



A view from the future

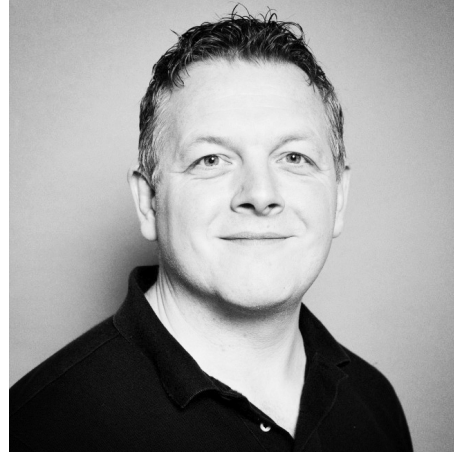
Outlook on what the future holds
from foresight experts.



Who wants to know what the future holds? We're not saying we have the answer, but thanks to key insight experts from leading global organisations, this report offers a clear view of the changes we could experience. This view offers food for thought as to what we should be planning for, how we should be structured and how we should position ourselves and our organisations to really embrace the future. For many of us, the future is closer than we think.

Lindsay Parry

MD Nepa UK



The Insights Experts who kindly shared their views for this Nepa report paint an exciting vision for the profession. I am already thirsty to experience the coming decade as described by these soothsayers. The beautiful blend of human and technology, the best of both worlds, is on its way. It seems that the future is already here, the decisions we make today will help shape the tomorrow.

Dan Foreman

CEO Hatted

The experts

We interviewed eleven industry experts for contributions to this report, including the following:



BV Pradeep

Former Global Vice President, Consumer & Market Insight, Market Clusters
Unilever



Pradeep is a strategic marketing, insights & analytics consultant with over three decades of international experience. He was, till last year, the Global VP of Consumer & Market Insight for Markets at Unilever Plc, where he led Global Centres of excellence, in Shopping & Ecom Insight, Market Insight and Predictive Analytics. Pradeep has been in global, regional & country roles, leading over 300 CMI professionals across 40 countries. He was a governing Council member of ESOMAR for 6 years, Vice President (2017-18) and has been a key note speaker at many global industry conferences.



Corrine Green

Senior Insights Manager, Global
Vodafone



After over 30 years working in market research, Corrine continues to enjoy understanding people, and what makes them tick. She's also lucky enough to have worked with some wonderful mentors and agencies in her client-side roles, covering The AA, Centrica, B&Q, Nokia and now Vodafone (the latter two being global positions). Corrine has an interest in Brand & Communications, and how to truly drive insights into business decision making (persistence, creative communication and being sensitive to the politics are her learnings). She also enjoys experimenting with newer, quicker turnaround techy methods, as well as good old fashioned 'asking people what they think'.



Anna-Sterre Mees

Global Business Partner Insights & Analytics
Philips



Anna-Sterre is an insight innovation rebel. She puts her creative mind to work and is always searching for new ways to discover 'the why' behind customer answers. She knows the language and priorities of both agency and client-side worlds, and connects the dots between multiple data points and white spaces in global markets, translating them into strategic implications for product innovation and marketing, while building bridges between the varied insight needs of internal stakeholders. Anna-Sterre is a known speaker on topics like trends, customer decision journeys, positioning, segmentation, and the impact insights can have on strategic decision making.



Mario Callegaro

Senior Staff UX Researcher and Survey Scientist
Google



Mario is Senior Staff UX Researcher and Survey Scientist in the Google Cloud Platform UX team. He focuses on helping the team to collect high quality surveys about cloud platform products. Mario consults on numerous user experience projects in terms of survey design, questionnaire design, sampling, and reporting. Before moving into UX, Mario was working at Google as a survey scientist in the Marketing organisation. He holds a MSc and a PhD. in Survey Research and Methodology from the University of Nebraska, Lincoln.



Andy Steel

Head Evaluation Intelligence China & Korea
L'Oréal



Andy started his career in upstream R&D for Unilever. He then worked on product and business development in the UK and Latin America. When he came to China in 2008 it was the start of a journey in consumer insights – establishing a regional Consumer Technical Insights team with Unilever R&D, then working at Ipsos, leading product innovation methods development and initiating the first experience using mobile devices for consumer research in China. This work was presented at ESOMAR ASIA in 2014. Andy is passionate about human perception and behaviour, experience research, and leveraging data and digital for driving decision making in concept and product development.



Elaine Rodrigo

Chief Insights & Analytics Officer
Reckitt



Elaine re-joined Reckitt as Chief Insights & Analytics Officer in 2019. Passionate about people and consumers, her ambition is to always put consumers first, via consumer-centric thinking and 'humanising data' through the digitalisation of insights. She believes in seamlessly connecting sources of data for insight with analytics, to drive data-driven business decisions. Prior to Reckitt, Elaine was Chief Strategy & Insights Officer at Danone, and has also led Insights teams at Kraft/Mondelez. She started her career 24 years ago in Kantar and Ipsos, after graduating with a PhD from Monash University. Originally from Singapore, Elaine is currently based in London.



David Benjamin

President International Markets Group
Blackbaud



David Benjamin is President of Blackbaud's International Markets Group, overseeing Canadian, European and Asia Pacific operations. David is a seasoned executive with decades of leadership within the technology, telecommunications and media sectors. He holds an MBA with a focus on strategy and finance from Manchester Metropolitan University, and graduated with honors from London Metropolitan University with a BA in European Business.



Nick Graham

Global Head of Insights & Analytics
Mondelēz



Nick Graham joined Mondelēz, the makers of brands like Oreo, Ritz & Cadbury, in March 2021 as the new Global Head of Insights & Analytics. In this role, he is responsible for setting the vision and strategy for the function and helping to transform its tools, skills and capabilities, working in close partnership with local Business Units and his cross-functional partners. Nick started his career in advertising planning and brand & innovation strategy consulting. Prior to joining Mondelēz, he spent eight years at PepsiCo, leading Insights & Analytics teams for both the global categories and subsequently the US beverages business unit.

A view from the future

Outlook on what the future holds from foresight experts.

The challenges of the past couple of years have both accelerated and decelerated change for everyone on the planet. For example, the importance and role of Ecommerce, digital acceptance and attitudes to sustainability have amplified. But travel, long-term planning and our mental wellbeing have suffered.

What are the long-term implications of these changes for brand teams? What kind of insights and data will we need to plan for an uncertain future?

At Nepa, we felt it was time to reframe the role of insights in the light of these changes. So, we spoke to different insight leads from a range of companies – from Vodafone, L'Oréal, General Mills, and Reckitt, to Philips, Heineken, Organon, Unilever, Blackbaud, Mondeléz, and Google.

We asked them about how they saw the future of insights evolving. In a world of data, what is the future for insights? How will we manage our relationships with the people we research? How will we manage data? Will the role of the insights expert change? How can we as individuals stay ahead of the innovations that are coming?

Their responses might surprise you.



London riots,
6-11 August 2011

From 2011 to 2022

Then

Turn your mind back to 2011. If you were working then, what kind of things concerned you? To jog your memory, there were riots in the UK and the Arab Spring took off across much of the Middle East and North Africa. The world's second-worst nuclear disaster happened in Japan. We saw the deaths of both Osama bin Laden and Gaddafi. The US elected its first black president. The world was emerging from the economic collapse of 2008. Overall, there might have been reason for celebration.

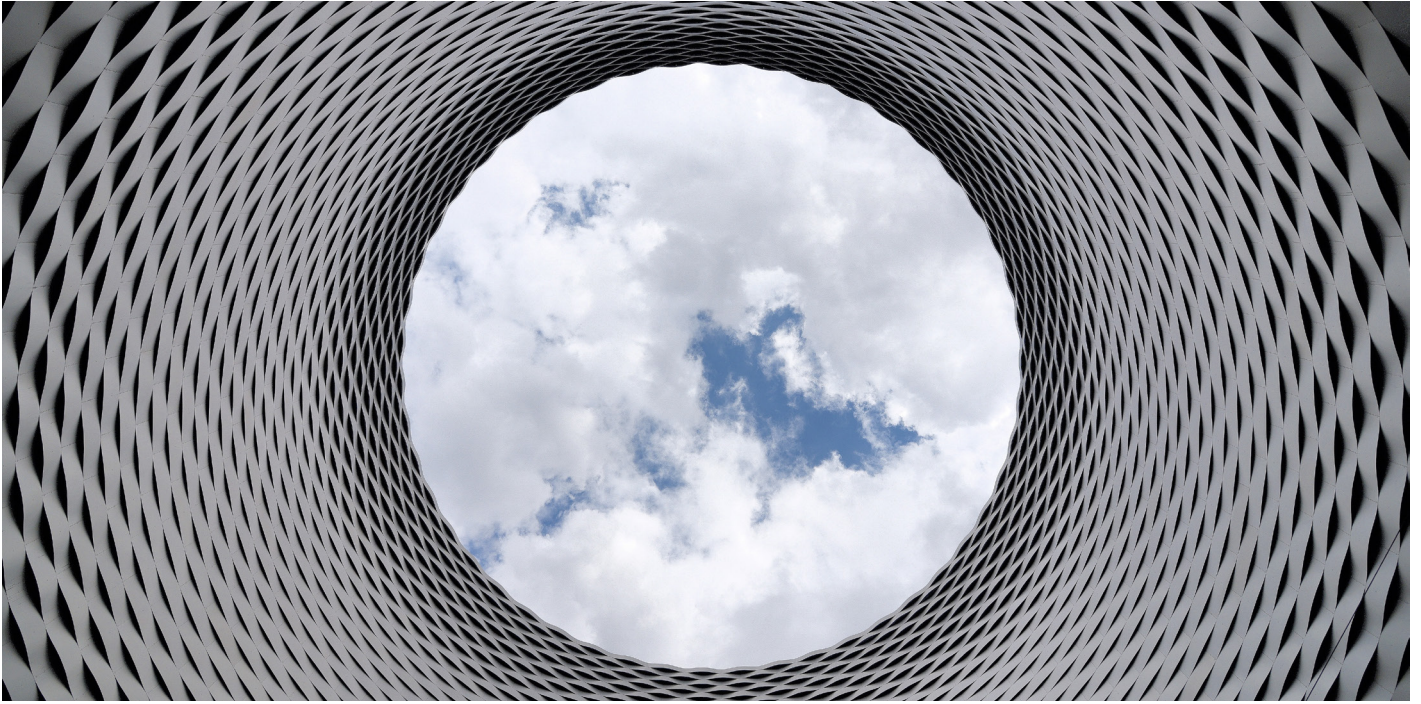
In the world of market research, the global industry was valued at \$32 billion and was well on the way to recovery from the recession. For example, Aegis acquired global agency Synovate for £525 million (and was in turn acquired by Japan-based advertising group Dentsu for £3.16bn in March 2013). There were a few other mergers such as SSI (remember them?) with Opinionology – to provide an 'end-to-end' sampling, data collection and data analytic portfolio – but overall M&A activity, compared to 2021, was low.

Someone joining the insights profession in 2011 could be forgiven for thinking they had arrived in a quiet, intellectual, business backwater. How things have changed!

Now

In the last year we saw the full development of 'Restech', which at its apex saw Cint acquire Lucid in a deal worth \$1.07bn. Insights is now truly a tech-driven industry and DIY tools proliferate – MRX professionals are under more pressure than ever to work fast. But we also saw some of the downsides of tech, with 'big data' swamping organisations, leading to data overload. As data acquisition becomes less important, its analysis and integration become vital.

2021 was the year that diversity and inclusion really started to impact insights – with significant strides made towards bringing unheard voices into the boardroom. And finally, with clear evidence that the planet is continuing to warm and with extreme weather events coming thick and fast, sustainability was placed firmly at the centre of the agenda.



The context in 2031

It is hard for anyone to work out what their life will be like in ten or more years. But we wanted to establish the backdrop for the world of insights in 2031 before diving into the key themes.

There is strong alignment among our research experts that we are in the midst of a shift in the world order, which will continue. Asia will move ahead, but the Middle East, Africa, and Brazil – areas with large, young populations - will be more innovative, dynamic and restless. As a result, even more disruption, new ideas and developments will come from these markets.

Meanwhile, is North America (by far the largest market for MRX right now) in terminal decline, with a huge and powerful economy but an ageing population and deep internal division? And where the US leads, is Europe far behind? Our experts say that it is possible that Europe (the second largest market for MRX) may become increasingly moribund compared to younger and more dynamic economies. Living on its heritage, could it become one vast open-air museum/theme park for Chinese tourists?

Against this background, what will the world of insights be like?



◆ THEME 1

A different relationship with people we research

Let's start with people. There is strong consensus among our experts that the relationship we have with research participants, whether active or passive, will fundamentally change.

A conversation

First, we will ask directly for as little as possible, minimising the 'time & effort' from consumers when we ask them insight questions. We will stop asking people what they want, and we will stop doing it at a specific point in time. Indeed, we will avoid asking questions wherever possible, either having a natural conversation with people (more likely to be audio or through a spoken response than using text, to access many people who cannot read or write), or using other sources such as social listening and Google to piece together a rich picture of their lives. Social media will be key for this. As one of our experts said: "We need to better understand the natural behaviour of consumers, through social", and "We should use social media as a key jigsaw piece, together with other jigsaw pieces, instead of asking questions".

Research itself will be social, providing networks and links, communities and connections. Results will be shared with participants, so the 'rewards' people get for interacting with brands or organisations will be very different. Data is not paid for, but brands will deliver benefits, for example through experiences, personal development, or simply connections with others. Our experts cited data exchange, value exchange, and wearables exchange as examples. "Data will be a currency of connected homes, businesses, individuals, food, printers, toilet analysis, shampoo products, human and virtual experiences".

But it is not (only) about data. There is strong agreement that 'big data' is no silver bullet and has not delivered the ROI some people wished for. Consumers find it creepy to be 'spied on' and targeted. By 2031, we'll be much more concerned with authentic relationships; less focused on consumers as data points and more interested in them as people. This will allow us to talk with them about their personal experiences, understand their emotions, and get a deep understanding of sub-conscious drivers.

Ultimately, the consensus is that we are heading for a 'Ready Player One' scenario where people have opted into a data-sharing 'game' and are doing it for gain, rather than a 'Matrix' where brands in a virtual world unconsciously control people.



◆ THEME 2

Holistic integration

All the experts we spoke to were confident that to get to this deep, digital conversation, we will be weaving a rich fabric from many different data sources. New data will be behavioural, real-time, always-on, consciously shared, non-consciously opted-in, and fused with other data. Many spoke about how different agencies will be working together in partnership to provide complementary skills and data sources. We will also be using connected panels so that we are not only getting a snapshot of a consumer, but are creating a web of their lives.

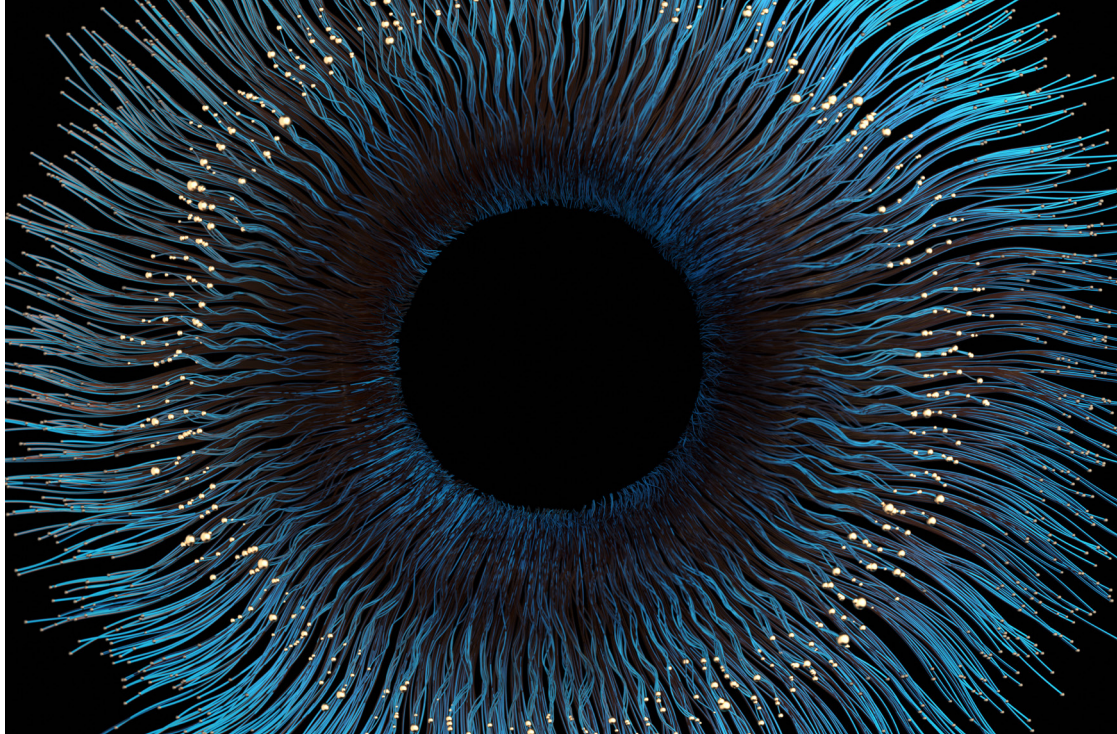
Silos will be broken down. As one of our experts put it: "Consumers don't think in silos and it's weird that we still sometimes do when we try to understand behaviours. Can we detect from behavioural data, link that using algorithms and use that to predict the future, taking in account sub-conscious drivers. If we can do that, we'll be much better at building future scenarios and likely events".

The result of breaking down these silos will be a better understanding of the category a brand operates in for the consumer, and who we really compete with in order to stay relevant.

We will also have fewer internal silos, so data is shared more widely across organisations. Companies may still have a digital officer, data analysts, insights, IT and marketing/CMO functions, but data will flow across and between them and be clearly tied to financial and performance data. We will have connected workflows across different data collection methods. We'll be using desk and internet research to frame and scope information and understand context. Secondary research will also be integrated and essential.

The role of qual is fundamental to a change in conversation, which will be much more in demand. "The spend split is currently 20% qual; 80% quant, I expect these proportions to change in the future with more qual, less quant". We have long talked of the need for qual to get to the 'why' behind big data, in this new world that will become even more important. And this means not only asking more open questions but having the relationships with consumers that enable us to understand context and mindset.

Ultimately there is a consensus that it is less about speed - that issue will be cracked with the integration of technology and computers doing the heavy lifting. The challenge will be to distil insights and connect them to actions for the organisation.



▶ **THEME 3**

Automation

In the future, we will be livestreaming and sharing information in return for money or equivalent value exchange. New methods will involve data exchange, value exchange and wearables exchange. This will lead to more data, but less complexity as it will be more integrated. There is a strong feeling among our experts that the current levels of complexity, in terms of data streams, cannot be sustained without automation, machine learning, and AI to help open up new opportunities.

Having said that, our experts are unified in the view that AI and automation will never replace human thinking, just (hopefully) the boring bits. There is broad acknowledgement of the challenges of keeping the human at the centre when so much of the world will be automated.

A host of emerging ideas are cited – many are here already so we imagine should be standard in 10 years' time. For example:

- Wearables will be a way of life, a source of data and for medical diagnostics.
- Sentiment analysis will be enabled by AI and machine learning.
- Digital avatars will replace respondents - personas to test and screen ideas and learn from each other.
- 'Internet of Things' panels will be common place.
- Text and tone analysis will have the scale of a quant study.
- Company apps will engage with respondents and capture data and behaviour.

The consensus among our experts is that these will be normal. Data will be all pervasive and as part of this, as we have seen, the use of social data will be the norm.



◆ THEME 4

Privacy

In this brave new world, whither privacy? It is a crucial topic and varies enormously by country, but we are already witnessing unease and loss of trust in many markets. People are rebelling against an environment where they feel 'spied on', and many are busy opting out of sharing their data. The political consensus is hardening against an open flow of data, and new legislation is being passed in many markets to prevent companies getting more access to consumer data.

While many consumers are currently happy to share data with companies, our experts are concerned that in the future, using data from wearables, social, toilet analysis and the internet of things goes too far. "Consumers find heavily focused data approaches too creepy – we know too much about them". An open data sharing world creates new parameters, boundaries and impacts for data privacy. It's no surprise that the experts agree that revealing alcohol levels, old photos or sharing medical data with employers causes more harm than good: "companies don't get the ROI they had envisaged with these data driven approaches".

The consensus is that the solution will be clear value exchanges, and several ideas were put forward by experts to facilitate this. For example, adding benefits through an experience or personal development will be way more important than monetary exchanges. To get to a point where respondents willingly participate (rather than being incentivised), our experts agree that the exchange must be social, creating communities, adding value through those connections and in turn creating an interest in the results of pooled data.

Ultimately, the vision is that in ten years the consumer will get value for 'enabling' access to the data surrounding their lives – they will be more in control of their own data and, in effect, become the owner of their own consumer panel.



The future for insights

Our experts agree that the profession is at a crossroads, and we could have two very different scenarios in ten years.

The first is that the insight function will become the Google for an organisation – creating and curating a system whereby any question from anywhere will be answerable in a Google-style format. For example, typing “is what is happening this year different to what happened previously?” into a search system, and being presented with the answer. Many people in insights would see this as a fresh hell – distilling what we do into answers to specific questions, ignoring context and removing human need or the ‘why?’ altogether. But it is the logical continuation of the move to ‘data democratisation’ - the proliferation of platforms putting dashboards and data into the hands of a range of different people within organisations. With this scenario, the corporate insight function becomes more of an IT role; to build, populate, and manage these knowledge management systems - while providing tech and statistical support for co-workers. The role will be to focus on removing internal barriers to allow maximum automation and integration. Meanwhile, the team managing the data will be delivering it to their agencies for them to ‘create insights’.

With this model, the delivery of insights will be different. Our experts ask, who will need debriefs if they have access to continuous, curated data? Will MR be subsumed into something else? A historical artefact, like glassblowers when machine manufacturing came in?

The alternative to the AI, machine-driven insights team is one where culture, context and the ‘why?’ question is more important than ever. In this scenario the insights profession is elevated to a powerful combination of data and business consultancy, with a seat on the board and strong strategic role within organisations. Evidence is crucial, but it is combined with the ability to communicate context, relevance, and culture, and to envision the future - becoming as one of our experts says, a ‘lighthouse’ for organisations. Having experience is only one path to this kind of insight person; as our experts say in Wizard of Oz style, “do we have the courage, brains and heart” to do this? Or are we happier squirrelled away with our data machines?

Clearly the best path is going to be a powerful merger of data management combined with the business sense to make the right decisions. The future is synergy – of data sources, consumer needs, insight and consultancy; of both human and technology. And the future whole, to paraphrase Aristotle, is much greater than the sum of its parts.

If you want to talk about the future get in touch...

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