Exploring the future of insights and the role of customer voice: A view to 2033

Why are we here?

Our industry is the most fearful it has ever been. We look at the sandstorm that is AI and wonder when it will suffocate our industry, and who will be left standing when the storm ends. There's a level of uncertainty that we've never seen, and we are feeling the pace of change ramp up even now.

As a strategic player in the Australasian industry, we need to hold our leadership position. We can't wait for change to happen and then respond. We want to be in the driving seat.

We have commissioned this work to understand how we might take a more active role in shaping the way insights are created and used, looking ahead to 2033 and beyond.

We will step through a four-stage process to build this view:

1. Look at what has brought us to this point

2. Define the key drivers of the future

3. Explore scenarios for how the future could look

4. Take a position on how we will prepare for those scenarios

SWC

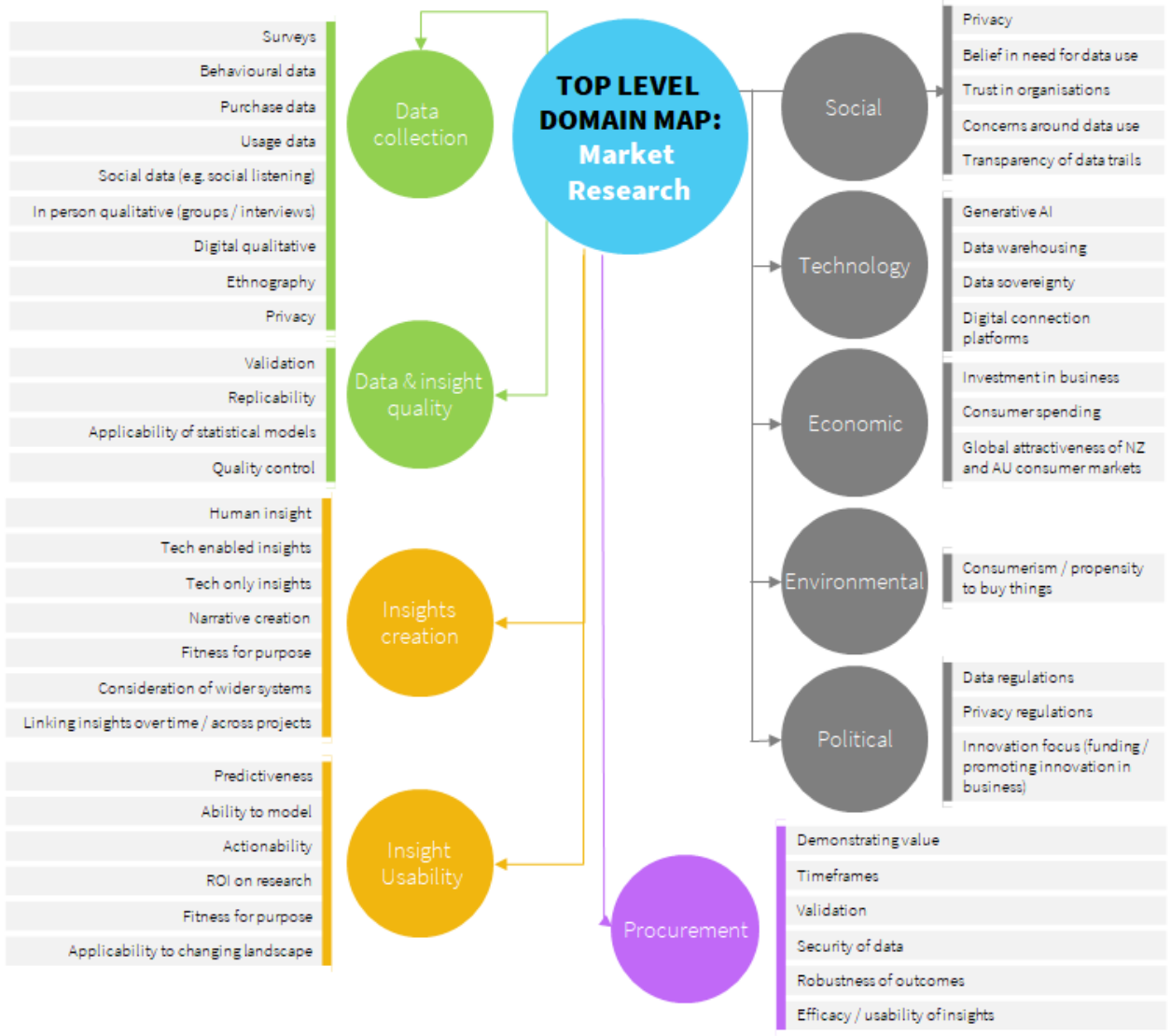# Domain Description: The Future of Market Research

How do we bring the customer 'voice' and insights into product and service design and delivery in 2033?

Domain Definition

The Future of Market Research

Explore how the ways in which we collect and translate customer insights could change over the next ten years. Understand the impacts of this for how market research gets procured, used, and valued in the business community.
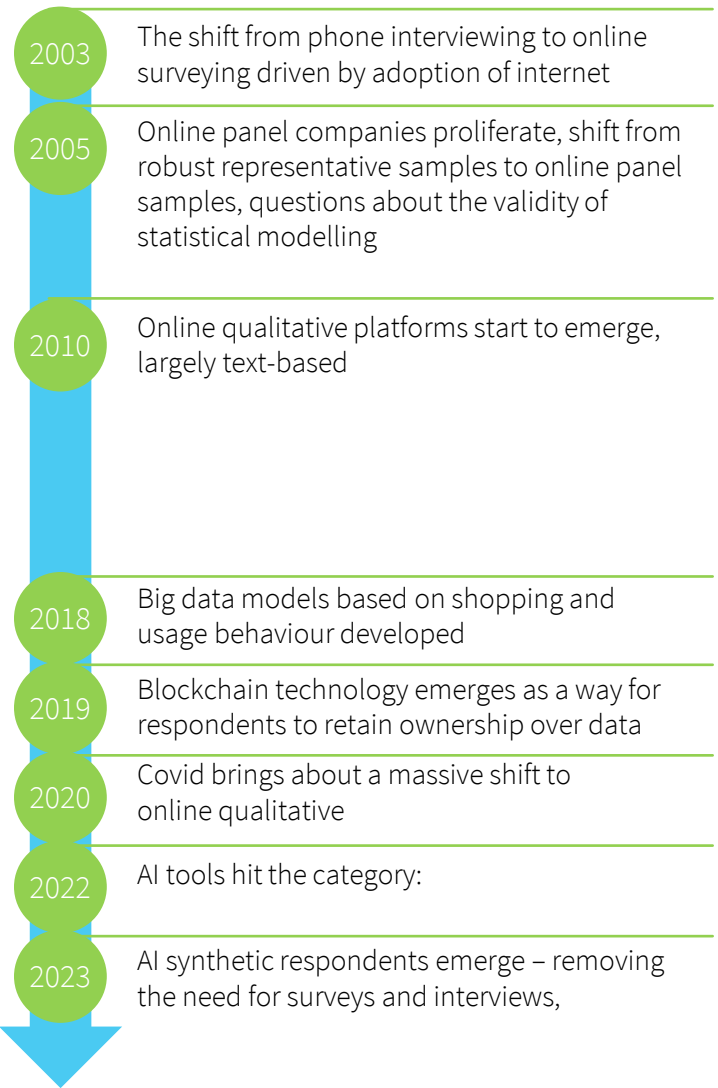
The detail

The client	A New Zealand and Australian market research company at the strategic end of the market
The geographic scope	New Zealand and Australia
The nature of the question	Exploratory
The horizons	Horizon 1 2023-2028
	Horizon 2 2028-2033
	Horizon 3 2033 +

TOP LEVEL DOMAIN MAP: Market Research

Data collection:
- Surveys
- Behavioural data
- Purchase data
- Usage data
- Social data (e.g. social listening)
- In person qualitative (groups / interviews)
- Digital qualitative
- Ethnography
- Privacy

Data & insight quality:
- Validation
- Replicability
- Applicability of statistical models
- Quality control

Insights creation:
- Human insight
- Tech enabled insights
- Tech only insights
- Narrative creation
- Fitness for purpose
- Consideration of wider systems
- Linking insights over time / across projects

Insight Usability:
- Predictiveness
- Ability to model
- Actionability
- ROI on research
- Fitness for purpose
- Applicability to changing landscape

Social:
- Privacy
- Belief in need for data use
- Trust in organisations
- Concerns around data use
- Transparency of data trails

Technology:
- Generative AI
- Data warehousing
- Data sovereignty
- Digital connection platforms

Economic:
- Investment in business
- Consumer spending
- Global attractiveness of NZ and AU consumer markets

Environmental:
- Consumerism / propensity to buy things

Political:
- Data regulations
- Privacy regulations
- Innovation focus (funding / promoting innovation in business)

Procurement:
- Demonstrating value
- Timeframes
- Validation
- Security of data
- Robustness of outcomes
- Efficacy / usability of insights

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We are an industry that is historically slow to change

But right now, the industry is at a point of do-or-die transformation

2003	The shift from phone interviewing to online surveying driven by adoption of internet
2005	Online panel companies proliferate, shift from robust representative samples to online panel samples, questions about the validity of statistical modelling
2010	Online qualitative platforms start to emerge, largely text-based
2018	Big data models based on shopping and usage behaviour developed
2019	Blockchain technology emerges as a way for respondents to retain ownership over data
2020	Covid brings about a massive shift to online qualitative
2022	AI tools hit the category:
2023	AI synthetic respondents emerge – removing the need for surveys and interviews,

Current Conditions:

– AI has come for market research like a freight train, changing the way we work, upending who owns the ability to ask the customer questions, and impacting the speed with which the industry works (AI is coming for B2B market research)

– At the same time, we're dealing with a plague of bots in the data collection side of research, impacting data quality and throwing the validity of insights into question (Bots Biasing market Research)

– All of this is happening in a context where client organisations are looking to move insights in-house and the role of the research organisation is in question – where can we add value that the client can't create themselves? (Why brands are moving research in-house)

– The industry is served by a rapidly increasing number of research platforms making it easier and faster to reach the customer and create insights (ESOMAR predicts 18.9% yoy growth in tech driven market research)

– And clients are increasingly focused on speed over quality (though they now expect both), there's no point spending 6 months researching a development only to be gazumped by a competitor who can do it faster (Technology tranforms the speed of research)

The upshot:

We're at a real moment of transformation. The pace of change in the industry has ramped up as a result of covid. Traditionally conservative clients now have a taste of tech enabled research, economic pressures mean clients expect to do more with less, and the pace of change in general means they want instant insights.

Robustness and validity fall by the wayside in the fight for quick insights. The question is: where will this all take us?

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The trends influencing the industry are pushing us to a faster pace of change

10 key changes that are increasing (▲), decreasing (▼), or holding steady (═)

Synthetic data, real insights?

Increasing discussion around synthetic data including validity, use cases, quality. The conversation often happens alongside questions about the quality of panel data – synthetic data is held up as a solution more here

Closing the say-do gap

As VR and smart glasses hardware becomes more accessible the conversation is increasing around the value of neuromarketing techniques and analysis in market research, moving away from what people say to how they respond more here

Continuous insights, immediate action

Increasingly businesses are looking for customer service insights that are real-time and ongoing (rather than point-in-time) and that trigger immediate action. Information Architects are engaged with insights teams to create live, action-based programmes of insights and response more here

CIOs muscling in

Internally at client organisations insights have traditionally been the domain of the marketing or customers success teams (or similar), with the rise of omnichannel customer experience, data, insights, and analytics increasingly become the domain of the CIO and information teams. This has the power to change the way insights are bought and used more here

Who can see me now?

Privacy and personal data remain a hot topic – trust in how data is tracked and used continues to be an issue. As noted in a 2023 survey from Deloitte, 58% are concerned about their data being tracked, up from 40% in 2022 More here

Eavesdropping for insights

Social listening and conversational data, analysed by AI, create far more of an early warning system for what customers really want or need, and why – helping businesses make faster-paced decisions around product and services more here

Internalised insights

Client organisations are beefing up their internal insights capabilities. From ESOMAR: Insights teams at global and local companies have adapted rapidly and dramatically by conducting around 50% of their market research internally since 2020. More here

Perfect is the enemy of progress

An undercurrent to articles on leadership, decision-making, information, data modelling, and analytics is to focus on progress not perfection. Speed to decision and speed to market trump robustness – though this may have impacts on statistical robustness and validity more here

AI everything

AI is the topic du jour and insights companies are developing their own tools, outlining their AI approach, and getting on the bandwagon quickly. The industry is in the wild west of AI and everyone is running to stake their claim more here (conference proceedings)

The real representative

Nat Rep samples usually only include gender, age, and location. Budget and time constraints can lead to dismissals of factors such as ethnicity, religion, and social-economic status. Research is becoming more cognisant of inclusion, diversity, and intersectionality and the impacts this has on insights. More here

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There is tension at the intersection of trends that suggest different potential outcomes for the industry

AI vs. Human: Where will we end up?

CONFLICT
While there is general agreement that the insights industry must take on AI tools or risk becoming obsolete, there is conflict as to where to draw the line.

One faction believes that the human in the system is what makes insights valuable. That the line needs to be drawn at data collation, and not step into implications.

On the other side there's a belief that AI can go all the way – from data creation (synthetic respondents) through to insights and implications.

We are yet to understand exactly where that line will land in the mid-term future, and what's too far. As a result, ESOMAR has set up an AI taskforce to start to define guardrails for the technology

Who can we trust? Asked vs. Implied data

TENSION
There's a tension in how data is created or collected that then feeds into insights. On the traditional side, the gold standard is question and observation of real-world, real-time people, places, and behaviour. This might go deep, it might include longitudinal data, and it might surface unspoken insights, but we know who the insights have come from and how.

On the other side is more aggregated non-research data, implied data, synthetic respondents. There's an argument that we can't always trust that people say what they mean, or act in rational ways. It's only from data at scale and often implied or extracted from other arenas that the truth emerges.

See here for human and here for implied

Dumb data: Can we make a difference?

CHALLENGE
While data and insights are widely agreed as critical to business decisions, being able to effectively access, translate, and use data and insights is harder than it needs to be.

One of the key challenges facing the market research industry is salience – if the industry doesn't pick up its ability to live in the boardroom, it will be replaced.

Why use a costly research company when AI and the internal team can do it themselves. A recent survey by Talend highlights that 20% of leaders and data experts struggle to extract value from their data and insights.

The issue to resolve: Can the industry make data and insights more usable before the category becomes irrelevant?

Yet we haven't been doing the work of planning for a different future

Few of the research industry bodies or major players are publishing projections on the industry as it stands, nor is it easy to find projections on customer experience insights spend, or even customer insights spend.

This feels like a real gap. We have people like the Australian Market Research Society, Research Association New Zealand, ESOMAR and Greenbook talking about the role AI and data analytics will play and how that is cannibalising traditional market research spend. Yet, they're not willing to project beyond the end of the current year.

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The six drivers that will shape our industry highlight where we need to start paying attention and planning

Sharp Shooting AI

We are in the wild west land-grab of AI in market research, the next five to ten years will be defined by whoever wins the best real estate. AI will have a massive impact on how we gather data, and build and activate insights throughout business.

- AI is most likely to make support and pure analysis jobs redundant, 40% of researchers expect AI to explain findings as well as humans within 10 years link
- ESOMAR has set up an AI forum to start to navigate some of the issues around AI in MR link

Sneak attack data

Surveys, and to some extent qualitative research, decline as insights professionals rely more on data that is already out there – social listening, synthetic respondents, big data, behavioural data etc.

Enabled by AI, you simply need to ask a question and it will be answered – no six week wait, no $250k spend.

- Social listening to increase to $14bn by 2028 link

You belong to me

With the shift in the ways data is collected – social listening, behavioural data, spend aggregators, through to tracking and primary research, data ownership and privacy becomes increasingly thorny. Even more so once data sets are connected and a fuller picture of individuals emerges.

- Concern around tracking and how data is used is on the rise link
- As data sets are combined, anonymity is highly compromised link

The hunted becomes the hunter

While internal client insight teams aren't new, the proliferation, scale, and reliance on internal teams is growing rapidly. Clients are the insights hunters now, leaving research companies out of the loop.

- From 2022 to 2023 the share of projects carried out internally in Asia Pacific went from 40% to 50% link
- Insights are becoming ingrained in every action, every decision. Brands are bringing audience research in-house to get straight to the insights that link
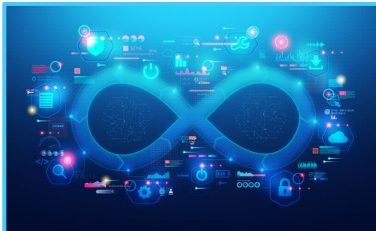
Continuous Customer

Clients have always lamented the gap between insights and action, and now they can access the tools they need to close that loop. Insights feed directly into programmes for how we manage service, how we develop products, and how we prioritise business resource.

- Kantar Digital Mirror "a dashboard interface with guided analysis and built-in targeting and activation options." link
- Qualtrics end-to-end NPS and experience management Outer Loop link

Gestalt Reversed

The focus will shift to a more nuanced view – simple, traditional nationally representative samples don't give enough anymore. The industry is looking to understand the niches as well as the bigger picture. Inclusive and diverse samples that enable nuanced understanding will help companies to find white space for targeted products, messaging, and services.

- The diversity landscape needs to be explored with more sophistication link
- Inclusive market research drives customer engagement link

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Those drivers paint the picture of our four scenarios:
1. The Baseline Future: Bifurcated but not broken

Sharp Shooting AI

The first flush of AI hubbub settles down as researchers and clients learn to live with key tools as part of the process of insights. The focus for tools is largely on the repetitive, slow parts of the process: coding open enders, understanding topline themes. Beyond that, the human takes over and is critical to adding real value.

Where AI makes a real difference is in the longevity of insights usefulness – libraries of raw data are built that make ongoing interrogation easier. Clients get more value out of research spend and researchers don't have to replicate the same project for different questions.

Sneak attack data

There's a realisation that social listening and big behavioural data, while useful in certain applications, can't replace conversation and primary research.

When companies are looking to spend millions of dollars on a product, secondary and social data is useful for surfacing ideas, but there's nothing like testing them in front of the target to really know what will fly.

Secondary data does give us the ability to be more targeted in who we recruit for research (and verifying identity) and how products are designed for different tribes.

You belong to me

Trust continues to erode but there's a collective sense of "what can I do about it". It just becomes one of those compromises you make for modern life.

Sure, there are increasing data breaches and increasing regulation to try to stop these. But – if you want the access to technology, you take the compromise of sharing your data.

The hunted becomes the hunter

The cycle comes back around as companies tighten their belts and lose head count. Internal research teams shrink, with staff moving to agency-side and winning work from the companies they left.
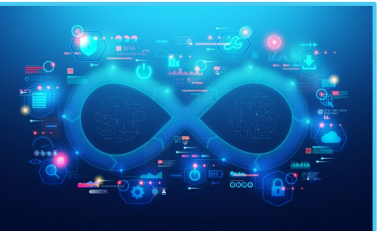
Continuous Customer

Closed loop platforms gain a certain amount of traction with larger corporates, but smaller companies flounder in their ability to wrangle the data and build automated responses.

In NZ and AU, where small companies are the bulk of the business market, they take on board the principles of continuous, but follow a more manual process for ongoing tracking and response.

Gestalt Reversed

The industry takes on board a more inclusive view of how to ask questions, engage different people in research and bring their perspectives into insights.

However, at large scale the cost involved in finding diverse participants and maintaining their participation in research becomes prohibitive.

True diverse perspectives becomes the domain of qualitative research and AI enabled digital secondary research like social listening and synthetic respondents.

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The Baseline Future:

Bifurcated but not broken

The future of market research: How do we bring the customer 'voice' and insights into product and service design and delivery in 2033?

A world in which…

The market research industry has stretched and reshaped, but not broken at a fundamental level. We have new tools that make us more efficient – the drudgery has been removed (who ever loved coding open enders anyway).

There are far closer links between primary research and secondary (social listening, big data, behavioural data, digital tracking, etc.) so we have a more rounded and complete view of the customer that brings more value to the client.

We rely on this kind of secondary data for exploratory work – understanding when new gaps and pain points are bubbling to the surface. This has opened new conversations with our clients – we're now there with the strategy and design teams thinking about the future, not just reporting on the past.

But equally, our clients have learnt to serve themselves in a lot of cases. So, the nature of our work has bifurcated: platform providers vs. consultants. The two work together, but the consulting financial model is not scaled enough for the platform players to want to own that part of the research anymore.

It's not all AI roses – no matter how data is collected there will always be people who try to game the system. New AI farms are starting to pop up: synthetic respondents started to gain popularity, but people realised that they could push their own agenda by creating content the LLM would read as specific targets. The value of synthetic respondents has fallen as they've been manipulated.

The Whale

AI is the 'whale' that drove a lot of where the industry is at now. Once the wild west calmed down and plyers consolidated into a few major platform providers, AI was simply part of the fabric of how we worked. The efficiencies it brought in how we work is what has enabled the industry to stay relevant, and to bring a more nuanced customer voice to the table.

How we as a company might respond

The company started that process of bifurcation back in 2021. The innovation labs we set up and started spinning businesses out of was focused on automation of the regular processes within the industry. We as a caompany has always kept these businesses separate (branding, target, leadership, structure) because they are so far down the spectrum from the high touch consultancy we've built our name on.

In this world there is ample space for our two separate arms to the business – we are ahead of the game with the separation and automation plays.

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The drivers change again under the Transformation Future:
Frictionless but crowded, white space is hard to find

Sharp Shooting AI

Two major players won the war of AI technology and now underpin all of the research platforms across the industry.

What this means is that those companies have the scale to invest in an integrated, end-to-end AI enabled research process. Humans still drive it, but AI has taken all of the grunt work. We feed in research objectives, audience, business objectives. It churns out research design (for human sign-off), and manages the process from data collection to initial insights.

Sneak attack data

Social listening data enabled by AI makes it easy to turn huge swathes of unstructured data into counted thematic codes, approximating what would normally come from questionnaire and interview data.

Researchers therefore have the ability to ask the AI questions as one might ask in a questionnaire, and get quantified data back – based on actual human conversations.

It's the validity we want, but at a speed that was previously impossible.

You belong to me

With AI, the ability to link data sets increases exponentially, but this also gives customers and consumers the ability to see exactly who is collecting information and how it is being used.

A start has been made in enabling consumers in the control of how their data is used. It is not yet freely available, but within the following 10 years (2033-2043) there will likely be easy consumer dashboards (much like credit rating dashboards) that enable them to see where their data is, who has access, and turn permissions off and on.

The hunted becomes the hunter

Big corporates like Coca Cola and Unilever stayed with the internal model, supported by key contractors for highly specialised work.

Smaller businesses that don't have the budgets for large internal teams have shifted the structure of the agency landscape by hiring "freelance internal teams" – research teams that contract to several businesses. It's a hybrid model that gives a sense of internal teams, but without the headcount.
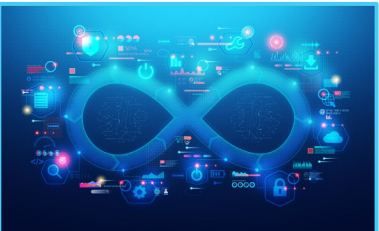
Continuous Customer

This is the one area that hasn't seen much shift in the 10 years from 2023, and lines up with the baseline scenario.

Closed loop platforms gain a certain amount of traction with larger corporates, but smaller companies flounder in their ability to wrangle the data and build automated responses.

In NZ and AU, where small companies are the bulk of the business market, they take on board the principles of continuous, but follow a more manual process for ongoing tracking and response.

Gestalt Reversed

With the deep digging enabled by AI and social listening already outlined, understanding of diverse and intersectional consumer groups has grown exponentially.

The AI enabled research process provides nuanced views of highly niche audiences, and surfaces not just insights, but special considerations in product and service development that have impacts for niche and diverse audiences.

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The Transformation Future:

Frictionless but crowded, white space is hard to find

The future of market research: How do we bring the customer 'voice' and insights into product and service design and delivery in 2033?

A world in which…

The research process becomes frictionless – a smooth flow from business objectives to insights that feed how we develop and manage products and services.

This world is enabled by two main AI players and a few dozen trusted platforms licensing the technology. But what it means is that it gets harder to find true white space for clients – blue ocean ideas, innovation, or insights that trigger new ways of thinking.

When clients are all using the same data sets (social listening, AI enabled fieldwork and panels), finding the insight no-one else has seen comes down to the people asking the questions and translating the insights.

Thus, the role and value of the researcher now lies not in the process of research itself, but in the curiosity and thinking that goes into the questions and recommendations.

Research itself starts to look more like scenario planning – testing visions of the product/service and competitive landscape against the data (panels / socials / big data enabled by AI) to understand what versions of the future create the best business outcomes.

The headline concern for the industry in 2033 is about understanding and protecting against the potential impacts once consumers have better visibility over, and control of, the network of their data. There is a rush to build solutions – from incentivising consumers for linked data use through to how we enable anonymity for consumers while still providing rich insights.

The Whale

As in the baseline, AI is the 'whale' that drove a lot of where the industry is at in this transformation scenario. It has enabled the research industry to step back from the "doing" and focus more on the value parts of the process – formulating the questions, finding the nuggets no-one else has seen, and translating insights.

How we as a company might respond

The split in approach for big corporates (focused on internal teams) vs. small-medium businesses (freelance contracted "internal" teams) means the company needs to pick a side. What can we offer corporates that they can't get from their internal teams (do we need to specialise – and in what)? OR: Can we structure our teams in a way that make us the go-to for the new freelance internal teams, become the outsourced team these businesses need?

Possibly we can look to the IT development / infrastructure industries of today to understand how they manage this balance, as we see a very similar structure there right now.

SWC

Under the New Equilibrium Future the drivers find some balance:

3. A well-knit blanket we can all fit under

The shape of the key drivers in a new equilibrium future

Sharp Shooting AI

The research industry pulled together to create a cohesive AI-enabled model of working. Customer data is always the input, but this is used as a base to extrapolate out for customised synthetic insights.

Humans add the more strategic element to AI enabled insights – the companies who win are the ones who have melded deep psychological and behavioural science understanding and frameworks with AI speed to insight.

Sneak attack data

Synthetic data regulations were developed around 2028, with requirements created around the use of primary data as an input to synthetic and social listening analysis.

Field companies developed an always-on model of feeding direct responses from customers into their data lakes, ensuring the speed promised by synthetic data can still be achieved in a world where it must be backed by primary data to be used.

You belong to me

The new model of incentivisation means that every time a customer data point is drawn from a data lake, royalties are paid for that data point. While these might be fractions of a cent per data point, they add up over time for the people that data belongs to.

Some choose to take the accumulated revenue each year, others use this for social good – donations to causes close to their own hearts.

The hunted becomes the hunter

The insights agency model moves from project-based to ongoing relationships with a retainer model. As such, the insights professionals feel like part of an agency village for each client rather than a supplier relationship. The question of internal vs. external insights capacity becomes moot as true partnership is the focus.

Continuous Customer

Always on models of feeding data lakes mean that product and service development become more of an ongoing conversation rather than a time-bound and distinct piece of work.

Gestalt Reversed

Because of the new benefits that come to the customer for sharing their data, traditionally hard-to-reach groups and niche groups become more engaged in the data sharing process. They open up their thoughts, feelings, and behaviours for closer inspection, lowering the cost to reach hard to find customers and increasing the role of their voice in product and service development.

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The New Equilibrium Future:

A well-knit blanket we can all fit under

The future of market research: How do we bring the customer 'voice' and insights into product and service design and delivery in 2033?

A world in which…

Researchers and AI developers work collaboratively to develop both the human at the machine within the research industry.

Frustrated with the promise of AI never quite matching the reality, key insights players formed partnerships with the AI community to scale up insights focused development.

The tools that came from this enable a far more enhanced insights creation and implementation process. The researcher, the client, and the tool work in harmony to truly understand the business need, and to create ongoing, dynamic insights at each stage of the product or service development process.

As a result, the process of bringing a new product to market looks a lot more like a conversation rather than a big project.

The researcher uses AI tools and the customer connection to constantly feed in the right insights at the right time, and work with the client to translate this to product development outcomes.

What used to take six weeks and looked like a black box of "research" now happens real-time, and there's far more transparency in the process. The research companies who win are the ones with the smartest strategic people and access to the most flexible AI and customer panel tools, both working in concert.

The Whale
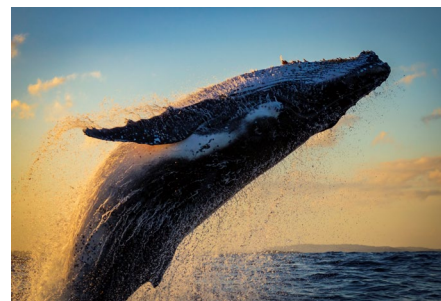
A willingness to collaborate across research industry, client organisations, AI development, and panel providers is the element that enables this future. It requires recognising the potential, willingness to be transparent, and willingness to be flexible on the part of all parties.

How we as a company might respond

Now is the time for us to begin some honest and exciting conversations with clients and AI development players. Let's show the way for clients – that we can do it differently but it will require a shift in their process. Let's work with the AI developers to build more dynamic and collaborative AI.

The first step is to start to define what a "conversational" and enabled research process might look like, who does what, how it might look as a business model, and who we can work on a proof of concept with.

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And under the Collapse Future the drivers leave us in the cold:

4. Winter comes to the cricket who sang all summer

The shape of the key drivers in a collapse future

Sharp Shooting AI

AI didn't just create shifts in the way the market research industry worked, it created shifts in the way insights clients thought and the ways they worked.

New models for business replace agile, lean, and all the design-thinking processes that had become embedded through the 2010s.

The new models of business are systems-focused, networked and dynamic. Insights agencies did not keep up, and couldn't thrive in a world where clients were demanding far more dynamism.

Sneak attack data

The AI companies steamrolled over robustness and validity arguments and built key partnerships with the big social media players.

They now have vast levels of access to data points both public and private – social media through to your doctor's office. They have everything they need from data trails to be able to build insights that rival even our own understanding of ourselves.

You belong to me

The value AI offered in its initial phases of 2023 through to 2026 means that the consumer gave up a lot of their data privacy to get the most out of the personal tools on offer.

Once that happened, there was no putting the data genie back into the bottle. So much of the world relies on AI now, that forcing privacy regulations would drive economies to a halt.
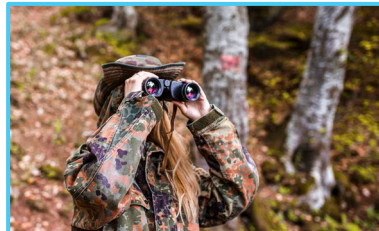
The hunted becomes the hunter

Human enabled insights cannot rival the insights that comes from linked up data that powers the AI models. The big insights players have crumbled, with one or two holding on but largely irrelevant.

The researchers themselves are now looking to work within the corporates harnessing the power of AI insights, or serving the smaller businesses who can't afford AI platforms.

Continuous Customer

It's as continuous as it gets – we can probably predict what a customer is going to do before they even think of doing it themselves.

Gestalt Reversed

It's as niche as it gets – again, client businesses can understand the detail of niche and hard to reach customers at the touch of a button and can develop customized offers almost as quickly.

SWC

The Collapse Future:

Winter comes to the cricket who sang all summer

The future of market research: How do we bring the customer 'voice' and insights into product and service design and delivery in 2033?

A world in which…

The research industry never fully got to grasps with the ways the world was changing and the pace that was happening within. We thought we had time and that AI tools were the saviour for a dinosaur of an industry, we were wrong.

What we didn't fully comprehend in 2023-2025 was how AI would shift the ways our clients would do business. We were focused too much on the ways AI might change our industry, without keeping an eye on what was happening to client business.

Insights became fully democratised, tools proliferated that enabled clients to gain direct access to the hearts and minds of customers, and that helped them make sense of what they were seeing.

Sure, the first tranche of AI tools was poor at nuance and strategy, but the tools quickly learnt and shifted.

The big research companies fell first – because their larger clients were more likely to be able to pay for first generation, expensive AI tools. The market research industry flooded with freelancers, and the smaller research companies found it hard to hold on.

Researchers now are on one of two paths: either retraining to be work on the ongoing development of those AI tools that took their jobs, or fighting it out for the few clients still relying on traditional methods.

The Whale

Once again, AI is the driver of the collapse of the market research industry. What we feared in 2023 (that AI would take our jobs) has come to pass, and we let it happen. The enabler to this situation is the new sophistication of AI tools, moving beyond assistance to strategy, but at a level of robustness and scale that human researchers could never replicate.

How we as a company might respond

We as a business cannot be complacent and insular, we need to lift our gazes to the ways our client businesses and expectations are shifting. There's potential for this company to be at the forefront of developing those tools. In a world of collapse, the winner is the owner of the tools and the smarts behind them.

We need to consider key partnerships now, looking to JVs with companies who are focused at the more sophisticated end of AI tool development.

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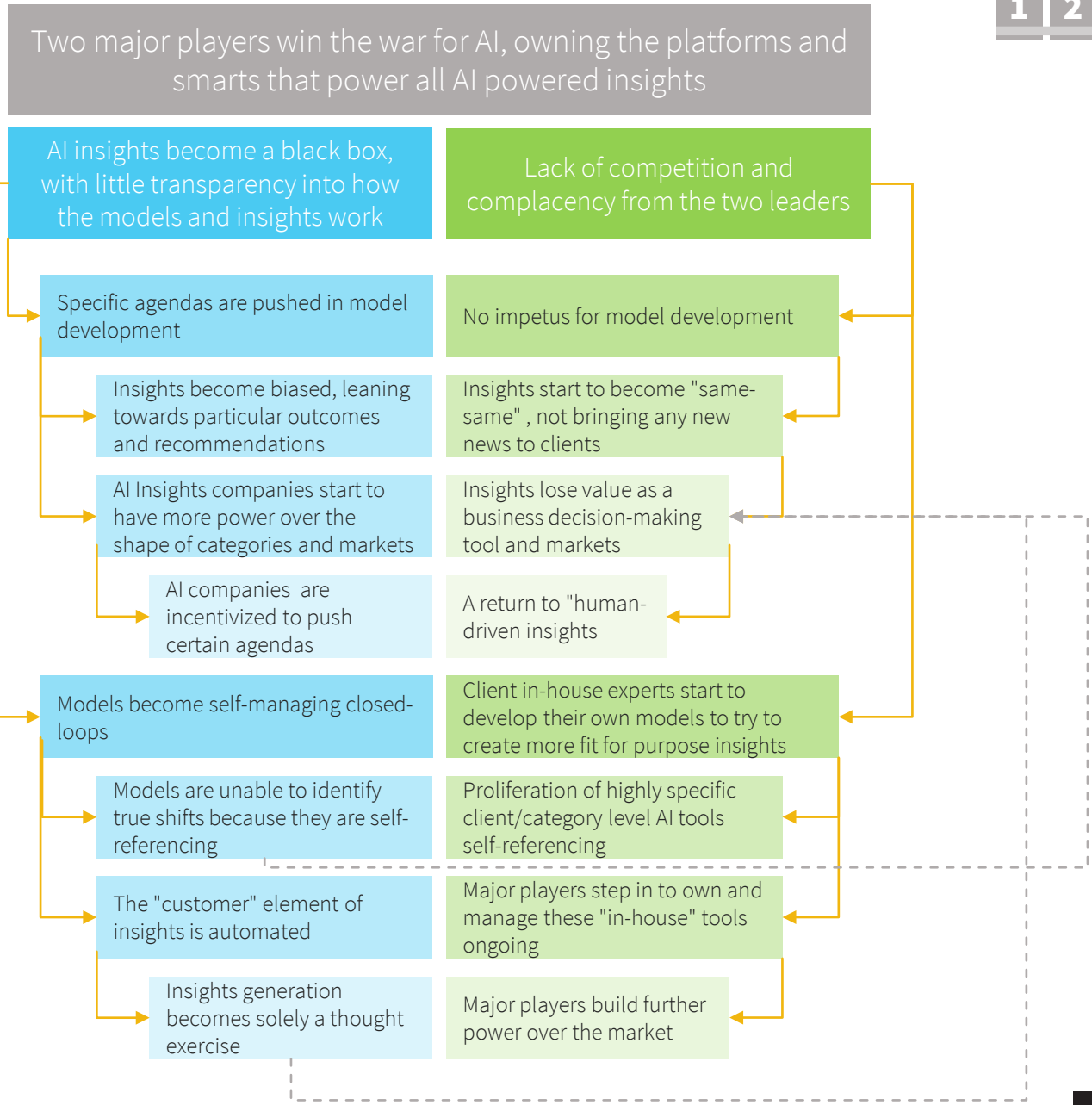# From across all of those futures there area lot of potential implications:

One area of the domain map is driving a lot of change right now: Insights Creation. The changes in this area are what triggered this project looking at the future of the industry.

This is where we as researchers add the most value now, this is what enables us to command a premium – the quality of our insights (alongside the way we work with business to embed them).

If there are structural changes or commodification shifts in this element of the market, our business model must shift to stay viable.

To illustrate just how vulnerable the industry is to shifts in insights creation, let's take one key outcome from the transformative future and consider the implications this might have for our industry.

Ultimately, the process and outputs of insights creation loses value in this scenario – either too biased or too removed from the customer (or both). There are many other possible implications, but this one alone highlights the value in driving the future to avoid industry irrelevance.

Two major players win the war for AI, owning the platforms and smarts that power all AI powered insights

AI insights become a black box, with little transparency into how the models and insights work

Lack of competition and complacency from the two leaders

Specific agendas are pushed in model development

No impetus for model development

Insights become biased, leaning towards particular outcomes and recommendations

Insights start to become "same-same", not bringing any new news to clients

AI Insights companies start to have more power over the shape of categories and markets

Insights lose value as a business decision-making tool and markets

AI companies are incentivized to push certain agendas

A return to "human-driven insights

Models become self-managing closed-loops

Client in-house experts start to develop their own models to try to create more fit for purpose insights

Models are unable to identify true shifts because they are self-referencing

Proliferation of highly specific client/category level AI tools self-referencing

The "customer" element of insights is automated

Major players step in to own and manage these "in-house" tools ongoing

Insights generation becomes solely a thought exercise

Major players build further power over the market

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When we spin out wider implications we can start to formulate a range of possibilities for our future

The most important implications

AI insights become a black box, with little transparency into how the models work and how raw data is converted to insights

Models are unable to identify true shifts in human desires, needs, fundamental philosophy because they are self-referencing based off initial development training

Customers / public pushes back against tracking and aggregation of data trails

Without transparency the validity of the future of AI-enabled insights will be called into question.

OPTIONS FOR US:
• Own the AI, bring the transparency
• Bring the AI black box into question sooner, lessen the hold it has over the industry

AI loses power because it can't understand the subtleties and quirks of human behaviour and give early warning of shifts in attitude, psychology, philosophy

OPTIONS FOR US:
• Build a business model that brings the best of both worlds

The whole future of this scenario depends on the willingness (or at least compliance) of the public in how their data is used and merged.

OPTIONS FOR US:
• Work towards a fair reward system for customer data
• Develop partnerships for proprietary customer data lakes

The most provocative implications

Insights companies create exclusive partnerships with social media platforms as a way to build a competitive advantage

Linkages created between social listening outcomes / data and big data using a blended LLM and new large data modelling (LDM) process

We are able to provide exact insights into the potential ROI of making specific product or service investments

If we don't build partnerships now, the social media giants will create their own capabilities, making the insights industry as it stands unnecessary.

OPTIONS FOR US:
• Partnership with social media giants now – early advantage

Large language models only have value once they are combined with large data models. Until then, decision makers will question the validity of numbers created from LLMs.

OPTIONS FOR US:
• Start to build the bridges between LLMs and LDMs and own this space

Insights agencies have the capability to steer business strategy in a way we have only dreamed.

OPTIONS FOR US:
• Start to build a product suite around predictive ROI concept testing using AI models as an input

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From there we recommend one of two pathways:
1. Keeping the quirks and surfacing the hidden in insights

The big issue of a future in AI insights is how well it can truly find and understand subtleties and quirks of human behaviour and irrationality, and give early warning of shifts in attitude, psychology, philosophy.

Until the AI is at a point where it doesn't just consider language, we need to build a process that matches the speed of AI, but provides our clients with the value of understanding human quirks, irrationality, and psychology.

WHY SHOULD WE CARE?

The value of insights to business is often in understanding something that the customer themselves can't articulate. If we can understand unexamined pain points or unexpressed needs, we can give our clients a head start on the competition in solving customer problems or meeting unmet needs.

The question about AI is how much it can surface those issues that sit below our consciousness. If we rely on AI only insights and it is only focused on rational behaviour and expressed needs, we as an industry, and we as a company, lose the ability to deliver true value.

HOW MIGHT WE RESPOND?

This is where the value of human insight lies. AI can tell us "what is", once it surfaces but human insight can tell us what may be below the surface.

We see competitors putting a lot of energy into AI fuelled insights and we certainly need to match that energy, but where we can stay ahead of the competition is in thinking about how we developed the human fuelled insights alongside it (rather than simply replacing humans as our competitors are trying to do).

We need to create two streams of work to respond:
1. An AI insights development stream. This will be focussed on understanding the types of business questions AI is best placed to answer, and importantly, where it falls short
2. A pivot to our human insight capability – developing further capability in the subconscious, behavioural science, and psychology level of human insights that AI is weaker in.

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From there we recommend one of two pathways:
2. Building our own social network, becoming the 'intel inside' social listening

If we don't build partnerships now, the social media giants will create their own capabilities, making the insights industry as it stands unnecessary.

We need to build our own network of partnerships (ideally exclusive) and gain first mover advantage. We need to be social listening 'intel inside' that other industry players rely on.

WHY SHOULD WE CARE?

We need to own social listening and build capability that our industry competitors and the social platforms can't catch up to easily.

First mover advantage will be critical to winning in the future.

HOW MIGHT WE RESPOND?

By getting ahead of the competition and locking in social media partners now. We need to work with them to develop ways to not just understand what is posted on certain issues or brands, but how that fits into a wider pattern of behaviour and develop models for how we understand that pattern, and put the specific insights into a broader context.

We need to consider that the social media market is dynamic, and to have a response for that – at what points will we bring a new partnership into the fold, how can we build a process that means we're not reinventing the wheel every time we bring someone on board.

We also need to think beyond just the big platform. We need to consider how we bring niche platforms in to provide insights into niche groups.

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The plans from here based on those pathways:

	Horizon 1 2023-2028	Horizon 2 2028-2033	Horizon 3 2033 & beyond

Keeping the quirks and surfacing the hidden in insights

	Horizon 1	Horizon 2	Horizon 3
AI Insight development	• Experimentation and evaluation of simultaneous AI and Human analysis and insights, identify where AI falls short in terms of value to client • Find an AI platform partner to understand the ability to develop LLMs that read between the lines	• Work with AI platform partner to train and AI model to at least flag where more subconscious or irrational inputs might be at work	• Use the "rules" developed in the human pivot to work with AI platform partner to start to write these into new models of training AI beyond language only
Human Pivot	• Map key business decisions to underlying psychology of customer, identify the areas where deeper and/or more subconscious impacts and influences lie • Outline a process of seamless integration of human and AI insights at speed	• Develop human capability in psychology and subconscious insights capture • Develop a set of rules for surfacing these insights • Develop the seamless AI and human process, focused on increasing speed to match that provided by solely AI-enabled insights	

Building our own social network, becoming the 'intel inside' social listening

	Horizon 1	Horizon 2	Horizon 3
Building our social network and capabilities	• Identify key potential partners (Meta, TikTok, WeChat) plus a list of niche players including those capturing a niche audience, and those who look like they might be gaining traction towards mass audience • Approach key partners, sign up at least one big and three small players • Work to understand the data lakes, the potential ways that we can work with these	• Build a self-serve platform for external users to ask questions of social data and gain insights • White label and market this platform to the major agencies and big client brands • Develop a process based on initial implementations for future bringing on of new partnerships • Actively develop at least one more major and six more niche social platforms	• Work with the social platforms to create their own white labelled insights capabilities with our intelligence inside for supercharged insights

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A reflection on the project and process: What we've learned

The fear has lessened

While the future certainly has the potential to be as bad as we imagined for the industry and our business, the process of doing this work has created a more balanced view of the possibilities. The uncertainty leading into this work is what stoked that fear, and now the dangers have been brought into the light alongside the possibilities.

The way forward has clarified

This document outlines several steps we COULD take, the next stage from here is to expand on the options and use a rigorous evaluation process to define the strategic plan (and related tactical streams of work). We now have options, where before we felt like we were sitting in fog.

An enabled model is our best bet

We need to take the reins to drive the industry towards an AI enabled model rather than an AI slave (or AI replaced) model – there is work to do now to set us on the pathway, and it's critical that we start it now.

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