

# Preface

**W**hen we began thinking about this book, we knew we had a good idea because there was a great deal of buzz about the need for the industry to change. For example, there was an explosion in potential new research tools because of the Internet and mobile telephony. And at the same time, there were concerns about data quality. Also, interesting technological developments in brain science had broad implications for assessing marketing stimuli. Also, the practically brand-new use of radio frequency identification (RFID) technology was allowing researchers to accomplish things never before possible. And much work in cultural anthropology and behavioral economics was starting to creep into mainstream research thinking.

Then, too, serious thinkers were starting to codify much of what had been happening in product development research, in segmentation, in advanced analytics, and in qualitative research.

Indeed, the very philosophical underpinnings of the discipline were shifting. There were new ideas about how research information should be shared, about roles that researchers must play in the future, about how to justify expenditures in research, and even an entire new sense of what might be expected from research.

So this is what *Leading Edge Marketing Research: 21st Century Tools and Practices* is about.

To bring the book to fruition, we found contributing authors, who are well-known, thought-provoking marketing research experts. As important as theories are, we were not looking for concepts that hadn't been fully field-tested; we specifically sought *actual practices* that represented guideposts for the future development of the industry. As we searched, it turned out we had tapped into a *global* phenomenon—something that we had not anticipated. We found serious thinkers around the world, who were interested and interesting. So these authors, engaged in a common cause, come from the United States, England, Singapore, New Zealand, Australia, and Scotland.

All are experienced marketing researchers from leading client-side companies, veteran consumer insights managers, executives from blue-chip research and consulting companies, and thought-leading marketing and marketing research academicians. Many have a foot in both the domain of academe and the world of practitioners; and many have previously written or edited noteworthy books on their own.

They have joined us by writing chapters in *Leading Edge Marketing Research: 21st Century Tools and Practices*, and if you like this book and think it makes a contribution, all praise goes to these 38 men and women, who are practicing on the emerging landscape of the research profession and have been willing to openly share and explain in detail what they are doing.

Each chapter in this book presents a rich, innovative discussion of an emerging area of marketing research. The articles are broad enough to fully cover the topic and the methods employed and contain case histories, such that a sophisticated reader should be able to fully understand the underlying theory and research process and even replicate it, should they be willing to make the effort.

Each chapter contains the following elements:

- Where applicable, a brief historical review of traditional approaches that have led the research community to the need/opportunity for a new approach, which will be described in the rest of the chapter
- A comprehensive review of a single topic reflecting the newest work in the field and, where applicable, how it may be combined productively with earlier approaches
- A detailed enough explanation of methodologies so that a sophisticated reader could actually try to use the new approach described
- Real-world examples of how the approach is being used, how it works, or how it offers something no other tool does or how it provides something quicker, more accurately, or in a less expensive manner
- Ethical issues, if any, associated with the use of these latest methodologies
- Illustrations to enhance the exposition, such as pictures, diagrams, graphs, tables, and so on
- Footnotes, as well as recommendations for further reading

Five key sections and an epilogue structure *Leading Edge Marketing Research: 21st Century Tools and Practices*. The sections include new developments in the following:

- Quantitative marketing research
- Qualitative marketing research
- Customer motivation research
- Marketing research industry trends
- Epilogue: The Future of Marketing Research

*Leading Edge Marketing Research: 21st Century Tools and Practices* broadly covers the latest practices of marketing research. As such, it will appeal to those with specialized interests in the field as well as those who are seeking a panoramic view of the field in its entirety. It will also appeal to nonresearch executives—those who faced with profit and loss responsibilities and who are looking to bring fresh insights to the marketing issues facing them by using leading-edge research approaches and, in doing so, to maximize the value of their research investments.

Certainly, *Leading Edge Marketing Research: 21st Century Tools and Practices* is a touchstone for today's research professionals. They will find it a valuable and up-to-date reference; one that provides tools and techniques to better understand and predict consumer behavior. In doing so, we hope that today's marketing researchers will achieve greater distinction for their contribution to managerial decision making and add a renewed vitality to an industry clearly in need of transformation.

Important as well, *Leading Edge Marketing Research: 21st Century Tools and Practices* is ideally suited for teachers and students of either undergraduate or graduate courses in marketing or marketing research. Whether used as a primary or supplemental text, *Leading Edge Marketing Research: 21st Century Tools and Practices* will enrich the curriculum, help develop assignments or initiate projects, be a source of topics and methods, and fully enlighten students about the future of marketing research and how leading-edge research methods will bridge the chasm between academic and practical skills.

We hope that you find *Leading Edge Marketing Research: 21st Century Tools and Practices* useful, challenging, and a strong motivation for raising the marketing research bar to heretofore unimagined heights. When you finish, we know you'll be excited and hardly able to wait until you can try some of these new techniques.

We understand; we feel the same way, too.

—Bob Kaden  
—Gerald Linda  
—Melvin Prince

# Acknowledgments

If having a research career that spans 40 years provides anything, it is perspective. And so today, at this very moment, more than ever before, the time for a paradigm shift in the way marketing research is practiced is at hand. For students and research practitioners to learn from and embrace even some of the leading-edge approaches they will find here, and as a result bring a new vibrancy to my lifelong profession, would be acknowledgment enough for me.

So I will simply applaud the courage of the many visionaries and who contributed to *Leading Edge Marketing Research*, and who continue to toil day in and day out to open minds to the many ways we can be a more important force to those we serve

So, too, I thank my coeditors for their patience and perseverance in working with me and, thus, allowing me to put an exclamation point on what has turned out to be a pretty decent career.

—Bob Kaden, Lincolnwood, IL

The origin for *Leading Edge Marketing Research: 21st Century Tools and Practices* stems from what at first seemed like casual “attaboy” congratulations from Mel Prince to Bob Kaden and me for a coauthored prior publication. In addition, he said something like, “You know, your last chapter on the future of marketing research could be the basis for an entire book itself.” Bob and I thought, “Now isn’t that nice.”

This was in early 2010. Little did we understand what lay ahead because once Mel gets an idea, he is relentless in pursuing it to completion. He cajoled, he argued, he pushed, and he ignited our interest. About two and a half months later, we had a contract with Sage, and we have been running hard ever since.

So thanks Mel, for being the first to realize that there was a need for this book. And thanks, too, for being an indefatigable partner and coeditor in bringing this project to completion.

I also wish to thank longtime friend and coeditor Bob Kaden, for being a true partner. This is the second book we have worked on together, and I couldn’t find a better peer, a sharper research mind, or a better writing collaborator.

Of course, I want to praise the 38 authors of the 20 chapters and epilogue in this book. As the chapters started to come in, we three coeditors became more and more excited at their quality, lucidity, and meaningfulness. These contributors, from around the world, truly made our dream for a pragmatic book about work actually being done on the leading edge of the research industry into a reality.

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Finally, I want to thank my wife Claudia, source of all good things in my life, who occasionally questioned whether working on this book was the best use of my time, instead of say, billing more hours or pursuing new clients.

May she be proved wrong!

—Gerald Linda, Glenview, IL

In principle, this innovative and intriguing book will transport marketing practice and marketing education into the 21st century, much as the editors envisioned. By strategic diffusion of the latest research techniques and practices, the book will be instrumental in enhancing the quality of marketing practice. In addition, it will increase the value and relevance of marketing education.

I congratulate the distinguished contributors to *Leading Edge Marketing Research* for their generosity and courage in openly sharing with our readers previously unavailable trade technologies. Your superb efforts in writing and rewriting while immersed in your professional pursuits are sincerely appreciated.

My coeditors, Bob Kaden and Gerry Linda, enabled this project to get off the ground. We worked very closely and intensively to develop a clear vision of where *Leading Edge Marketing Research* was positioned. They did yeoman's service in recruiting talented contributors, and brought the work to a high professional level. A project of this magnitude demanded a mix and match of editors, with our diverse backgrounds and perspectives. As editors, we represent a fortuitous assortment of industry and academic perspectives, methodological expertise, writing styles, and substantive research knowledge.

Heartfelt thanks are also due to our associates at Sage publishing. Their experience, patience, understanding, and helpful suggestions made our lives ever so much easier and pleasant. We will most certainly remain friends.

Finally, I must convey my personal gratitude to Sheila for her constant inspiration, help, and guidance over the course of this challenging and productive book project.

—Melvin Prince, Darien, CT



PART I

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# **Challenges to Marketing Research**

# New Roles for Marketing Researchers

IAN LEWIS

SIMON CHADWICK

Cambiar LLC

## INTRODUCTION

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The marketing research profession will experience major changes in the years ahead, with new roles and opportunities emerging for marketing researchers. Importantly, though, we begin with a historical perspective, and then look at how marketing will change in the next 5 to 10 years. With this as a base, we discuss the future expectations for marketing research from the perspective of senior management.

We also highlight emergent information sources and marketing research methodologies. Then, we examine how marketing research departments will need to operate and what this means for the roles of marketing researchers—those in client marketing research departments and those working for marketing research companies.

We delve deeply into the evolving roles and responsibilities, identifying needs, opportunities, and career path implications, and then we look into how the taxonomy of marketing research companies will evolve and what that implies for the changing role of the researcher.

Our chapter concludes with a reprise of the new roles, the drivers, and the keys to success.



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## A PERPLEXING HISTORY

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On November 14, 1938, the newly minted director of customer research staff at General Motors, Henry “Buck” Weaver, was featured on the cover of *Time* magazine. He was the first—and, perhaps, the last—market researcher to be so honored. Such was the status of research at the time. It only went downhill from there. As marketing research became more and more the norm in corporate America, as methodologies became more and more standardized, and as an entire profession progressed from “cottage” to “industry,” its orbit perplexingly gravitated further and further away from the C-suite and from strongly influencing corporate and marketing strategies.

In 1991, this green British market researcher (Simon Chadwick) arrived in the United States to take the helm of a respected market research company. What he found stunned him. His clients rarely saw, let alone conversed, with their CEOs; his survey results were invariably packaged in thick, boring reports that nobody read; his brilliant researchers were never allowed to make recommendations; and the first conference he attended—the Research Industry Leaders Forum—was dominated by research directors from Fortune 500 companies bemoaning their “lack of a seat at the table.”

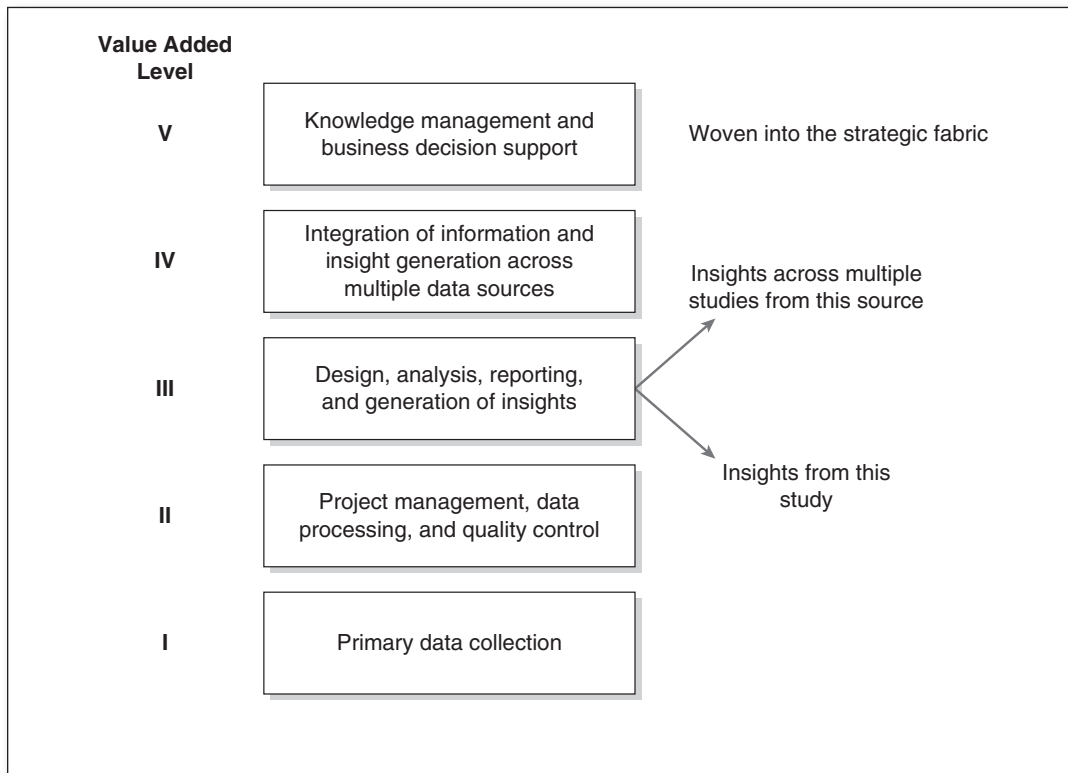
Marketing research had declined from the strategic top floor to the basement of tactics and hygiene. Luckily, this was to be its nadir, and over the last 20 years, research has regained much of its strategic luster. That it has done so is due in large part to a generation of research directors and vice presidents who realized that only they could make research more relevant and have more of an impact. To do that, they had to overhaul the product and the entire way in which they and their staff interacted with senior management. It was going to be a long journey.

In 2003, Roper Consulting (a division of the research firm NOP World), under the leadership of veteran Boston Consulting Group (BCG) consultant Richard Hermon-Taylor, set out to track that journey. Through an exhaustive study of the research departments of 30 major corporations, Roper constructed a taxonomy of research and the way it impacted the organization in the value added. Figure 1.1 highlights his thinking.

The taxonomy posits five levels of the research process. The first two—primary data collection and project management—define research at its tactical basics and are primarily about its *inputs*. Beyond that, we start to think about its *outputs*. At Level 3, there are two possible outputs:

1. Studies that yield insights from that study alone (we call this Level 3a)
2. Insights that are derived from multiple studies from a particular source (for example, a single research provider—Level 3b)

It is beyond Level 3 that the research function starts to become more strategically critical for an organization. At Level 4, the function derives insights from the integration of information generated across multiple sources—that is, it has become a source of holistically generated insights that have strategic value to the organization. Level 5 is the Holy Grail of

**Figure 1.1** Taxonomy of Research Process

research departments and CMOs; it integrates all sources of information and insight into a cohesive knowledge management and business decision support system.

When we started our analysis of this taxonomy in 2003, about one third of companies in our study were at Level 3b or above. That is to say, 70% of companies were treating research as a tactical, hygienic necessity. Seven years later, we would estimate that more than half the companies in our database view their research functions more strategically, and they are driving for (level) five. Certainly, the Advertising Research Foundation's (ARF) initiative in pushing for research transformation would suggest that this drive has assumed strategic importance in many key Fortune 100 companies.

However, we are not there yet.

## TAKING STOCK OF TODAY'S SITUATION

Numerous sources paint a picture that is troubling for how marketing research is performing while the need for consumer insight to inform business decisions grows. Dissatisfaction in the performance of marketing research is voiced by clients and marketing researchers.

Company and marketing executives want to see greater business impact from marketing research while researchers want to be in the role of the “most sought after” for advice and counsel. Market Research Executive Board (MREB) reports that 61 % of senior executives/business partners want research to be a strategic partner, but only 29 % currently view the research function as such. Furthermore, business partners who view research as a strategic partner are much more likely to have changed decisions based on research than those who view research as an analytic resource (54 % versus 34 %).

In 2009, the BCG conducted a study of 40 global, consumer-facing companies, among researchers and business partners. They found that “Nearly 90 % of blue-chip companies aren’t fully leveraging their market research functions. Less than 45 % believe that their marketing research/consumer insight function provides a competitive advantage or high ROI” (Egan, Manfred, Bascle, Huet, & Marcil, 2009).

Dissatisfaction with the status quo is voiced by marketing researchers and their clients. An ARF survey conducted in 2008 reported, “85 % of research leaders are neutral or dissatisfied with the impact of marketing research in their company” (Rubinson, 2010, slide 6).

Some industry leaders have been highly vocal about how marketing research needs to respond. Stan Sthanunathan, vice president of marketing strategy and insights, Coca Cola, is a frequent speaker at industry events and espouses, “We need to go from insight providers to creative problem solvers, storytellers, disruptive thinkers and visionaries, acting to shape change and light the way” (personal communication).

## HOW MARKETING WILL CHANGE IN THE COMING YEARS

A working committee of the ARF Research Transformation Super-Council (RTSC) looked ahead to 2020 and highlighted nine overarching trends that will impact marketing (ARF RTSC General Council meeting, August 3 2010). They are listed here:

1. *Changing economic power balance, driven by the ascent of China.* By 2020, it is forecast that China will overtake the United States and equal the European Union (EU) in gross domestic product (GDP; Avruch, 2010).
2. *Technology/digitalization.* In 2000, we didn’t have Facebook, which in July 2010 had 500 million users (Zuckerberg, 2010). There were no Blackberries, iPhones or iPads. We can count on several major tech innovations in the next decade; we just don’t know what they will be! We do know that the march toward digitalization of everything will continue.
3. *Privacy.* Increasing digitalization will have the effect of increasing privacy concerns.
4. *More connected, more empowered consumers.*
5. *Media makeover.* Media brands will increasingly become multimedia brands, the need for 360 media planning and measurement will escalate, and geosynchronous targeting will be ascendant.
6. *Globalization.* Companies will increasingly need to operate globally yet act locally. Brand Z/Interbrand reported that 6 of the 10 fastest growing global brands are from outside the United States.

7. *The challenges for developed markets.* Developed markets such as the United States, Japan, and major European nations have aging populations, and face challenges with the escalating cost of healthcare and pension costs.
8. *The multicultural world.* In the United States, the aggregate U.S. minority population is expected to become the majority in 2042.
9. *Sustainability.*

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## THE FUTURE OF MARKETING RESEARCH DEPARTMENTS

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What will the marketing and C-suite expectations be for research?

A recent IBM study polled more than 1,500 corporate heads and public sector leaders across 60 nations and 33 industries. Eighty-eight percent of all CEOs and 95% of standout leaders believe getting closer to the customer is the top business strategy over the next five years. This spells opportunity for marketing researchers (Carr, 2010)!

On an analyst call in 2009, P&G CEO Bob McDonald said, “Consumer research has an integral part to play in achieving these [growth] goals” (McDonald quoted in Tarran, 2009, para. 3).

Looking ahead, Monika Wingate of the UW-Madison School of Business noted, “There is an increasing expectation on the part of management for researchers to uncover breakthrough insights” (Wingate quoted in Shepard, 2006, para. 7).

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## THE EVOLVING ROLE OF MARKETING RESEARCHERS

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While there were only *data* sources in the 1990s, there are now broader and richer *information* feeds, with video, pictures, emotions, eye movement, facial tracking, body and brain responses, and more. Today, we have mountains of information, and research has a huge need to synthesize the information, tell the story, and take a stand to create business impact.

In 2010, the ARF Research Transformation Super-Council defined the new mission for marketing research as “Inspiring better business futures by listening, learning, and translating humans and markets to bring them to life, in order to anticipate and give knowledge to the enterprise” (personal communication).

Researchers must spend their time productively, addressing the key strategic needs of client corporations rather than the myriad tactical issues. To achieve this, researchers must make the journey to become consultants. The journey requires a shift in how researchers define their purpose, in what they provide their clients, in how they define value, in how they work, and in their ability to influence others. We organize this transformation into four pillars: (1) mindset, (2) principles, (3) tools, and (4) practices.

A consulting mindset is focused on making change happen, going beyond information to provide solutions and provoke action. It measures value creation by the impact on client actions. It’s not about lengthy PowerPoints—it’s about figuring out the important few things

that the company needs to act on and being the catalyst for action. At the ARF Industry Leaders Forum October 28, 2010, Margaret Coughlin, CMO of Digital Globe, said, “The presentation should last 10 minutes; the discussion should continue for hours” (personal communication).

Consulting principles include understanding the different levels of client value, stakeholder alignment, empathy, collaboration, individual and organizational value creation, and more. Unfortunately, these principles aren’t taught to researchers progressing through the ranks—researchers are trained to operate independently, with a focus on technical mastery.

Consulting tools include problem/opportunity definition, determination of important deliverables, and solution development. Learning these tools can ensure that research is better focused, with clearer expectations and with higher-level actionable findings.

Consulting practices include being a first mover, synthesizing knowledge and collaborating to leverage expertise, creating intellectual property, communicating for impact, and more. These practices are far from commonplace among researchers today, but are well known to management consultants, and are essential for the new value creation model.

Marketing researchers who step up to the plate and embrace the consulting pillars can make a huge impact in their companies.

As we look ahead, some of the trends are readily apparent. The volume of available information will continue to grow rapidly, driving the need for synthesis; processing power will continue to increase, and advanced analytics will flourish. The need for closeness to the customer and the increasing challenge to differentiate products and services will drive innovation, especially in *unprompted* consumer feedback (i.e., other than answers to questions).

Leading corporations will ultimately develop fluid, searchable knowledge collection capabilities—an “insights on demand” capability that won’t require stopping to initiate individual studies to answer business questions—although this is still in the distance and will develop much more quickly in some industries (such as consumer packaged goods [CPG]) than in others.

To address these many challenges, the future role of marketing researchers can be boiled down to four headlines: (1) consult, (2) synthesize, (3) tell a story, (4) take a stand.

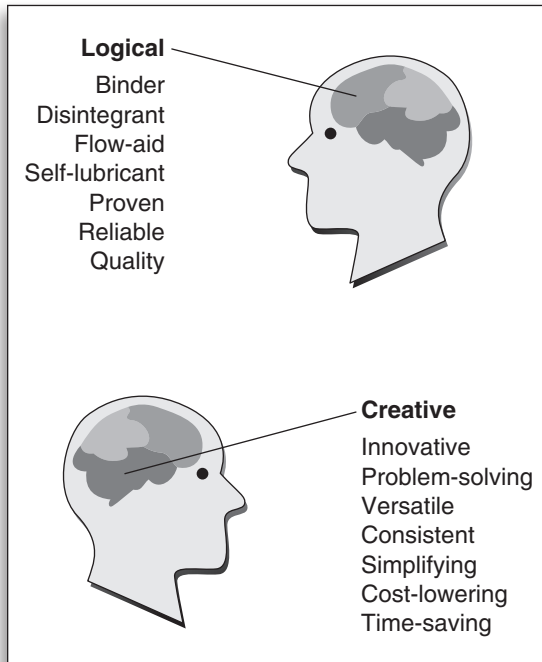
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## EMERGENT INFORMATION SOURCES AND RESEARCH METHODOLOGIES

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Back in the 1990s, the structure of data sources for marketing research was straightforward. There were just two buckets. One bucket was for company data, retailer data, syndicated marketing and sales data, and syndicated media data. Then there was a second bucket for survey research, which came in a few flavors and sizes—custom survey research, which was conducted mostly by phone or in malls; traditional qualitative research, including primarily focus groups and individual depth interviews (IDIs); and syndicated survey research studies.

In the years following Internet adoption, and especially with the growth of broadband, things changed rapidly. Change accelerated in marketing, in media, in technology, in consumer empowerment and communications, and in marketing research.

**Figure 1.2** Left and Right Brain

The decade starting in 2000 saw the ascent of Google and social media taking off, dramatic Internet advertising growth, and a host of new measurement systems. The rise of mobile communication and smart phones fueled new modes of communication. These changing events have prompted marketing research to expand from two buckets to four buckets.

One new bucket formed containing mountains of company and syndicated digital data from websites and mobile and social media, that primarily feeds the left side of the brain, or the logical side of the mind, and is illustrated in Figure 1.2. Another new bucket developed from unprompted consumer feedback—from listening, search analysis, ethnographies, virtual shopping, neuroscience, biometrics, eye tracking, metaphor elicitation, emotion mining, behavioral economics, and more—that primarily feeds the right side of the brain, or the creative side of the mind.

As the ARF noted, a major paradigm shift is under way: “Research used to be discrete events, now there’s a continuous flow of insights that we can tap into” (Rubinson,

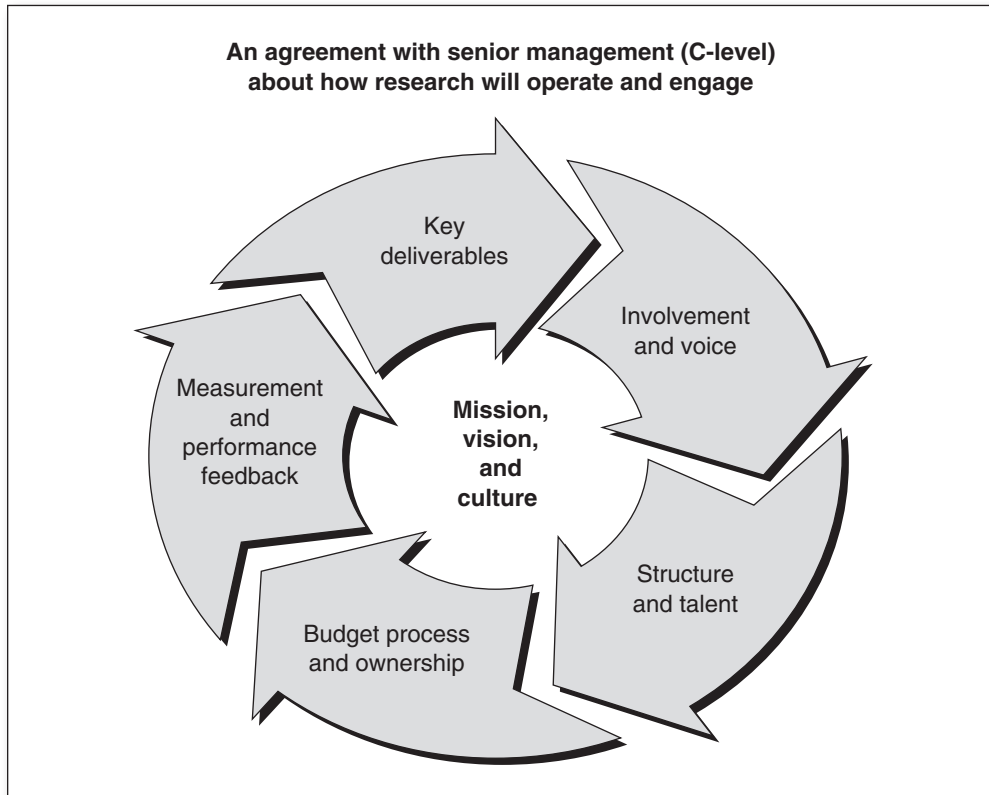
2009). And the survey research bucket didn’t stay still as online surveys replaced much of what was done by phone or in malls. Additionally, online access panels, custom online panels and hosted online communities flourished; do it yourself (DIY) surveys sprang up and new online capabilities emerged.

The rapidly expanded toolkit for researchers has major implications for research talent, which we will explore later in this chapter.

## HOW WILL MARKETING RESEARCH DEPARTMENTS NEED TO OPERATE AND ENGAGE TO CREATE BUSINESS IMPACT?

In November 2009, Mediapost reported, “According to BCG, low ROI on consumer insight in part results from many companies continuing to run the function in an outmoded fashion: they ask marketing researchers to take orders rather than to act as strategic partners generating breakthrough insights.” Findings were based on a BCG survey of 800 executives (half consumer insight, half line management) at 40 global consumer-facing companies with \$1.5 billion or more sales (Lukavitz, 2009).

Marketing research departments need to develop formal agreements with their management about how to engage and operate with the business, something that we’ve termed The Management Contract.

**Figure 1.3** The Management Contract

## WHAT DOES THIS IMPLY FOR NEW ROLES FOR RESEARCHERS?

It will be helpful to look at this from a number of vantage points, as defined by the part of the marketing research business one works in or desires to work in. Two broad categories are as follows:

1. *Client marketing research departments.* This is where the purchasing of research services happens. Industries range from consumer packaged goods to financial services to media to healthcare, and so on. And the size of the client research department ranges from one to perhaps 1,300 at Procter & Gamble.

A 2009 BCG study found that the most successful market research departments have impact across multiple functions in the organization, well beyond marketing. These departments are likely to be responsible for competitive intelligence, new product forecasting, and/or measuring return on investment (ROI) for marketing investment, broadening the range of career possibilities for marketing researchers.



2. *Marketing research providers, often called “suppliers” in the United States.* This is largely where the research is conducted and sold. There is a wide range of providers, the most prominent being for the following:

- Custom quantitative survey research
- Syndicated marketing and sales information
- Syndicated media information
- Syndicated web/mobile and search data and analytics
- Copy testing
- Traditional qualitative research
- Observational research (such as ethnography, anthropology, or virtual shopping)
- Online panels
- Online communities
- Consumer listening (from social media, blogs, etc.)
- Neuroscience, biometrics, eye tracking, and other body and brain information

The larger providers often offer multiple services, and the largest company has approximately 25,000 employees.

Additionally, the rapid and continuing expansion of the range of services since the 1990s has led to many more types of research roles, with correspondingly varied educational and experiential background requirements.

## Defining the Roles of the Marketing Researcher in the Future

In this section, we’ll look at the skills needed, where the opportunities are, what this implies for career paths, what this means for different constituencies, and what it means for someone considering a career in marketing research.

A European Society for Marketing Research (ESOMAR) sponsored debate in London held in April 2010 noted,

There was general agreement, from the floor, the chair and the speakers, about the need for the next generation of market researchers to be better than their predecessors in being their clients’ ‘wide angle lens’. That is having the ability to: handle formal survey data; glean insights from the ‘social media’, tease out clues from the web and then explain what it all means in simple stories. Indeed Bill Blyth (TNS Director of Global Research) “highlighted the importance of researchers having the skills needed to ‘triangulate’ different sources of data.” (Smith, D. V. L., 2010, p. 4)

## What are the mindset, skills, and background needs?

Historically, the majority of researchers have been left-brain oriented, having a heavily quantitative orientation. However, the best researchers have been able to integrate both left- and right-brain approaches. Some have even referred to the need for a “bionic marketing researcher” to fulfill all of the needs. This is illustrated in Figure 1.4.



**Figure 1.4** Mindset, Skill Set, and Expertise Needs

|   |  |
|---|--|
| <p><b>Mindset</b></p> <ul style="list-style-type: none"> <li>• Change agent</li> <li>• Bold, provocative</li> <li>• Curious</li> <li>• Open-minded</li> <li>• Collaborative</li> <li>• Integrative</li> <li>• Future-focused</li> </ul>   | <p><b>Skill Set</b></p> <ul style="list-style-type: none"> <li>• Conceptual</li> <li>• Visionary</li> <li>• Creative</li> <li>• Analytical</li> <li>• Problem solver</li> <li>• Storyteller</li> <li>• Relationship builder</li> <li>• Empathetic</li> <li>• Persuasive</li> </ul> |
| <p><b>Expertise</b></p> <ul style="list-style-type: none"> <li>• Knowledge of the business, brands, and company capabilities</li> <li>• Marketing research knowledge</li> <li>• Advanced statistics and modeling</li> <li>• Synthesis</li> <li>• Media and consumer technology understanding</li> <li>• Consumer understanding</li> <li>• Insight identification</li> </ul> |  |

The list is somewhat daunting, and few (if any) people will be masters of the entire list. As such, there will be an increasing segmentation of roles. Generalists who are grounded in research and are strong conceptual thinkers, strategic, future-focused change agents will be in demand. Yet, there will be a growing need for those with specialized skills and who have mastered the intricacies of specific research methodologies, such as modeling data mining or accessing social networks to improve insights into consumer behavior.

Looking ahead, what are the opportunities?

Opportunities for **specialized capabilities** will increase for both left- and right-brain application areas.

The rapidly growing mountains of digital data will fuel growth of applications that feed the left-brain; the ability to work with mega-databases and to apply advanced analytics will clearly grow for the foreseeable future. The growing need for marketing accountability will also fuel growth in analytics.

An Inside Research survey reported in the June 2010 (volume 21 number 7) issue noted, “More than half of IR’s buyer Roundtable respondents embraced ‘listening’ to social media as wave of future, and additional third called it potentially goldmine of useful information,” even though many struggle applying it today. It’s a good bet that right-brain oriented approaches, such as consumer listening, online communities, and observational research will be growth areas for several years. The same trend is likely for what we call “body and brain” measurement, which includes neuroscience, biometrics, eye tracking, emotion mining, and more.

Other growth areas are not strongly left- or right-brain leaning, such as information synthesis, shopper insights, global expertise, or multicultural expertise.

Figure 1.5 summarizes the major growth drivers that will lead to new marketing research opportunities.

**Figure 1.5** Growth Drivers for Market Research Opportunities

| Left-Brain Oriented  | Right-Brain Oriented   | Dual  |
|--|--|---|
| Mega databases<br>Advanced analytics<br>Marketing accountability | Consumer listening<br>Online communities<br>Body and brain measurement | Synthesis of information<br>Shopper insights<br>Global<br>Multicultural |

The source of talent for these growth areas will come from a wider range of sources than has been the case historically. The marketing research industry will need many more people with specialized expertise in the following areas:

- *Management of extremely large data sets.* Google processes about 24 petabytes of data per day. AT&T has about 19 petabytes of data transferred through their networks each day (Petabyte, n.d.). [A petabyte is  $10^{15}$  bytes of information.] Marketers will increasingly seek to search the rivers of information that are available in real time.
- *Advanced statistics and analytics.* The enormous data sets open new avenues for advanced analysis—to connect the dots and mine multiple information sources, to understand behavior, to segment and target more granularly (with mobile facilitating geo-targeting), and for predictive modeling.
- *Web analytics.* Search and web behavior can be mined for search engine marketing (SEM), language optimization, content development, ROI, and more.
- *Modeling.* Models are built to understand and guide, to explain variation, or for prediction (e.g., direct marketers use models for prediction without focusing on the underlying causation). A return on marketing model is used to measure and explain variation and to guide future marketing investments. Cross-platform (TV, Internet, print, social media, etc.) media models will measure the impact of individual platforms and the synergies between platforms. Once again, the surge in data availability opens new modeling applications.

The industry will also recruit more of the following:

- *Neuroscientists and biometricians.* Success stories have been cited at conferences by Hyundai, The Weather Channel, Frito Lay, Yahoo, and Microsoft. Millward Brown

added a Neuroscience practice in March 2010, and expanded it across four continents in July.

- *Ethnographers and anthropologists.* Marketers and marketing researchers need to understand how to connect at an emotional level with their customers and prospects to differentiate their brands. Ethnography is not new, but has experienced resurgence with the increased need for emotional connection. Ethnographers and anthropologists can get to a deeper level than with the traditional focus group approach, and we expect the growth to continue.
- *Trade insights experts.* CPG companies now have a growing business to business (B2B) marketing function that is focused on the trade customer. The balance of power has been shifting from the manufacturer to the trade. Trade insights functions at clients are typically self-contained units either within the marketing research function or reporting to sales/customer marketing. Major research companies have substantial trade insight divisions
- *Global and international experts.* With the ascendancy of China and the other Brazil/Russia/India/China (BRIC) countries, and with the opportunity presented for growth in other developing markets, there will be an increase in demand for marketing researchers who are knowledgeable about marketing research capabilities for international markets. This includes an understanding of language, cultures, values, habits and practices in any number of worldwide geographies.
- *Multicultural experts.* In the United States, the aggregate minority population is expected to be the majority in 2042 (U.S. Census Bureau, 2008). Other countries are also experiencing increased multicultural populations pointing to the need for multicultural minority experts.
- *Behavioral economists.* Daniel Ariely's (2008) best-selling book *Predictably Irrational* is an excellent primer on the insights that are possible using behavioral economics to understand how shoppers make decisions.
- *Futurists.* Marketing research needs to be more future focused, and this will lead to more attention on processes and expertise.

Opportunities for **generalists** will require talent that has more consultancy-based skills—people who are strong conceptual thinkers, strategic, and who are always looking to go beyond the “what,” or findings, to the “so what,” or implications, to the “now what,” or outcome from their work.

Masters of business administration (MBAs) are likely to remain one of the preferred educational qualifications for entry-level generalists in market research departments, along with psychology and social science graduates. At the most-senior management levels, we believe that marketing research positions will be filled more frequently than today from backgrounds that include the following:

- *Management consultants whose orientations are to be change agents and who understand the big picture and understand the business.* Starbucks and Novartis hired heads of strategy and research from BCG and McKinsey in 2010.

- Strategic planners, who have a big picture orientation and understand key business needs and drivers.
- Agency planners who use personal experience to be strong conceptual thinkers with a holistic understanding of consumers, are facile at integrating information from multiple sources, and open to new approaches and thinking.

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## CAREER PATH IMPLICATIONS

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It's pretty clear that few, if any, people could be experts across all the growing range of marketing research approaches. As we've pointed out, this will lead to increasing specialization and to an increase in dual career paths—one being a specialty career path, the other being a generalist career path. For instance, a research company may develop a neuroscience unit with opportunities for neuroscientist staff to progress within that unit, or a web analytics unit staffed with modelers, or a qualitative research unit staffed with moderators, ethnographers, and anthropologists. Likewise, a manufacturer might have a group dedicated to advanced analytics or the return on marketing investment (ROMI) measurement.

The adoption of dual career paths is dependent on the size of the research company and the nature of their business or the size of the client research department. Obviously, larger organizations will have the greatest opportunity to implement dual career paths.

The message here is that there will be increasing opportunity for specialists in the growth areas to advance.

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## WHAT DOES THIS MEAN FOR DIFFERENCE CONSTITUENCIES AND LEVELS?

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### Client Marketing Research Departments

Size of department and the combination of willingness and ability to change will drive how client marketing research departments evolve and the corresponding job opportunities. This is illustrated in Figure 1.6.

### Research Companies

The changes that we have outlined are already making themselves felt on the supply side of the industry. So much so that industry associations such as ESOMAR and the UK's Market Research Society have embarked on a major project to redefine the marketing research industry. But more of this later.

In full-service research companies, as we define them today, the changes that we are seeing regarding how accounts are serviced are already making themselves felt.

Where the project was once king, now the relationship dominates. That relationship is anchored in not only understanding the client's real business needs but also bringing a

**Figure 1.6** Change Orientation and Size: Impact on Staffing

|                                     | <b>Change Averse Environment or Department</b>   | <b>Environment and Department Embraces Change</b>   |
|-------------------------------------|--|---|
| <b>Large Department (N = 50+)</b>   | Staffed with project focused traditional researchers and syndicated analysts<br>Late adopters for testing emergent approaches, reacting to management requests | Have senior-level generalists with strong conceptual and consultative skills<br>Have specialist functions for emergent approaches<br>Outsource low value-add work                       |
| <b>Small Department (N &lt; 30)</b> | Staffed with project focused traditional researchers and syndicated analysts. The latest adopters for testing emergent approaches.                             | Staffed with generalists with strong conceptual and consultative skills.<br>Outsource low value-add work, and to leverage emergent specialties, and onboard this when scale sufficient. |

holistic array of information and insights from a variety of sources to bear on the client's problem. More to the point, the research company needs to identify itself with those problems and needs and become an advocate within the client company for their resolution.

In short, the supply-side researcher will become more of a consultant, which clearly has major implications for the types of people who research companies will need to hire. At the forefront will be the rapidly changing role of the account manager.

## Evolution of Account Manager and Research Manager Positions

Whether account manager at a supplier or research manager at a company, a number of changes are emerging. To illustrate these changes, we're deliberately examining researchers with at least five years of experience and looking out five years. Figure 1.7 shows the increase in what will be demanded of these evolving positions.

## Emerging Research Manager or Account Manager Role

Even in looking out five years or more for the generalist position, there will remain plenty of jobs with the "was" profile for years to come. For client organizations with small research departments, staff will continue to be generalists. For larger client organizations, there will be an increasing need for specialists—in shopper insights, consumer listening, ethnography/anthropology, global knowledge, multicultural, data mining, advanced analytics, behavioral economics, and the others we have mentioned. Some clients will even hire journalists to help improve storytelling capabilities.

At very senior levels, the need to consult, synthesize, tell a story, and take a stand will be paramount. Research department leaders will need to be effective operating with the

**Figure 1.7** Emerging Research Manager or Account Manager Role

| Was   | Emerging Role  |
|---|--|
| <p><b>Research or account manager</b> position exists to design, execute, identify insights, and report on projects for client/marketing.</p> <p><b>Key Responsibilities</b></p> <ul style="list-style-type: none"> <li>• Design studies requested by client/marketing and develop questionnaires</li> <li>• Manage supplier implementation of study—field, tabulation, costs, and timing</li> <li>• Write reports, identify insights, and present to client/marketing</li> </ul> <p><b>Success Factors</b></p> <ul style="list-style-type: none"> <li>• Ability to manage all aspects of project independently</li> <li>• Efficient processing</li> <li>• Responsiveness</li> <li>• Identify insights</li> <li>• Storytelling</li> </ul> | <p><b>Research or account impact manager</b> position exists to leverage a wide range of information sources to drive business impact.</p> <p><b>Key Responsibilities</b></p> <ul style="list-style-type: none"> <li>• Understand specific business needs of client/marketing and other business functions</li> <li>• Mine information sources</li> <li>• Supplement information sources with research studies, if needed, managing implementation</li> <li>• Synthesize information, identify insights, and recommend actions</li> <li>• Communicate and follow-up to create business impact</li> </ul> <p><b>Success Factors</b></p> <ul style="list-style-type: none"> <li>• Business knowledge</li> <li>• Consulting skills</li> <li>• Understanding of wide range of information sources</li> <li>• Ability to synthesize from a wide range of information sources</li> <li>• Storytelling</li> </ul> |

C-suite. We expect clients to hire from management consultants, strategic planners, and agency planners.

In August 2009, Inside Research (Volume 20 Number 8) asked vice presidents and directors at marketing research buyers and suppliers to, “Imagine what you’d tell a son or daughter or another bright young person who had decided to become a marketing/advertising/public opinion research practitioner and asked your counsel on career preparation.” Their advice was to get a social science degree, then an advanced degree (either an MBA or a masters in marketing research). Some quotes are provided next.

“I think a strong undergraduate program is very valuable. While I chose the social sciences as number one, I think a broad exposure to literature, arts, science is very important. I think the number one factor in choosing MR as a career is if you truly enjoy this kind of work—analytical, psychological—aimed at solving business problems.”

“As our industry has become more ‘specialized,’ I think a career path in MR today is highly dependent on one’s area of interest. If mathematically oriented, a supplier focus may be most relevant. If communications, an advertising agency, or if understanding consumer motivations and behavior, a manufacturer.”

“I’m toward the end of my career. . . . I would urge a young person to get both global research experience and digital research experience. Technology is changing the field quickly. Some of the best opportunities will be for young people who pioneer in using new ways to gather useful information from cyber space.”

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## **HOW WILL THIS EVOLVE BY INDUSTRY? WHAT ROLE DOES CORPORATE CULTURE PLAY?**

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The nature of the business and the culture of the client organization will impact rate of adoption of these changes. Consumer packaged goods (CPG or FMCG in Europe) and consumer technology will be among the first to embrace the emerging roles, and this process has already begun. For these companies, and especially for those with brands that need ongoing product and communications innovation, it is already happening.

Technology companies, for example, have been early adopters of consumer listening; Dell and Kodak now have chief listening officers (Slutsky, 2010). However, the adoption process will be slower in B2B industries and where the corporate culture is more resistant to change.

The importance of corporate culture was perhaps best stated by Jane Altobelli, EVP, Chief People Officer, Human Resources for SymphonyIRI, at a recent ARF Industry Leaders Forum, “Culture eats strategy for lunch!”

The model in Figure 1.8 illustrates how corporate culture and the culture of the research function impact the adoption process. The top right of the quadrant promotes rapid adoption.

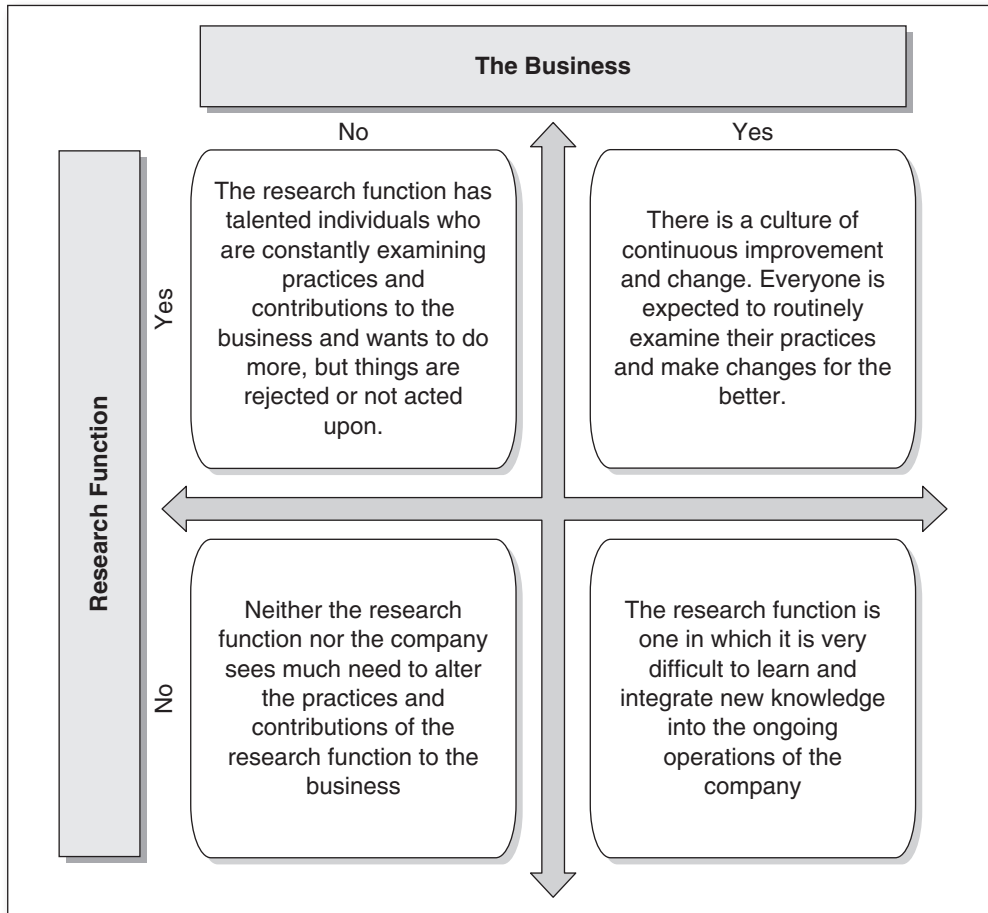
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## **HOW WILL THE TAXONOMY OF RESEARCH COMPANIES EVOLVE?**

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The rate at which client marketing research evolves will determine the pace of change for research companies. First of all, what exactly is a research company? Is it a company that specializes in primary research, based on quantitative or qualitative interviews with consumers and customers? Or is it a company that integrates information from a variety of sources, primary and secondary, passive and active? Or is it perhaps a new breed of company—for example, a company that specializes in web or marketing analytics?

One way to assess where the winds of change are blowing is to follow the money. Where is venture capital going? Prior to the Great Recession, the answer was technology-oriented research companies. Today, overwhelmingly, the answer is companies specializing in marketing and web analytics. This has not gone unnoticed by the major research companies, who are forming and/or acquiring analytics capabilities.

**Figure 1.8** Impact of Culture on the Adoption Process

Source: Wayne R. McCullough, PhD, Institute for Social Research, University of Michigan.

Increasing demand for integrated, left- and right-brain solutions has meant that there is much more appetite on the part of clients to experiment. As technology opens new vistas for listening and for conducting research and ethnographic studies, solutions are beginning to emerge for clients to widen the scope of insights generation.

As a result, we are now seeing entire new segments of the research industry begin to emerge and grow with many breakthrough innovations coming from new entrants and start-ups. These vary considerably in nature, but all share the same common theme: using new people who can harness new technology to enable and produce insights that were previously unattainable. Interestingly, they fit into the taxonomy at all levels.

*Level 1: Data Collection.* With the advent of social media as a primary form of communication, entertainment and connectedness, the traditional (online) mode of interacting



with people for the purpose of collecting information has started to break down, especially in the younger demographics. This has led to the emergence of the *social media data collection* company. Pioneered by firms such as Peanut Labs, itself an offshoot of a social network, the art and science of deriving samples and collecting data from social media users—including game sites—has now become part and parcel of the online data-collection toolkit. If you want to reach young males, for example, you have to look to social media.

*Level 2: Project Management.* Just as online data collection revolutionized the way in which we sample people for research purposes, the social media genre is beginning to change the way in which we manage projects. Indeed, it is changing the way in which we *define* projects. The online qualitative and ethnographic platform offered by Revelation, for example, promises to “unleash the power of qualitative research.”

By using a social media interface, firms such as these are able to engage consumers in a much deeper and broader way over a longer period of time—where once a focus group perhaps elicited 12 minutes of contribution from a participant, now that same participant can contribute two to three hours of time and thought using a variety of qualitative and ethnographic exercises. They can participate in bulletin boards, do specific exercises, upload photos and video, annotate and tag what they upload with their thoughts and feelings and so on. For the qualitative researcher, this means not only a faster, easier, and cheaper approach to projects but a much richer set of derived insights and a bigger information set.

This redefinition of what a project is—and what it can generate in terms of insights—stretches across the spectrum of what we currently consider to be research and beyond.

Online communities, such as those offered by Communispace and Passenger, allow multiple interactions between clients, researchers, and participants and can be used for multiple purposes within a relatively short time. The online virtual environments created by Decision Insights and others allows testing of hundreds of variations of packaging, promotions, and in-store display situations where before a shelf test would have allowed only a handful. New product development projects by companies, such as InsightsNow! artfully combine online and off-line, quantitative and qualitative, questioning and observation to leverage the time and contribution of each respondent to a level undreamed of only five years ago.

Indeed, today a project may not even involve respondents as such. Web analytics companies, such as Conversion, instead carefully set up multiple listening posts on the web, sampling sites by their known demographic makeup, and glean insights both qualitative and quantitative in nature.

Or take the example of “Digividuals,” a new service offered by the British research company BrainJuicer. These are research robots (or “bots”) profiled to look like a target audience that are let loose to garner web talk on sites such as Twitter and that then re-Tweet to the same audience to stimulate reaction to certain concepts or themes of interest to the researchers. Such Digividuals have been known to garner reaction from as many as 100,000 individuals on the web.

*Levels 3 and 4: Insight generation.* In these examples, we have seen how new platforms have engendered entirely new ways of collecting information and have come to redefine what data collection and, indeed, a project actually are.

These new entrants are not just about new ways of collecting data. In virtually every case, they are about generating insights that would not otherwise have been available. Additionally, the insights that they generate are rarely singular or point in time. These companies are accumulating insight norms and databanks against which to measure and assess the quality of the insight being generated, and they are formulating hypotheses of human behavior against an ever-richer context of background information. As such, their input becomes more valuable over time.

One might say that such accumulation of knowledge and wisdom was perfectly possible under the old paradigm of surveys and focus groups. However, the ugly truth is that few companies would progress beyond our Level 3a—that is, they would look for insights from the project itself but rarely compare these to an extensive library of similar projects in the past.

True, some companies, such as BASES and Millward Brown, built norm-based systems designed to enable decision hurdles, but all too often, neither the research company nor the client would take the time or trouble to mine the information that they already had in their possession. Very simply, such an undertaking would have been too costly in time and money, and there was always the next project that needed to be dealt with.

Today, another type of new entrant is resolving those issues of cost and time: the off-shore extension team. These are teams of highly qualified people in countries, such as India, that are assembled to provide an extension to the client's research or consumer insights function. Costing perhaps less than half what it would take to staff an equivalent function in the United States or Europe, these teams are there not only to deal with peak loads of demand but also to provide data mining services for existing data to generate new insights, high-end analytical services, and listening services, such as blog mining, that can be integrated with more traditional survey research.

*Level 5: Business decision support (or research impact).* Truth be told, very few of the new entrants cited previously will rise to Level 5 in their impact on the organization. However, it is possible that certain business intelligence platforms could do so through various kinds of decision support systems that integrate knowledge gleaned not only from research but from a myriad of other sources (competitive intelligence, CRM, business analytics, secondary data, financial data, and so on).

There are those who believe that such platforms could subsume the role of consumer insights in impacting strategic decision making. We are not so sure, as we believe that the impact of right-brain information is equally as powerful as that of left-brain—and machines are often lacking (at present at least) in deriving insights from the right brain. We shall see.

The 1990s and 2000s saw a period of unprecedented consolidation in the research industry, as major research companies not only expanded their geographic reach but also filled in various niches in their portfolios that could lead them to the nirvana of one-stop shopping. The great thing about this is that it led to a period of refragmentation, as the principals of the acquired companies recycled themselves and became serial entrepreneurs.

Today, those entrepreneurs have been joined by many others who understand the role of technology in redefining research, and are not afraid to bring new solutions to the

market. The list of the types of companies that they have brought to the scene—types that were not there 5 or 10 years ago—is a long one:

1. Social media data collection companies
2. Providers of online communities
3. Builders of proprietary online panels
4. Virtual environment specialists
5. Web analytics firms
6. Advertising analytics providers
7. Crowdsourcing and predictive markets specialists
8. Qualitative and ethnographic platforms
9. Offshore extension teams
10. Neuroscience specialists
11. Biometric firms
12. Business intelligence platforms

The boundaries are blurring as to what constitutes a real research firm. And to compound the situation, research suppliers are determined to blow up the old model of market research, an objective publicly espoused by BrainJuicer, for example. Whether they succeed in this objective, the landscape for the supply-side researcher is changing forever, as Figure 1.9 demonstrates.

## The Changing Role of the Researcher

The researcher of the future will have more advanced skills than today's equivalent. While the basic mindset and background relevant to survey and qualitative research will still have relevance, tomorrow's researcher will need not only to have a much broader set of skills and interests but also have the ability to understand when and how to search for and bring in skills not possessed. They will need to understand how to manage, integrate, and analyze data from a multiplicity of sources, both right-brained and left-brained.

And then, they will have to be an excellent communicator and storyteller.

While all of this might seem daunting, in actuality, it is not all that different from the profiles of researchers that European suppliers of research searched for 30 years ago. Some of the most brilliant minds in European research—John Samuels, Kit Molloy, Julian Bond, Sven Arn, and Cecilia Gobbi are all good examples—came from backgrounds similar to the above and possessed skills and mindsets that were near identical to those we say are critical to the future success of the profession. And today, many of the most successful young European research companies carry on that tradition—Nunwood, FreshMinds, Incite Consulting, HTP, and BrainJuicer are just a few that are blazing trails of which their forefathers would approve. Perhaps the American research industry could do worse than look across the ocean for inspiration.

**Figure 1.9** The Changing Role of the Researcher

| Was  | Will be   |
|--|---|
| <b>Roles and Responsibilities</b> <ul style="list-style-type: none"> <li>• Study design</li> <li>• Questionnaire design</li> <li>• Sample design</li> <li>• Analysis plan</li> <li>• Analysis</li> <li>• Reporting and presentation</li> </ul> | <b>Roles and Responsibilities</b> <ul style="list-style-type: none"> <li>• Definition of insight needs</li> <li>• Choice of instruments for inclusion in integrated design</li> <li>• Sourcing of expertise</li> <li>• Integration of insights from sources and from historical data</li> <li>• Analysis</li> <li>• Building and telling the story</li> </ul>         |
| <b>Mindset and Skills</b> <ul style="list-style-type: none"> <li>• Quantitative or qualitative training and capabilities</li> <li>• Statistical training</li> <li>• Analytical frameworks</li> <li>• Writing skills</li> </ul>                 | <b>Mindset and Skills</b> <ul style="list-style-type: none"> <li>• Broad appreciation and understanding of a variety of tools and approaches</li> <li>• Statistical and qualitative analytical skills</li> <li>• Ability to detect patterns in a variety of data forms</li> <li>• Curiosity about new forms of insight generation</li> <li>• Story telling</li> </ul> |
| <b>Background Needs</b> <ul style="list-style-type: none"> <li>• Economics</li> <li>• Statistics</li> <li>• Psychology</li> </ul>  | <b>Background Needs</b> <ul style="list-style-type: none"> <li>• Behavioral economics</li> <li>• Statistics</li> <li>• Psychology</li> <li>• Geography</li> <li>• Political science</li> <li>• Social media</li> <li>• Communications</li> <li>• Business</li> </ul>  |

For that to happen, however, and for the younger generation to view marketing research as exciting and sexy (which it undoubtedly *should* be), our educational system will need to catch up to modern reality; our associations will need to adjust their training priorities, and our practitioners—both on the client side and on the supplier side—will need to reassume their role as professors for the modern generation.

Education surrounding marketing research today, whether as an undergraduate or graduate course, tends to focus too much on the basics. Curricula stress research as we knew it—probability theory, sampling, questionnaire design, how to analyze tables, and

rudimentary qualitative approaches. There needs to be awakening in universities as to the changing nature not only of research itself but of what it is designed to achieve.

Similarly, our associations are stuck in the same universe and need to broaden their educational and certification horizons to a new world. Certification, in particular, causes considerable concern, as there is a danger that it will preserve in aspic our old precepts of what research is and cause us to miss the opportunities that the new research affords us.

Some research companies and end users are beginning to awaken to the new reality and adjusting their training programs accordingly. GfK is an excellent example of this, having designed its graduate training program around the power of social media.

SymphonyIRI Group is a major syndicated research company and is at the forefront of transforming the role of its market research function—and their story is worth telling.

Besides recruiting a new profile for the client account teams, SymphonyIRI is also implementing a comprehensive business insights training program. Their program is a five-stage client engagement continuum starting from Stage 1 “vendor” to Stage 5 “trusted business adviser.” Skills, competencies, and client outcomes are mapped to each stage. Most critical is the creation of an insights competence group differentiated from a services competence group.

Starting early in 2010, they rolled the training out to the client insights teams on their top strategic accounts. Their strategic clients expect insights that are actionable, compelling, with clear recommendations, and a point of view that ultimately advances their business outcomes.

The insights training program has led to specific actions being implemented by clients who attribute many positives to the new skill sets being provided to SymphonyIRI client insight team members. Because of the training, client insights teams are being asked to meet with more senior people at the client organization—both within and outside of market research. Several clients are clearly showing interest in being part of this new business partnership and cite the clear benefit that their account teams are providing to the business. They range from recommendations on brand building to market mix to price and promotion to shopper-centric strategies.

Jane Altobelli, EVP & chief people officer at SymphonyIRI Group, stated,

In order to deliver these insights, we needed to recruit a new professional with consultative experience and skill set. In parallel, we needed to train our existing teams on how to better create and communicate insights and to reach the right individual at our clients. . . . A consulting framework and methodology must be the centerpiece of insight creation and delivery with the researcher having skills to identify, build, communicate and deliver the insight. (personal communication)

The importance of consulting or consultative skills is underlined by the fact that CEO John Freeland came to the firm in 2007, after a 25-year successful career at Accenture.

Whether others will follow is a matter of speculation, but one can only hope that they will and, in doing so, attract the best and brightest of the upcoming generation. We certainly

know that the right training can and does affect the impact of research, both in end-user organizations and in research suppliers.

Another example is that of a major telecom company, where an entire insights and intelligence function was retrained in what constitutes insight and how to communicate it. Here, the emphasis was on the fact that insight requires a complete change in body, mind, and soul. *Body* refers to the structure and processes that needs to be present in an organization for insight to take place. *Mind* references not only the data and analysis that are necessary for insight to emerge but also the behaviors of the people mining data and doing that analysis.

And, most important, *soul* encompasses the attitudes of those charged with producing insight—are they empathetic with both the business and the consumer? Do they have intuition and imagination? And, most important of all, do they have the storytelling capabilities to communicate the insight effectively? After all, an insight is not an insight unless it is effectively communicated and results in actions and behaviors that are different from what would have taken place had the insight not emerged.

In the instance of the telecom company, body-mind-soul insight training resulted in a complete transformation of the research function, from reactive order taker to proactive and strategically vital decision maker, and all within nine months.

Training does work, as long as the will to transform is there. Transformation works, as long as the training is there.

In today's world, training and education play a crucial role in achieving research impact. To ensure that we have impact, we need to train in both the science of deriving insight and in the art of communicating the impact that it can have. Nothing less will work.

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## KEYS TO A SUCCESSFUL MARKETING RESEARCH CAREER

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We have discussed the history of the role of marketing researchers, looked at the trends that will impact marketing, discussed what marketing and the C-suite will demand from marketing researchers and how researchers must respond, and explored the emergent marketing research capabilities. With this as background, we then discussed the implications for new roles for marketing researchers working for client (buyer) research departments and for those working for marketing research suppliers.

The future offers great opportunities for marketing researchers that align themselves with the trends. The opportunities can be summarized in two areas:

1. Generalists who are strong conceptual thinkers, strategic, future focused, and change agents who understand the intricacies of businesses they serve. They need to become great consultants who seek alignment on key management needs, synthesize information from multiple sources, build strong relationships, tell compelling stories, and persuade management to take action.
2. Specialists who align themselves with one or more of the numerous growth areas. Growth areas include consumer listening, advanced analytics (e.g., statistics, modeling, data mining, web analytics, media measurement, and analytics), online

communities, co-creation capabilities, business intelligence platforms, shopper insights, neuroscience/biometrics, behavioral economics, global and multicultural experts, ethnography, and anthropology.

The key drivers behind these opportunities are threefold:

1. Technological innovation and digitization
2. The need for researchers and marketers to get closer to customers and prospects to create competitive advantages
3. The changing global economic landscape

## Keys to Success

If you are starting out or in the early years of your career, we suggest that you explore how your skills, mindset, interests, and sources of satisfaction fit in with the growth opportunity areas that we've discussed.

Seek to

- review the generalist and specialist growth areas, and ask yourself where your passion lies. Your passion will fuel your curiosity and engagement, which will enhance your success;
- learn as much as you can about the area(s) that attract you and then reassess critically. Are you still passionate about it? Is it a good fit with what you're good at?
- seek ways to get started on your chosen direction. This may involve further education, an appropriate entry-level position, an opportunity to change responsibilities where you are working, or a complete job change; and
- if you are thinking of a generalist path, be honest with yourself about your ability and aptitude to be a change agent, conceptual thinker, synthesizer, and storyteller. These capabilities will be increasingly necessary as your level of responsibility increases.

For those who have already been in the profession for several years, critically evaluate yourself and seek to determine

- if you want to follow a specialty growth path and how your particular skills mesh with the many specialties that are emerging and
- if you have the strong leadership abilities necessary for becoming a generalist and can master the four skills necessary for this career path: the ability to (1) consult, (2) synthesize, (3) tell a story, and (4) take a stand.

We believe that marketing research and the role of marketing researchers will change more rapidly in the next 5 to 10 years than at any time in the past, and that this will open enormous, wide-ranging opportunities.

There are many paths to success, and we hope we've touched on one that speaks directly to you. Best of luck.

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