



## **Marketing Research in the New America: How Will Our Industry Survive?**

By Michael Francesco Alioto, Ph.D.

It's not an exaggeration to say that the U.S. society is undergoing a radical upheaval. Our culture of mutually exclusive racial and ethnic groups is being overtaken by a more homogeneous society driven by an enhanced rate of technology-based connectivity. Ideas and innovations which were once the domain of a single group are rapidly diffusing across groups, cultures and geography.



*Global scale: City-to-City Connections with the Internet (2011)*

*Source: Chris Harrison, Human Computer Interaction Institute. Carnegie Mellon University*

Since the nature of the change is both qualitative (type) and quantitative (amount), business strategies and models must adapt to account for this new paradigm. In marketing research, our ability to collect, understand, and draw insights from this new consumer base is vital. For the successful development and positioning of products and services across both multi-cultural and global markets, we must be open to a new kind

of consumer intelligence, including; attitudinal, behavioral, emotional and social data.

Given the emergence of this new pattern, there is legitimate concern as to whether our current marketing research methods are adequate to accurately gather consumer insights. Based on the scientific-survey approach developed in the early 1940's, current methods were derived for political polling when

the attributes and components of the traditional societal framework were firmly set.

If we don't create new valid and reliable methodologies, marketing research will ultimately cease to be a key function within the business model. Without action, we face the potential to become obsolete or irrelevant. It is up to us as a discipline to continuously invigorate the industry with methods and approaches

## The Traditional American Face

Key Elements	Critical Factors
Separate Individual Racial, Class, or Ethnic Groups	Heterogeneous Groups based on Common Group Themes
Distinct Educational Divisions	Clear distinction between levels of education
Gender Dominant	Specific Functions based on Gender Differentiation
Distinct Social-Economic-Status Classes	Specific Functions based on Distinct SES Structures or Classes
Market Specific	U.S. Market Dominate
Language	Specific Language based on Racial or Ethnic Group
Individual Touch-Points	Traditional Media, Proven Modes, Individual, and Traditional Communications
Societal Construct	Structural-Functional

## The New American Face

Key Elements	Critical Factors
Integrated Society: Cross Societal Groups	Homogeneous Individuals/groups across Society based on Multi-Dimensional Themes
Age Based Cohorts	Cutting-Edge Technology and Innovation based on Age Acceptance (Cross-Educational Levels)
Gender Blending	Gender Neutral
Technology and Web Connected Capabilities	Functions and Structures based on Technology Knowledge and Access to the Web
Market Diverse	Globalized World
Global Communication Forum	Communications based on Technology, and Electronic/Virtual Platform
Mass Communication Touch-Points	Technology, Innovation, Social, and Electronic Virtual Communication (Multi-Dimensional, across Space, Discipline, and Time)
Societal Construct	Behavioral and Multi-Sensory

Table 1

which are viable for our new society and accurate in regards to critical consumer insights.

### The Changing Face of America

For most of its history, America possessed societal characteristics which were based on various heterogeneous groups. As time progressed, these groups evolved to include elements of gender specific and social-economic levels which reinforced the class, racial, or ethnic characteristics of these groups. These characteristics were one-dimensional and singular in nature; representing a linear approach to societal attitudes and behavior. Group interactions were the exception, not the norm.

For marketing researchers, this gave rise to group-specific methodologies and approaches, including the use of quota or "bubble" samples, traditional survey techniques, and specific methodologies. Respondent targets were set based on

shared group characteristics, which were then assessed in both aggregate and sub-set analyses.

With the advent of the computer, connectivity to the Web, and related innovations, there have been significant changes in U.S. societal attributes. Technology has increasingly been assessable, if not disruptive, resulting in new advances now available to the growing masses, regardless of group composition. Technological advancements have also been associated with qualitative innovations, in which new concepts and pioneering ideas are spread overnight via the Internet.

Another factor driving change has been the continuous evolution of U.S. society. We are experiencing constant change and traditional group decline as members are crossing ethnic, racial and cultural lines in both personal and professional associations. In fact, we haven't experienced paradigm shift of

this magnitude since the great waves of early 20th century migration. Coupled with this trend is the ever-broadening role of women, access to advanced education, and reduction in class-specific status (see Table 1).

### A More Holistic Approach to the Market

In marketing research, our methods must adapt to become both more innovative and sophisticated as we will be charged with understanding the entire nature of the new consumer. In qualitative specifically, some change has taken place with the addition of audio/video, in-home, and natural group interviewing techniques. But much of this evolution has occurred within the traditional methodological framework, which is dependent on traditional research approaches. We are still missing the holistic nature of the respondent by utilizing traditional, one-dimensional methods.

## The Traditional American Face

Key Elements	Critical Factors
Methodology	<ul style="list-style-type: none"> <li>Traditional: <ul style="list-style-type: none"> <li>• Mail</li> <li>• Telephone</li> <li>• Intercept</li> </ul> </li> <li>• Central Location</li> <li>• Online</li> </ul>
Response Types	Single Individual and Linear Focused (Scientific)
Attribute Stimuli	Single-Dimensional based on Survey Instruments
Data Type/Level	Individual-Level, Primary Data
Survey Environment/Structure	Traditional Survey Question-Based Attributes

## The New American Face

Key Elements	Critical Factors
Methodology	<ul style="list-style-type: none"> <li>Innovative/Behavioral: <ul style="list-style-type: none"> <li>• Social Media</li> <li>• Mobile</li> </ul> </li> <li>• Research Communities</li> <li>• Mix-modal Approaches</li> </ul>
Response Types	Multi-Sensory and Behavioral
Attribute Stimuli	Multi-Dimensional based on Concrete and Abstract Stimuli, including Reflective Elements
Data Type/Level	Multi-Level, Multiple Data Channels ("Big Data")
Survey Environment/Structure	Lifestyle and Behaviorally Based Inquiry (e.g., Gamification)

Table 2: The New American Market Face: Critical Implications for Marketing Research Methodologies

As society continues to evolve, we will be required to dynamically transform our methods to reflect this new state of being or continue to bias our results and insights. If researchers understand both the depth and scope of the new paradigm, then we must institute new approaches which will allow us to accurately gauge society and its impact on the products and services being developed.

### Critical Implications for Marketing Research Methodologies

Given the changes confronting us as Americans, consumers are reacting differently to marketing research and the inquiries being made. As the societal attributes of consumers are no longer one-dimensional, neither must our research methods and attributes be. The social science disciplines have long recognized the multi-dimensions of the human condition. Table 2 above outlines some of the key elements of the marketing

research process which must be modified or enhanced for the new multi-dimensional consumer paradigm.

There are five areas of the marketing research discipline which require rethinking and modification to truly gauge critical consumer insights. These include methodology, response types, attribute stimuli, data type/level, and survey structure.

1. **Methodology:** the most critical area which must undergo change to meet the criteria of the new societal paradigm. Many consumers no longer use mail or land-base telephones as a primary, or even secondary, form of communication. Online surveys are also being phased out by the smart phone. Smart devices are the ultimate representation of the new paradigm based on connectivity and technology. Surveying consumers via smart devices allows the researcher to gather information in real-time, at
2. **Response types:** much of our marketing research continues to be one-dimensional based on rationality. Too often we continue to capture only information consistent with either attitudinal or behavioral data that doesn't venture beyond rational decisions. We tend to ignore information concerning emotions, psychological factors and biological dimensions of the consumer. We must recognize that our consumers

the location of interest and within the lifestyle of the consumer. It is a much truer experience which can simulate real-world situations. Other newer methodologies, such as social media, research communities, and mix-modal approaches, can capture the multi-dimensional and multi-sensory perceptions of consumers in ways that traditional approaches and methodologies could not dream of accomplishing.



are multi-dimensional and a true read of the market can only be accomplished if we have a complete read of the respondent—all levels and dimensions.

3. **Attribute stimuli:** most of our interviewing tools are words which represent concrete items.

For consumers, it is hard to relate words to pictures, sounds, and moving imagery. While words can describe many things, it is often not a sufficient condition in marketing research. To truly capture the thoughts and insights of the consumer, researchers should incorporate multi-stimuli items in their research design. This is a much more real assessment of the consumer's thoughts and senses.

4. **Data type:** consistent with attribute stimuli, collecting data from respondents for a single study or topic will provide results for the particular set of research objectives associated with that study, but will not provide a complete picture of the consumer. The need for "big data", in which one is assessing various types of data, is critical. Big data should not be just for heavy number

crunchers; it should be the domain of all marketing researchers in this new market-based paradigm.

5. **Survey structure:** most surveys are structured based on a series of questions and rating indicators. It is very scientific and reflects its

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roots in the experimental laboratory structure. However, most consumers do not consider, assess, or purchase products in this way, e.g. by a series of discrete decisions within a controlled environment. Much of our decision and consideration process is non-linear and not via rational consideration sets. Many customers find surveys boring and uninspiring, leading to bias, fatigue, and inaccurate data. The gamification structure has been offered as

an alternative to the rational/linear format, allowing consumers to provide data and marketing research insights based on a non-linear, non-rational and potentially pleasant experience. This allows for a more real-world assessment of the marketing research exercise and will better simulate true environment. Coupled with smart phones, gamification can add an element of real-world simulation, which traditional surveys and methodologies can never achieve.

### **A Roadmap for Impactful Marketing Research Methodologies With the New Face of America**

Given what has been outlined here, there is no turning back to the traditional approach.

If anything, change will increase significantly by the exponentially shifting forces of technology and the people who create them. Paradigms will now "shift" at an ever-faster rate as our standard approaches are unable to address or solve the puzzles<sup>1</sup> identified or uncovered by new technologies and innovations. The real questions for the marketing research discipline are twofold:

<sup>1</sup> See Kuhn (1970) for a detailed assessment of paradigms and paradigm shifts.

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1. Do researchers recognize the change and the speed of change that is occurring around us?
2. Are we enlightened or bold enough to implement changes and improvements in our research designs, methodologies, and approaches to keep abreast of the changes occurring in society?

As marketing researchers, we tend to be a very conservative group. Part of this has been driven by our adherence to the scientific method and our need to “prove” (or at least “falsify”) approaches beyond a reasonable doubt, before we accept or use them for “real” marketing research studies. Another restraint for innovation and development has been the noticeable lack of cooperation for progress among the three major principles of the discipline: clients, research agencies, and the academicians. We require more resources, time and effort spent on joint “research-on-research” endeavors for the development of new techniques, methods and approaches in order to arm our marketing research professionals with the tools and techniques they require within the context of the new America. Many times, we are too busy conducting marketing research, addressing key business problems or teaching to fully realize that our methods, approaches and techniques are out of date or not gathering critical consumer insights. What we require is more bold leadership and testing of the various approaches and methods which can and will more accurately gather key consumer findings.

Without leadership and inspiration, where will our discipline be in five years? Think about the Italian Renaissance as an example. If we did not have the thinking and insight of Michelangelo, Leonardo da Vinci, or Botticelli; where would Western civilization be in terms of artistic development and a reflection on humanism? What we require is the same for marketing research.

We have the initial ideas and concepts for a marketing research platform which is in alignment with the new respondent, e.g. one based on multi-sensory, behavioral, and emotional content, driven

by technology-based communications and access. Our main problem is the unevenness of development, testing, and acceptance of these approaches. The marketing research discipline needs to

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facilitate a working arrangement between research agencies, major business firms (clients), and the academic world to facilitate this innovation and testing format.

Given the rapid change in characteristics and behavior in the U.S. market, it is imperative that the marketing research industry create a strategy for the development, testing and implementation of new research methods and techniques to adequately address the multi-dimensional nature of our respondents. We propose that this be conducted jointly by businesses, research agencies, and the academic world. Each of these participants will be able to provide thought power, resources, and systematic development approaches which will be able to address the new critical of society. In the long run, each of the participants will benefit significantly with this strategy. Testing will be both regular and rigorous with results that can be systematically peer-reviewed. Finally, an endorsement by all three of the major participants will allow for a timely and even launch of new methods; removing serious doubts, questions, and conflicts due to test results which are valid and reliable.

Our time as researchers is short. The changes driving society at the individual, group, and national level are great and are coming at much shorter intervals than in the past. [Just as] in our society, we are

experiencing major disruptive changes to our evolutionary process (similar to the Theory of Punctuated Equilibrium in the paleontology discipline<sup>2</sup>). Failure to keep current and develop approaches and methods to address these changes will only result in the irrelevance of the marketing research discipline.

Let's evolve together and learn from the new consumer. There is much more at stake than just our discipline. The competitiveness and innovation of the entire American economy (and we would argue, our entire nation) is dependent on our actions. Let's not decline to become a lost footnote of history.

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<sup>2</sup> See Eldredge, and Gould (1972) and Gould (2002), for an assessment of Punctuated Equilibria.