

# RESEARCH WITHOUT BORDERS

## GLOBALIZATION OF THE MARKETING AND RESEARCH FUNCTIONS IN A BRAVE NEW WORLD

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### PREMISE

For years, multinationals have voiced the mantra “Think global, act local,” suggesting a reasonable balance between overall global strategy and tactical execution customized to market-specific conditions. This dichotomy was perhaps always too simplistic – the division of labor between global headquarters and country managers is often far more complex, and prone to tension. Moreover, there are frequently other levels between the two extremes, such as regions or sub-regions.

From a corporate marketing perspective, the challenge has been to establish the right *structure* that balances the desired global consistency and control with acceptable levels of accommodation to local conditions and independence at other levels – “right” and “acceptable” reflecting each company’s culture, style, and objectives. In some cases, this structure will simply mirror the production or distribution structure already in place. In others, organizing the marketing function globally may be quite independent of other operations. Either way, the effectiveness of this division of labor is critical to the multinational’s success in the global arena.

But getting it right is not easy, and many companies struggle with various solutions only to try others, as the pendulum swings back and forth between more central control and more local autonomy, and regional and sub-regional groupings merge and are split from each other. Penetration into new markets, or shifts in relative priorities of markets or product mix, only exacerbate these tensions.

For the *market research* function, the global marketing structure and division of responsibilities is also critical. Normally, the *activities* of the research function follow the larger organization in which it is nested and serves. In other words, projects will reflect the global, regional, country, etc. marketing unit seeking research information. The *location and staffing* of the function, however, may be quite different, especially if the research staff is relatively small or reliant on outsourcing. While many multinationals disperse researchers among local offices, others rely on a centralized function that serves the world. Whatever the case, many of the tensions that affect the marketing function are visited on the internal researchers as well.

While not necessarily the most efficient model, this “hub-and-spoke” geographically-drawn structure has been the norm for many multinationals, and has served them relatively well. A number of recent trends, however, threaten to upend the practicality, even the relevance, of this approach, undermining basic assumptions, dramatically altering standard practices, and recasting professional roles.

The trends themselves are well known:

1. The increasing use of the Internet as a marketing and advertising channel;
2. The growth in e-commerce—the Internet as a sales channel;
3. The rise of social media as a source of information, as well as a medium in which to engage and influence consumers.

Much has been written on how these trends are reshaping both the marketing and market research professions. Many predict the end of traditional marketing models, especially as power shifts from seller to buyer. In some ways, what we are witnessing today has its parallels in the power shift from manufacturer to retailer 20 years ago. One of the major factors that empowered merchants then was the information that they were beginning to collect on their sales and their customers.

The current global trend toward consumer empowerment is also driven largely by information. The Internet and its mobile offspring enable shoppers to easily make price and product comparisons among competing outlets, real and virtual, as well as enabling information sharing among consumers that impact purchase decisions at multiple points in the process. They

also have provided multiple purchase channels which consumers have now come to expect to meet their individual preferences. Merchants and manufacturers are struggling to keep up with the demands of these consumers, and still make a decent profit.

The supposed death of traditional research has also been largely proclaimed (often gleefully), with the prediction that an entirely new breed of researchers will emerge with little regard for representative samples or sampling of any kind, or interest in traditional research tools such as multivariate or sophisticated qualitative techniques. Rather, the “next generation” will be skilled in engaging with consumers in their own terms and on their own turf, primarily through social media. Their deliverables will be the distillation of conversations – some overheard, some actively engaged in. (And they will be much cooler than most of us would claim to be now.)

On the other hand, there is little if any discussion on the potential impact of these trends on the global *structure* of the marketing and research operations. One of the primary purposes of this paper is to demonstrate that the current standard operating Marketing Department model is totally unsuited to the brave new world we are entering. If form ultimately follows function, we should see a fairly significant recasting in how many companies organize these operations globally, or we may see many proud organizations stumble because they cannot break out of their geographic hamstrings. The other primary objective is to assess the potential role that research is likely to play in this brave new world, especially the in-house departments.

For us, the stakes are extremely high—probably higher than for our marketing colleagues. Our structure tends to mirror that of the marketing organizations in which we are nested, and our “needs” will in most cases be secondary to those of the larger entity. The trends cited above will, directly and indirectly, have a huge impact on our position in the new hierarchy. This goes beyond how much we engage in social media vs. traditional research activities. These seismic shifts could provide a major opportunity to dramatically grow the salience of the market research role within the enterprise as a whole, or it could lead to a significantly marginalized activity.

#### **GLOBALIZATION—NO LONGER JUST BUSINESS AS USUAL**

There is nothing new about globalization. Companies have been “going global” since ancient times, with the Phoenicians providing an excellent example. Essentially, we are talking about market expansion—buying and selling outside one’s home market. The dispersion of artifacts among early civilizations connecting peoples from Western Europe to China underscores the pervasiveness of global trade over the centuries.

The basic aspects of this ancient model have remained pretty much unchanged, including the need for distribution systems, local agents or overseas offices, mechanisms to handle payments, and laws to regulate the process and protect buyers and sellers. Marketing directly to end-users outside the home country, however, is a much more recent piece of the puzzle, which has grown exponentially over the last century, incorporating advertising, promotions, and ultimately, research.

Historically, marketing has been a one-way “push” process, following a “Ready-Aim-Fire” format. Marketing research provided one of the few channels of information flowing in the other direction, the “voice of the consumer,” but these served essentially as inputs into this outward-facing framework. Research might provide early-stage guidance to “Ready” a new product launch or advertising campaign, or help fine-tune the targeting or execution at the “Aim” stage. (While usually absent during the “Firing,” researchers might be called upon to measure marketing effectiveness, the “Body Count” stage.)

The much-vaunted globalization of the past two decades is in many ways just an acceleration of past practices, fueled by falling trade barriers and the rise of new markets and social classes with discretionary income. More and more companies have gone ‘global,’ selling goods and services, and setting up plants and offices, in a wider range of companies than ever before.

But some elements are quite new, such as the out-sourcing of multiple roles overseas, from manufacturing and assembling products to customer service centers. Moreover, we’ve seen the rise of truly ‘stateless’ multinationals who no longer serve or even care about the economic or political policies of the “home” country. Also relatively recent is the establishment of a truly global trading context governed by international agreements, and the rise of regional trading and labor zones, and even a multi-country common currency (stay tuned).

Marketing activities have certainly mushroomed as a result, with many global initiatives leading to local execution. However fundamentally, the function, although increasingly sophisticated, has not been transformed. It is still largely a push-function, just pushing in more places through more channels.

## EMERGING AWARENESS OF THE DISCONNECT

The realization that existing marketing and market research structures might no longer fit the “model of a modern multinational” began to emerge early in the century. A 2006 study by the Market Research Executive Board™, “Managing a Global Research Function”<sup>1)</sup> noted a marked rise from 2001 to 2006 in the percent of companies whose researchers claim a global scope, from 26% to 51%. Many of the research executives surveyed reported that the increasing demands of the global enterprise outstripped research resources. Market research was generally aligned with the corporate Marketing structure, with personnel placed in headquarters and regional or local offices. They were primarily expected to serve the needs of their local (most proximate) stakeholders/internal clients, which made it increasingly difficult to serve the larger strategic priorities of the global core. Layering demands (global and local) was simply leading to overload, with the more local and/or tactical demands winning out.

One solution explored by the study’s authors is to focus the limited research resources on global/strategic priorities, using that lens to evaluate all requests from all sources. This approach would be supported by greater sharing of information among researchers, sharing personnel among regions, and methodological standardization.

In retrospect, the advice seems eminently sound but perhaps a bit naïve. The basic assumption is that the headquarters’ research department can dictate the activities of the entire company’s research staff. But this would entail prying these staffers away from the local internal clients, meeting whose needs provide their *raison d’être*. Basically, this goes against the basic rationale of the geographically-based global structure. In most cases, this could not be accomplished without the very strong support of corporate Marketing.

Nevertheless, the report is important for showing the inherent downside in both the global marketing/research structure, and in research’s inability to meet the increasing demands being placed upon it.

## INTENSIFICATION – THE CMO (AND OUR) DILEMMA

While the MREB study primarily focused on the challenges generated by globalization on the research function, IBM’s 2011 CMO<sup>2)</sup> study concentrates on the impact on Marketing, particularly from the perspective of the global head. This survey of 1,734 CMOs found a great deal of consistency among these executives when it came to the key challenges they were facing:

- Understanding their customers, and delivering value to them;
- Creating lasting relationships;
- Demonstrating marketing ROI.

It also found consistency when it comes to the trends having the greatest impact, including:

- The rise of consumer empowerment with its increased demands on the enterprise;
- Data overload;
- Increasing complexity of the issues they need to address.

The CMOs recognize that globalization and the digital revolution, as noted already, is fueling consumer empowerment. They also realize the potential power of social media and channel explosion to either help or hurt their companies. However, large numbers feel quite unprepared to deal with these challenges.

In their struggle to understand and engage with their customers, social media emerges as pivotal, if not a panacea, which of course has contributed to the data explosion. These two areas are the ones in which the CMOs report the greatest lack of preparedness. Their solution is to turn to the IT professionals. But where are the researchers?

Again, this study provides an extremely telling window on the challenges faced by Marketing heads, and promotes an extension of traditional marketing to encompass broader engagement with customers, which social media and other digital outlets can provide. It does not consider the greater implications of these challenges on the essentially “push”-driven marketing model, or on global Marketing structure itself. And alas, Research is depicted as irrelevant, essentially backward-looking and focused on markets rather than consumers(!).

## THE NEW COMMUNICATIONS LANDSCAPE AND ITS IMPACT ON MARKETING

The digital revolution has opened up a set of new commercial and communications channels whose usage is fast evolving, driven by technology, savvy entrepreneurs, and many eager consumers. E-commerce continues to grow at the expense of brick-and-mortar and other traditional sales channels, and has now become “mobilized.” Advertising and marketing through the internet have become commonplace, and gain traction as other media, such as newspapers and magazines, go digital. Essentially, however, these have served as new channels for “push” strategies for both products and corporate messages targeted to consumers.

Many companies have sought to establish direct “dialogues” with individual consumers, often as a form of CRM. A few have hosted communities that allow a more structured interaction between companies/brands and their customers. These certainly create opportunities to be responsive and to get a better handle on where consumers are coming from, and they can foster co-creation and other activities that go beyond the traditional scope of the marketing or communications functions.

The rise of social media, in its broadest sense, coupled with more interactive websites, represent something completely different. Here we have communications channels primarily flowing among consumers, with marketers listening to and/or participating in conversations that they generally don’t control. Companies are scrambling to set up systems to monitor and analyze these conversations, especially those in which their brand or corporation is mentioned. Many, of course, are trying to join in, directly or through proxies, to help shape the content.

But “push” is falling to the wayside, despite marketers’ attempts to turn this communications river into just another out-going channel. In this setting, consumers are seizing the initiative, and setting the agenda. The experiences, information, misinformation, images, and opinions of a single individual can reach thousands if not millions of other consumer in minutes, with potentially lethal effects. Not only brand image, but corporate reputation and profitability, can easily be undermined by an outspoken few. Think of a devastating review posted on a hotel booking site (“stayed up all night fighting bedbugs”), or a brief video of an airline employee acting badly. If social media has helped topple governments, it can easily do the same for brands.

From a *functional* perspective, these developments demand an entirely new way of thinking about marketing. First, it means giving up the idea that marketers, with all their spending, can shape the brand agenda. Instead, marketers must accept that consumers have “seized the mike,” and do their best to follow the conversation and influence as best they can. Of course, marketers have always recognized that “word of mouth” was a powerful force influencing brand perceptions and product usage, but in the past it has been essentially private and inaudible, so it was conveniently ignored. Now, WOM has a megaphone and is anything but private.

Second, from an organizational/structural perspective, these developments have an even more profound impact--borders matter less and less. Just as e-commerce enables cross-border purchasing, social media have created a truly global village with chatter flowing in all directions. Consumers share brand experiences and perceptions that often crisscross the globe. A “cool” ad placed in one country may ricochet across the continents. While most marketing organizations carefully hone their messages through local operatives to reach local audiences, these same consumers are receiving brand-related messages originating in many other markets. This adds a new layer of complexity to managing global brands.

## A NEW CMO PERSPECTIVE

In order to get a sense of how today’s CMOs are responding to these challenges, as well as some of the issues raised in the studies cited earlier, we carried out a modest study among 14 CMOs of a wide range of leading global companies, primarily based in the United States and United Kingdom. These consisted of in-depth telephone interviews that focused on global structures, the relationship between Marketing and Research functions, and the response to social media and other forms of digital communication.

All of these companies share a traditional geographic structure, with the reins or real control over strategy held by the core or global group. Regional and even sub-regional centers are common. (In a few cases, groups are divided first by product category, then by geography within each product group.) Global Marketing tends to be responsible for setting brand strategy and direction, creating design and communication standards, and ensuring the regional groups are in compliance. Execution tends to reside at a regional level, with varying amounts of approval and oversight from Global.

Most of the CMOs believe the structure works well, and few report major changes over recent years, although there is often some jockeying for power between central and regional players.

*“There is a good deal of tension between Corporate and our people in the field. Those in the field feel like they know their customers better than the Marketing people at Corporate. This creates issues.”*

*“We give our local groups authority, not autonomy. Every step requires approval through our global marketing group.”*

*“We do not operate our local subsidiaries in a marionette-type fashion. Not only do we give them a fair amount of autonomy, but they have fairly big budgets to do what they see fit.”*

However, most admit all bets are off when it comes to the future. As noted in the MREB study, Research tends to follow the Marketing structure and is primarily devoted to carrying out the very tactical needs on a local level with the exception of brand tracking or image studies.

Social media is very much on their radar screen. All their companies are actively involved in tapping into conversations, although not all are actively engaging. This has been accompanied by major technology investments in this area, along with e-commerce, over the past three to five years. There have also been significant investments in new personnel. In most cases this activity is nested in, or has a dotted line reporting relationship to Marketing.

To date, most of this activity is housed at the headquarters level, in large part due to the expense involved, but also because of the desire to use this learning to inform global strategy. A few companies listen, analyze and act on a regional or local level because of a belief in the radical differences among consumers in different countries, and the sense they can respond more nimbly that way.

For the majority where social media monitoring is a more centralized function, the implications of this truly globalized media for their traditional marketing structure have not been recognized. The focus is much more on trying to get a handle on what all this chatter means. CMOs feel overwhelmed with the “data” generated, and don’t know how to find the “nuggets.” Some express dissatisfaction with how social media activity is currently managed, and are hiring new senior level personnel and forming new groups to take on this responsibility.

*“There’s so much data out there. There’s no shortage. It’s like the Tower of Babel.”*

*“We are making a sizable investment in recruiting new people with cutting-edge skills that are going to handle all of social media monitoring. They’ll let us know what all this means.”*

To recap, CMOs, in their intensified quest to understand and connect to customers and other consumers, are increasingly looking to social media to meet these needs, and investing heavily in systems and personnel to do so. Moreover, many are relying on social media monitoring and engagement as new forms of research, claiming an increasing portion of the marketing budget, and consequently reducing funds available for more traditional research activities. At the same time, they struggle to make sense of the output, and have not yet grasped the implications of this truly global phenomenon for their geographic-based structure.

So what role do they expect Research to play in this brave new world? Apparently, not much. In looking for help in coming to grips with this somewhat unwieldy force, we are not even in the consideration set. This is a reflection both of how CMOs view researchers, and how they tend to view the social media challenge.

Essentially, this small sample of CMOs perceive Market Research as being a very traditional, conservative function, slow, expensive, and not proficient in cutting-edge methods. Given this image, they do not expect researchers to solve their social media issues, but are building their new departments with other kinds of professionals, especially those with marketing, digital marketing, or IT backgrounds. This reflects their sense that the social media challenge is largely technical in nature, and is ultimately a marketing tool, not an information source. Researchers are not seen as particularly technologically adept, having the necessary skills to manage or analyze social media, or able to act with sufficient speed. They are simply not a good fit with the fluid and dynamic social media environment.

*“In the future, Research has to move beyond tracking studies into real-time tracking...A 6-week lag to get data is not acceptable. This is a very fast-paced environment.”*

*“Research has the perception problem of being too slow, too expensive, and not really ‘with it’ enough to handle social media. Out marketing people are digital experts. They’re on top of this.”*

The net result of these perceptions could well be the diminishing role of the internal researcher as the social media engine claims more of the resources and budgets, and provides a greater share of the “insights” shaping strategy. While CMOs believe Research must “reincarnate” itself as a far more “savvy” persona just to stay relevant, they still don’t see them being a key player going forward.

*“I think it is more than [Research] just being marginalized, it’s just that there is just so much data coming from social media and some of our folks feel that all the information that they get obviates the need to do much research at all. This is a critical time.”*

The remarkable thing about this situation is not the “too-slow-too-expensive-too stuffy” criticism, which we’ve heard for years, but rather that there is apparently very little appreciation for the skills that we prize the most – the ability to analyze, distill insights from mounds of information, and truly understand what consumers really mean when they speak. The last is the core attribute of the professional qualitative discipline, but its relevance appears to be lost on the CMOs, perhaps because they do not understand that all social media research is qualitative.

On the contrary, many appear to be struggling with how to quantify the information generated by their web scraping and other monitoring activities. Despite attempts at content and contextual analysis, a lot of what on boils down to word counts displayed in clouds.

*“Our engineers think that what people do is more valuable than what they think, and this can be dangerous because they tend to rely too heavily on one type of data. This real genius is in tying what people do to what they think...that’s when you get the full picture. Social is a lot like that. You can’t just count how many times they mention [our brand]. We have to know why they talk about us and what it means to them.”*

In fact, the emergence of social media monitoring and engagement should present a golden opportunity for the research profession to enhance our position and significantly increase Marketing’s dependence on us. In many ways we are the best suited to the task that now confronts a function that intensely feels the need to understand and interact with consumers better, and has embraced a mechanism that has given a new meaning to “raw data.”

- Our purpose in life is to understand consumers, especially their motivation and likely behavior.
- We are used to evaluating the intrinsic reliability of data, how they can be used and what their limitations are.
- We tease meaning out of individual streams of consciousness – that’s what qualitative researchers do for a living.
- We know how to combine the learning that emerges from social media with that derived from more traditional research.
- We understand cultural differences and nuances, and how they affect how consumers communicate and how they can be engaged. The whole world of observational and anthropological-based work has exploded in recent years, underscoring our expertise in this area.
- At the same time, we are accustomed to working and thinking globally, finding commonalities across countries as well as idiosyncrasies within them.
- Finally, many researchers are accustomed to derive strategic implications from a wide range of types of information.

It is perhaps our natural skepticism, and understanding that whatever learning emerges from social media activities is not alone a sufficient base for decision-making, that has contributed to CMOs rejecting our greater involvement. They may well believe they have found a holy grail that delivers answers with lower cost and increased speed, and don’t want our caveats to shatter their myth.

But the greater issue may be that we are not credited with the skill set that we claim, but are still regarded as number crunchers crunching an outmoded body of numbers. Since the CMOs are focused on the technical aspects of the problem, our ability to translate our valuable skills to this new medium doesn’t enter their collective consciousness.

(While these observations are based on a very small sample, they dovetail well with those reported in the IBM study of over 1,700 CMOs.)

From our profession’s perspective, this CMO perspective must seem contrary to our own reality. The shift in focus to all kinds of internet-based research, including on-line focus groups and bulletin boards, social media monitoring and communities, is undeniable. Many of the papers at this conference testify to how forcefully we have embraced this brave new world. Serious conversations and debates have emerged exploring ways to achieve greater representativeness through non-traditional data gathering methods, and to integrate learning from disparate sources. How can these trends be reconciled with the harsh perceptions of the CMOs?

The answer probably lies in the distinctions between in-house and supplier-side researchers. Marketing and marketing research departments certainly engage firms with social media expertise, many of which fall within our own profession. However, many other suppliers providing infrastructure or who enable marketing via social media channels are outside this circle. In many cases, I suspect, even the purely “research” firms are not emphasizing this term in their positioning. The distinction between learning from the chatter and influencing it—a distinction set in stone in traditional codes of conduct—seems to be blurring, especially among those buying the services.

It is more the *internal* researchers who are being left out of the party, who are not considered appropriate partners, let alone entrusted with managing the new social media learning divisions. In many cases, they may not even be involved in selecting the outside suppliers.

*“At present, our Research folks risk a similar fate as the dinosaurs. If they don’t speak up and find a way to be more relevant to the conversations happening every minute of every day, their jobs and their funding will continue to be reallocated and further minimized.”*

## A CALL TO ARMS

The threat to our continued stature within the Marketing organization and enterprise as a whole appears to be very real. This is quite different from the challenges we’ve experienced over the past two decades, in which we strove to enhance our role and find a place at the table primarily by taking on more roles normally associated with consultants. In general, neither internal nor external researchers succeeded in carving out that place or being awarded the same stature as management consultants, yet the basic relevance of the research function was rarely seriously questioned. The continued increase in research spending over the past 20 years, and the recovery from the recession, prove this point.

The real threat now is a diminished role in general, as more and more dollars are devoted to activities from which we—at least, the corporate-side researchers—are excluded. There is an even darker side to this. Since this activity tends to be centered in headquarters, global research staffs may find themselves starved for funds and left managing brand trackers and a few other multi-country efforts. Research will then become even more a regional or local function with a tactical focus.

This is by no means a necessary outcome, certainly not in all cases. We suggest that experiences will vary considerably from company to company, and may well be determined by how marketing departments deal with other, larger issues than the role of Research. These are how multinationals respond to the new globalization described earlier, and how much they come to recognize that distilling insights from the mass of data extracted from social media monitoring is not really about finding technical methods to quantify and categorize brand mentions.

We see two potential scenarios emerging. In one, multinationals will cling to their current geographically-based structure while embracing social media monitoring and marketing largely at the corporate level, while eventually enabling more social media activity at the local level. In this framework, Research is likely to be increasingly marginalized, primarily focused on regional and local needs while largely excluded from the expanding social media activity at the global level. Its “monopoly” on the global voice of the consumer will be largely transferred to “experts” in this new field.

The other one is somewhat more optimistic. Here, CMOs will come to recognize that the new globalization implies a globalized consumer base that cannot just be reached through customized messages flowing through local channels. Instead, they will adopt some form of a “global village” approach. While regional and local marketing organizations will still be necessary, an over-arching global strategy focused on this global customer base will be critical, and will entail far more central involvement in managing execution. It may also suggest structuring the marketing department among global consumer segments [such as socio-economic level (affluent, mass, etc.), or age (youth, seniors, etc.), or clustering markets by stage of development, irrespective of geography.

In this scenario, the global research function stands a much greater chance of defending and expanding their role because the central marketing group will become more dependent on all kinds of information from around the world to support increased centralization of their function. In short, Research can help enable the necessary power shift to the headquarters staff, acting as an ally in what will inevitably be somewhat of a power struggle.

Even under this more positive scenario, success will depend a great deal on Research taking a very proactive role in shaping its own future. This must start with a frank evaluation of how researchers are perceived by their Marketing peers, and taking efforts not only to dispel what may well be myths, but change much of the behavior that has led to the caustic comments often voiced by these colleagues. Many others have elaborated these particulars before, so only a few need be cited here:

- Understand the full scope of business needs and the decisions that will be made based on the research, not just the objectives of a specific project;
- Focus on learning that informs decisions, not methodology and findings;
- Make forceful, but supportable, recommendations, transcending the immediate scope of individual projects wherever possible.

Beyond these basics, researchers must accomplish two critical objectives – they must convince top headquarters staff that they not only welcome social media monitoring as a legitimate form of (additional) learning, but can answer the pressing

need of analyzing these data better than anyone else; and they must convey the message that the global marketplace requires a more centralized marketing operation.

The first task, as noted earlier, is going to be challenging, given how many marketers have already dismissed their research staffs as too wedded to the past to take on this assignment. This could be countered by our gaining a deep understanding of the social media monitoring landscape, and bringing specific suggestions to Marketing of new or different approaches than those being used or considered. Once recognized as being a valuable source on social media methods, researchers can start educating their business partners about the unique “understanding” skills they can bring to bear, particular those from the qualitative arena, that can yield more actionable results than the more mechanical procedures currently being used. Finally, they can demonstrate how these learnings really complement as opposed to supplant other sources of information. Spontaneously providing examples that merge social media output with survey, transaction, or secondary data could really help in this regard.

The critical point here is that researchers not wait around to be called, but take the initiative in reaching out to the senior staff, actively lobbying for the time and space to make these cases.

At the same time, researchers should take on the mantle of advocates for the globalization of the marketplace, urging senior Marketing management to understand how the game is changing, and what the implications are for their function. In fact, since the internet in general and social media specifically are driving this trend, the quest for a greater role in those arenas should be placed under the globalization rubric.

As part of instigating something of a revolution, researchers must also persuade this management that they are an essential partner in realizing a more centralized Marketing structure, based on our unique ability to blend the global and the local into a coherent understanding of what consumers really want, and how best to connect with them.

To be convincing, the headquarters’ research team needs to bring both strategic and a global perspective to all its efforts. The key here is not only the ability to see the “big picture,” but to draw on the wealth of research and information flowing up from the local research staff. (It would be best, of course, if the entire research function could align around strategic needs of the enterprise rather than the more circumscribed demands of the regional and local organizations, as already recommended by the MREB study eight years ago.)

As good researchers, we must close with our caveats. We don’t pretend to predict the future. But we do believe the trends observed and reported for nearly a decade, as well as the issues raised in our own modest study, imply challenges to our profession that we ignore at our peril. The good news is that they raise challenges to our Marketing brethren as well, and if we take the initiative in alerting them to the implications of the globalized marketplace, we may still emerge as not only relevant, but essential.

We’ll see.

## FOOTNOTES

1. Market Research Executive Board™, “Managing a Global Research Function. Aligning Research Operations to Support the Firm’s Expanding Global Footprint,” 2006;
2. IBM, 2011 CMO Study, “From Stretched to Strengthened, Insights from the Global Chief Marketing Officer Study,” 2011. This study was featured in Research World No. 32, January/February 2012.

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