



A look back, a look ahead

Researchers weigh in on the past 25 years and opine on the next

By Joseph Rydholm

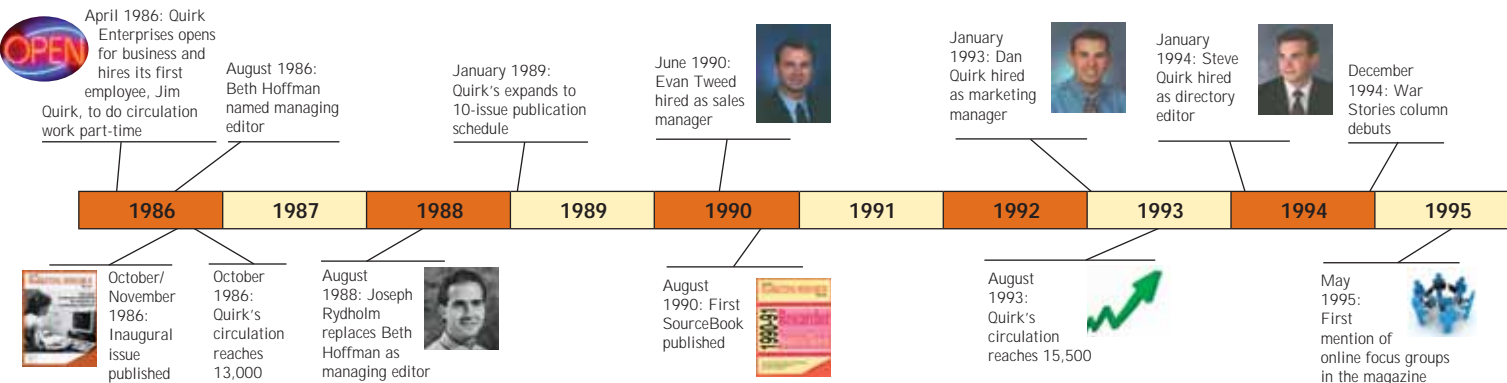
No matter what industry you're in, 25 years is a long time. A lot can happen. Certainly the past two-and-a-half decades have seen a host of changes in the marketing research realm.

When *Quirk's* began publishing in late 1986, door-to-door had been shown the door, swept out by phone and mail research. Computers and their data-crunching power grew in import during the 1990s but the real sea change came with the advent of the Internet. At first the focus was on transitioning quantitative research that had previously been conducted offline to the online space. Then, as the Web matured and technological innovations proliferated, the focus on duplicating the traditional offline survey-taking experience fell away and creative researchers sought to improve the respondent experience (and, hopefully, the resulting data) by seizing on the Internet's unparalleled abilities to engage and entertain. Those same qualities convinced researchers in the qualitative camp that the

snapshot

Research veterans give their views on what the industry's done right - and wrong - over the past decades and what we can expect the future to hold.

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online space was a boon for qualitative undertakings. And, as if those frontiers weren't promising and exciting enough, then smartphones and tablet computers hit the scene, opening up whole new options for researchers of all stripes, from quick-hit mobile surveys to deep-dive, consumer-generated explorations.

To get a sense of where we've been and where we're going, we e-mailed short questionnaires to a handful of veteran research industry members. We asked them to look back 25 years, look ahead to the next 25, talk about what marketing research has done right and done wrong, assess the current state of things and close with some words of advice to those just entering the profession.

What factor or factors have had the greatest influence (positive or negative!) on marketing research over the past 25 years?

"New technology. Twenty-five years ago, we had no fax, no CATI, no Web sites, no search engines, no smartphones (no cell phones), no e-mail, no online panels - everything is different in how we do business. This has had both a positive impact (instant search for information, showing respondents streaming video online) and a negative impact (clients expecting suppliers to be available by cell/text/e-mail 24/7; the death of the representative sample)." — *Ron Sellers, founder, Grey Matter Research and Consulting, Phoenix*

"I think one of the biggest changes was the advent of telephone and CATI research technology because it did away with most door-to-door research. At the time, most felt it would ruin research quality because we would not know for sure who was being interviewed. The second big factor was technology in the form of inexpensive PCs, which made widely-distributed data analysis possible. Another factor is the Web. Like telephone research before it, Web research is taking over the industry and many of us are concerned about a perceived decline in research quality." — *Don Marek, executive director, Marketing Research Institute International, St. Louis.*

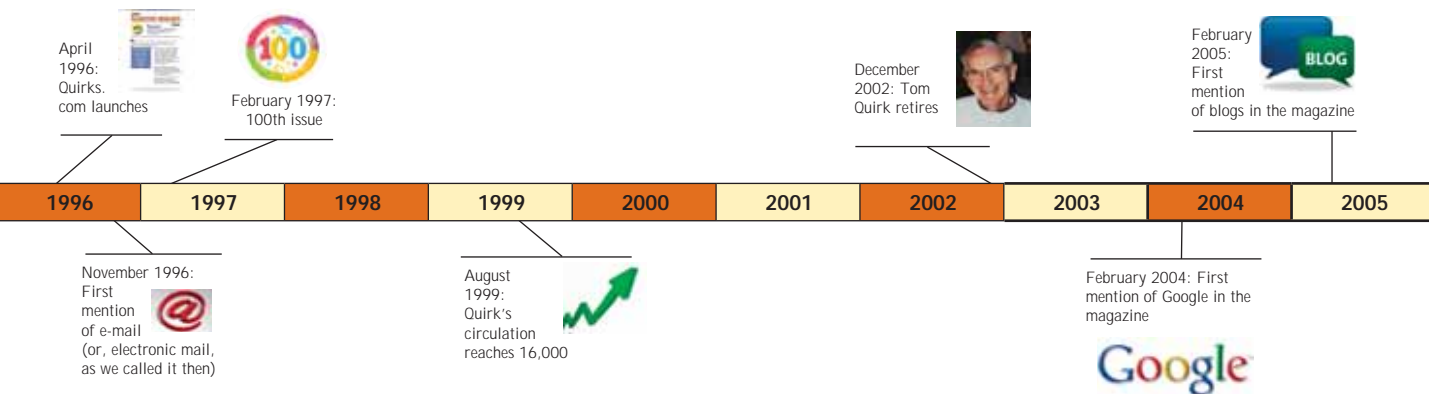
"If we roll the clock back to 1980-1985, the men and women who were assuming leadership of our industry (in their early 40s or older) were, for the most part, classically trained in marketing. Most were solid researchers with extensive experience. Many were formally trained in science and scientific methods. The high quality of this leadership group, collectively, has been a major factor in the growth and development of the research industry over the past 25 years.

"The intrusion of public money into the research industry began in earnest after 1990, as larger firms began to acquire smaller research firms. Since it was easier for European firms to raise money in public markets in Europe than it was for U.S. firms to raise

money in the U.S., the ownership of what had been an American industry shifted quickly to Europe. Most of the largest research firms are now headquartered in Europe. Within the last 10 to 15 years, venture capital and private equity firms have aggressively moved into the research industry, just at a time when growth in the industry was beginning to slow. The net effects have been an intensification of competition in the industry, more rapid change, greater instability and more decisions based on short-term profits rather than the long-term good of clients." — *Jerry Thomas, president and CEO, Decision Analyst, Arlington, Texas*

"I think the Internet has had the greatest influence, and I think it has been the most positive AND the most negative influence. Positive because it allows for faster and less expensive research that more people can do, which is also its weakness because now, 'anyone can be a researcher' with no training at all. If it were not for the Internet, it would be extremely difficult to get representative samples by age due to the decline in landlines. Another major influence has been increased privacy concerns, which have the result of bringing legal issues into research more than they have ever been before." — *Jim Nelems, CEO, The Marketing Workshop, Norcross, Ga.*

"As a direct result of the Internet research experiences of research sup-





pliers and users, new research methods and tools no longer face the same kind of lengthy, uphill battles they formerly faced to be considered, tested and implemented. Thus, new ideas come to market and can mature into valuable new capabilities much more quickly than before. Look at mobile research and, now, social media research, as prime examples. In addition, the pace at which new capabilities are refined and improved has been accelerated.

“Internet research also has changed the face of who owns research companies. The industry is now characterized by behemoth research organizations as well as innumerable startups (both from longtime research stalwarts and a slew of entrepreneurs without any research upbringing).” — *Bob Lederer, editor and publisher, RFL Communications Inc., Skokie, Ill.*

“In terms of positive trends: Technology in qualitative - online, social media, mobile, user-generated photography/video, analysis software and so on. The use of technology greatly expands what we can do. More ‘be-there’ research - observ-

ing or accompanying people in their lives rather than depending on what they think they think, say they think/feel. Also, fields like neuroscience and behavioral economics are altering our view of human psychology and, as a result, raising questions about what role qualitative research (and quantitative, for that matter) will play in the future.” — *Judy Langer, president, Langer Qualitative, New York*

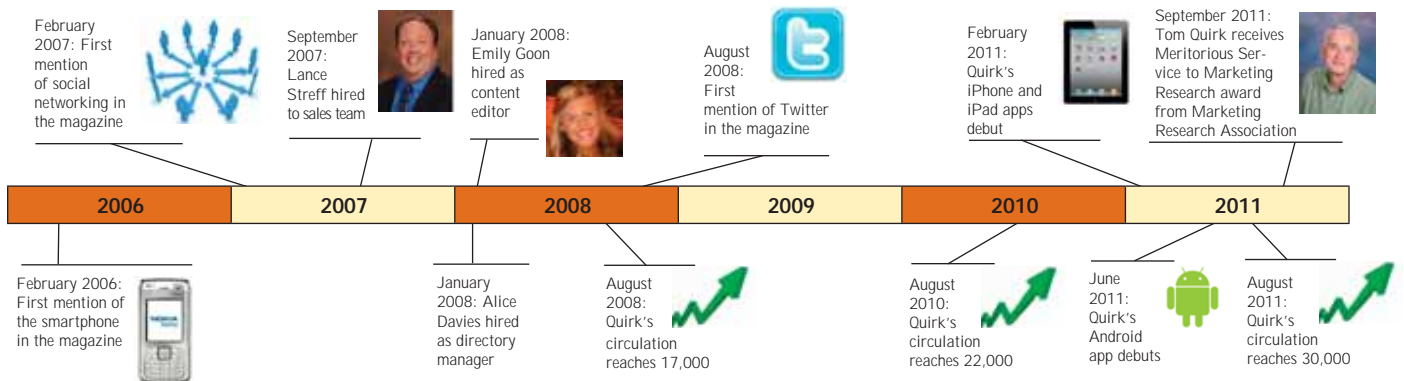
“Technology has had a huge influence on the person-to-person relationships that were so much a part of our business [focus group facilities]. Instead of a moderator or a familiar contact at the field department of a manufacturing company or ad agency calling to chat, giving the specs and then calling to book the study, a bid sheet is e-mailed and when you do get someone on the other end of the phone they really can’t answer your questions and may take days to get back to you. For so many years price was never an issue - if we had the room available it was a done deal. Today the client is given a bid by one of several facilities in the area and the job goes to the lowest bidder regardless of their ability to recruit according to specs.” — *Merle Holman, CEO, Group Dynamics in Focus, Bala Cynwyd, Pa.*

What factor or factors will have the greatest influence (positive or negative!) on marketing research over the next 25 years?

“Smartphone and tablet technologies are emerging as the new driving force behind our lives. Few of us have landlines and soon we will no longer have desktop computers, with laptops exiting close behind. Our busy lives are centered around these small devices that give us access to everything at the push of a touchpad. This will have both positive and negative impacts on how we do business. We must be prepared for the change or we will lose touch with the staple of our existence as researchers - the consumer opinion. We must meet consumers where they are.” — *Jay Mace, senior vice president, McMillion Research, Charleston, W.Va.*

“The advent of social media and how consumers not only communicate with each other but with advertisers will no doubt have the most significant impact on our industry. Consumers now have unparalleled access to communicate and discuss brand preference as well as satisfaction/dissatisfaction - both actively and passively. As an industry we’re going to be challenged with how to best harness this data while not isolating respondents or violating privacy rights.” — *Kristin Luck, president, Decipher Inc., Fresno, Calif.*

“Things are exciting for qualitative, and fairly bleak for true quantitative. We have so many more creative options for qualitative - video diaries, online picture sorts, mobile MR, etc.



The challenge, as with any new tools, is learning to use them in a way that actually makes a difference, rather than just using them 'cause they're cool. For quantitative, we have lost the ability to have a true random representative sample. Call-blocking, cell phones and plummeting response rates have hurt phone; online panels are not truly representative and mail is slow, clunky and has low response rates as well. If the 1,000 people we interview don't really represent any larger population statistically, what reason is there to do quantitative research?" — *Ron Sellers*

"The other big technological change is data integration. Yet-to-be-invented large systems and new software will enable us to integrate Web, telephone, social networking, eye tracking, scanned, mined and passive data research into market intelligence. Combining this data will enable us as an industry to get the big picture and overcome regulatory and privacy issues." — *Don Mark*

"We work with many large organizations and the greatest problem they face, day after day, is confusion. Our clients are awash in a sea of data, consultants, gurus and professors and don't know who to believe or what to believe. This turmoil creates opportunities for those with charisma and a good story to lead the confused astray. Companies must focus on the basics - research, science and truth - to succeed over the next 25 years. They must not fall prey to mythology and the limitless promises of false prophets." — *Jerry Thomas*

"Just as important to the future of our industry will be our willingness and commitment to fall in line with respondent whims and preferences. The record-setting (in time) wearout of online research respondents is not something we can afford to see happen with other new research capabilities. I have spoken publicly about the industry's need to adopt a platform that commits

all of us to do everything we can to find the pleasure points of everyone under the age of 30-35 in order to ensure their participation in our future research efforts." — *Bob Lederer*

"The goal of research has always been to find out what drives people's emotions and behavior, and today we have more tools to help us understand. We also confront some existential questions: Will biometric measures of what people are 'really' feeling and social media monitoring of what they are saying supersede the ways we currently talk with, observe and interact with them? My hope is that the answers will come from solid research on research." — *Judy Langer*

What have we, as marketing researchers and as an industry, done right over the past 25 years?

"Opened up qualitative research to deeper, wider thinking; new, revived methods, including getting more from 'traditional' qualitative." — *Judy Langer*

"I think we were challenged to take advantage of the Internet and related technologies in a way that forced methodologies, sampling and overall survey presentation to change. While some still argue the pros and cons of this evolution, we have found how to make it work as an industry and in a manner that meets the general public where they are and also holds to the core values that as researchers and data collectors we must always strive to uphold." — *Jay Mace*

"In some cases, we have managed to get a seat at the strategic table as true partners rather than just order-takers. Twenty-five years ago, it was more common (at least in the companies where I worked) simply to pass along the findings to the people who would use them. Today, it's more common to help the end-clients use the findings and to be consulted for input on the

meaning of the findings rather than just providing the data." — *Ron Sellers*

"As an industry, we have done a great job as research technicians. We have developed and refined our sampling, our software and systems, the methods of data collection, our analytical tools and techniques. Collectively, we have helped grow the marketing research industry over the past 25 years - and that is a great success. We have helped countless corporations do a better job developing and marketing their products by providing the science-based data required for sound decision-making. We have taken market share away from advertising agencies - who used to be major players in the research industry." — *Jerry Thomas*

"We've done a great job of embracing new technologies, like online and because of that, we're now seeing earlier acceptance of emerging research methods (mobile/social media)." — *Kristin Luk*

"We have maintained our standards but also somewhat adapted them to changing respondent needs - although not as aggressively or effectively as is necessary. Our respondent base is changing even more quickly than the research industry itself and it will continue to do so for the foreseeable future." — *Bob Lederer*

"[On the qualitative front] there are a number of things done 'right' and they include: paying respondents a fair fee for their contributions to research; finding ways to limit repeat respondents; creating facility settings that widen the modalities for conducting market research; training researchers who can efficiently collect data for strategic decision-making by clients; creating an organization of qualitative researchers committed to ethical research practices; helping clients see qualitative research as



a full member of the research industry and not a stepsister to quantitative.”
— Naomi Henderson, CEO and founder, RIVA Market Research and RIVA Training Institute, Rockville, Md.

Where did we blow it?

“We could have done a better job embracing Web research in the beginning. I was shocked at the 1997 Research Industry Leadership Forum when leaders of the biggest U.S. research companies attacked Web research. Our industry succeeded despite itself.” — Don Marek

“Not making the transition [to the Web] as an industry sooner. We allowed technology-based companies, not research companies, to take the lead in our backyard. This caused innumerable quality-assurance issues and the need for end users to question the value of our reporting. While we recovered, the stigma continues to be addressed at virtually every conference or end-user presentation I am privy to.” — Jay Mae

“The quality of some of what passes for marketing research is horrible. DIY contributes to this but is not the only cause. Also, we still struggle to be seen as essential rather than as optional. When budgets get tight, that’s the time to spend on research, but that’s the time research usually gets slashed - much like advertising.” — Ron Sellers

“The research industry has tended to focus on corporations with marketing research departments. These departments are often below the C-level.

Accordingly, our industry has been outflanked by the consulting industry. Consulting firms have sold their services to C-level executives, especially the president, CEO and board members. Oftentimes, research companies actually have the experience and skills to do a better job than the consultants (especially in the marketing arena) but never have the opportunity to pitch their ideas or submit proposals.

“The second missed opportunity may be characterized as ‘lack of showmanship.’ As an industry, we marketing researchers have tended to be focused on the technical details and the numbers, whereas our clients want to see pictures, video and colors and hear interesting stories. We must get better in transforming our numbers and facts into interesting narratives and/or movies our clients can understand and enjoy.” — Jerry Thomas

“Our reliance on online methods to conduct research has created a distance between researchers and respondents. As we’ve moved away from face-to-face interviewing we’ve forgotten in many cases that there are actual people on the other end of our surveys and are abusing them via tedious, long surveys. Clearly there’s been concerted industry effort in the last couple of years to address survey quality issues, however, there’s still much work to be done.” — Kristin Luck

“We have never done a good enough job of promoting our industry to the general public. We count on them for participation in our research efforts and they are our lifeline to data. With greater promotion of our industry we would build better respondent cooperation.” — Steve Schlesinger, CEO, Schlesinger Associates - New Jersey, Edison, N.J.

“We didn’t ‘blow it’ but we’ve become far more trendy and gimmicky. Little research on research is done but, instead, self-interested researchers (sup-

pliers and clients) simply pronounce that their ‘new’ methods - sometimes new in language only or old/revived - are superior to traditional ones.” — Judy Langer

“Letting clients dictate research modalities that pandered to egos rather than sensible research designs. For example, clients would ask that IDIs be conducted to limit the influence of thought leaders rather than finding researchers who knew how to successfully manage thought leaders in group settings. Relying solely on qualitative research findings for decision-making rather than matching it with quantitative research to get the full picture.”
— Naomi Henderson

Is marketing research - as a discipline and a business decision-making tool - on the upswing or on the decline?

“I think we are emerging from a slight decline. I believe we have shown the tenacity for overcoming our own biases and fears and have embraced the revolutionary ways in which we do our jobs today, as well as in the years to come. We are no longer taking a backseat with respect to technology but, as an industry, we are at the forefront of developing tools and strategies for acquiring opinion and reaction from the masses to serve our clientele, using social media, mobile technologies and so much more.” — Jay Mae

“As a discipline, it’s on the decline. DIY, low-budget data collection that takes serious shortcuts and wanna-be moderators are all examples of where the discipline itself has fallen on hard times - anyone can write and program a questionnaire, pay \$4 a person for crappy, no-quality-control online sample, and generate ‘research.’ ” — Ron Sellers

“Market research as a decision-making tool is on the upswing but in a different way than in the past. The

heavy reliance on data has given way to the need to be quick, focused on knowledge not data and leverage multiple touchpoints to understand the people, how they think and what they really want. Integration of multiple data points will continue to be paramount.” — *Gayle Lloyd, head of product research, Batesville Casket, Batesville, Ind.*

“It is on the upswing. As business gets more complicated and global, the need for quick, accurate market intelligence becomes even greater. The integration of data collected through a variety of means and countries will become a more vital part of our industry.” — *Don Marek*

“Marketing research is definitely on the upswing. There is little doubt that many more surveys are being conducted today than 10 years ago, thanks to low-cost, do-it-yourself survey tools and the spreading spiderweb of the Internet. Surveys are now being conducted by many different departments within corporations (without the knowledge of the other departments, in many instances). Of course, whether this survey data is of high quality, and whether that data leads to better decisions, is open to question. More secondary research data is available today than in the past and we see no decline in the quality or use of such data. More government data is available and is more widely used. More and better sales data is available, compared to the past, and analysis of that data falls within our purview. More money is being invested in shopping research. And, there are new sources of data (such as social media and Web chatter) that one might count as ‘research’ if one had sufficient faith. So, in total, marketing research continues to expand as an activity, but it is becoming more fragmented and perhaps more amateurish at the margins.” — *Jery Thomas*

“On the upswing. We are considered an important discipline within

businesses and are getting more visibility higher up the food chain. The value of our deliverables is critical to solid decision-making and that is getting noticed more and more. As an industry we are also becoming more and more creative in our methods and how we bring insights to the end client.” — *Steve Schlesinger*

“It is definitely on the upswing; incredibly larger numbers of research users are spending more money. However, we have a responsibility and task to both meet their changing needs and offer our own innovations that break the mold and present improvements on their stated needs.” — *Bob Lederer*

What advice would you offer to someone just getting into the marketing research profession?

“Learn far more than the profession and the discipline. You have to do the research right but it is incredibly helpful to have a broad base of knowledge and interests. Read widely, absorb everything and don’t limit your interests or conversations to research or business practices.” — *Ron Sellers*

“Be multidisciplined. Become astute at understanding human beings. Do not be a victim of and a slave to data. Stay current. Develop fine-tuned listening skills. Learn the craft well but be creative.” — *Gayle Lloyd*

“Hang on; you are in for an exciting ride! Know and use statistics/data analysis so your work is projectable. Embrace technology because that is where our main advancements will come from. Learn to like to travel; our global industry is going to require you to do it.” — *Don Marek*

“Get into the trenches. Master basic skills. Learn the nuts and bolts. Master the science and methods of research.

Learn marketing. The need for good research is greater than ever and the need for good researchers will grow. The companies that master marketing research have tremendous advantages over the non-users of research. Think about it this way: When you were in college, wouldn’t it have been nice to know what questions would be on the test and what the answers were? That’s exactly what good research can do for smart companies.” — *Jery Thomas*

“Learn (and do!) every piece of the research process - no matter how tedious or mundane. Without really understanding what goes into a study, from the design to field to working through the analysis, it’s easy to lose sight of how important each phase is in the process.” — *Kristin Luck*

“Try to start with the basics, such as interviewing. And read all you can. Young people today have never heard of the founders such as Alfred Politz or even know what an IBM punch card is.” — *Jim Nelems*

“Market research is far more diverse than most outsiders realize. The stereotype is that it’s a game of numbers and, more recently, of high-tech. In reality, if you have a deep curiosity about how and why people tick, you can find a niche to use your talents. Read key books and journals about the market research industry. Join the key organizations that support the ethics of this industry. Get training in the disciplines related to market research. Have a definitive philosophy about the role of market research in your career. Stay abreast of the trends in market research. For moderators, decide early on if your career will be as a niche or a general moderator. Be willing to say no to clients or client work that goes against your principles. Do not sacrifice family or health on the altar of the market research industry.” — *Naomi Henderson* | **Q**