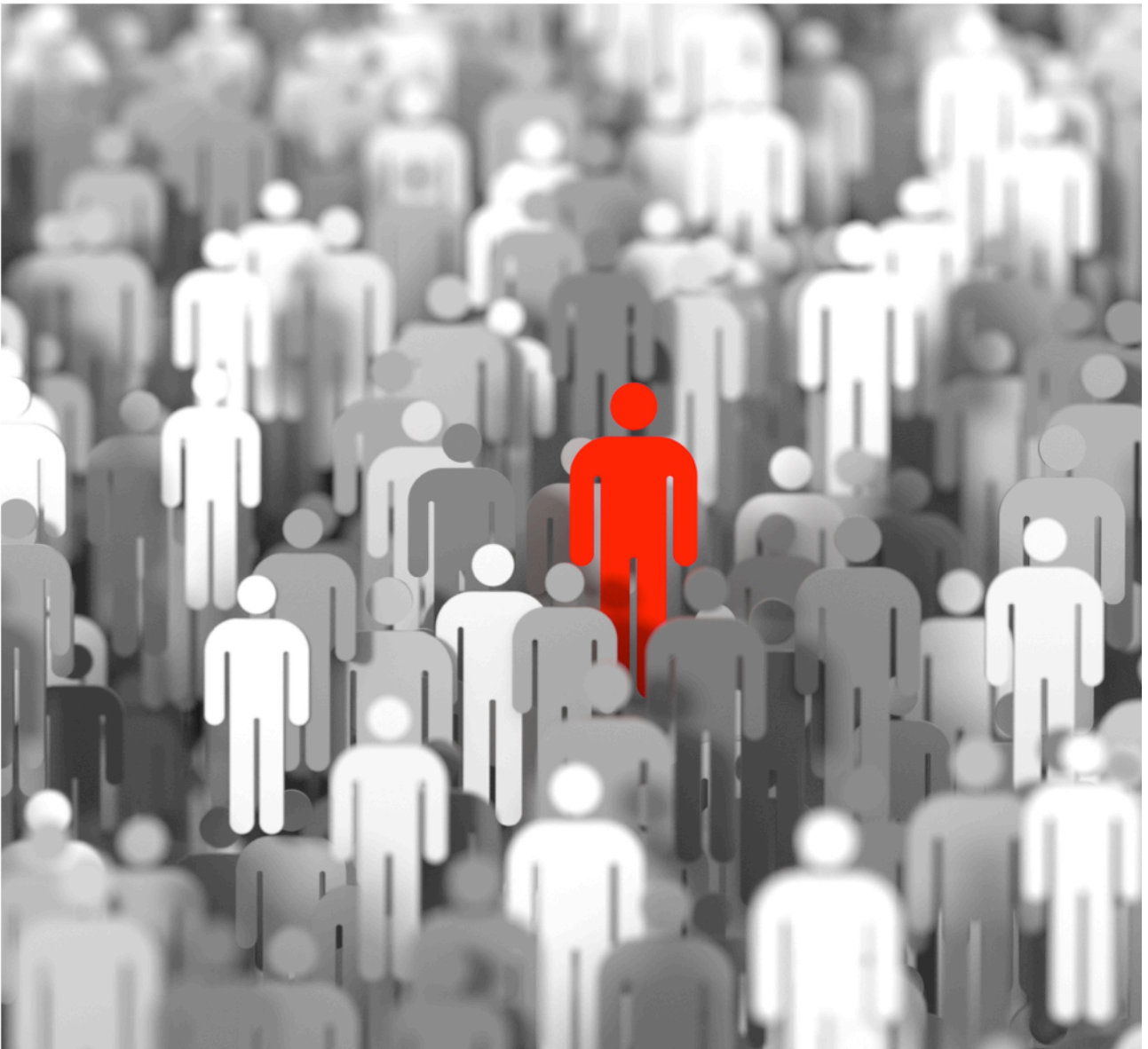


#NewMR

Market Research Skills and Training Study 2018 Japan Edition



Ray Poynter & Sue York

Executive Summary

This report looks at market research training in Japan and contrasts that with the situation globally. The study is based on a global study of 1108 market researchers, collected between April and June 2018, 129 of whom were from Japan.

The global report can be downloaded from goo.gl/BPVF9g.

Key Findings

The main story is that too many market researchers, globally and in Japan, are not getting the training that they (and the industry) need.

- In Japan, 50% of researchers receive less than 6 hours training a year (globally the figure is 39%).
- Only 10% receive 6 or more days a year (only 18% globally).

Our recommendation is that (in most cases) the minimum level of training for market researchers should be three days per year. This is in many ways a modest figure, but it is more than two-thirds of people working in market research are receiving at the moment (only 22% of researchers in Japan currently meet this target).

In Japan, 28% of researchers are not sure if they are receiving enough training (and 43% are sure that they are not receiving enough training). We recommend that the industry (organisations like JMRA, groups like JMRX, and leading agencies such as Intage, Macromill, Cross Marketing and Rakuten), establish clear guidelines for the amount of training researchers should receive.

We recommend that researchers are loosely divided into two groups, Learners and Mavens (i.e. standard and advanced), and recommend that Learners receive three days a year training and Mavens receive at least six days.

Two key areas for development in Japan are webinars and other forms of e-learning. However, to make these viable it is important that Japanese language versions are developed and that employers make it clear that watching a webinar or attending an e-learning session is work, and should be completed.

One issue for training in Japan is language. In the longer term, Japan's market researchers need to enhance their English language skills (most global research is organised and analysed in English). Attending training sessions and courses in English can be an aide to improving English-language skills – however it can make learning slower and less accessible. In the short term, there needs to be a growth in Japanese-language training courses and options – especially webinars and e-learning.

The core training needs in Japan, for market researchers, are:

1. Core quantitative research skills (including survey design, sampling and analysis).
2. Story finding, insight finding, and storytelling.
3. Advanced techniques, such as big data, artificial intelligence, and digital technologies.

Introduction

This report looks at market research training in the context of Japan and contrasts it with the NewMR Global Report (downloaded from goo.gl/BPVF9g). The study was conducted in April to June 2018, with global total of 1108 market researchers, with 129 from Japan.

The project was run by NewMR's Sue York and Ray Poynter and supported by a wide range of people, to whom we offer our thanks. In Japan we would specifically like to thank Mr R Sano, Ms T Yoshida, Ms N Kishida, and Mr S Kishikawa.

Amount of market research training

Participants were asked how much training they had taken part in. Table 1 below shows the amount of training reported.

	Global		Japan	
	Total %	Cumulative %	Total %	Cumulative %
No Training	24	24	33	33
5 hours or less	14	38	18	50
6 hours to 2 days	25	63	28	78
3 to 5 days	17	80	12	90
6 to 10 days	9	88	5	95
11 to 20 days	5	93	2	97
More than 20 days	4	98	2	99
Not sure	2	100	1	100
Base	1108		129	

Table 1

Table 1 shows that in Japan one-third of participants said they had received no training in the last 12 months, half said they had received less than six hours training, and 78% had received less than three days of training. The recommendation from NewMR is that in a knowledge-driven profession like market research, the target should be three or more days a year of training, at a minimum.

The global situation, with respect to training is poor (63% receiving less than three days) and the situation in Japan (78%) is a little worse than the global average.

Was Amount Adequate?

Participants were asked if they felt the amount of training they had received was sufficient or not sufficient. The results are shown in Chart 1.

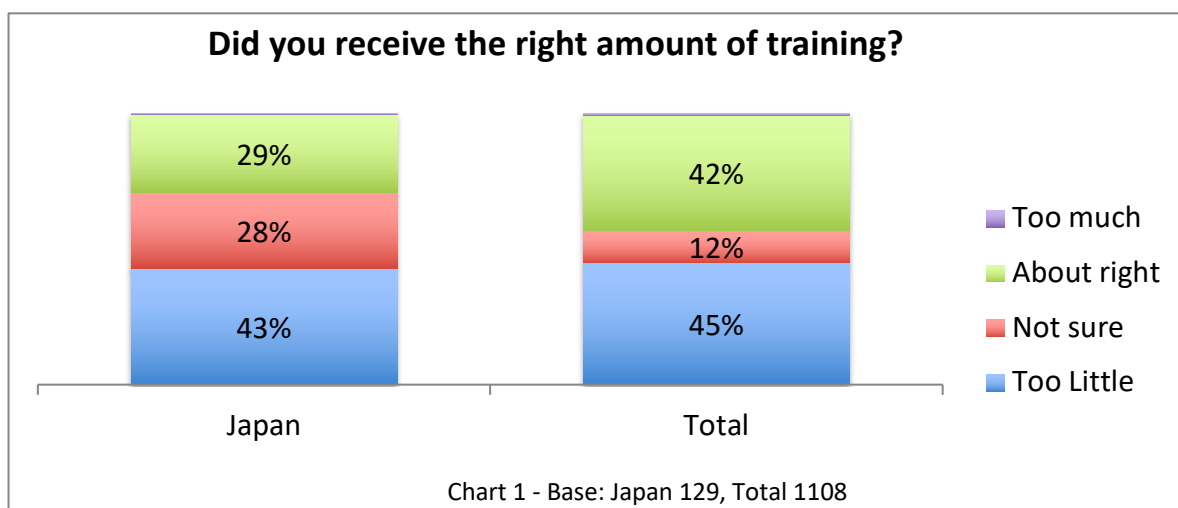
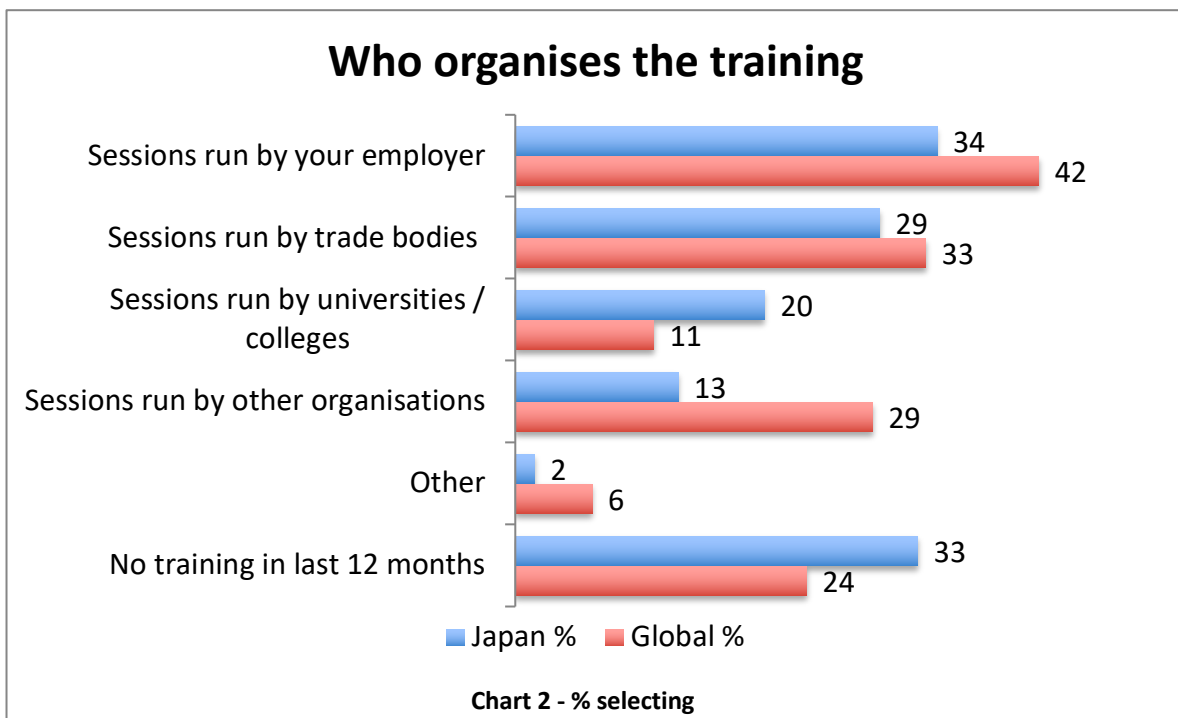


Chart 1 shows that in Japan nearly half of the participants felt they did not received enough training – a very similar number to the global figure. However, it is worrying that 28% of participants in Japan said they were not sure whether they had received enough training. This suggests that more work needs to be done in Japan to establish targets for training and then to publicise them.

In terms of hours of training received and in terms of perception, market researchers in Japan are not receiving enough training to create an industry focusing on being ‘value added’.

Training Formats and Providers

Chart 2 shows that the most popular setting for training is ‘Sessions run by your employer’, but only 34% of participants report receiving this sort of training, compared with 42% globally.



Key differences between Japan and the rest of the world include more use of sessions run by universities/colleges and less use of session run by other organisations. The key recommendation here would be to explore more use of sessions run by other organisations.

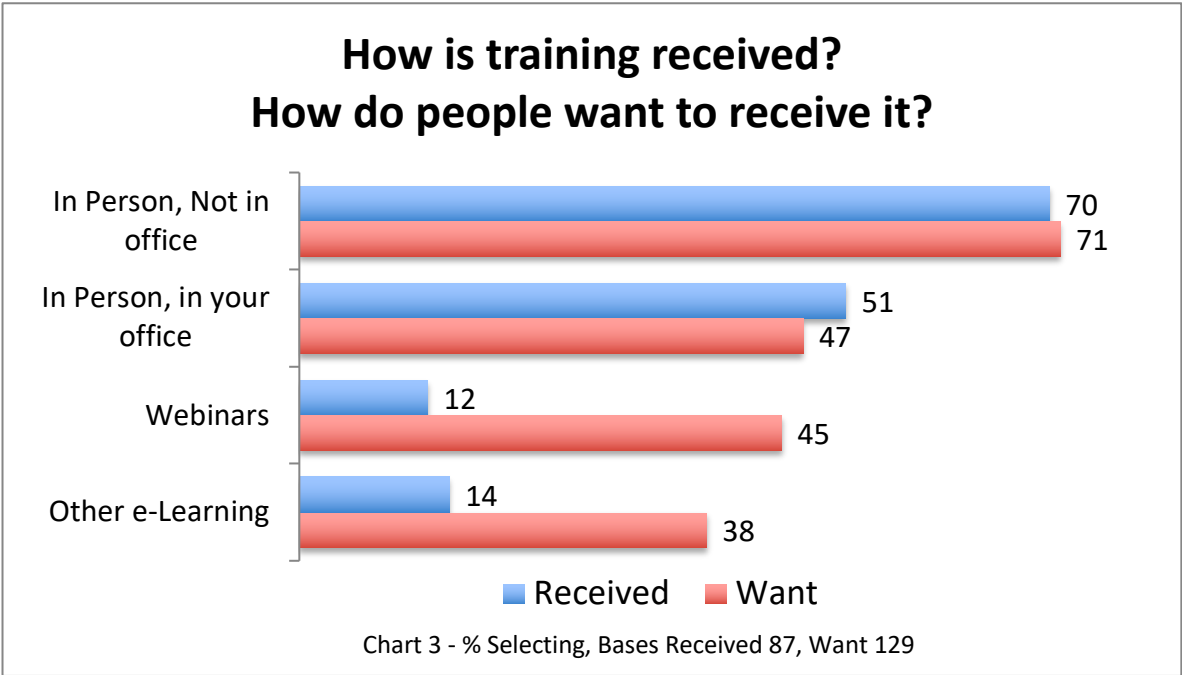
How are people receiving training and which modes are preferred

We asked people to tell us about the different formats of training delivery. The chart below shows the formats that people have participated in during the last 12 months (for the 89 people who had received some training) and the formats they say they prefer.

The chart is sorted in descending order of preference for the forms of training wanted.

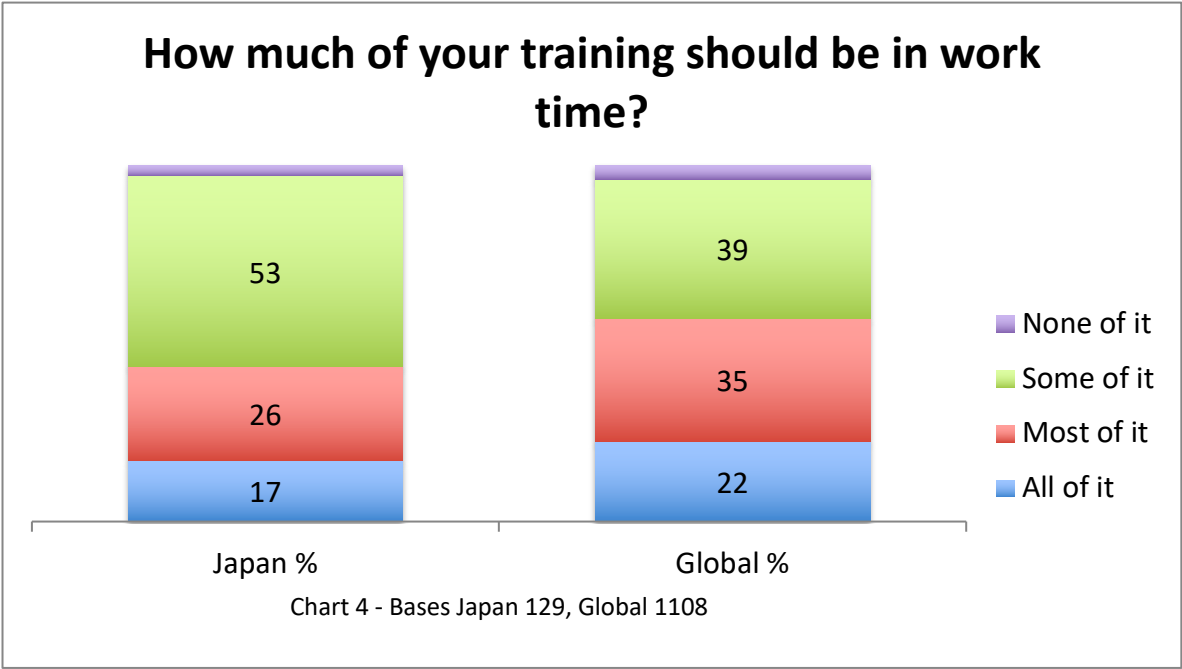
The most commonly provided form of training (the one most preferred) is in-person training, conducted in locations outside of people’s offices. The second most popular is in-person at people’s offices. The gap between receiving and wanting in-person training is relatively small.

In terms of webinar and other e-learning options, the gap between receiving and wanting them is large. This leads to the recommendation that more online/virtual training should be offered in Japan – in Japanese.



When should training happen?

We asked the participants how much of their training should happen in work time, and Chart 4 shows the results for Japan and the Global data.



The data for Japan is quite similar to the rest of the world. Most people feel that some or most of their training should be in work time (so a small amount of it can be outside work time).

What topics do people want training on?

We asked an open-ended question about the skills people felt they need to develop over the next five years in market research and insights. After translating and coding the results, the key finding was that there are many different things that people would prioritise.

Table 2 shows the results of the coding.

What do	Counts
Quantitative traditional MR techniques e.g. Design, Sampling (include Panels), Questionnaire Design, Statistics	22
Story Finding, Insight Extraction and Development	14
Big Data & data integration	14
Advanced Analytics, Statistics, Data Science, Data Mining, Bayesian approaches, Neural Nets	12
AI, Automation, Chatbots, Machine Learning, Text Analytics	12
R, Python, SAS, SPSS, Programming, Computer coding, Databases	10
Online & Digital Technology & Digital Marketing	9
Business skills	8
Presenting, Reporting, Visualisation & Storytelling	8
Qualitative, including Semiotics, Ethnography	6
MR trends and new stuff	4
Other	18
<i>Total</i>	<i>137</i>

Table 2

The key demand is for core training in the area of quantitative research, issues like survey design, sampling etc. Other important areas include advanced quantitative techniques, Big Data, and story/insight finding.

Recommendations for Training

In the 2017 NewMR Benchmarking study we defined a skilled market researcher as a Maven and made a series of recommendations about the sorts of activities a Maven should be involved in, as a minimum. These recommendations were:

- Read 1 article or blog post each month
- Read 2 relevant books per year
- 2 training sessions or workshops per year
- Listen to 2 webinars per year
- & Try to attend conferences

These original recommendations represent a time commitment of about three days professional development per year.

We would now like to add some specific training recommendations:

1. That all organisations acknowledge that if market research is to prosper in these VUCA (Volatile, Uncertain, Complex and Ambiguous) times, then a skilled and evolving workforce is essential.
2. That three days a year of training are recognised as the recommended minimum, a figure that 63% of researchers (and 78% of Japanese researchers) in the study fail to meet.
3. That people aspiring to be Mavens (market research experts) should be taking part in 6 or more days training a year, as well as meeting the recommendations from our 2017 report.

4. More use should be made of online learning, including webinars, online videos, and e-learning.

From the study we can see that globally there is a big mismatch between the market research industry's stated intention to be a valued-added, knowledge-based profession and a lack of training. The position in Japan is slightly worse than the global average, so the need to address it is stronger.

One of the findings from the study is that webinars and e-learning are under utilised in Japan, both in terms of comparisons with other countries and in terms of what people have stated as their preference. However, as some of the open-ended comments reveal, there is a need for employers to make space for training and to make it clear that attending a webinar or e-learning session is 'work'. For example “ウェビナーでのスキル獲得自体には賛成ですが、会社として積極的に推奨しないと、受講中「仕事をしていない」と思われやすいので、そこを危惧しています。”

Most of the training offered by global bodies (such as ESOMAR and the University of Georgia's Principle's of Market Research course) are in English only, so there is a need for more Japanese language training, as evidenced by the following sort of open-ended comment “在りません。英語ができないもので。”

About the Authors



Ray Poynter

Ray is a co-author of The Handbook of Mobile Market Research, author of The Handbook of Online and Social Media Research and the #IPASOCIALWORKS Guide to Measuring Not Counting, co-founder of NewMR.org, co-editor of the ESOMAR book Answers to Contemporary Market Research Questions, a content author for the University of Georgia's Principles of Market Research course and is the Managing Director of The Future Place.



Sue York

Sue is one of the founders of NewMR and Strategy & Partnerships Director who enjoys working at the intersection of research methodology, technology and innovation. Sue is co-author of "The Handbook of Mobile Market Research" and co-editor and curator of the ESOMAR book, "Answers to Contemporary Market Research Questions" and Content author for the University of Georgia's Principles of Mobile Market Research course. Sue is an active member of the market research online community, and is a familiar face on Twitter, where she tweets as @1Sue3, mostly about research methods and related innovations.

Thanks

We would like to thank everybody who helped make this project a success, including everybody who shared the survey link and completed the survey.

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Study Details

Key Details

1108 interviews (129 in Japan), collected from April to June 2018, from links shared on social media, via NewMR newsletters, through personal contacts, and with the help some research associations such as MRIA, JMRA, ESOMAR, GreenBook, AMAI, AMSRS.

Because of the way the sample was reached, we believe that the study over-represents people who are more engaged with the market research world, so the true picture could be even more concerning.

Countries

The table below lists all of the countries that supplied 5 or more interviews. In total, data was collected from 59 countries.

Comparing our responses with ESOMAR's market research turnover figures, the main differences are that a) our sample under-represents Spain, China, France, and Germany, and b) it over-represents India, Japan, Canada and Australia. Our study also under-represents USA and UK, even though the sample we have for these two locations account for almost 30% of our responses.

Country	Frequency	Country	Frequency
United States	218	Hong Kong	10
Japan	129	South Africa	10
UK	105	Philippines	9
India	93	Indonesia	9
Australia	77	Chile	8
Canada	74	Malaysia	8
Italy	42	Belgium	8
Netherlands	32	Sweden	8
Germany	30	Norway	7
Singapore	26	Switzerland	7
France	21	UAE	6
Mexico	20	Egypt	6
Brazil	20	Turkey	6
Bulgaria	13	Spain	6
China	11	Bangladesh	5
New Zealand	10	Colombia	5

Table 4

The Data

Below we have set out the data, in terms of counts for the total column for the global data and for Japan.

Count Data	Total	Japan
Base	1108	129
Q1 What sorts of training received?		
Q1 Sessions run by your employer	469	44
Q1 Sessions run by trade bodies	368	38
Q1 Sessions run by universities / colleges	124	26
Q1 Sessions run by other organisations	320	17
Q1 Other	69	2
Q1 No training in last 12 months	261	42
Q2 Format/location experiences (no training excluded)		
Q2 In person at your offices	455	44
Q2 In person elsewhere	414	61
Q2 Webinars	512	11
Q2 Other e-learning	235	12
Q2 Other	19	3
Q3 How much training		
Q3 5 hours or less	157	23
Q3 6 hours to 2 days	278	36
Q3 3 to 5 days	187	15
Q3 6 to 10 days	95	6
Q3 11 to 20 days	55	3
Q3 More than 20 days	49	3
Q3 Not sure	26	1
Q3 No Training	261	42
Q4 Was training enough or not?		
Q4 Too much	13	1
Q4 About right	466	37
Q4 Too little	494	55
Q4 Not sure	130	36
Q6 Format/location wanted		
Q6 In person at your offices	509	61
Q6 In person elsewhere	673	92
Q6 Webinars	697	58
Q6 Other e-learning	495	49
Q6 Other	32	3

Q7 How much in work time?		
Q7 None of it	47	4
Q7 Some of it	431	69
Q7 Most of it	381	34
Q7 All of it	246	22
Q9 Age		
Q9 Under 25	31	1
Q9 25 to 34	265	29
Q9 35 to 44	354	41
Q9 45 to 54	273	41
Q9 55 to 64	149	15
Q9 65 and older	32	1
Q10 Role in Research		
Q10 Research buyer/user	202	40
Q10 Research supplier	695	64
Q10 Service supplier (e.g. software or fieldwork)	131	11
Q10 Academic	29	6
Q10 Other (please specify)	42	5
Q11 Length of time in MR		
Q11 Less than 1 year	30	12
Q11 1 to 3 years	91	16
Q11 4 to 9 years	205	23
Q11 10 to 20 years	415	45
Q11 More than 20 years	351	30

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