with members of the IMA's Insight Forum suggests that, for most, the role is extremely busy and increasingly varied. The challenge is twofold:

- How do you perform individual aspects of the leadership role as well as you can?
- How do you determine and manage the balance between the different aspects so that you are doing the right things as well as doing them well?

We believe that one useful way of bringing order to what can sometimes feel like a fairly chaotic existence is to think about the job of an insight leader as incorporating the following three roles: technician, manager and entrepreneur.

The idea for this came from a celebrated book about the challenges faced by small business owners, "The E-Myth Revisited" by Michael Gerber (the E standing for "entrepreneur"). Gerber contends that most new small businesses fail because:

- Most businesses are founded by technicians – people who love producing something to a high standard and have set out to do it on their own but who do not necessarily have the wider business management skills to make a success of a company.
- It is fatal to assume that, if you understand the technical work of a business, you know how to run a business that does technical work.
- Small business managers need to pay more attention to two other

aspects of their role – the managerial role and the entrepreneurial role.

Why is this relevant to insight leaders?

Leading an insight team within a large organization has a lot in common with running a small business. The team needs to thrive and survive in the context of organizational change and reorganization, just as a business must compete in an external marketplace.

Additionally, many leaders have been offered the opportunity to lead an insight team because they have previously proved themselves adept at the technical aspects of a market researcher or analyst role. This technical experience can be enormously valuable for insight leaders but those who continue to act as technicians will have a very narrow approach to an insight leadership role.

Just like a small business owner, an insight leader needs to balance the technical aspects of their role with the managerial and entrepreneurial aspects. In the IMA's insight leader guide, "IMP602: How to lead an insight team," we examine what each of these aspects involves and we present a tool that can help insight leaders to ensure that they give each the attention it deserves.

Fewer than one in every six large organizations has an insight strategy, and even fewer have a structured plan for thinking about their insight people.

Insight skills and attributes

"Our people are our greatest asset" is a cliché for a reason: it's true. For an insight team to perform well, the caliber of its people is crucial. Despite the increasing amount of data available to organizations, and the greater automation of data collection, analysis and reporting, insight teams continue to need very skillful people who can identify the key insights and business implications and then influence decision-makers to take the necessary action.

The range of skills needed in an insight team is growing. A key cause is that new technology is changing the nature of data collection, data analysis, knowledge management and communication. Progressive organizations are also recognizing that skills in communicating insight and in influencing decision-makers are as important as the ability to generate insights in the first place.

In his book "Good to Great," Jim Collins makes the point that successful business leaders make it their primary concern to "get the right people on the bus." Successful insight leaders have the same priority.

The IMA finds it helpful to think about four main categories of skills and attributes required in an insight team: business skills and personal attributes; specific insight skills; market research skills; and insight analysis skills.

Since the IMA founded the Insight Forum in London in 2005, there have been a number of debates about the relative importance of technical skills versus business, personal and investigative skills.

On the one hand, many teams which originally identified themselves as market research functions not surprisingly prized the traditional research toolkit as taught in agencies across the world. Some of these teams have started to take a more relaxed view of the need for technical qualifications now and instead have prioritized business, personal and generic insight (or "sense-making") skills. As one insight leader told us: "I need consultants who do research, not vice versa."

On the other hand, it has been notable that the analysis side of the house has been going the other way, with rather mixed results. In the early 2000s, a number of banks and retailers developed teams founded on business skills and investigative aptitude, investing in excellent data management systems, which reduced the need for expert data analysis. But as the world of data has exploded, we have seen a massive increase in the number of data analytics teams with brilliant technical skills but not necessarily well-rounded business skills.

A related debate over the same time period is the extent to which it is realistic to find "insight unicorns," people who can tick all the boxes. A few of the larger insight teams have taken the approach of dividing team members into two camps: those who focus on technical work and those who focus on the interface with the rest of the business. More commonly, insight team members are required to have a solid combination of all four skill sets but with space to accommodate people who are stronger in one area than another.

Insight perspective

Bill Gates claims that Hans Rosling's 2018 "Factfulness" is one of the most important books he's ever read. He reportedly sent a copy to every student in the U.S. who graduated that year! The IMA believes it's equally important for insight leaders and their teams, despite the fact that it never actually references corporate insight at all. So, why is it so relevant to us?

Before becoming chief executive of the IMA, I worked for one of the world's biggest banks for 20 years, spending over half of that time leading all its analysis of retail customers and markets. An important part of that role was to run data-based investigations into critical business issues, supplying decision-makers with facts, figures, insights, ideas and recommendations for how new propositions should be launched, new channels developed and customer needs addressed.

But it became increasingly apparent over that time that insight within a global bank, as in every other sector, is only partly about investigating specific issues. Much of the time it's about challenging assumptions and providing customer and market context. It's about painting a picture to show stakeholders how value is really driven by customer behavior and how this behavior is in turn driven by a wide range of habits, circumstances, beliefs, needs and aspirations. The problem I experienced is not that senior people don't know particular statistics. Rather, it's that in a commercial organization there tends to be an endemic focus on short-term revenue and cost metrics, not on the fundamental truths of how and why customers do business with the organization.

It's no surprise, then, that in its daily conversations with cor-

porate insight leaders, the IMA increasingly finds that they have sympathy with Rosling's mission to "fight devastating ignorance with a fact-based worldview." Or, in other words, they appreciate the critical need for their teams to develop "an insight perspective" and to share this with senior decision-makers.

If we're going to develop an insight perspective, and encourage an enhanced corporate worldview shaped by customer and market knowledge, then it is worth going back to Rosling's book. We should consider the application of 10 key instincts which he believes are often the barriers to human beings seeing things as they really are. These are: the gap instinct, the negativity instinct, the straight-line instinct, the fear instinct, the size instinct, the generalization instinct, the destiny instinct, the single perspective instinct, the blame instinct and the urgency instinct.

These instincts and the way to develop an approach to counteract them are discussed in the insight leader guide "IMP604: How to develop an insight perspective." It can involve both a mind-set and behavior change from our people.

Insight recruitment and development

Corporate insight teams are reliant on people. Technology can enable people to generate and disseminate insight – it helps facilitate *how* things are done. But it is only people who can influence decisions about *what* is done at a strategic level. And it is only people who can act as trusted advisers to key decision-makers.

This is why it is so important for an insight team to find, develop and retain the right talent.

Insight team leaders face many daily challenges. People issues are often not seen as being as urgent as the demands of stakeholders until you face a crisis. Yet you need your team to perform at their best in order to deliver what stakeholders need. When recruiting, developing and retaining staff some corporate policies present more challenges than they used to, such as reduced HR support, a blanket ban on the use of specialist recruitment agencies, lower training budgets and flatter team structures.

Given all of these challenges, how can you find, develop and retain the best talent for your corporate insight team?

The answer is to give the acquisition and management of people the thought and time it deserves. Specifically:

- Be clear about the skills needed in the team as a whole; audit current skill levels and come up with a long-term plan for closing the gaps.
- When you recruit, be clear about the most important skills required and the most effective way to identify the best candidate.
- Take a considered approach to onboarding new staff.
- Take the time and trouble to understand what is important to individual team members and how their performance is affected by their ability, motivation and opportunity.
- Think creatively to identify workable ways to develop and reward staff.

We may not always be in charge of the process, but understanding best practice gives us some ammu-

nition to shape what happens in our organization. Ultimately, the issue is that if insight is to deliver competitive advantage, then our organization must be at least as able as its competitors to recruit, develop and retain really good insight people.

Insight teamwork

What matters most – how well you perform as an individual within an insight team or how well the insight team performs overall? The answer you give probably depends on your perspective and how your organization rewards performance.

But if you were the chief executive of your organization, wouldn't you be most interested in how the insight team performs overall? That is certainly the perspective we take at the IMA.

In team sports and the military, it is clearly the team's performance overall that really matters. The success or failure of such teams is also generally easy to judge; they either win or they lose.

We all know from history and experience that individuals within a sports or military team can be very talented, but that is not enough to guarantee a team's success. Key drivers of success are: team members' commitment to a meaningful common purpose, having a clear performance goal, having the right mix of skills in the team and blending those skills together effectively.

What is true for sports and military teams is also fundamentally true for teams in organizations. That is why there are so many motivational speakers from the worlds of sport and the armed services.

The lessons from such speakers are relatively easy to apply to proj-

ect teams where there is a clear end goal, such as building a new tower block or launching a new product. But it's not quite as straightforward where you have an ongoing function such as insight. Would a suitable performance goal for an insight team be to deliver a certain number of insight projects or pages of output? Surely not.

So, there is a profound question to be answered about what insight team excellence looks like in terms of outcome. But we also need to focus on what excellence looks like in terms of how the individual members of an insight team work together to maximize their collective impact.

In this area, best practice includes: working as a "true team" (as defined by Katzenbach and Smith in "The Wisdom of Teams"), encouraging teamwork, taking collaboration seriously and having a development plan for the team overall (in addition to the usual development plans for individuals).

Here is a summary of the key points made in this article:

- Insight teams are heavily reliant on the talent and behavior of their people, yet very few insight leaders take a really comprehensive approach to managing their people.
- The process of developing people cannot be seen in isolation; it is closely connected with other aspects of insight capability development.
- The IMA's Insight Roadmap provides a comprehensive structure for leaders who want to think in a top-down way about all the aspects involved in insight capability development.
- The IMA can also provide any corporate insight leader with a free benchmarking exercise to understand how their function performs in each territory.
- However, there are a number of topics specific to people development which every insight leader should explore: insight leadership; insight skills and attributes; insight perspective; insight recruitment and development; and insight teamwork.

The IMA has published an insight leader guide on each of these issues, available on our website www.insight-management.org. Q

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Beyond ROI: Three strategies for demonstrating the value of customer insight

By Finn Raben, Director General » ESOMAR

Insights teams have the capacity to deliver one of the highest ROIs of any department within a business. An effective insights team has the ability to future-proof a company, playing a strategic, not just tactical, role in driving change. However, insights teams sometimes struggle to be seen as credible business partners and their valuable input is often overlooked, especially when their impact is measured in the wrong way. The 2019 "How to demonstrate the value of investing in customer insight" study by ESOMAR looked at the best way for insights teams to prove the value of investing in customer insight, reviewing relevant literature and conducting 20+ in-depth interviews with industry leaders from major organizations including ANZ, Diageo, eBay, Ferring Pharmaceuticals

and Heineken. From the findings, ESOMAR deciphered three (overlapping) strategies that insights teams can pursue to perform highly and showcase the value of insight.

The problems with ROI metrics
The qualitative interviews with industry leaders completed during the study found that there is a nervousness about solely going down the ROI route in assessing the value of insight. Insight plays a complex and creative role in putting the customer at the heart of business decision-making, so evaluating by a specific set of criteria, especially monetary criteria, has the potential to do the insights team a disservice and equally promotes the pursuit of unhelpful activities within the team. As one industry leader interviewed for the study explained,

"The ROI model leads us to cutting budgets; it's a deficiency model of insight. It's not an abundant growth model or concept." Another industry leader explained it this way: "We only implement strict financial ROI measures on projects where we can predict a product of service volume or value change with what we did." Although insights teams are predominantly looking for long-term impact over short-term benefit, there are certain situations in which ROI-style metrics can be useful.

Nevertheless, insights teams need ways to prove themselves as a valuable resource for long-term strategy within the company. It is essential that they're able to prove that they provide strategic, future-proofing value to a company. If they're unable to act as a credible

business partner providing visions for future strategy then they risk becoming irrelevant. The ESOMAR 2019 ROI study looked at the best ways of doing this.

The best approaches to prove the ROI of insights

The ESOMAR ROI study found that the first strategy client-side insights teams should use in order to showcase the value of insight is to focus on future-proofing the organization. As one industry member commented, "We need to move away from the model of risk mitigation towards future-proofing. Old-fashioned return on investment measures are no longer fit for purpose. We must talk about the future return on investment."

It is the insight team's primary role to equip the organization to deal with disruption and change. This means seizing every opportunity to demonstrate involvement with strategy in order to deliver value. When the insights team is perceived as a purely reactive resource, it runs the risk of being viewed as a cost center. Instead, insight teams should be the go-to team when it comes to identifying powerful strategic insights.

When it comes to demonstrating that the marketing research function is uniquely equipped to prepare the organization for what's ahead, insights teams should ask the following questions:

- **Strategic foresight:** Are you building a reputation for being able to spot and seize, in a timely way, critical opportunities that lie at the heart of driving value and growth in the business?
- **Proactive not reactive:** Where are you on the journey from being a market research, order-taking team on the fringes of the

business to being a central, proactive facilitator in driving change?
- **Commercial acumen:** Are you constantly demonstrating the business impact that customer insight is having on the business? Are you showcasing, to all senior management throughout the organization, the business acumen and commercial awareness of the insight team, so that it is clear you are a value creator and not a cost center?

The ESOMAR ROI study found that the second strategy client-side insights teams should enact in order to showcase the value of insight is to gain access to and to build a positive reputation with the C-suite. Taking this action will inform the insights team of the business strategy and help to secure the team's involvement with it, allowing the team to provide powerful and meaningful customer insights that can inform future thinking. This positioning will also help customer insight professionals gain access to all the sources of data we now use to derive a customer insight.

Insights teams should analyze these areas related to their position within the business:

- **Customer-centricity:** Where are you in terms of being seen as the lighthouse – the North Star within the business – when it comes to understanding customer behavior? Are you at the center of creating an organization genuinely committed to customer-centricity?
- **Holistic analysis leadership:** Have you secured access to all the customer insight data (and relevant ancillary data) and are you building a reputation as the expert in integrating the (per-

tinent) evidence into a holistic picture to tell the customer story?
- **Be the insight champion:** Are you building a reputation as being the insight champion? Do you have the strategic vision and forensic energy to unearth powerful insights that tell the company how to best change and influence customer behavior? And are you leading the way in the adoption and use of insights from digital, artificial intelligence and machine learning tools?

The research also highlighted the importance of education and communication more widely within the business. One industry leader explained how they use webinars to reach wider stakeholders and educate them on the value of insights, while others spoke about using case studies and storytelling to demonstrate the long-term, not just the short-term, value of insights. This means insights teams need a broader set of skills than just data analysis. As one insights professional ESOMAR spoke to pointed out, "There's no point in having a silo of really intellectual people who are so interested in their research but incapable of communicating and inspiring others to act." Another said there's a risk that the research industry as a whole isn't bold enough and should do more to tell stories about how they add value. By telling compelling stories that stress the future-proofing, strategic role that the insights team plays to both the C-suite and wider groups of stakeholders, teams can add value that isn't necessarily quantifiably measurable.

Lastly, the third strategy insights teams can use to demonstrate their value is to use a mix of success criteria, not just ROI metrics. Our research showed a skepticism

around relying solely on ROI metrics; one interviewee said, "You can get an ROI measure to see if there's been a sales uplift on a particular initiative but an ROI measure won't tell you much about whether you contributed to the longer-term strategic view. You need softer measures to deliver this."

To show the true value of insights, it's essential that insight teams are not just using ROI metrics and benchmarking to demonstrate value. Instead, teams should focus on confidently showcasing the impact of insight using a mix of hard and softer measures, especially when senior stakeholders are evaluating impact. These measures do have a part to play but they only provide a narrow assessment of the role insight is playing. Again, the study showed the concern that taking the ROI route alone would limit customer insight to only being seen as a cost center rather than a value creator.

In regard to the mixed criteria of metrics, insights teams can:

- **Avoid the tyranny of metrics:** Can you resist calls to use ROI metrics as the sole measure of your effectiveness? How close are you to hitting the sweet spot in using a mix of metrics and more qualitative measures to demonstrate the success and effectiveness of insight?
- **Tell the insight story:** Are you regularly disseminating compelling insight success stories throughout the whole organization's management (case studies demonstrating the value of insight)? Where are you, in terms of socializing your success (deploying innovative communications techniques to demonstrate the way insight is setting the future direction of the business)?

STRATEGIES
client-side insight teams should use in order to showcase the value of insight:

- ☑ **Future-proof the organization**
- ☑ **Gain access to and build a positive reputation with the C-suite**
- ☑ **Use a mix of success criteria, not just ROI metrics**

- **Create a learning organization:** Are you taking responsibility for creating a learning organization with insight at the center of an agile, customer-centric culture that is capable of continually adapting to change?

Evolving the insights team to optimize ROI

So, what immediate actions can insights teams take to make sure they're implementing these strategies? Firstly, insights teams need to remember that insight doesn't end with a presentation; rather the story starts with a presentation and must be followed by closely monitored and mentored implementation. Insights teams need to find a way to secure a dialogue between themselves and the stakeholders they're trying to contact and create impactful stories and case studies to communicate insight success with these groups of people. What's more, teams need to make sure they have systems in place to ensure that insight messages have landed. Follow up on your powerful customer

insights and confirm they are acted upon and implemented within the business. It is vital you take personal responsibility for driving action and implementation.

Networking across the business is also crucial in order to influence these target groups. This is about creating a customer insight culture throughout the organization. Why not run interactive, cross-disciplinary customer insight workshops or create an insights newsletter that reinforces the fact that your team is at the heart of driving customer-centricity. However you choose to communicate, it's important that you go large and commit.

The results of the study show that enhancing our skillset as researchers remains on the to-do list. We need insight professionals who are comfortable leading the strategic dialogue with stakeholders and making insights easily consumable within a business by stakeholders of all levels. These skills are essential for us to create actionable insights and influence change. Q

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Intelligence Capital™ – Helping researchers create a C-suite dialogue

By Jane Frost CBE, Chief Executive » MRS (Market Research Society)

You don't need me to tell you that we live in uncertain times. These days, economic and political flux is the unavoidable context for all our conversations – from international relations right down to summer holidays and olive oil – and we should acknowledge that businesses are facing some of the greatest obstacles to progress of recent times.

But even before June 2016, growth was becoming increasingly hard to achieve in the global marketplace. Far from the rates of growth experienced in the 1950s and 1960s, in the five years to 2017 the top 700 global businesses saw profits contract by 25%. And,

with data showing the returns on incremental innovation are slowing, companies can no longer rely on small variations to products or services to deliver profit increases.

It can be no coincidence that this flattening of economic growth runs parallel to a fundamental shift in the value of businesses. In 2019, most of a corporation's financial value lies in its corporate, customer and brand equity – a far less tangible asset than factories and equipment. Businesses are less reliant on physical capital but these intangible assets are more vulnerable to external changes in conditions and their value can shrink surprisingly quickly – just ask Kraft Heinz.

There are exceptions, of course, and there will always be pockets of growth in even the toughest environments. The companies that identify them under these conditions tend to be better attuned to evolving social patterns, to how markets are responding and being reshaped.

Businesses can now lease assets rather than owning them. Digital platforms and networks have replaced infrastructure, while making it easier to find and acquire customers. The growth of the service economy and the experience economy has put customer interaction at the heart of any offer; it is no longer about the what but the

how – and sometimes it is only about the how.

Some businesses have already responded to this radical restructuring of markets and we've seen chief customer officer roles created at businesses like Virgin Atlantic while growth officers have replaced sales and marketing positions at others. All businesses are trying, in these times of tough competition and narrowing margins, to find any competitive advantage.

I do not mean to come across as pessimistic – far from it, in fact. As with all change, challenges bring opportunities, and I believe this evolving landscape presents a real chance for insight teams to position themselves at the heart of their organizations and establish their work as business-critical.

Businesses are acquiring data at a rapid rate (more data than they know what to do with) from a broader and more varied range of sources – but data alone is not enough. Intelligence is the greatest tool available for harnessing these untapped assets, if we can effectively demonstrate the role of insight in driving financial performance. To do this, insight team leaders

Businesses are acquiring data at a rapid rate (more data than they know what to do with) from a broader and more varied range of sources – but data alone is not enough.
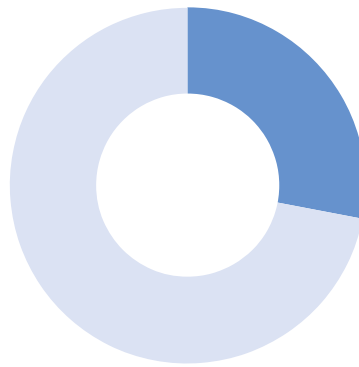
must be able to speak to their CFOs in language they will relate to and understand.

Many CEOs are trumpeting commitments to "customer centricity" – but few can define it. Here is another opportunity for our sector – but only if we can create the intellectual framework to build a sustained value proposition for ourselves.

Throughout my career as a marketing and strategy director at large private and public sector organizations I was continually met by the same questions: How do we demonstrate the value of marketing to senior decision makers? When budgets are being negotiated and resources allocated, how do we make the business case for our department?

These conversations are, of course, much harder to have the further you sit from your CFO and finance department. Research from earlier this year showed that insight and finance teams are not well aligned:

- Only 24% reported they have a close working relationship with their finance colleagues.
- Only 19% felt colleagues view the money the insight team spends as an investment, not a cost.

Only 28%
felt finance colleagues respect the contribution that the insight team makes to evidence-based decision-making.

- And perhaps most worryingly, only 28% felt finance colleagues respect the contribution that the insight team makes to evidence-based decision-making.

It is clear CFOs lack a sustainable "value" to point to or a framework that corresponds with the company's own investment and growth strategy. Financial and human capital are cornerstones of such a growth strategy and their measures are long established and accepted. Just because insight as an asset is harder to quantify, it doesn't mean it is less important, especially when more products are going direct to the customer and disruptions enabled by technology are becoming more frequent.

This is where Intelligence Capital™ comes in. MRS worked with agency and client-side organizations to plug this gap and provide companies with a framework that puts research, insight and data analytics center stage in business strategy and reframes how we seek investment in the function.

Intelligence Capital™ is made up of three elements: structural intelligence, activation intelligence and human intelligence. Structural intelligence represents the sum of what the business knows about

its markets, its performance, its customers and the wider business context. Activation intelligence includes market initiatives and experiments designed to capture innovation and growth opportunities. Human intelligence connects these together by identifying new insights and applying them to markets.

In our technology-led world, people retain a vital role in delivering business success, and human intelligence is critical to bringing all other elements together. Machines cannot articulate the business question or develop hypotheses about where to look for opportunity. While machines can run analytics to uncover insight, they cannot apply the insight to the business question or act on it. And data in and of itself is not forward-looking; it is only the interpretation and application of that insight that turns it into foresight.

In this context, the quality of a company's human intelligence will impact its trajectory as much as (if not more than) the volume and quality of data it holds.

We must be clear: Human intelligence cannot – and should not – be measured by grades and degrees alone. As the sector that provides insight and evidence, we have long worked to be representative of the changing world around us and understand the importance of reflecting the society we interrogate. Varied backgrounds, lifestyles and experiences broaden the knowledge base and expertise of an organization, and several cross-industry studies have shown that diverse workspaces deliver on the bottom line – further incentive to invest in people.

An intelligent culture is one that keeps asking "why" and expects data and insight to integrate and underpin decision-making.

Developing an Intelligence Capital™ asset and having a C-suite conversation needs talent. We're giving companies the tools to develop this. MRS has implemented the most comprehensive set of inclusion and diversity policies of any market research sector in the world. Our Manifesto for Opportunity requires CEOs to commit to creating safer and more representative workplaces – by publishing their pay statistics annually, working towards government targets for women and people from ethnic minorities at board level and improving recruitment practices.

Attracting the best talent from all walks of life is the basis of our reputation as an industry and its perception as an aspirational career choice. It is another product of our unsettled times that our sector has been back on the front page recently through the auspices of political polling – frustrating when it accounts for only 3% of our industry's work. As a result, we've found ourselves in conversations with the House of Lords Select Committee about opinion polls and the Financial Conduct Authority regarding the use of private polling by hedge funds. Maintaining standards and best practices is imperative for attracting the best people from around the world.

The key is for all three elements of Intelligence Capital™ – structural, activation and human

– to work together. The successful application of Intelligence Capital™ creates new value in four ways: unlocking revenue streams, strengthening brand value, increasing speed to market and generating efficiencies. Crucially, it will help companies find that elusive growth.

And how to make it sustainable? Not every employee or team can be proficient in translating data directly into profit – and we shouldn't expect that to ever be the case. But all of us have the ability to ask questions, to interrogate outcomes and imbed intelligence into our processes and ways of working.

An intelligent culture is one that keeps asking "why" and expects data and insight to integrate and underpin decision-making. It requires us to create learning organizations and demands the development of empathy as well as the empowerment of people within businesses. Frightening? Possibly. A challenge? Certainly. But one we must collectively rise to. Working together, we can change the nature of our business conversations. Q

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How researchers can prepare for the rise of automated analysis

By Huey Yii "Daphane" Tan and Sean Jordan

Over the last two decades, journalists and reporters have seen their work augmented or outright replaced by automated systems, the utilization of which has allowed many news organizations to trim both reporting and editorial staff in favor of generating cheaper, cleaner content authored by robotic algorithms. The human footprint in journalism is fading as technology gets better every year and it is not unthinkable that one day, much of the content published as news will actually be written by artificial intelligence algorithms, with human reporters merely providing the data and editors overseeing the final results.

As a similarly data-driven industry, the field of marketing research is also beginning to grapple with these changes. While journalists cover real-world events, marketing researchers investigate and report on business problems. Both industries are focused on gathering data and both are held to high standards in terms of how they report what they've uncovered. Both are also facing increasing pressure to provide useful reports faster, more cheaply and with fewer errors. And both are under increasing pressure to leave the data gathering and assembly to automated and AI systems and to focus instead on finding the facts needed to tell a compelling and insightful story.

A shift in the industry

This change isn't necessarily negative. Less than a century ago, the rise of appliances for washing clothes and dishes led some to question if housewives might become bored and dissatisfied if so many of their domestic chores could be so easily automated. Such an idea is laughable today. Nevertheless, the transformation of these appliances from optional to essential within a single generation illustrates how quickly broad cultural acceptance towards automation can happen. And whereas data gatherers were once tasked with spending a significant amount of time collecting, preparing and cleaning data for detailed analysis, today's automated tools save researchers and analysts from these rote tasks and allow them to spend more time on the substantive work of uncovering insights. The more intelligent these tools become, the more they take the tedium out of the process and make it easier for researchers to find the answers they seek.

Granted, most researchers don't need to be persuaded that AI systems are a benefit. In a 2018 survey conducted by Qualtrics with marketing research professionals, 93% of those surveyed said they view AI as an industry opportunity instead of a threat and 80% said AI will make a positive impact on the market.

Despite broad appreciation of the benefits of AI, its potential downsides have not gone unnoticed. The same report found that many researchers are also considering more training or a career change to safeguard their jobs against AI. Qualtrics (which itself has incorporated many AI-based automated tools into its research platform) predicts that AI will take over data analysis within 10 years. Furthermore, technologies such as automated statistical analysis, text analysis and natural language processing are expected to significantly impact industries that market researchers serve.

The role of the researcher of tomorrow is to get used to delegating analysis to AI systems. "AI will have an impact on how data is collected. AI will have an impact on how data is analyzed," says Aaron Fransen, vice president, financial services practice for MaritzCX. "But AI will not have an impact on the fundamental need to identify how to solve business problems when it comes to making business decisions."

In other words, the robots aren't coming to replace marketing researchers. AI is evolving to work alongside human problem solvers.

The human element

As long as there is a need to understand consumer behavior, the market research industry will never be obsolete. However, the nature of conducting research in the coming decades will hardly resemble today's practices because technologies utilizing AI touch every single element, from defining the research problem to writing the final report.

Today, only a portion of marketing research involves AI. Humans still determine the entire upfront process, which includes defining a problem, setting objectives, selecting a research method and determining a sampling plan. Where automation does come into play is optimizing a survey, gathering responses, managing field work, producing charts and visualizations, analyzing open-ended comments and generating reports. Even so, many of these tasks still require a considerable amount of human input and some functions (such as AI text analytics) aren't nearly reliable enough yet to give human analysts the day off.

However, within five to 10 years, it is quite likely that AI processes will be employed to handle these tasks, from helping to set objectives to writing appropriate survey questions, to automatically generating the appropriate analyses (complete with robust printouts and explanations of the findings in plain English). AI will also allow researchers to delegate tasks such as localizing surveys for different regions, panel onboarding, outlier detection and data cleaning to bots designed to handle these jobs efficiently and cheaply. And as these AI processes are linked into libraries of validated surveys and established best practices, future researchers may become far less concerned with the task of data collection than they are with what to do with the data once it's collected.

"Yes, it's possible to achieve 100% data automation in the MR industry but just because it's possible doesn't mean it is advisable," says Paul Herdman, global head of customer experience, for NICE inContact. "Could we fully automate data collection and insights without ever speaking to another human? Yes, with today's technology it is fully possible. However, technology is an enabler, not the solution for the MR industry. We still need smart, capable, highly trained people to frame the business problems logically, interrogate data sources that are most relevant to their business and ultimately make the right decisions on how to act. Technology enables us to investigate more data, ask more questions and get results faster and cheaper but each business is too unique to leave analysis and decision-making to algorithms alone."

Part of the toolbox

Technology will never replace experience and common sense. In fact, humans are needed to validate the accuracy of AI-produced findings. Therefore, market researchers may need to invest in understanding the impact of technology on their jobs. "If you don't understand at a basic level how the technology works, how any software program you're using works, how can you know the outcome it gave you was the right one?" says Herdman.

AI technology is least likely to kill strategic jobs, according to Qualtrics. Marketing research veterans who don't have the time or energy to learn new tricks can breathe a sigh of relief and focus on the value they bring: common sense and experience. AI and technologies will become a part of the research industry's toolbox but we still need experience and business knowledge for higher-value

tasks like establishing hypotheses, writing coherent survey questions, validating AI-produced findings and communicating findings to stakeholders or clients.

Furthermore, AI-powered market research is not as simple as a robot churning out models or finished reports. There is always going to be a need for a "captain on the ship," says Joseph White, senior director of marketing science for MaritzCX, one whose expertise helps set up the problem for the algorithm, implements the algorithm in the system, trains the system to do what it needs to do and, most importantly, validates the system for accuracy. Similarly, report writing requires researchers to craft several versions of the report, complete with text for different outcomes. "Automation is a tool for the thinkers but it can never replace the thinkers," says Jeff Minier, executive director at Kynetec.

Robust skill set
In a world of growing automation, researchers need to develop and cultivate a robust skill set that can incorporate these tools. Whereas marketing research was once the domain of practitioners with a significant amount of training in statistics or the social sciences, tomorrow's marketing research leaders may instead need to be experts in utilizing tools and technology to effectively manage the automated marketing research process. "The tools in people's hands today are different from those in the past," says Fransen. "Therefore, researchers need a high degree of aptitude for utilizing technology."

Because of the inevitability of AI augmentation, incoming market researchers will likely benefit from boosting their technology

skills, particularly learning how to write code to maximize the benefits of using a research platform. For example, in the field of syndicated research, having some firsthand programming knowledge in database tools such as PHP or SQL allows researchers to develop a better understanding of multiple sources of data, organize them efficiently and provide better insights to their clients or managers. And while DIY tools for online surveys have made it easier than ever for supplier-side and corporate researchers alike to author complex surveys, some experience with JavaScript can go a long way in streamlining survey design. And knowledge of languages such as Python or R can allow a researcher to conduct sophisticated custom analyses without having to manually prep or reconfigure data for more standardized tools.

Of course, it is possible to have a healthy and long career in marketing and research without ever learning how to code and it's quite likely the AI tools of tomorrow will even be able to assist in writing whatever code or scripts a researcher might need. "If there's a researcher in the middle who is knowledgeable about things on both ends – the qualitative stuff or the super quant stuff – the better he'll or she'll be at framing up the problems, solving those issues, creating a good research design, analyzing numbers and turning them into insights," says Minier.

The future of marketing research
Despite all of the changes journalists are facing in their own industry, the truth is that the profession of journalism is not in danger of being replaced by automation. Rather it is likely that the journalists of tomorrow will play

a far different role than those of today, becoming content experts and cultivating relationships with their readers and sources. They will provide input into algorithms that help them to write their stories more capably and efficiently and to augment their own reporting with related data sources that can help their readers to develop a deeper understanding of the truth.

Likewise, the mission of a marketing researcher will continue to be to properly define a business problem, understand the research design and methods required to solve that problem, collect the right types of data needed to close informational gaps and then to synthesize that information into insights and solutions. The researchers of tomorrow are not likely to look back on the processes of today and wish they had more time to spend on the tedium of collecting and analyzing data. Rather, they'll probably wonder how anyone could have played the role of a researcher without the aid of AI. Q

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insights
ASSOCIATION

For researchers, leadership = implementation = growth

By David Almy, CEO » Insights Association

Late last year I had one of those rare conversations that changes your life. It was with Alyssa Rodrigo, director of insights for Labatt Breweries of Canada, a division of AB InBev, the world's largest brewer.

My call with Rodrigo was an introductory one, which is common as I talk to a lot of insights and analytics leaders, so I began by asking about her professional life. What's her role? What does she do at Labatt? It had been a bit of a challenge setting up the call so I suspected that she was unusually busy.

"I spend 75 percent of my time implementing the insights from the research that I spend 25 percent of my time directing. We outsource a lot of the research," I recall her saying. "My greatest joy is seeing positive, bottom-line results for our company from the implementation of those insights. It's what gets me excited every day."

Mic-drop moment.

I've talked to hundreds of researchers over the years. My rule of thumb is that most of those conversations trend toward research methodologies and tools. Rodrigo was on another page, in another place.

"Do you know how rare you are?" I asked her. "The number of insights and analytics people I talk to whose main focus is the implementation of insights is in single-digit percentages. You are exceptional."

"I'm blushing," she replied, explaining that, in her company's culture, she had a team leadership role, gathering and leading groups to implement actionable insights in concert with her management. She was acting, in effect, as both a source of consumer-centricity and a management consultant.

I don't know what she's paid, but it's not enough; she's a bargain.

My mind flashed to the urban myth that, aerodynamically, a bumble bee should not be able to fly but does so in spite of itself as nobody has informed it otherwise. Rodrigo is changing Labatt for the better because she believed she could and had leaders and a corporate culture that supported her.

I later asked one of the insights industry's icons about the implementation of insights and its prevalence today. He smiled and said that most in our community do not see themselves as implementers of insights. "Most of the time, we do research, story-tell and walk away," he said.

But there is a trend at the highest levels of the industry, he reported, as the best and the brightest have realized that success is broader and bigger than the use of methodologies and tools. In recent years, the McKinseys of the world have started bundling research, actionable insights and implementation

by playing the role of management consultants, while billing at rates around four figures per hour. Smart folks.

Source of strategic value

Economic incentives aside, many of the top insights departments within companies have adopted a similar model, seeing a broader leadership picture and a path to permanency via the development of competitive advantage amid customer-centricity.

So, we're talking about fringe behavior, technically, but one that represents the leading edge of the insights and analytics profession. The most advanced players redefine themselves, seeing and mastering a broader view, not as a support function but as a leadership function and a source of strategic value.

In thinking about this, I began to observe what I'm now calling the Insights Association (IA) insights value topology in four steps.

The first is the business problem or purpose or use of research. This is not news. What may be news is that pulling from a variety of sources, the Insights Association has identified about 70 unique use cases by category, a list that is now undergoing peer review to refine what I'm calling an "inspiring menu of ideas" for benchmarking and pondering of what's possible.

What, I wondered, might we be doing that I'm not seeing today?

In these peer-review sessions to refine the list, our goal is not brevity but clarity. Clarity is tough in that many of the 70 contain words common to veteran researchers but alien to those less gifted with that experience, like me.

So, our next steps are to group the 70 into digestible buckets and

"My greatest joy is seeing positive, bottom-line results for our company from the implementation of those insights. It's what gets me excited every day."

provide common-language explanations so that the C-suite, which writes checks, can understand fully what's possible. We should publish this list shortly to our members as a first draft, as I suspect we'll have missed a couple of dozen.

The second is the actual research process involving methodologies and tools. On first cut, we identified 214 of these and we're in the process of culling and deduping the list to make it more manageable and real. It can include research using primary or secondary data (or syndicated), or a hybrid, but always should use "the right tool for the job" whatever that may be.

The IA Code of Standards and Ethics for Marketing Research and Data Analytics is a good overlay here, setting boundaries for quality, integrity and fidelity. It's also where the business of insights has been built in earnest over the past 75 years.

The third is the outcome of the research process – the implementable insights into the markets or marketing for products, services or ideas. This is secret-sauce stuff, the answer to what to make, provide or have the marketing folks promote.

I have not begun the task of harvesting and publishing a compendium of perhaps deidentified insights, but my dream is to see exactly what insights look like at many organizations to get a sense

of the rhythms of our business. I can guarantee that there will be surprises in that list. It is the glimpse of the highest strategies at play in business and it'd be oh-so-fascinating to study the tone and texture of those suggested actions. More to come…

The fourth and final step is implementation, which yields impact – and thus benefits – for the research sponsor. This is where ROI is witnessed and calculated, where we create competitive advantage around customer-centricity.

(It may be of note to mention that Pearson defines the research process in six steps, with the first being the business problem, steps two through four being slices of actual research activities and step six being report generation, which I'll liken to outcome/insights. Implementation isn't mentioned.)

If all four of these steps are optimized – purpose/problem/uses; process/research/methodologies/tools; outcomes/insights/actions; and implementation/impact/benefits – the fourth step, implementation, should directly address the first step, purpose, resulting in great value to the sponsor. The loop comes full circle; benefit is maximized.

Another industry veteran, when I laid this all out, said, "But David, researchers don't think of themselves that way," and I thought and said, "Most don't. You're right."

Seeing the whole picture

But some do. And more are doing so every day as the industry evolves and grows more sophisticated. McKinsey, and our best and brightest, are seeing the whole picture and figuring out how to provide the most value.

News flash: This also is how the C-suite likely sees the research process and the true value and opportunity of insights realized. They are our customers.

At a recent visit to Michigan State University I talked with a class of graduate students not yet bruised by the real world. Their professor, Michael Brereton, former CEO of Maritz, had implored the class to be leaders in the research space.

Toward the end of an intense session, one of the students raised a hand and quietly asked, "But can I have a good life if I only do the actual research?" It was a poignant moment as she was rejecting her professor's vision in favor of a less risky and challenging role. "You absolutely can," I replied, undercutting him in front of his students, which I regretted, a bit, the instant I said it.

I thought about this later and pondered the difference between people. Some are cut out to be leaders, some not. You can have a happy life being a person who supports others.

But for our industry and profession, the surest and best path to growth lies in the quality of what we do as leaders delivering on the promise of creating competitive advantage and truly delivering customer-centricity. This vision really is a) not easy and b) at the heart of the most successful companies. It's also a choice, and companies can go in a different direction not driven

by facts. There are many paths to success and ~70 uses, ~200 methodologies/tools and who knows how many insights and implementation strategies.

Leadership, then, equals growth for our industry and profession and its sponsors. That may require a rethinking of our role and

its limits, in which inertia is our enemy. Think whole picture, whole process, from inception to profit.

For inspiration, perhaps you should buy your team a case or two of Labatt Blue Canadian Pilsener. It may make the evolution a little more enjoyable. Cheers! Q
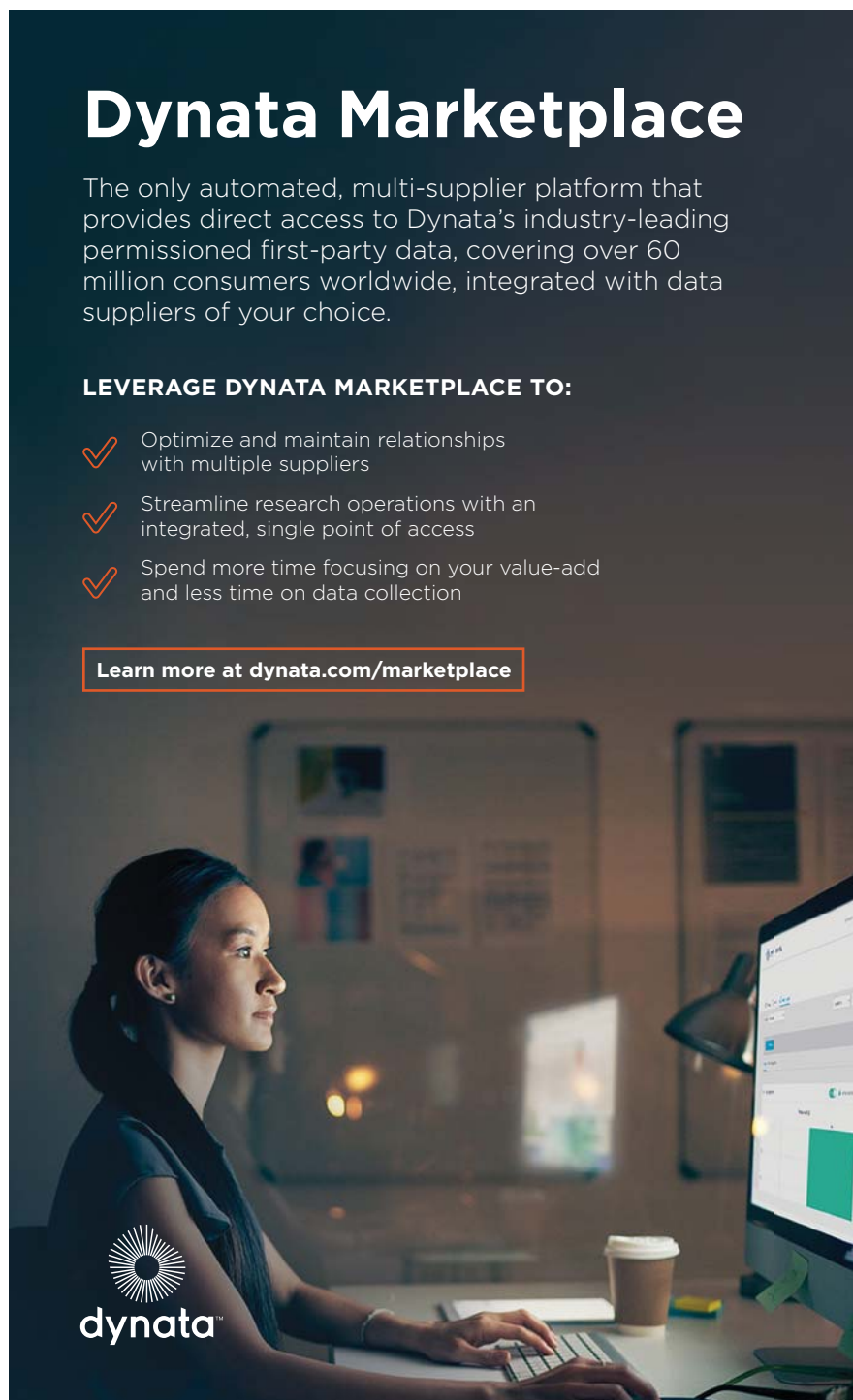
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