Automation and Market Research
A journey, not a destination

A review of the impact of automation in market research

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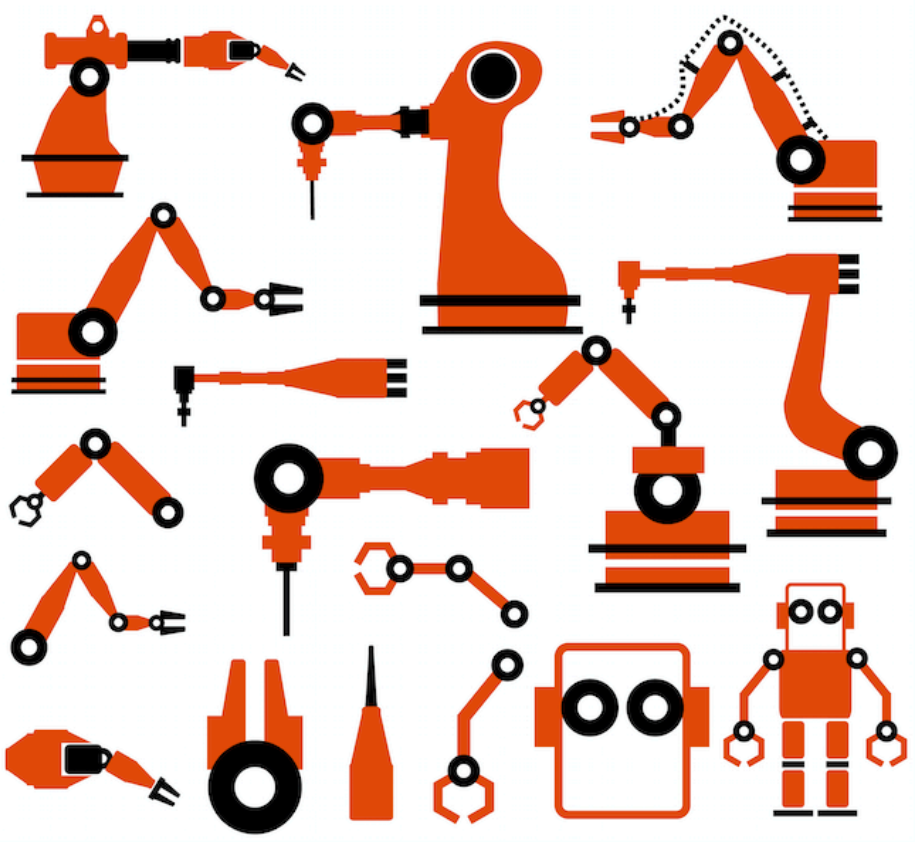

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Executive Summary

- Automation in market research will continue to evolve and accelerate.
- Automation makes things faster, cheaper, and sometimes better. Clients not suppliers determine quality.
- Automation will result in more research being conducted, a growth in evidence-based decision making, at a lower cost per project.
- Automation will continue to generate winners and losers. Be an automation winner – for example by leading to adoption of innovation.
- Clients often value speed more than cost savings, as shown in interviews with Valspar and T-Mobile.
- Most people agree that the benefits of automation are doing more with less, faster, consistency, and sometimes quality.
- The problems that people fear from automation are less focused, but people accept that more automation is inevitable.
- I predict that 40-60% of existing market research jobs will disappear over the next 5 to 10 years, but something like 20-30% new research jobs will be created.
- Artificial Intelligence is going to have a major impact on market research over the next 5 to 10 years, having an impact on areas like qualitative research, research with images/video and creativity.
- Increased automation will result in more business problems benefiting from research.

This report has been written by Ray Poynter, drawing on a wide range of views, contributions and interviews.

The project was sponsored by ZappiStore.

Why Automation?

A good example of the benefits of automation can be seen by looking at the automation of glass blowing. The first commercial automated glass blowing system was introduced in 1905, credited to Michael Owens in the USA. Automation meant that the number of bottles produced per person increased by about 600%. The price of bottles fell to about 8% of the previous cost. Bottles no longer needed skilled blowers of glass – which meant it was quicker and easier to recruit additional workers. The improved consistency and reduced cost of the bottles helped create a range of uses in food and drink. The result was that thousands more people were employed in the glass industry, food, drink and medicines became safer, cheaper and more available.

The automation of glass blowing highlighted many of the advantages of automation, automation can:

- Reduce the costs of production.
- Increase the output per person.
- Increase the quality/consistency of products and services.
- Remove the need for special skills.
- Increase wealth, both in a narrow financial sense, but also in the wider sense of enabling food, accommodation, safe water, education, and the arts to be provided and afforded.

However, automation usually creates losers as well as winners. In the glass blowing example, skilled glass blowers lost their special position and companies competing with the automated companies struggled. Automation of glass blowing created wealth, employment, and helped advance society, but it also meant some people earned less, some lost their jobs, some lost status.

This report looks at automation from the perspective of market research and insights. The report draws on lessons from beyond research and insight where relevant, with the aim of creating a clearer picture of the impact automation is having on market research and insight and the people who work within the sector or who benefit from the results of research and insights.

From Brawn to Brain

Automation initially impacted unskilled manual labour such as agricultural workers, for example using power from horses and flowing water. Later, particularly through the industrial revolution and into the 20th Century, automation impacted skilled-labour, for example glass blowers, spinners and weavers, and the makers of machines (from steam engines to cars).

From the 1950s onwards automation started to tackle repetitive white-collar jobs (for example in banking and finance). The impact of automation on office workers was very similar to the impact of automation had been on brawn; costs decreased, consistency increased, the range of services increased, and for the first 40 to 50 years of automation the total headcount increased because of wider economic

growth. But, within that total growth there were also plenty of losers, such as the staff of smaller branch offices, and into the 2000s the total headcount started to fall.

Henry Ford to Post-Ford

One of the most powerful examples of automation is the car industry. The earliest cars were made by hand, the automation processes of people like Henry Ford made cars cheaper, more reliable and easier to maintain. The consequence was the massive growth of the car industry, employing millions, creating wealth, and changing society. But, over the last 30 years the continued growth of automation has massively reduced the number of people working in the car industry as the growth of the sector can no longer outpace the efficiency growth of automation.

In the early days of automation one feature was reduction in choice, 'any colour you want as long as it's black' for example. As automation in auto-manufacturing became more sophisticated choice expanded and continues to expand.

Automation Today

Automation continues to develop and is in the process of becoming much smarter. In some industries, such as steel making, automobiles, and banking the impact over recent years has been to cut headcounts dramatically. In other areas, such as programming, data visualisation, and the gig/sharing economy automation has been expanding employment.

From robots in our factories, drones carrying out a growing range of tasks, automated testing of blood and DNA, and the AI of smartphone assistants such as Siri, automation is continuing to shape and reshape the workplace, the economy, and society. Automation is a journey, not a destination.

Automation and Quality

Automation that succeeds always reduces costs, increases speed and usually increases consistency, but its impact on quality is more varied. In the case of things like computers, contact lenses and engine parts, automation generally produces a superior product. In the case of meals, music and high fashion automation generally produces a product with lower quality than humans.

In most cases where the quality of products or services produced by automation is lower than that produced by the average human provider it is because of one or more of the following:

- The automation is not yet mature, so it can only produce an inferior product.
- The market has decided that it is willing to buy a cheaper inferior product.

In the end, **it is clients who should and do determine whether a solution is good enough for a particular purpose**. It is not the role of vendors to tell clients what they should buy.

In some situations, and for some people, the consistency that is often associated with automation can be seen as a negative, for example identical houses, clothing, ceramics etc. In other fields the consistency is seen as a key attribute, for example in the production of computer chips, banking services, and pharmaceuticals.

In many cases the product or service produced by the best humans remains superior to that of machines. However, the price difference between these sorts of premium products and the automated product is usually too large. There has been a growth in recent years in products described as 'artisan', i.e. produced by skilled craftspeople, for example bread, cheese, and beer. These products are typically more expensive and less consistent.

DIY and the Impact of Automation

Another disruption/innovation/change caused by automation was the creation and growth of Do It Yourself options (DIY). For example, ATM devices (Automated Telling Machines) meant we could collect cash without needing bank tellers, changes in word-processing meant that most white-collar workers started to do their own typing. More recently this trend has led to self-service tills in shops.

The impact of DIY automation is often referred to as disintermediation, the removal of intermediaries. Familiar examples of roles impacted by this disintermediation are: travel agents, insurance salesmen, and bank tellers.

More recently, the DIY impact of automation and disintermediation has expanded into other areas such as the creation of DIY platforms (for example travel websites, eBay, Airbnb) and higher-end functions such as automated trading, journalism, and programmatic advertising. The creation of the 'gig economy' for example drivers working for Uber, is another extension of the DIY/automation process.

This DIY/disintermediation is reducing costs, increasing the availability of services and putting people more directly in charge of their lives.

Market Research's Long Acquaintance with Automation

Market research has a long history of using automation, but it also has a long history of beating itself up about not being innovative, something that I believe is more grounded in attitude than fact.

Market research's use of automation extends from punch cards to print rooms for paper questionnaires, to optical scanning to read questionnaires, to computer-aided telephone interviewing, and of course the rise of Internet data collection and now smartphones. Each of these examples of automation created winners and losers and quality did not always improve – think of the on-going concerns surrounding online panels.

Automation In MR Is All Around Us

Automation is already a major factor in market research and its scope and impact is going to accelerate over the next few years. In this section of the report I draw upon the views of opinion leaders from around the research industry and around the world.

Opinion Leaders Crowdsourced Views

The topic of automation was discussed with a range of market researchers and the key findings are set out below.

Automation is impacting the whole organisation

Our crowdsourced team highlighted that automation is impacting every aspect of organisations, for example people cited: salary payment, e-payment, e-booking, leave approval. A good example of automation in the business is sales, where tools like Salesforce have automated many of the processes, increasing both effectiveness and the ability of management to oversee the process.

Key recent impacts of automation on MR

Key recent impacts include digital-based data collection tools (fewer roles for interviewers), new approaches such as automated facial coding, **MROC** management, social media listening and the use of apps with smartphone-based research.

Amongst the providers of research services quotation protocols and sampling/quota management are highly automated, as is some survey creation and data processing. Projects are increasingly using automation to enable participants to move from one aspect of a study to another without manual intervention.

Repeat tasks are being automated for example the fielding of **Millward Brown's Link** test is now almost completely automated saving enormous amounts of time.

Automation has increased engagement in some cases, for example in real-time tracking automation has enabled the data gathering to be seamless and painless for the participants, leading to enhanced engagement.

Automation Strengths

One of the interesting things about discussing the benefits of automation is that the list of benefits that people mention tend to be quite small, but contains some very important items. The most widely agreed element is 'Doing a lot more, faster, with less' (fewer people and/or less money).

Other benefits include increased productivity of analysts, reduction in errors, more thinking time, less process. In addition people mentioned improved dissemination and sharing, standardising (allowing mix and match).

Automation Weaknesses and Challenges

Some people mentioned standardising as a benefit, but others mentioned it as a negative, particular when it pushes out better solutions, or where it makes better solutions more expensive (because there are fewer people who can offer them).

Some automation is 'black box' which means that quality is harder to manage and making the right choice is riskier. Indeed the speed of change and automation means that making the wrong choice is becoming a bigger problem, as is not making a choice.

If the reporting is automated, but the data entry on the frontline is manual, the system can look more correct and useful than it really is, leading to faulty decisions being made. Automation needs to ensure that the elements being automated are quality checked. Automated data visualisation can fall short for non-standard projects.

Where is Automation Heading?
The crowd shared their short to medium-term aspirations for automation. Key opportunities were:

- An integrated picture of the customer, with data coming from many sources, being stored in an accessible format, and interrogated with automate tools.
- Increasing the ability of skilled staff to conduct more research and spend more time on insight, because they are spending less time on admin, repetition and error checking.
- Allowing MR companies to be more competitive, including with non-MR companies.
- Developing MR approaches that connect to the tech-driven changes in consumers' lives, e.g. app-based approaches.
- Creating 'lite' versions of products with a low price or subscription model.
- Allowing analysts to work on more projects and spend more time doing analysis and less on design and logistics.
- Allowing researchers to handle much larger quantities of data, utilising standardisation, automation, and processing power.

Automation Threats
Key threats include:

- Automation means changes, and not everybody likes change.
- Artificial Intelligence (AI) may overtake large parts of current automation, making current automation redundant.
- Automation may tend to report the simple truths, not the key ones.
- If research buyers are replaced by AI systems, then the human element in the supply of MR may be less relevant.
- The 'cost reduction' mentality may spill over to tasks that can't (yet) be automated – taking some good solutions off the table.
- Potential for a dominant supplier to appear and distort the market (like Google in online advertising).
- The life cycle of some new tools may be too short to make money.

- Risk of annoying customers (i.e. the customers of the research clients) and customer backlash.

Acknowledgements
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A younger perspective on automation was eloquently set out in an ESOMAR blog post by Helene Protopapas from Nielsen. Helene disputes the notion that it is good for younger researcher to spend hours checking data as part of the learning process, arguing for a 'different and high-intelligence starting point'.

The GRIT Report

The latest wave of the GreenBook GRIT study included a section on Automation in market research. **The GRIT report confirmed that automation is in action all around us, with many organisations using automation platforms for a variety of uses**.

Automation in Use	%
Analysis of survey data	42%
Charting and infographics	41%
Analysis of social media	35%
Analysis of text data	35%
Sampling	33%
Survey design	29%
Online focus group/IDI moderation	24%
Report writing	22%
Analysis of image and video data	20%
Project design	19%
Attribution analytics	13%
Matching suppliers and buyers	11%
Analysis of biometric/non-conscious data	10%
Matching contract "talent" to projects	8%

Base: 924

The table shows the percentage of GRIT participants who are already using automation platforms to conduct a variety of tasks. The table is ranked from most popular to least popular.

Initially, the finding that over 40% of respondents are already using automation for analysis of survey data and for charting/infographics may seem surprising – but most survey platforms these days offer a variety of automated options for producing results and for outputting standard sets of charts and outputs. Indeed, this finding makes the point that automation is less of a binary divide and more of a continuum.

The number of people using automation will grow, but so will the breadth and depth of what the automation delivers.

We might see some rapid changes, like the impact of Henry Ford on Cars or Michael Owen on glass blowing. However, it might have quickly but with large visible disruptions, we need to plan for both possibilities.

The bottom end of the GRIT table, for example matching 'talent' to projects and analysing biometric/nonconscious data is partly (or largely) driven by the fact that most respondents are not involved in this sort of work. Because most participants are not doing this sort of task, they are not doing it manually or through automation.

The Client-side Perspective

In addition to the crowdsourced feedback and the GRIT review, I conducted interviews with two users of ZappiStores automation (Brian Ley at Valspar and Don DiForio at T-Mobile both based in the USA) to gain another perspective. Here is a summary of what I found.

Both Valspar and T-Mobile are using automated products from ZappiStore to test ideas, concepts, and advertising for some of their research needs. These tests are characterised by being fast, inexpensive, and highly standardised (e.g. there is little or no scope to change questions, reporting etc.).

The main benefit that Brian and Don quoted for these automated approaches meant that it enabled them to respond to requests from stakeholders in the business who wanted to conduct quick research to support a business decision.

I asked Don and Brian about whether the highly standardised nature of these automated tools was a problem and they both replied in a similar way. Quite often the standardised test format was an advantage, a stakeholder might want to do the test and want to change some of the questions, normally this might lead to a discussion about the merits of the idea and then delay while the changes were made. With standardised tools the options for the stakeholder are simple a) use the test as is, b) don't test, c) pay more and take longer to get a tailored solution.

I pressed Brian and Don about whether the key benefit of these automated approaches was the money saved or the gain in speed. They both replied that the money saved was important and appreciated, but that most cases it was the speed that was the key benefit.

Asking about the sorts of situations where they would not use these automated tools brought a variety of cases, for example qualitative research, where a bespoke strategic study was needed, where advanced techniques were wanted, and where access to background data (such as Link benchmarks) was important.

Both Don and Brian expect more automation options to become available, with more linkage to integrated data, fewer long surveys, and a more customer-centric way of gathering information.

Automation And A Wider Context

In this section I look at a number of topics related to automation and introduce the issues surrounding AI (Artificial Intelligence).

Automation, Standardisation, and Agility

Before 1841, i.e. right through the main part of the Industrial Revolution, there was no standard for the size of nuts, screws, bolts etc. Each blacksmith, company and factory used their own range of sizes, which severely limited the ability for machines to interact and made maintenance harder. However, in 1841 Joseph Whitworth introduced a standard that went on to become BSW (British Standard Whitworth).

Equipped with this standard, parts for machines could be built by different companies and assembled, and repairs could take place where a breakdown occurred, not where manufacture happened. Manufacturing started to shift to an agile model, where parts could be made as needed and when more parts were needed it was possible to commission additional suppliers.

Good automation requires standardisation. It is the standardisation and adoption of TCP/IP that makes the internet work, and the standardisation and adoption of HTML that makes the World Wide Web function. Whilst market research has generally been good at adopting automation, it is has failed to create the necessary standardisations. There is no agreed standard for machine interpretable survey definitions and there is no agreed format for output. Indeed, a large amount of market research outputs are locked away in PDF, Excel, PowerPoint, Word, and proprietary platforms.

If market research is to maximise the benefits of automation and AI it needs to adopt standardisation.

The Paradox of Automation and Increased Employment

In Western society, fears and concerns about automation creating job losses and social disruption date back to the early 19th Century and the Industrial Revolution. Because of the industrial revolution, across the wider economy, more people were employed and more people were better fed and clothed. The economy won, many people won, but some people lost.

The history of automation shows that there are usually winners and losers. The losers are often easier to identify, as they are the people who lose their jobs or resources. The winners are often those who most-effectively deploy the new technologies, those employed by them, and those who use the services and products. If we look at the early 20th Century and car building in North America, the losers were those who built cars on a small scale or focused on horse-drawn vehicles. The winners were companies like Ford and Chrysler, the hundreds of thousands who found employment in the Detroit area building cars and supplying the auto industry, and of course the millions of people who were able to buy a car.

Automation initially tackled manual tasks (such as building cars and harvesting fields), the second wave tackled repetitive tasks (such as giving cash to customers of banks) or tasks where people could serve themselves (such as booking holidays and travel).

The next wave of automation is tackling more complex jobs, including many that were thought to be 'creative', such as:

- Media buying – being replaced by programmatic advertising.
- Journalism – being replaced by AI and crowdsourcing.
- Retail – shifting the focus to online, and from shops to warehouses.
- Hotels and taxis – with Airbnb and Uber shifting the model to self-employed.
- Market research – with DIY platforms like SurveyMonkey and pre-packaged solutions like those from ZappiStore .

Other sectors that look likely to be massively impacted include: solicitors, accountants, HR professionals, middle-managers, and designers. One interesting prediction and indication of the impact on the creative industries is that the rise of automation, computer animation, AI etcetera could massively impact the movie business, including the role of actors. In the future Brad Pitt and Kate Winslet could find they are increasingly competing for work with AI versions of Humphrey Bogart and Lauren Bacall.

Artificial Intelligence

Your smartphone and computer are likely to be using Siri, Cortana or Google Now. These are personal AI assistants that interpret what you are saying and provide solutions to take actions. Other applications of AI that surround us are search engines, image recognition (e.g. Google Goggles), spam filters, online help bots and telephone bots, and online ad targeting.

At the high profile end of the spectrum there are examples like Google's Driverless Cars and the recent Go competition between Korean Grandmaster Lee Sedol and Google's AlphaGo, won by the bot. There are also some interesting developments in AsiaPacific, advertising giant McCann has hired an AI bot to be a creative director in its Tokyo office, and Hong Kong venture capital firm, Deep Knowledge Ventures, appointed a bot to its board in 2014.

Self-driving cars are already on the roads of California, at limited speeds and with occasional bumps, but this is a technology already in place. The impact, once it is cheap and competent, are likely to spell the end of taxis and perhaps even private car ownership for most of us. One of the many aspects of self-driving cars that is already in widespread use is SatNav navigation.

Self-driving cars and Uber provide an interesting perspective on how automation can work. Uber itself is a disruptive innovation based on automation, drivers become self-employed 'partners' using an app, disintermediating the traditional taxi companies providing a service that out-competes traditional alternatives – and which in many cases has increased the total number of people employed driving people around. However, Uber has forecast that in the future all of its cars will be driverless, reducing employment as a driver.

Automated Journalism

AP (Associated Press) has been using automated to increase capacity and reduce costs. According to Journalism.co.uk, AP's business reporters were producing about 300 stories per quarter on topics such as net income and sales. Since automation,

the volume of stories has increased to 3,700 per quarter. AP have been able to use this automation to move their skilled resources out of churning out earnings reports and into hunting for stories that go beyond the bare numbers.

The AP use of automation provides some interesting insight into timelines. AP started testing automation in 2012, but it was not until 2014 that AP started to use automation for semi-live testing. The first step was to let automation produce the earnings reports, but the journalists checked and if necessary fine-tuned the copy before it was published. By October 2014 AP were able to move beyond this double-check system and increase productivity.

The AP are hoping to soon reach 4,700 reports per quarter, and beyond that be able to use their automation journalism on any topic that uses structured data.

AI and Market Research

AI has been relatively slow to take off in Market Research, due to the lack of relevant tools. However, I think there are signs that this is about to change. I think we will see several AI incursions into market research over the next five years and I think key ones will be:

- Text analytics. This has been improving for years and where are at the tipping point. With text analytics in place the balance between open and closed questions (and between qual and quant) will shift. We know that open-ended question are usually richer, but closed question (e.g. a 5-point) scale are easier to process. When we can process the open-ends we will encourage them not avoid them.
- Image analytics. When researchers ask participants to take pictures we normally only ask a few of them, and when we ask them to take a video we normally ask only a very small number of people and ask them to limit it to 30-40 seconds. These restrictions are because it takes so long to process images and video, using humans. But the tools to process images and video with bots is coming on stream and this will also change the tasks that researchers ask participants to do.
- Project design. This is likely to be achieved by creating a Q&A system with users that suggests research routes and once a route is agreed the bot will create the survey, commission the research, and interpret the results. This is close to what some systems (including many of the ZappiStore) products do, but it goes to the next step. Current systems have a limited range of options and the approach is relatively formulaic, the next step is to widen the choices and to make the interpretation more intelligent, including utilising the open-ended responses.
- Complex Analytics. Data sets are getting larger and more complex. Data sets for things like customer satisfaction and brand tracking are also becoming more fragmented as people seek to shorten surveys, add in a Big Data, and interrogate social media. This sort of complexity needs AI to make it practical and cost effective.

- ModeratorBots. Most online discussions and online communities are limited in size because of the need to have humans as moderators. This is changing and chatbots are becoming more common. Chatbots, based on text recognition and AI will create a range of new options for online discussions and communities. This shift, like others above, will encourage the collection of more data which in the past has only been processed qualitatively, but which can now be addressed by AI.

Automation Today, Three Big Trends

The three big trends in automation are:

1. Robots, devices that work without a person being there, for example driverless cars and trains, automated hotel check-ins, drones, and robots in factories.
2. Platforms, apps and software that are disintermediating tasks and markets, for example Expedia, ZappiStore, Lift etc.
3. AI, automation that tackles tasks like analysis and creativity and which can mine data to avoid fraud, design research, or suggest business strategies.

The Next Five Years

In this section we have asked leading voices in the market research and insights industry to tell us in a very short form their predictions for automation over the next five years.

- One
- Two
- Three
- Four
- Five

Automation In MR, A Journey Not A Destination

Pulling together the threads in this report I think we can see that automation has been happening for years, is happening now, and will happen in the future. The question is not whether automation is a good thing, but how to make good things from the process of automation.

The following points show the different ways that automation can and is being used to deliver better outcomes.

- **More research**. The reduction in costs and the increase in speed brought about by MR automation has resulted in more research being conducted. The growth in DIY tools like SurveyMonkey and of research communities illustrate what happens when the marginal cost of research is reduced and the speed of execution is increased. This trend will continue as automation becomes ever smarter and more widely available.
- **Improved Consistency**. During the interviews I conducted for this report, it became clear that many people wanted the stages before them and after them in the research process to be automated. They wanted their inputs to be more reliable and consistent, and they wanted to know that their outputs would reach their intended recipients without being distorted or corrupted. This highlights one of the key benefits that automation can provide, namely consistency. With consistency it becomes easier to assemble different components together to create a better total.
- **The Agile Research Paradigm**. The agile paradigm when applied to research requires automation and will benefit from further automation. The agile process we are talking about is one based on more tests being carried out, feeding back into the business process, allowing the business to adapt and optimise the outcome. For example, during concept development, market entry, or customer centricity programmes, an agile research approach would be testing ideas and feeding information back to the people designing and running the project. This research paradigm is very different from the traditional big project approach and is a better fit with the way many organisations are now seeking to work.
- **Improving Productivity Of Consultants and Analysts**. There seem to be two things that the users of research really want. They want faster/cheaper research and they want more consultancy/advice. At first glance these two look contradictory, but automation (including AI) can help provide this combination. With automation taking care of the details and logistics, analysts and consultants (qual and quant) can focus more on the client, the business problem, the interpretation, and the advice. As we move forward, system commands along the lines of ‘Chart that’, ‘Verify that’, ‘Compare these’, ‘Find exceptions to this’ will increasingly reduce the need for consultants and analysts to depend on a chain of other skills, freeing them up to focus on their key tasks.

Being An Automation Winner, Not An Automation Loser

In drawing up this report I have come to several conclusions:

1. Automation is an accelerating trend, within market research and in the wider society. Most automated solutions to current problems will only have a short lifespan before being replaced, perhaps 3 years from adoption to replacement in many cases.
2. Automation will displace large numbers of jobs within the market research industry, and many of these jobs will be professional, skilled jobs. As I have said elsewhere (Poynter, 2016), my estimate is that over the next 5-10 years 40-60% of existing market research jobs will disappear, but I also expect 20-30% new research jobs being created.
3. Business choices about how to use research will increasingly be shaped by the possibilities offered by automation, which will lead to more fast projects, more test and learn (or agile, or trail and error depending on your preferences).
4. More people will be conducting research. Most parts of an organisation want to connect with and hear from their customers. The start of this trend was DIY platforms like SurveyMonkey, but these still require people to be able to design and analyse surveys. The next step will be fully-finished, shrink-wrapped solutions that people in NPD, Sales, Operations, HR, Finance etc. can deploy without having to study market research and its tools.
5. Geography will continue to decline as a key factor, a trend greatly accelerated by the adoption of online surveys and the use of international panels.
6. Automation will produce more standardised research; AI will produce smarter research. Automation will favour well-organised companies; AI will favour smarter companies.

Given these observations, what is my advice for companies and individuals want to be automation winners, rather than being automation losers?

Advice For Clients

My key advice for clients is to focus on what the real blockers are, not on the technology. For example, do your key stakeholders need faster results, better results, deeper results etc. Another element to consider is how much of your time can be saved? Using a standardised tool can reduce the amount of time you have to spend liaising with internal clients and suppliers, giving you time to address issues like strategy and insight.

Research is becoming more democratised. More departments are conducting their own research, often using DIY tools. Automation can help in this process because it can give you more time to focus on colleagues and advice, and less on the logistics of research.

But, you need to stay ahead of the game. You need to know more about the research tools available than your non-research colleagues. This means one or more of conferences, webinars, supplier events, magazines, blogs, and books. Two handy resources for keeping up-to-date with trends are NewMR and the GreenBookBlog.

Advice For Suppliers

My first piece of advice is that unless you love high risk, high reward strategies, do not take any big bets. Most of the profits that happen over the next few years will related to technology and automation. However, most of the changes that will happen will fail, the rate of attrition will be high.

My second piece of advice is not to bite off more than you can chew. Take tasks one or two at a time, implement automation and move on to the next tasks. When choosing what to automate, my advice is to try to get it to pay some positive ROI in the first year. Many of the automation changes are only going to last 2-4 years before needing to be changed again, you don't want to keep a system just because you haven't finished paying for it.

Expect to grow the size of your tech/IT team – as we go forward you will probably need more people in the tech/IT area. This seems odd since outsourced, SaaS (software as a service) is the big trend, but it always seems to end up needing more tech/IT people.

Advice For Individuals

Some jobs will be more at risk from automation, for example working on repetitive projects (e.g. tracking and customer satisfaction) and working on repetitive tasks (like scripting surveys and coding open-ended responses).

The key roles that I think will benefit from automation are:

- People involved in installing, training and promoting automation platforms.
- People focusing on people, for example client success managers, account managers, ethnographers, and sales teams.
- The people who are increasingly being referred to as 'talent', for example great presenters, good leaders, out-of-the box thinkers, designers, video editors etc.
- People who can create non-linear solutions to problems. Automation and AI will tend to create ever more prescriptive boxes and the people who can think outside these restrictions will be of increased value.

Closing Thoughts

Automation is happening, it will continue to happen and it will change the way you work. Market research automation and AI have the opportunity to expand the role of evidence-based decision making. Faster/cheaper research facilitates new ways of working, moving away from the 'big project' approach to an agile, learning approach.

In the past automation has mostly impacted manual or junior staff. In the future it will also impact senior and creative staff. There will be winner and losers, so you want to be one of the winners.

The best place to be is to be the person creating, implanting or using automation. The worst place to be is the person doing the same thing they were five years ago.

References & Resources

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Resources

NewMR – NewMR have a vast library of webinars (recordings and slides) on research topics on their Play Again page and produce a weekly Newsletter.

GreebBookBlog – the GreenBookBlog is edited by Lenny Murphy and has a cutting edge post every day.

Ray Poynter, Winning the Research Revolution, 2016, Vision Critical, https://www.visioncritical.com/resources/research-revolution/

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