My brief as a speaker was to comment on points raised in the opening session, within the general theme of serving the needs of research users in the 1980's. This scheme did not allow a prepared paper, and my impromptu comments tended to be discursive. Below is a summary of my main points, leaving out anecdotes and examples used in the actual talk.

1. THE CHANGED STRUCTURE THAT SERVES THE DECISION-MAKER

During the 1950's and 1960's the use of survey research increased dramatically. The work carried out was primarily based on direct communication between decision-makers in user organisations and research consultants in outside research organisations. There was considerable investment in developing new methodologies to meet the widening range of applications, and a very fast adoption of the new techniques or transfer of successful methodologies from one type of business problem to other problems posed. One stimulus to this process was that the research consultants were continually being challenged by exposure to the real problems facing decision-makers.

By the early 1970's, the research industry had reached a level of maturity in terms of it being an accepted part of decision making in business and government. A consequence was that part of the research process was institutionalised within the administrative structure of business organisations and government departments. People were recruited to manage the research function and to act as research advisors. They had varying job functions and titles, and I will refer to them collectively as "inside professionals".

For consultants in outside research organisations, this trend represented a significant change in working relationships. Whereas they had been given problems through direct contact with decision-makers, there was an increasing

\[^{1}\text{President of Canadian Facts}\]
tendency for them to be given specifications via inside professionals; often with an inadequate background briefing as to the real problems or decision options.

### CHART A.

Chain of Activities in Decision-Making Process

<table>
<thead>
<tr>
<th>Type of Activity</th>
<th>Full Consultancy</th>
<th>Market/Social Consultancy</th>
<th>Survey Consultancy</th>
<th>Production Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived Opportunity</td>
<td>D</td>
<td>D</td>
<td>D</td>
<td>D</td>
</tr>
<tr>
<td>Problem Formulation</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision Options</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Needs</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Design</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Data Collection</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Information</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Understanding</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Recommendations</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision</td>
<td>D</td>
<td>D</td>
<td>D</td>
<td>D</td>
</tr>
</tbody>
</table>

D = Decision-Maker  
X = Research Organisation

2. THE EFFECT OF THE CHANGE ON THE RESEARCH PROCESS

Yesterday morning Peter Hicks and Robert Stewart gave analyses of the way their respective organisations use survey research. Their two organisations are very different and the types of problem areas quite dissimilar. Yet their descriptions of the decision process were almost identical, except for the terminology used. What they demonstrated was that at a certain conceptual level formal decision making is the same, whatever the context.
If the decision-making process can be generalised to all types of organisation, we can construct a general set of specific activities that make up the decision-making process. We can also describe the different types of user/research organisation relationships in terms of those activities. This has been done in Chart A, with the activities carried out by the decision maker indicated by a "D", and those carried out by the research organisation indicated by an "X".

Research organisations have added Survey Consultancy and Production Services to the types of service they offer clients as a response to market demand. The main point of my chart is to emphasize that when a restricted service is commissioned from a research organisation the gaps in the chart must be filled by people within the user organisation. And not only must the activities be performed well, but also part of the function is to ensure that anyone performing a later activity has full knowledge of the previous steps.

Without wishing to imply that the performance of research consultants is perfect, there is a case to be made that inadequate research is often due to the inside professionals not filling the gaps in the activity chart competently. Sometimes this is due to lack of experience, and sometimes due to the structure of the user organisation. It is not unusual for research consultants to be contacted by an inside professional, who has a research specification but is unable to answer questions because the real problems or decision options have not been communicated within the user organisation.

It is possible that the lower level of methodological development, and the slower rate of adoption of those methodologies that have been developed, are also due to the change in structure. Twenty years ago the typical contact for a research organisation was of the form "This is my problem, how can you help solve it". The contemporary equivalent is more likely to be "We want to do this survey of 1,000 adults, how much will it cost?" Even if subsequent discussion shows that a different approach would be preferable, it is not uncommon for the internal procedures not to allow re-opening the decision as to the form of research. This is particularly the case with government research.
Before leaving this topic I will make two qualifications to the criticism of the internal research function. The first is that some information needs are simple and repetitive, and in those cases there is no reason why a production orientated brief should not be given to the research organisation. The second is that the situation has improved in the past two years. The sudden demand for inside research professionals in the early 1970's far outstripped the supply of qualified and experienced people, and it has taken a few years for the market to adjust. I anticipate further improvement during the 1980's.

3. DEVELOPMENTS IN THE 1980's

There is a tendency for people who speculate on the future to either predict imminent disaster or a technological utopia. It is likely that the changes in the 1980's will be greater than those we have seen in the last ten years, but such changes will be more significant in the mechanical aspects of our work than in how the data are actually used. This is because the people will not change, but a combination of economics and technological innovation will affect the way data are collected.

4. LIKELY CHANGES IN DATA COLLECTION

There has already been a trend towards telephone interviewing and mail surveys, at the expense of personal interviewing, and this trend will continue. The suggestion has been made that this is because personal interviewing has become too expensive. But this is true only in a comparative sense. Costs of personal interviewing have kept reasonably close to inflation during the past seven or ten years. The real pressure has been towards obtaining more interviews per constant dollar by using alternative methods. This is the common process of product substitution in a competitive market-place.

The main technical developments that have been mentioned are the use of direct entry interviewing systems, scanning of Universal Product Codes at retail outlets, and two-way communication systems such as Teledon. All are technical developments that are already operating, but the time-scale in which they will make an impact will vary.
The most immediate impact will be provided by the UPC scanning systems. They are already operating in both the U.S. and Canada, and the scope will grow as more supermarkets convert to scanning check-out systems. The services have considerable potential for providing retailers and marketing companies with a wide range of information on the effects of pricing, promotions and advertising, and eventually in providing brand share estimates based on a significant proportion of total retail sales. There will be significant growth in this application over the next five years.

Computerised direct entry interviewing devices are best known in the form of CRT terminals for telephone interviewers, but portable hand-held devices are also being developed. The telephone interviewing application is well developed in the U.S. and some units exist in Canada. The main reason for a slower adoption rate in Canada is the telephone tariff differences. Because of the higher WATS costs in Canada, research organisations have set up telephone interviewing offices across the country rather than having one large centralised facility. In the present Canadian context, the economic trade-offs between data entry costs and long-distance charges are less favourable. However, the increased sophistication of low priced micro-computers will begin to have a general impact within the next three years.

Two-way communication systems, whether based on the telephone line or the cable system, have an immediate attraction as data collection devices. They have the potential of being fast, inexpensive and flexible. However, some industry forecasts are for 500,000 households to be connected by 1986. If so it will be some years before an adequate representative sample will be available. On this basis, the main impact should be in the latter half of the 1980's. However, given the importance the media attaches to current less representative polling methods, we can expect some applications within two to three years, irrespective of whether such work has any validity.
5. LIKELY CHANGES IN DATA ANALYSIS

Although the facilities exist for significant strides in data analysis and information retrieval, I do not anticipate any revolution in this area. Significant work will be carried out, and we have heard of federal government plans for larger data bases and the creation of synthetic data bases. However, without a clearly focussed end-use objective, attempts at such systems have been disappointing in the past. Even when the data bases have been created, I feel that there will be many occasions when the correct, relevant and timely data will not be available for particular problems. But that is the situation that exists today, and it can be argued that the new developments can only improve on the current position. The major question will be the extent of the additional benefit for the costs involved. For this reason I expect such activities to take place mainly in the public sector. The only example of a comparable data base being created in the private sector is that which will accrue from the scanning data on product sales.

Regarding other types of data analysis, I expect there to be an ever increasing gap between the most sophisticated organisations and the typical organisation. The analytic methods already available are under-utilized by most user organisations and there is no reason to believe that adoption of methods developed in the 1980's will be any faster. For example, Gus Hess gave us an excellent presentation of the application of a particular analytic model. I expect that to most people in the audience, it appeared to be in the forefront of methodology. In one sense it is. Yet all but one of the statistical methods that make up the model had been developed by 1970, and major research organisations will have used them for a select few of their clients each year. Until the inside professionals both understand, and feel comfortable with, the more advanced statistical analysis techniques the present position will not change greatly.
6. OTHER DEVELOPMENTS

In a very stimulating and provocative contribution, Yvan Corbeil discussed the assessment of public needs, and how such needs may be tracked over time. He described the development of psycho-socio-cultural monitors during the past five years in a number of different countries, pointing out the difference between them and the more common social monitors, which are basically the periodic repeating of public opinion questions.

The newer types of monitor are based on standard research methods. Their development has awaited sufficient demand by potential users. I suspect that the 1980's will see that demand mature and the psycho-socio-cultural monitors become viable and well established services. Some subscribers may be disappointed by the generality of the data, and may feel that it is not very appropriate to their day-to-day decision making. But for other people, particularly in the public sector, the data will meet real needs, and can become part of the integrated data base system.

I am less sanguine about the other issue he presented. I am not opposed to using the arational or intuitive modes if they are limited to the exploratory and hypothesis forming stages of survey work. There should be no formal constraints placed on the search for possible structure. But I do have concern with the application of intuitive methods to the validation or main survey stages. Some of the methods he quotes, such as body posture, have been tested in the past with very poor levels of between observer reliability. Without wishing to appear to have a closed mind on new methods, I believe that most people will require very good evidence of the validity of such approaches before they become a significant part of research in the 1980's.

The French have a saying, "l'exactitude n'est pas la vérité". While I have some sympathy with that view, I believe that Yvan Corbeil was being deliberately provocative in extending such sentiments to his suggestions for future research approaches. But perhaps another cause was a sense of frustration with the stagnation in conceptual thinking in recent years. We need to anticipate
changing needs and demands, and I hope research in the 1980's will produce
developments in our conceptual thinking in addition to the changes in the
methods of data collection.

RESUME

J'ai pris la parole brièvement pour discuter de points soulevés lors de la séance d'ouverture sous couvert du thème
général: servir les besoins des utilisateurs de la recherche
dans les années quatre-vingt. Comme il n'était pas question
de rédiger un texte, mes commentaires faits à l'improviste
tenaient davantage de la discussion à bâton rompu. Voici
un résumé des principaux points abordés, sans les anecdotes
et exemples donnés durant mon exposé.