

AN ORIGINAL IN-DEPTH SEGMENTATION STUDY
OF THE MARKET RESEARCH INDUSTRY*

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Abstract Six factors emerge from a study of more than 100 demographically-diverse researchers involved in various aspects of marketing research: The Midwestern Corporate Researcher, the Surveyor, the Agency Researcher, the Eastern Researcher, the Analyst, and the Marketing Fan. The backgrounds, aspirations, and outlooks of these types are described and compared.

Hundreds of segmentation studies of American consumers have been conducted. Many have been described from this podium. But I am about to tell you about one study that is different than any other...different because it is about you and your peers in marketing research.

Our firm, Survey Sampling, sponsored and conducted this study so we could better understand our market--the market research industry. We wanted a broad per-

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spective of the research community. When you draw samples all day long, as we do, you begin to wonder what really goes on out there.

We wanted to know how market researchers view themselves and the field in which they work. What kind of beliefs do people have about this business? Does a common work ethic about market research exist? These questions are important to us because we are a marketing-driven company and want to understand the needs of our customers. We began by listening.

We asked researchers to talk about their work. To assure a variety of opinions, we used a factorial design to control five characteristics that might affect one's attitude: Geography, age, sex, job level, and type of organization. Half of our respondents were over 40 and half younger; half were men, half women.

Our staff interviewed researchers in twelve markets. One third of our respondents worked in the Northeast, a third in the Middle West, and a third in the South and West. A third of our respondents were top managers such as research directors or presidents of research firms; a third were middle managers--associate directors or field directions; and a third held such jobs as analyst, project director, or account executive.

We divided the research industry into three groups. First, those that pay for research, the producers of goods and services for consumers and business. Second, the full-service research firms that conduct most studies. And third, the other organizations closely related to research--ad agencies, industry associations, media, field services, tab houses, government and university organizations, consultants. One-third of our interviews were from each group.

These five factors in combination produced 108 different cells. We tried to complete at least one interview in each cell. But some cells--such as older men with lower level jobs in advertising agencies--were difficult to fill, so a dozen cells were empty.

We succeeded in interviewing 126 researchers, most of them twice. The first time we used open-ended queries and taped respondent replies. The interviews

lasted 45 minutes on average. We listened to more than 100 hours of commentary and extracted more than 4,000 statements.

We discarded factual statements and duplicate belief items. Judgment and pretesting produced a final set of 101 items. These were given as Q sorts to most original respondents plus a few others. Each respondent sorted the items into 13 piles, ranging from the three with which he most agreed to the three with which he least agreed. The number of items in each stack was designated and followed a quasinormal distribution.

With respondents as variables, we used principal components factor analysis and varimax rotation to learn if our respondents shared common beliefs or if attitude segments existed.

I want to emphasize that the six types we found were not defined by us using any a priori scheme of classification. Rather, the types arise from the respondents themselves.

As I describe each type, I will refer to demographic characteristics, but these relationships are incidental to the attitudinal patterns that really define each type. You should know that ideal types are elusive in the real world, but they are useful for understanding the structure of that world. To save time, I will tend to speak in somewhat absolute terms rather than qualifying each finding as a "tendency." And as I describe a type, my descriptions will be based on items that the type ranked higher or lower than the other types.

Permit me a brief historical footnote. Q methodology was developed by a British psychologist, Dr. William Stephenson. Will remains in excellent health and, at age 83, is still busily contributing to social theory. Next July, in Columbia, Missouri, his friends will celebrate the 50th anniversary of Q.

And now on to our findings. We extracted six factors that explained 50% of the variation. So in a way, I am not talking to 1,500 people this morning, but to only six types. We call them the Midwestern Corporate Researcher, the Surveyer, the Agency Researcher, the Eastern Researcher, the Analyst, and

the Marketing Fan.

In naming the types, I have tried to avoid judgmental labels because catchy phrases often overwhelm the data they are supposed to describe.

At this time, we can make no estimate about the frequency of these types in the population of researchers. But in this study, the Midwestern Researcher was found most often, with 30 respondents, and the Marketing Fan least often, with 14 persons.

FACTOR A:
THE MIDWESTERN CORPORATE RESEARCHER

Factor A researchers are generally found in midwestern states and work for manufacturers. Most have graduate degrees. Their education often includes a marketing degree.

Midwestern Corporate Researchers have worked in research from 3 to 30 years. Half are directors of market research while the younger ones are supervisors, senior analysts or project directors. Neither age nor sex seems related to this type so we will use the pronoun *they* from now on.

Midwestern Researchers are quite positive about market research. More than any other type, they think research is valuable, important and a lot of fun. They genuinely like research, particularly its fast pace. Midwestern Researchers take research rather seriously, believing that proper academic training is essential, that you have to enjoy working with numbers and be well organized. They value multivariate analytic techniques and computerized telephone interviewing systems.

Midwestern Researchers also speak well about their peers in research. They think that most interviewers do a good job, that researchers rarely violate respondent confidentiality, and that advertising agency researchers try to be objective. Indeed, they disagree with almost every criticism of market researchers, particularly those aimed at themselves as clients.

Midwestern Researchers believe that they are well regarded by top management. I suspect that these re-

searchers identify closely with their management; they consider themselves as more marketing oriented than research oriented. Someday they would like to run a business.

Midwestern Researchers also believe in carefully controlling their research projects. They tell their suppliers exactly how the study is to be conducted. They believe they are sophisticated enough to tell whether the supplier is doing good research. They do not intentionally mislead suppliers about things like incidence, and they expect the supplier to be independent enough to tell them if there is a better way.

FACTOR B: THE SURVEYER

Speaking of suppliers, let's now meet factor B, the Surveyer, the person who collects our data from the public. Most are executives at research firms, but a few work for large manufacturers. Their job titles range from field director to president.

More women are found in this type than men so I will use the pronoun *she*. Relatively few have graduate degrees, none that we interviewed held a doctorate. Undergraduate degrees might be in communications, sociology, theater or marketing.

The Surveyer is very concerned about the quality of market research. She thinks one of the most crucial aspects is finding the right people to interview and that interviewers do the hardest work of all market researchers. She is concerned about the public's right to privacy. And the Surveyer certainly does not think clients have to demand high-quality studies; she tries for quality in every study.

But the Surveyer works under various pressures that make it hard to deliver quality. Her clients pay too much attention to cost. She thinks clients mislead her about what incidence to expect and they don't allow her enough time to do a good job. She particularly dislikes the three-bid system and much prefers working with clients on a long-term contractual basis.

The Surveyer's main job is to collect data rather than to analyze information. She thinks all research-

ers should do interviewing as part of their training. She doesn't think any particular academic background is better than another in market research. She does not think having an MBA helps much.

The Surveyer prefers working for smaller companies. She wants to be a researcher, not a planner. When she conducts research, she believes what she finds. She considers herself more research-oriented than market-oriented.

FACTOR C: THE AGENCY RESEARCHER

Six of the top ten persons representing factor C are research directors at large advertising agencies, so I call them the Agency Researchers. Most are men in their 40s and 50s who have been in research for 20 years or more. Most have graduate degrees, not so much in marketing but in varied disciplines--operations research, economics, American studies and the like. As undergraduates they majored in philosophy, psychology, or political science. There is a distinct liberal arts flavor.

The Agency Researcher takes a much broader view of market research than other types. He is highly concerned about the professionalism of market research, considers himself in the mainstream of research, and thinks a lot about industry issues.

He is pretty critical about our industry. He thinks that fundamentals of scientific observation are often ignored, that many researchers have little understanding of what business is about, that research studies rarely have theoretical foundations, and that we have made little real progress in understanding why people buy.

The Agency Researcher thinks focus groups are often misused, that sampling decisions are often made haphazardly, that high quality work is rare, that researchers have lost touch with the interviewing process, that there are too many time-wasting conferences.

He also thinks market research is pretty competitive, even cut-throat, rather than easy-going. But the Agency Researcher is not unhappy in his job, not

at all. Research for him is an end goal, not a stage in his career. He thinks the pay is pretty good and that it is possible to be a "star" in this business.

Perhaps because he is involved with many clients, the Agency Researcher stays away from research details: He doesn't like handling the entire project from start to finish. He likes working for big companies, and he never keeps a messy desk.

FACTOR D: THE EASTERN RESEARCHER

Most factor D respondents are from the East and most are men. Unlike the Midwestern Researcher, who usually works for advertisers, the Eastern Researcher might also be a middle manager at an ad agency, or a consultant or work at a research firm. Most have graduate degrees not only in marketing, but economics, psychology, and sociology.

The Eastern Researcher has an entirely different orientation towards suppliers than his Midwestern counterpart. Whereas the Midwestern Researcher wants to design the study in-house and give exact specifications to suppliers, the Eastern Researcher is more willing to bring in the supplier at an early stage. And he puts less emphasis on documentation and detail.

The Eastern Researcher expects a supplier to help his client look better to his boss. He looks for suppliers who share his outlook on life. But like the Midwestern Researcher, the Eastern Researcher thinks of himself more as a marketer than a researcher and values his role as a consultant.

His interests seem in a way more narrow than other types. Perhaps most of his thoughts are about his own clients. Anyway, he professes to have little concern about our industry as a whole, nor does he care much about the professionalism of researchers or such issues as the public's right to privacy. He does not think we should start certifying market researchers. He thinks that to be a good researcher you need to be unusual, but it doesn't make much difference what kind of academic training you have.

The Eastern Researcher thinks research is more of an art than a science, and thinks simpler techniques

work better. Mail panels and focus groups are valuable tools for him but he doesn't think much of multivariate analysis. He would rather hire a marketing major than a research major. He doesn't think ad agency research is very objective. And his desk tends to be messy.

FACTOR E: THE ANALYST

The demographic profile of factor E researchers is pretty flat. They are as likely to be women as to be men; they might be young or old; they might work for manufacturers, media, government or research firms; they are found in all parts of the country. Education seems the only distinction, for they tend to have majored in mathematics, operations research or statistics somewhere along the way. Most have graduate degrees.

Above all else, Analysts enjoy the analytic side of research most. They consider themselves to be quantitative. They think the biggest problem in research is analysis. Quantitative skills are valued more than the ability to communicate. Analysts would be reluctant to reduce sample size to save money, yet they are more conscious of research costs than other types. In developing a study, they would plan the analysis before even thinking about the questionnaire. To them, research is a science, never an art.

Analysts are unhappy about the way most research is conducted. They think only a small group of research firms are doing quality work. They think most interviewers do a poor job. They believe most buyers of research are not sophisticated enough to recognize good research, that too many researchers are biased by preconceptions. As a result, Analysts think the results of many studies are not valid. They would be reluctant to use data collected in shopping malls or from mail panels because those methods are biased.

Analysts want research to be detached and objective, so they are especially critical of sponsors who select suppliers on the basis of personal compatibil-

ity. It should never be the researcher's job to make his client look better to his boss. To do that might compromise the quality of the research. Analysts will let the chips fall where they may.

FACTOR F: THE MARKETING FAN

Our final type differs from other researchers in several ways. They are much younger than other types, generally in their late 20s or early 30s. Most are women holding such jobs as project supervisors or assistants. None of the top ten has a graduate degree, although all have completed four years of college.

The Marketing Fan really doesn't like being in research at all. She doesn't think it pays very well and you don't get to be a "star" in research. The work becomes tedious after a while. She doesn't think of herself as a quantitative kind of person. She doesn't like the hectic pace of research, much preferring a 9 to 5 job.

The Marketing Fan suspects that corporate management has a low opinion of marketing research, probably viewing many reports with only casual interest, then tossing them in the circular file. For her, marketing research is at best a stage in one's career rather than an end goal.

What she really wants is to move into marketing, or at least planning. She views marketers as much more creative than researchers and they value writing skills more than quantitative ability. In marketing, she can spend more time thinking about front-end objectives, an area that she now thinks is often overlooked in research. But if she becomes a marketer, she is likely to hold a rather low opinion of her research suppliers.

CONCLUDING REMARKS

Now let me wrap this up with a couple of observations. First, I'd like to tell you who's having fun in this business. Most of all, the Midwestern Corporate Researcher is having a ball. The Surveyer and the

Agency Researcher like research almost as much. The Eastern Researcher isn't quite sure if he's having fun or not, but the Analyst and the Marketing Fan are convinced it's no fun at all.

I might add that I had all kinds of fun in conducting this research and I think most of our respondents did too. Most of them hadn't been interviewed themselves in years.

Let's also speculate about who might continue working in our field. The Agency Researcher and the Surveyer are in research 'til the cows come home, and the Eastern Researcher will probably stay with us too. But Midwestern Corporate Researchers, as much as they like research, are looking for ways to move higher up the executive ladder and away from research responsibilities. I don't think Analysts identify with our field at all. They probably think of themselves as social scientists or statisticians. And the Marketing Fan, I'm sure, will leave research whenever she can land a job in marketing.

We've given you thumb-nail sketches of six research types, but each deserves a formal portrait, for there is considerable richness in their item profiles and taped interviews that could not be conveyed to you today.

The six types account for half the variation in our respondents' sorting, so I am confident that we have identified the major issues in research today.

We intend to conduct further studies along this line, beginning with a series of interviews with leaders in the field of market research. We have already completed more than 40 interviews with research directors at major advertisers and advertising agencies and the CEOs of large research firms. We will be listening to their views about the direction our industry is heading.

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