

# CAMBIAR

## Mastering change

### United we stand, divided we fall?

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A major topic of conversation among researchers today revolves around what many see as the unnecessary and potentially damaging fragmentation of what used to be called the research industry. Which begs a number of questions: is the industry really that fragmented? And, if it is, does it matter?

Truth be told, researchers have had a tendency to fragment for quite some time. First there was qualitative versus quantitative, then market versus social research, and - with the advent of globalism - domestic versus international research. Not to mention B2C vs. B2B and all the variants of that based on industry sectors. For years now, pharmaceutical researchers have been a breed apart while many financial and automotive researchers would say the same of themselves as well.

Now, there seems to be another wave of fragmentation. Market research is now seen as being distinct from User Experience (UX) and Customer Experience (CX). Back in the day, these were called Design Research and Customer Satisfaction Research, with both fitting quite naturally into the portfolios of research suppliers. This seems no longer to be the case, with both 'disciplines' claiming separate identities that necessitate talents and capabilities different from those found in 'market research'. The same goes for what is nowadays referred to in many companies as 'consumer insights' as opposed to their 'data analytics' brethren down the hall. That the latter is any different to market research will come as a great surprise to the folks at Nielsen, IRI, comScore and 84.51/Dunnhumby.

Further fueling the trend, we now have a series of technology research solutions that are specialisms in their own right – examples might include virtual reality, video analytics and eye tracking. None of these is actually new but modern technology has made them far more prevalent and accessible than in the past.

If such fragmentation causes confusion in the research supply chain, corporate users of research also seem to be confused as to where the insights function actually belongs within their organizations. Should it be a part of Marketing or does it belong more in Strategy? Some companies even park the function under Information Technology. And that does not even

address the issue of what constitutes 'insights' – is it just primary research or does it include data analytics and competitive intelligence? Different firms have different answers to this question and it's unlikely to be resolved in any unified manner for some time to come, if ever.

In the United States, this fragmentation even extends to the number of associations representing the profession. I don't think anyone knows today exactly how many there are – some disappear and others proliferate. Certainly, there are the big ones, such as the Insights Association which casts a broad tent, as well as AAPOR (social and political research) and the Advertising Research Foundation. But there are plenty of others representing smaller constituencies, some of which such as the QRCA (Qualitative research) have been around for a long time, and others that are newer that represent some of the 'breakaway' disciplines discussed above – a good example being CXPA, which welcomes CX professionals and researchers.

The big question in the era of COVID-19 is: does any of this matter? I would argue that it does. Much of the qualitative and anecdotal evidence that we have suggests that insights (however defined) are more important and central to corporate strategy now than ever before. Companies (and indeed foundations, governments and NGOs) need actionable information now to determine not only how they navigate through the pandemic but also what their world will look like when this is all behind us. Is this really the time for the insights profession to be presenting itself as a bunch of disconnected, squabbling fiefdoms? Or has the time come for us to unite under a common umbrella through which we all are contributing to strategy, forging a path into the future?

The late lamented Jack Honomichl – the first journalist to dedicate himself to reporting on and analysing this industry – predicted that the time would come when major corporations would have a Chief Information Officer (which, today, would equate to a Chief Insights Officer). With very few exceptions, that time has not yet arrived. Will COVID-19 be the catalyst for such a position to be created? If so, will its creation trigger a coming together of the fragmented insights supply industry?

I am not holding my breath.